

## Summary Report

As a result of the Corona Pandemic, the WA-Summit could not take place in Wellington, New Zealand as planned. It was decided to move the face-to-face event to May 2021, restrictions permitting. To ensure continuity of the Business affairs of the WA-Summit, an online meeting was held using Zoom technology that was kindly offered free of charge by Rhonda Scharf (Canada) and moderated by Sherie Pointer (New Zealand). The meeting was recorded. This report is a summary of the discussions, decisions, and outcomes. The questions have been summarized and added to Appendix 1 – Q&A at the end of this report.

### Opening

The meeting was opened by Eth Lloyd, MNZM, M.Ed., AAPNZ (Life, Fellow, Cert.), Chairman, WA-Summit Advisory Council, who welcomed 55 delegates from 28 countries. Her full introductory speech can be found [here](#).

### Plenary Business Session – Chairman

#### 1. *Presentation of the new structure (WA-Alliance) to replace the WA-Summit Advisory Council. Discussion and endorsement.*

The World Administrators Advisory Council – Future Task Force provided a full [report](#) to all Delegates for their own internal consultation a month before the meeting, of the steps they had taken, the ways in which they had consulted the 2018 Delegates, the outcomes of that consultation and the decisions they made. The Task Force provided the following recommendation:

**THAT** the Delegates endorse the incorporated body World Administrators Alliance.

The Chairman reminded the delegates that each country has one vote so only the nominated person may vote. NO proxies were received.

The Zoom poll function was then used. The vote was:

*To Endorse the World Administrators Alliance to replace the WA-Summit Advisory Council.*

**ACCEPTED**

#### 2. *WA-Alliance Interim Chair – Endorsement*

Helen Monument was approached by the current Chairman of the Advisory Council and asked to consider taking on the Role of Interim Chair of the new WA-Alliance Council. This

role will run for 12 months and during that time a process for nominating and voting for Chairman of the Council for the future will be finalised.

The Task Force provided the following recommendation:

**THAT** the Delegates endorse the appointment of Helen Monument as the World Administrators Alliance Council's Interim Chair.

The Zoom poll function was then used. The vote was:

*To endorse the WA-Alliance Interim Chair, Helen Monument* **ACCEPTED**

### 3. *WA-Alliance Council Interim Membership – Introduction and endorsement*

The process for selecting the Interim Council members was set out in the Advisory Council – Future Report. The Interim Council will be in place for 12 months and their work will include determining a process for the future selection of Council members. Helen Monument introduced the Interim Council Members:

Christine Stewart (Australia), Jesse Egeonu (Nigeria), Ursula Wartha (Germany), Debra Chafe (Canada), Vicki Faint (New Zealand), Barrett Shaw (USA).

The recruiting process for candidates for the Interim Council was announced to all delegates resulting in nine applicants for the six places on the Interim Council. The Future Task Force reviewed all the applications and voted. A significant factor in this process was to ensure that those appointed meet the requirement for the WA-Alliance to have global representation and reflect the diversity of our profession, which, happily, was achieved.

Sadly, there were no applicants from Asia, Caribbean, or South America, but that of course may change in the future. The Interim Council Members have also been introduced across our Social Media Channels, and they've been communicated to all delegates. After this meeting, their biographies will be posted on the Website.

The Chairman urged delegates to consider that when they receive information from the WA-Summit asking for input, that they please do give their input as part of the consultation process. She is very aware of the demands of everyone's time, but the WA-Summit can only work with the responses that it gets.

The Task Force provided the following recommendation:

**THAT** the Delegates welcome the Interim Council members as introduced recently on our social media platforms and at this meeting.

The vote was then taken using the Poll function.

*To endorse the WA-Alliance Interim Council.* **ACCEPTED**

The Chairman thanked the delegates and stated that their votes at this point provides the support and the confidence for Helen Monument to take everything further.

4. *The Guidance of the Delegates on the membership levy to be charged by the WA-Alliance Council to provide an ongoing income source for managing the WA-Alliance.*

The Chairman pointed out that at previous Business sessions at Summit, on two separate occasions, delegates had voted for a membership fee, but because there was no formal mandate to manage finances and no bank account, this could not be done. This request is not an unusual one, it's the new process that can now go forward as we have the body in place to formally manage it. A recent email has been sent providing further explanation of possible membership categories.

Two levy structures have been suggested in the Task Force Report for Delegates to consult on within their own country. The Task Force provided the following Recommendation:

**THAT** the delegates agree that the WA-Alliance will be charging a membership fee along the lines discussed at this meeting.

The vote was then taken using the Poll function.

**ACCEPTED**

The Chairman then closed the first part of the meeting by saying the following:

“Thank you all for your participation, consideration, discussion and ultimately your vote on behalf of your country. I am truly excited for the future of the WA-Alliance and the WA-Summit, I will be here in the background to help and support all of those involved and especially Helen and her Interim Council, if, as, and when needed.

It has been an honour and a privilege to work with some of you over the past 20 years, and especially so many these past 5 years, to share in this journey towards our recognition as working in a Profession. I thank you all for sharing my dream, working with me, I feel I am leaving everything in good strong hands for the future.”

### **Facilitated Sessions – Chairman**

After a short break, the delegates were allocated to one of four breakout sessions, with the guidance of a Facilitator in each group to discuss the two topics described below. This was a rare opportunity for the WA-Alliance Interim Council to receive the Delegate's thoughts, ideas, and collective wisdom.

1. **Branding of our Profession** - What would work in your country to elevate the profession?
2. **Measuring effectiveness of WA-Summit outcomes** - What do you want to see from the WA-Alliance by May 2021?

Each session was recorded, had a note taker, and the online comments of the groups were captured.

Appendix 2 shows an overview of all the comments, suggestions and ideas that were captured in the four breakout groups. The WA-Alliance Interim Council will make use this input as it creates a road map for the future of the WA-Alliance.

After the breakout sessions, the Chairman concluded with the following words:

“It now gives me great pleasure to introduce the new Interim Chair of the WA-Alliance Council. I have known and worked with Helen Monument over a number of years, Helen was involved with the 2003 WA-Summit in London as I was, we shared a speaking platform in Barcelona, and Helen was one of our three fabulous facilitators in 2018 in Frankfurt.

Recently, Helen has been a sounding board and great support during her time working with me as we moved towards this new body, WA-Alliance. I cannot think of a safer or stronger pair of hands to have in this role of Interim Chair, as our new body navigates its way to providing the mission of guiding, influencing, positively developing, and elevating the profession.”

## **Closing the Business Session**

Interim Chair, WA-Alliance - Helen Monument

Helen Monument expressed her thanks to all the delegates for their endorsement of the new World Administrators Alliance, the Interim Council and for their confidence in her as interim chair. She also thanked Veronica Cochrane, Eth Lloyd and the Advisory Council - Future Task Force for all the work they have done to bring the wishes of the delegates at the 10<sup>th</sup> Summit in Frankfurt to fruition.

It was no easy task and the consultation document they produced was comprehensive and well researched. We are extremely grateful for the grant of \$5000 from the IAAP Foundation which enabled the task force to complete its mandate.

### **1. Update on Face-to-Face 11<sup>th</sup> WA-Summit May 2021**

With the state of the world at the moment, it's impossible to confirm any details at this stage, but as it's only six months away, the Council will take a decision very soon on how to proceed. It's looking less likely that we will be able to have a face-to-face Summit in New Zealand, but of course we'll keep you informed.

### **2. Confirmation of location for 12<sup>th</sup> WA-Summit 2022**

Looking forward, the 12<sup>th</sup> World Administrators Summit will be hosted by the IAAP and held in Nashville, Tennessee in July 2022. It seems a long way off, but let's hope that by then we won't just be back to a normal world, but back to a better world.

The closing speech by the Interim Chair of the WA-Alliance can be found [here](#).

## Appendix 1: Questions & Answers:

All the questions and concerns raised by the delegates during the Business Session have been noted by the Interim Council. The Chairman thanked everyone for their input and emphasized that raising such concerns in this forum is the perfect opportunity to make certain that they are valid and valued. Here is a summary.

### **WA-Alliance Council Interim Membership – Introduction & endorsement**

**Q:** How will the members of the Interim Council be elected?

**A:** This process will be formalized and clarified during the next six months by the Alliance governing body (the Interim Chair and Council). They are tasked with formalizing the election process for the Council and Chair of the Alliance. This process hasn't been decided yet, but will be discussed, decided, consulted on and shared with you all between now and May 2021, with the aim for it to be in place in a year from now.

**Q:** Who will be representing the Caribbean region on the Interim Council?

**A:** The Task Force has communicated to the delegates, asking for applications for the Interim Council. As described in the Business Meeting, we chose a small group of six, the Interim Council, with global representation, who will be working to develop a process as explained in the above question. It's not the same process as before, where we had regional representatives. At this stage we have gone for a wide geographical spread, but with a small team while we work out the process for the future.

### **Membership Fees & Categories**

**Q:** I am from a country with several associations, but am attending as an individual. Why should I pay to be a member if I do not have a vote? My voice is not going to be recognized, even though I may be doing a lot of work.

**A:** Different membership categories are being discussed by the Interim Council; the individuals will not be forgotten.

**Q:** Is the Alliance going to charge the associations a fee and allow individuals from that country to apply for individual membership as well? How is this going to work? Association membership is dwindling, when we form an alliance outside of the local country, and we draw them to the WA-Alliance, how are we bringing them back to their local associations?

**A:** The WA-Alliance is registered as a non-profit trade association, representing Associations and Networks, who can be members, as stated in the By-Laws. There may be a need to have a different category of membership if an individual is to be a member of the Alliance. For example, in countries where there is no association or network. If they were not included, the voices of the administrators in that country would not be heard.

The categories of memberships have to be decided upon and this is another task for the Alliance Interim Council. Again, all the delegates on this call will be consulted when necessary on any matter concerning memberships fees.

**Q:** I am an individual as opposed to an association, it's helpful to recognize that there are multiple assistants around the globe who do not belong to, nor are they represented by associations. For someone who is being asked to pay membership fees as an individual and not have a formal voice or representation, I think it maybe a missed opportunity when you consider the demographics with which individuals are in touch. When you consider the aging demographics within many of the associations that exist I do believe that not giving individual members the same privileges, rights and responsibilities as associations is perhaps a missed opportunity, because we have connections with millennials and should be encouraging them to become engaged.

**A:** These concerns are being heard and will be taken into consideration by the Interim Council.

**Q:** Can you clarify what value the WA-Summit will give to member associations, in connection with the fees as well. After the interim council has started to evaluate this in the coming year, we will have a better sense of scale of the membership and the running costs of the organization. We looked at the two proposals and would suggest a simpler one to start with and after the evaluation of the running costs and different packages to see what that would entail.

**A:** In the report we sent out are some of the things that the Alliance will be working towards.

- Supporting building an enhanced professional image;
- To help support standardization and pathways within the profession;
- To provide an international community;
- To foster collaboration;
- To provide access to the latest WA-Alliance research;
- To enable consolidated advocacy on behalf of the profession internationally.

**Q:** Could an individual be a business or an organisation? If so, could they benefit monetary-wise from being part of the membership and could that be taken into the weighting of the fees, so no association is disadvantaged? I understand the need for a fee for a non-profit organization, but also the need for various 'packages'.

**A:** One of the things mentioned in the above list is collaboration. One of the most important things that associations, networks etc. can do is to collaborate with others in their own country, because the benefit should always be to the Administrative professional as opposed to any specific body. Your comments are noted by the Council, particularly about any business gaining benefit from membership of the WA-Alliance.

## Appendix 2: Consolidated Input from the Facilitated Breakout Sessions

### 1. Branding of our Profession

*What would work in your country to elevate the profession?*

- Encourage internal networks amongst countries / globally.
- Hold interviews with Execs and get them to drive the change and have examples of role models.
- Canada will talk to the AAP about what the association can provide its members to ensure they are branding themselves properly.
- Looking at admin influencers in the younger demographics. Need to provide tools for all generations. And promote this as a career with great opportunities available to you. Use those influencers to get the message out. Have focused on tech training and those are the best attended.
- Develop partnerships with colleges so the profession can be promoted to students.
- Collaborate with the HR profession, get into their training programmes to increase awareness of the role.
- We should speak out to unite associations and bring them on board.
- Call to action is to help the admin prof to shift to the business partner mentality. Where can we look for opportunities; to help develop our skills; seek training; continuing education; what books can we read; shift mindset to business partner level.
- We need role models - assistants who are leaders, use them to drive change.
- Associations are growing across Canada, trying to move away from competition between them.
- We need to work on breaking down the competitiveness in different associations around the country. It is easy to be competitive (thinking yours is 'the best') and we can get defensive in our own silos. Need to build the skills to collaborate between associations.
- See the Admin as a business partner.
- Not all admins want to be C-Suite level.
- Admins need to be more tech savvy.
- We need to get the profession into people's minds earlier via college etc - that this is a career; having a professional status; having an entry level of training [ in the UK], and getting business leaders involved in that this profession is a career choice.
- Help the admin prof to shift to the business partner mentality. Where can we look for opportunities; to help develop our skills; seek training; continuing education; what books can we read; shift mindset to business partner level.
- Need to give the reason why this will help advance your career and help the profession to be seen as a career. To be tangible for members. The alliance can be the bigger voice and keep it moving. Need the tangible and the KPI's etc. The alliance needs to be at the higher level and really push that.
- Looking at admin influencers in the younger demographics. Need to provide tools for all generations. And promote this is a career with great opportunities available to you.
- Get the global matrix completed and communicated.

- Use the Summit to create a way to show the Assistant their power/value in their companies.
- Marketing of the profession on social media (specifically Linked In) should be increased, although some administrative professionals do not have a Linked In presence. There are also not many networks in India that talk about their profession. Should put webinars on Linked In to increase awareness of the profession. Encourage administrative professionals to self-promote and be an ambassador for the profession.
- Need to collaborate with the HR profession. Right from when they are in college, studying HR - include admin support. Get into their training programmes to increase awareness of the role.
- Clarity is needed on the name: in some countries Administrator means something different, Office professional, EA or PA can mean something completely different.
- In Spain, if you don't have a degree, you're not seen as a professional - in any job.
- Work more at getting in touch with management to encourage them to discuss the professionalism of their EAs.
- Need to train leadership about what we're able to do. Have to work to help people in the profession to be more confident in themselves. You can recruit someone with a degree, but you still have to train them in the role.
- Working together with other organizations as part of a total association; not working against each other; not thinking they (other associations) are a threat; it has been a disadvantage in the past to not work with so many of the different groups – coming together as one voice rather than having all these splintered groups – would like to see more discussion amongst groups. Bring on board and march together. Better collaboration.

***Choose two things you want the Council to do:***

- Keep learning new technologies.
- Self Development.
- Relevant training to get ahead.
- Formalizing accreditations and professionalize our profession.
- More on technology and self-development.
- Learning new ways to do things and being open to change.
- Webinars (if delivered at Alliance level, be higher level).
- Find mentor / become a mentor.
- Getting our profession heard and pushing focus on being a chosen career.
- Visualize the profession as a real career.
- More training with membership.
- Provide us with data on what is happening around the world.
- Be inspirational for new generations.
- Squash the misconceptions.
- Skills matrix outlining the importance of development from beginner to top executives.
- Sharing the knowledge with other assistants in your company and network.
- Mentoring.

- Marketing the profession - more PR work profiles published in major corporate magazines.
- Certification.
- Motivate and encourage young assistants in their development, mentor/mentee ship.
- Encouraging assistants/admins to come together as one body.
- Being a global matrix for training as in the credentialing work already done and getting it out there.
- The WAS to create a manner to show the EA their power/value in the companies and for the companies.
- Focus on many things and not focusing on branding – admins and associations tend to get in the daily tasks and then hard to focus on advancement etc; in terms of what the Alliance can do: what is the goal and what does it achieve for the admin profession? And then take to members and ask for input and how can we brand? Need to give the reason why this will help advance your career and help the profession to be seen as a career. To be tangible for members. The Alliance can be the bigger voice and keep it moving. Need tangible KPI's etc. The Alliance needs to be at the higher level and really push that.
- Create synergy and integration, more cooperation between associations.
- Need to train leadership about what we are able to do. Have to work to help young people in the profession be more confident in themselves.

## **2. Measuring effectiveness of WA-Summit outcomes**

*What do you want to see from the WA-Alliance by May 2021?*

- Need to do global research to establish what needs to be done to elevate the role.
- Alliance needs to follow up on notes and execution so members can keep track of what they are doing.
- CHRP – HR Association – Reach out to that group (Canada).
- Alliance should look at international credentialing to be administered locally.
- Look at strategic goals from all AP Associations.
- Sell to business and employers what we do.
- Need for tools for APs to help them with their career pathways.
- Use social media channels and magazines to explain our role.
- Need more ways to spread news for administrative professionals.
- What will models and delegates look like?
- Identify metrics to gauge interest levels.
- need to have outreach to younger people.
- What is the effectiveness of the groups we would reach out to?
- Clear standards for different titles Receptionist/Executive Assistant/Clerk, etc.
- help educate companies on what AP's do.
- need to meet the needs of the company and the individual.
- Clear road map – defined from one Summit to another.
- Should have international standards for job ads.

- Admins need to be more involved in strategic projects - execute rather than just contribute.
- Diversity and Inclusion are important.
- Need to take the profession to the world instead of waiting for the world to identify admin professionals.
- Receptionist/Executive Assistant/Admin all have the same ad descriptions in some countries.
- Isn't there an expectation, as members, that they are explaining the role to the world?
- Need to get into schools and meet with young apprentices.
- Continuous loop of plan/action.

***Visibility to the members:***

- Clarity on the purpose of the WAA
- Clarity on the different tasks of the WAA and the support they require from their members, (e.g.: by using the website or regular surveys to collect the knowledge) while taking into consideration that we are all volunteers.
- Deliver on our actions and present tangible results (e.g.: JDs or list of key responsibilities)
- Reach decision makers, entrepreneurs, managers, HR by raising the profile of our profession by using SM, website and encouraging members to add their membership to their CVs and electronic signatures to spread the word.

***Criteria for a successful Alliance:***

- Clarity on its purpose (what does the Alliance mean, what benefit comes from its membership)?
- Defining which role they will be taking in enhancing the perception of admins around the world, how will the Alliance relate to IAAP, IMA EMT.
- What's in it for our membership?
- More visibility as Alliance around the world by making use of social media.
- Representation for all types of cultures.
- How to support the council in the different tasks (communicate about the tasks so people are able to offer their support —> use the members section of the website) / need more involvement of the delegates with their competencies, e.g. regular surveys.

***What do you want to see from the Alliance?***

- Decent set of goals. Our stretch goal.
- Taking steps with regard to the new structure.
- Progress on our deliverables (Skills / Responsibilities list)
- Continued communication with everyone.
- Proper JD and list competencies of a proper PA / EA .
- Take into consideration that we are volunteers.
- Clear standards for different titles.
- creating strong linkages worldwide.
- attractive career choice for younger generation.

- Clear road map - defined from one summit to another.
- Continuous loop of plan/action.
- What models and delegates will look like?

***How can we manage these suggestions?***

- How do we get our voice heard by decision makers?
- How do we spread the profession to others (decision makers, managers, Entrepreneur HR etc)?
- How to raise the Profile of the profession?
- We only can be successful if we reach out to the outside world (social media /Linked-In / Website = need for a communication strategy).
- Use the membership on our CVs / electronic signature to promote the Alliance
- More visibility around the world by making use of social media
- Education - we have started teaching business certificates at a boys only school. Speaking to them about admin as a profession not just a stepping stone.

***How are we selling this to our members?***

- Finding ways to offer admins around the world access to education, also those with limited means, e.g. MOOCs.
- Consolidate what is being done on credentialing, job titles, images of the profession to have a clear frame of reference internationally.
- In some countries, our profession and the job that we do is not fully recognized or appreciated. Stereotyping still prevails.
- Increase awareness of our profession. We need to be open minded and communicate. Might be good to have a guideline published? See IMA Website <https://www.ima-network.org/profile-management-support-professional>

***Additional comments:***

- Summit should focus on outcomes, products - not just discussion and collaboration.
- Take the profession to the world - the Summit is the footprint that will allow us to do this so people will sit up and take notice. Once this has done, communicate the standards so everyone understands the levels of knowledge.
- Part of your membership of the Alliance means that you are sharing outcomes, asking for input from your own network that you represent on Summit outcomes.
- We also need to know what the expectations are from us. We have similar and unique specialities that we can offer the Alliance.
- We get lots of requests for things from the Alliance, but not enough people follow through and help out. Everyone is a volunteer and the more people that help, the easier it is.
- Have a survey of how the various associations have handled the outcomes and spread them to their members.
- All member associations to align their strategic goals with those of the Alliance - they would have to be measurable

***Expectations for the next six months from the Council:***

- Explain how the Council gets elected?
- What will the membership categories look like and how will they participate?
- Outcome of discussions topics in 2018
- A road map for the future - speak -> action -> plan -> from Summit to Summit

***Prioritise four things you would like to see done by May 2021:***

- Skills set matrix, career pathway
- International credentialling
- Universal standards
- Create or renew linkages to worldwide associations
- Promotion of this career and profession to the wider world
- Define our relationship with collaborating partners to ensure effective collaboration with them
- Foster next generation of APs
- Mentoring the next generation
- The future of our profession after Covid.