

## 12<sup>th</sup> World Administrators Summit

### Meeting Notes & Outcomes

15<sup>th</sup> & 22<sup>nd</sup> October, 2022

Helen Monument, Chair, World Administrators Alliance

#### DAY 1

The pandemic forced a change of plans to the frequency and location of the WA-Summit. As in 2021, the 12<sup>th</sup> WA-Summit was held online and spread over two days. The meeting was recorded. This report is a summary of the discussions, decisions, and outcomes. The Master presentation for Day 1 of the 12<sup>th</sup> WA-Summit can be found [here](#).

#### 1. Opening & Official Welcome – Eth Lloyd

The meeting was opened by Eth Lloyd, WA-Alliance Advisor and WA-Summit Chair who welcomed 55 delegates who collectively represented over 130,000 administrative professionals from 25 countries. Also welcomed was a record number of 20 Observers, who were able to speak only if invited to do so. Eth Lloyd explained the agenda for Day 1 and informed the participants about the ‘housekeeping rules’ and voting procedures for the meeting which would be done via a Zoom Poll on screen. The Delegate leaders are the only ones eligible to vote at the WA-Summit and there is one vote allowed for each country represented. Dee Holmes, (WA-Alliance Interim Secretary, New Zealand) was the Host for the meeting and would be monitoring the Polls as well as advising the Chair of any questions that came up either by Delegates raising their hand, or in the Chat window. Eth then welcomed the four facilitators who would be leading us through the four discussion topics in the breakouts: welcoming back our 2021 Facilitators Lucy Brazier, OBE, (UK/Spain) and Heather Baker (UK) and welcomed Liz van Vliet (Australia) and Amy McKeown (UK) who will be supported by Juanita Mort (US) who was also with us in 2021. Eth thanked everyone present for their commitment to the Summit before making her introductory speech which can be found [here](#).

#### 2. WA-Alliance Status Report – Helen Monument

Helen Monument introduced the members of the WA-Alliance and explained that at previous Summits, time on the agenda was reserved for a Business Update on how the WA-Summit was doing. Since the formation of the WA-Alliance, those business updates were moved to the agenda of the Annual General Meeting (AGM), at which WA-Alliance members have the opportunity to vote or approve all WA-Alliance activities. Most of the Summit Delegates are from WA-Alliance member associations, but as some of them new to the Summit, Helen gave a brief overview of activities since the last Summit in 2021. The Global Skills Matrix and the campaign ‘The Career Behind The Job’ would be covered under item 3 of the agenda.

##### *Membership*

The WA-Alliance Council is delighted that almost all the delegates here today are members of the WA-Alliance. We have grown to a total of 38 members – that means, 23 associations/networks, 13 business partners and 2 individual members from countries where there is, as yet, no associations (Dubai & UAE), all from 24 different countries. It’s less than we hoped for in our first year of operation, but we are living in somewhat challenging

times first with Covid and its impacts and now in an economic downturn. But we're optimistic that we will grow. If anyone has any questions about membership, please contact Debra Chafe, our Membership officer [membership@wa-alliance.com](mailto:membership@wa-alliance.com).

### *Communication*

The WA-Alliance has been communicating on social media and through its monthly newsletters. Helen encouraged all to subscribe and to follow these channels. Barrett Shaw, Communications Officer and his team are doing an excellent job on all the WA-Alliance social media platforms, supported by Terri Mullen and Elizabeth White Peters.

Helen also reminded members that the WA-A offers them the opportunity to use the WA-A social media channels and monthly newsletter to promote their activities. She requested members to get in touch with the WA-A whenever they have events they would like us to help promote.

### *Partnerships*

The financial model of the WA-A is membership-based and association leaders of not-for-profit organizations will understand the difficulties of attracting and retaining sponsors and partners. Without them, the WA-A would not be able to grow. Partnership Officer Chris Stewart and Deputy Partnership Officer Shirwyn Weber have been working hard and have done a series of partnering showcases to attract new sponsors. This year's Summit sponsor EMMRE will be introduced to the Delegates later in the agenda. It's hoped that a new WA-A sponsor will be announced at the AGM. Helen also thanked all the other individuals and organisations who have supported the WA-A in the past.

### *Regional Liaison*

A new role has been created, that of Regional Liaison Officer for the Caribbean region, Charon Maxime from Trinidad & Tobago will be meeting with associations across her area, to build positive relationships with each of them, not only to encourage them to join the Alliance, but to foster an atmosphere of collaboration between Associations and Networks in the region. Helen stressed that neither the WA-A nor member associations are in competition with each other, but the hope is that by communicating the strategies and initiatives of the WA-Alliance to Administrative Professionals in the Caribbean, we can work together with them, giving support, facilitating collaboration between associations in other parts of the world so they can share best practices and resources, and giving those in the Caribbean a voice in our global community. The plan is to create more regional liaison officers in the future.

### *Strategy – The Way Forward*

Helen briefly showed a slide with The Way Forward, the WA-Alliance strategy. It's built on the four aims of the Alliance to Develop, Guide, Influence and Elevate the administrative profession. All the WA-A activities are allocated to one of these 'spearheads'. A full strategy update will be given at the AGM and of course, members' feedback on all WA-A activities is always welcome.

### *Annual General Meeting*

The WA-Alliance held its first AGM on 31 August 2021 and will hold its second on 19 November 2022. Members will receive an invitation by Zoom and before that, they will be able to vote online for the position of Alliance Secretary – there are two candidates (Dee Holmes and Mohammed Almutairi), and the details will be sent to all members after the Summit.

### *Slack Channel*

A recommendation from the International Networking Report was to create a private communication channel for WA-A members to be able to connect, discuss and share with each other. All members have received an invitation to the channel. The focal point for questions about this channel is Katherine Vaillancourt, Technical Officer: [technology@wa-alliance.com](mailto:technology@wa-alliance.com)

### *Members' Forum*

The first WA-A members only forum was held on 15th June. There were two sessions, to cover different time zones. In total, 11 associations, 6 business partners from 14 countries joined the forum.

The purpose of the inaugural session was to give WA-A Members an update on the activities of the WA-Alliance so far, for the WA-Alliance to hear their feedback, and to give Members a chance to meet each other and discuss their challenges. Mental health was a topic at the top of everyone's agenda – as is uncertainty of the future of the role. A common theme was training, not all companies are willing to invest and much discussion about how to attract younger members to Associations. All topics that will be discussed in the Summit breakout sessions.

This forum will be held quarterly, but because of the Summit being held in Q3 and the AGM being in Q4, the next members forum will be held in January 2023, WA-A members are requested for input for the agenda beforehand. These sessions will be to bring important issues to the table, for discussion, or advice – and for all to share and network with their fellow members across the globe.

## 3. Reporting on 2021 Summit Actions – Helen Monument

### *The Global Skills Matrix*

It started its life as the Skills Set Matrix Report. At the last summit, the report was unanimously accepted by the delegates, and a task force went on to refine the look and feel of the report to create a set of amazing resources. A huge standing ovation is due to Lucy Brazier and her team at Executive Support Media for the design and production of the reports and the dedicated website.

The Global Skills Matrix was launched on 21st September 2021. After just one year, we are very proud of this achievement. There have been over 5000 downloads of the documents, Lucy and Helen have given 45 free webinars in 17 different countries. Translations are now online in German, French, Dutch, Italian and Portuguese, with more on the way (Greek and Spanish). The WA-A is immensely proud of this tool and the impact that it is having around the world. All the free resources can be found on the dedicated website [www.globalskillsmatrix.com](http://www.globalskillsmatrix.com).

The GSM has also been supported by Robert Half, the largest recruiter in the US - this is what they are sharing with their customers "The Global Skills Matrix from the World Administrators Alliance and supplement from executive Support Magazine are free resources to help identify administrative work levels and career paths". WA-Alliance member Heather Baker has linked her training courses to the GSM levels. We hope more will follow. We want to hear your experiences with the GSM – to collect case studies so that we can show organisations how it's being used and the benefits it can bring.

Lucy Brazier is one of the most well-known faces in our profession and her passion is well understood. She has been a driving force behind the GSM. Wherever she goes she talks about it. Lucy was then invited to share her experiences of what the business world is saying about the Global Skills Matrix. She explained that the WA-Alliance was right to launch when we did in September 2021, the world was just coming out of the pandemic and businesses were telling them that they'd been asked to look at the return on investment of each member of staff,

but they had never done this for the administrative professionals before, so can we help them to do so. We put the GSM in front of them and explained that at its heart is performance, so that's what's most important.

Lucy shared an excellent quantifiable example – which will eventually become one of our case studies – of a company in the USA with 500+ assistants who were all employed individually by their executives, so there was no commonality with recruiting, job descriptions or performance reviews etc, and there were 60 different job titles within the company. As a result of implementing the GSM, they now have a training plan in place for the next three years. We helped them to calculate that if their junior management – as a result of the GSM being implemented were saved just one hour by their Assistants it would mean a benefit to the bottom line of the company of US\$88,600, - per week, which is phenomenal. So then it becomes a very easy conversation for us to have HR. When Lucy and her team talks to businesses, the first thing they ask is “Have you heard of the GSM?”. They ask them what they currently have in the way of support, what they need – how many executives - what they have actually got and then they try and match the two together. Lucy also shared some exciting news about some new technology that is being developed that will enable individuals and companies to self-assess against the GSM to see which levels they're at and where the gaps are. Then training can be put in place f “How do we test our assistants” is the biggest question that businesses are asking, so now we can close that gap. She hasn't heard of one HR manager who did not think the GSM was a great tool, in fact they are very relieved that we've done this work for them, because they didn't have much of an idea about how to do it. Lucy congratulated the WA-A with the progress and reminded all that the challenge is to keep talking to business and keep spreading the word on how the GSM is a game changer for our profession.

#### *Awareness Campaign #TheCareerBehindTheJob*

The Identity and Image of Administrative Professionals Report was presented – accepted at the 2021 Summit and uploaded to the Summit website. The 11th Summit discussion group The Future of The Profession, recommended that the WA-Alliance start a campaign with the objective of raising awareness of the profession as a conscious career choice, elevating it to the level it deserves. A task force was formed and the Awareness Campaign was born.

A strategy was written, as there was understanding of the WHY, but the team needed to determine the HOW for the campaign. Two social media hashtags were created: #TheCareerBehindTheJob and #MyCareerOfChoice.

There are two phases to the project, the first is well underway and phase 2 is based on the target groups, Executives, HR Managers, Recruiters and Trainers. It's hoped to start phase 2 by the end of the year.

Social media messages have been posted since 9<sup>th</sup> May, Helen has given webinars and there have been magazine articles and interviews. There is an #AdminChat on the YouTube channel of Executive Support Magazine. There has been plenty of exposure, but it takes time and support from all in the industry. Helen encouraged all associations to support this campaign and to take collective responsibility for a proactive and long-term approach to positively influencing perceptions of the career.

#### *Workplace Harassment Report*

Helen quoted the following from the Workplace Harassment Report accepted at the 11th Summit:

“This topic was being discussed by Administrative Professionals nearly 30 years ago and we felt the time is right to bring it to the forefront again. We now need to stop harassment in the workplace in all its forms – bullying and sexual. The human price is massive.

And if it is true that administrative staff is the backbone of companies, then harassment is destroying this backbone from the inside out. Productivity suffers. Retention suffers. Profits suffer.

Harassment has been covered in silence for far too long. When we break the silence and the destructive cycle of bullying, the workplace will transform not only for ourselves but for our daughters and sons.”

The report and its attachments have been available on the website since the previous Summit. We have talked about this report on social media, to attract attention. This is a very important topic and even though the ‘me too’ movement seems to have gone very quiet – at least until the next high-profile person is involved in it, we must not remove our focus from this topic.

Helen reminded Delegates of the report recommendations and asked associations to take these back to their country and talk about how they can be implemented.

Helen then showed a draft of a proposal for a pledge that associations can use to show their support. Those who are willing to support and implement this pledge will receive a specially designed logo to display on their website as visible proof of their support and commitment to this very important topic. This was one of the recommendations from the report.

#### *Diversity, Inclusion & Belonging Report – Eth Lloyd*

Eth Lloyd was invited to present this item.

“At the 11th WA-Summit held on-line in 2021 a paper was presented on Diversity, Inclusion and Belonging. This paper, supported by Lucy Brazier of Executive Support Media, was researched and put together by a Team from a diverse range of countries: United States, United Kingdom, Kenya, Norway, India, South Africa, France, and Nigeria.

This team was widely diverse in many ways initially simply by the different countries they live in. They also brought both their own experiences and the outcomes from the research they undertook in developing this paper.

The Team developed several recommendations from the research which are set out in the paper and should be taken on-board. These recommendations were acknowledged by those present as being important and of value to those in many nations, in many cases where redressing historical wrongs is required, to develop further a sense of belonging.

I have no special skills or knowledge in Diversity, Inclusion and Belonging other than I belong to a bi-cultural family here in New Zealand - Maori and Pakeha (which means of European descent), and over recent years I have begun to understand some of the significant issues faced by my Maori whanau (family) which as a white person I never was aware of or truly understood before.

This personal journey has led me to look more deeply at many documents, especially those for and from the WA-Summits. For example, over the years I have spent time changing “his” to “hers/his” feeling at the time this was a significant step forward; and I have now re-done many of those changes from “hers/his” to “their” to ensure recognition of the sense of inclusion and belonging essential for those of diverse gender.

I recently re-read the Diversity, Inclusion and Belonging paper and it dawned on me that due to this being the first year of the WA-Alliance there had been little room, time, or budget for the Council to manage and implement any of the recommendations included in the Paper.

After some further thought I wrote a proposal to the Council to suggest one way to provide support for one of the recommendations in the report:

#### Recommendation 1 – Facilitating Sharing and Learning Platforms

##### 1.1. ANNUAL CONFERENCES: {specifically} “Offer conference bursaries”.

The Council has supported my proposal, which is just a starting point.

They then asked me to present on it today. The aim of my presentation is to seek physical support, from those of you attending this Summit, to form a Task Force under the sponsorship of the Council Treasurer Ursula Wartha who, with support from the Interim Secretary Dee Holmes, is taking on this important and valuable task.

This Task Force would be looking at ways to offer WA-Summit “bursaries” or some form of financial support to attend our Summits. This financial support would need to be gathered and managed separately, through financial gifts not WA-Alliance income, something I personally started by financially supporting one country to ensure they had an official country Delegate present today.

We would like to see this opportunity made available to those countries whose professional association finds the Delegate registration fee more than they can prioritise from their income, especially today with the after-effects of the pandemic.

We are asking those associations or individuals who can afford to send a Delegate to perhaps contribute a second registration fee to enable another country to send a Delegate, thereby providing diversity at our summits, enhancing our discussions, and ensuring diversity, inclusion and belonging for all administrative professionals.

I have set out today one way of ensuring diversity, inclusion and belonging for all. Ursula and her team will develop how this might happen, what parameters there should be, and what form it might take. There will be more communication on this in the coming months.

Today we are asking for volunteers to help develop this initiative to make financial support available, thereby ensuring that administrative professionals globally feel the WA-Alliance is actively participating in addressing Diversity, Inclusion and Belonging with global representation at our summits. Through taking this step we will be assisting the Alliance to provide leadership through meeting one of the recommendations made in this Paper.

There are other recommendations in the 2021 paper that require more actions and those will be addressed in the future.

Remember, I earlier mentioned that the WA-Alliance is an interactive and collaborative community and that it is not solely about what the Alliance can do for you, that it is equally and significantly about what you can do for the Alliance. Volunteering to support this initiative is one way you can give to the Alliance community.

Those who were willing to volunteer to support this initiative, put their names in the chat (or sent directly to Helen Monument), or to Ursula Wartha at [treasurer@wa-alliance.com](mailto:treasurer@wa-alliance.com).”

There was great support for this proposal from Eth Lloyd in the meeting chat. Several people immediately volunteered to join the task force, so thank you to them. Ursula Wartha will be in touch very soon.

Helen then thanked Eth for bringing this proposal to the table. It will be of great benefit to many and for the good of the diversity and inclusion of the profession.

#### 4. Meet the WA-Summit Sponsor – EMMRE – Helen Monument

Helen introduced the Summit sponsor. As you will appreciate, voluntary organisations are continually challenged to develop a sustainable financial model. You’ve heard how we’re doing that with the WA-Alliance and we’re delighted to introduce you to our sponsor for this summit, EMMRE. CEO Don Harms unfortunately could not join us today, but on his behalf, let me introduce him and his company.

Don Harms is the founder and CEO of EMMRE, a software platform designed to help executives and executive assistants build more strategic partnerships.

After experiencing first-hand the life-changing role an executive assistant can have on an executive's life, Don became passionate about helping more executives have this same experience.

"With the help of my EA, not only was I a better leader, but I was also a better father, husband, and friend."

Leveraging the unique lessons he learned, building his own strategic partnership, Don created the EMMRE software platform and blogs at "One Job Two People" where he shares lessons he's learned, problems he designed EMMRE to solve, best practices he developed with his EA, and what the One Job Two People mindset is all about.

Don's hope is these resources help executives and assistants build better, more strategic partnerships.

Don presented at ES Tech 2022, has been a guest on Joan Burge's webinar, Jeremy Burrow's Leader Assistant Podcast and the Exceptional Admins Podcast.

After living in Africa for 3 years, Don now lives in Colorado Springs with his wife, 5 teenagers (including 2 sets of twins), and any additional children that join them through foster care.

A personal video message was then shared from Don Harms. He included a special offer for Summit participants which can be seen for two weeks after the Summit on their website [www.emmre.com](http://www.emmre.com). Helen added that the Summit is delighted to have EMMRE as sponsor and looks forward to working with them in the future.

## 5. Selected Country Reports

At a face-to-face Summit, countries would have the opportunity to share reports on their progress against a particular goal in Administra. This year, we asked for your updates on your strategies on Goal 4 of Administra: Market Association membership to encourage active participation of younger people. 11 Countries sent a report, and these have been uploaded on the website. Some of them also included the results of questions that we'd sent out, so that also gives an interesting picture of the state of the profession in those countries. Helen encouraged everyone to read these reports, there is much to learn from each other by adopting some of the best practices mentioned there. Two countries were invited to expand on their activities against Goal 4: South Africa and New Zealand.

Susan Englebrecht for Cathy Harris from South Africa explained how the Platinum Assistant Network is contributing to and working on attracting the future generations of assistants:

*At first, we debated the idea of starting in the high schools and encouraging young adults to move into the Administrative Profession but felt the best place to start was with the current younger administrative generation. They are the generation that the future assistant will be looking up to as role models and leaders in our profession, and we would need to encourage them first so that they can be the encouragers in the short term – but they need to be developed into the profession now and have their voices heard.*

*It all starts with our Awards which has attracted mainly younger Assistants. Our Rising Star Award winner and runner up automatically become part of what we have called our Platinum circle, a forum set up for the winners of our Awards, where they get the opportunity to develop and grow from winner to lifetime achiever. Besides them having to pull together events, they also must be active and willing participants in speaking engagements and coaching opportunities and sign the PANSA Charter in agreement to this, ensuring they commit for the long haul.*

*A great example is from last years' Platinum circle, fondly nicked named the Unicorn Tribe, who had to put together a full day workshop for our administrative communities. They chose the theme of "The Power of You". Prior to this Susan and I hosted a session where they were required to put together a vision board about*

*themselves, their aspirations, and goals. They then each presented it to the Platinum circle, and from that I was able to extract those aspirations and goals unique to everyone, and to turn that experience into an educational story telling experience for our delegates.*

*Some of the topics that came out of the vision board story telling experience was:*

- Leaving a legacy – Roslyn Dunkley*
- Conquering challenges through the inspiration of your personal journey – Tamie Vermaak*
- Reaching those goals, you have set in a fun and deliberate way – Caryn Kuper*
- How to be brave in uncertain times and learning how to re-invent yourself – Vashi Suredin*
- Conquering the fear factor – Leigh Smith*

*This workshop was exceptionally successful.*

*In addition to the above, a conference has been organized by an external training house for December, where we have had the opportunity to include several of our previous winners, to be speakers at, we have introduced them to the many networks globally and Leigh Smith who was the PA of the year for 2021 had the opportunity to be interviewed by Marion Lawrence from the PA Hub in London. Our winners have also had the opportunity to write articles, some of which have been submitted to Executive support magazine and others used here locally in professional newsletters.*

*PANSA will be hosting our first ever summit in 2023 and all our stars will be participating and sharing on topics of which they are experts in. Of course, I and Susan and our many more senior ambassadors in PANSA will provide them with all the guidance and coaching they will need to prepare themselves for this event as well.*

*PANSA is very grateful to our broader global community for their continuous support and would like to encourage our global family to invite our winners and runner ups to participate in your events, your blogs, virtual training opportunities and interviews, and likewise we would love to have your younger stars be a part of our events. This kind of shared value interventions is one that will inspire the younger generation to flourish and grow into the future.*

*Helen thanked Susan and PANSA for their dedication to the profession and particularly for their ISIPHO initiatives. Both she and Cathy Harris are guiding lights for the younger generation of administrative professionals in South Africa.*

*Next, Sherie Pointon, Executive Officer of AdmiNZ was invited to share details of their project:*

*AdmiNZ has engaged with secondary schools at a local level. The tertiary sector within Aotearoa New Zealand has been going through massive review and change and we are not yet clear as to how the profession will be supported in the future. To this end, AdmiNZ has engaged with the new Workforce Development Council to ensure we have a voice as the future is shaped for the profession's qualification.*

*We are also underway with a project to have our own micro-credentials approved by our national qualifications' authority. These micro-credentials will provide a qualification set at our New Zealand Qualifications Authority's (NZQA) Level 5 (Level 7 is degree level) and will be assessed by NZQA for equivalency for Level 5 which will fit within the GSM's Level 4 skills and tasks. We have had our first micro-credential assessed and accepted for equivalency – "Administration Skills". There will be 6 micro credentials each worth 20 credits and each with 4 tasks required for achievement. They will be assessed in the workplace using the administrative professional's day to day work to provide the evidence demonstrating the knowledge required to achieve. Each task will receive an electronic badge and achieving the whole 120 credits will enable the candidate to apply for our AdmiNZ Certification. These electronic badges will enable easy inclusion on a CV, LinkedIn, etc.*

*Our micro-credentials will be one way of achieving a formal qualification which is one of the requirements for attaining AdminNZ Certification. Other options will include attending a technical college or achieving a degree through a university. Our learning from previous years is that Administrative Professionals hold many of the skills required for a qualification in Business Administration, achieve through on-the-job learning gained through various methods. We wish to acknowledge that learning through workplace assessment where they can show us their skills and knowledge, if a gap is found then together, we source appropriate training to gain the missing component.*

Helen expressed the hope that these reports give a unique insight into what associations around the world are doing for the benefit of their members, and our profession. There are some great ideas and best practices that are worth looking at, so we don't need to re-invent the wheel. She hoped that all will reach out to the associations in those countries to find out more.

## 6. Facilitated Group Discussions – Helen Monument

Helen noted how there was a perfect fit between the four discussion topics and each of the spearheads from the WA-Alliance Strategy, The Way Forward.

Delegates were allocated in advance to their choice of discussion group – as far as possible - as it's important that Delegates participated in a topic that they are passionate about. Allocated note takers were in each room to record the outcomes. There were 90 minutes reserved on the agenda and Helen reminded the groups that the objective is to conclude the sessions with defining concrete outcomes, with measurable actions that can be implemented in the coming months.

The Delegates and Observers were then divided into their pre-allocated groups:

***The Career behind the Job: How can we mobilize the administrative profession to elevate itself once and for all?*** Facilitated by Liz van Vliet, note-taker Christine Stewart

***Fit For The Future: How can we ensure the mental and physical wellbeing of administrative professionals in the post covid world of hybrid working?*** Facilitated by Amy McKeown, supported by Juanita Mort, and note-taker Debra Chafe.

***Future Proofing Technological Skills: How can administrative professionals become technology ambassadors*** Facilitated by Heather Baker, note-taker Katherine Vaillancourt.

***The Global Skills Matrix Reloaded: Ho can we take the GSM forward to the future?*** Facilitated by Lucy Brazier OBE, note-taker Helen Monument.

## 7. Plenary – Round up of Day 1 and Closure – Eth Lloyd

Helen thanked the four facilitators: Lucy Brazier, Liz Van Vliet, Heather Baker and Amy McKeown for giving pf their valuable time today. They will work with the note takers during the week and on Saturday, Day 2 of the WA-Summit, prior to presenting the outcomes, decisions and actions determined in each session.

Helen Monument thanked everyone for their contributions to the discussions that were lively, emotive and engaging.

On day two, Aliina Rowe, from the Deutsche Boerse, will present her paper “The Administrative Profession defining a role in organizational change”. Eth Lloyd will present the latest updates to Administra, our world action plan. Delegates will also have the opportunity to raise any other issues that have arisen during the Summit. Helen Monument thanked all for their engagement and commitment and closed Day 1 of the 12th WA-Summit.

## End of Day 1

## DAY 2

### 8. Opening and welcome to Day 2 – Eth Lloyd

Eth Lloyd welcomed the returning participants back to the World Administrators Summit. Her words of welcome can be found [here](#).

The slides can be found in the Day 2 Master Presentation [here](#).

### 9. Feedback Session – Helen Monument

Helen thanked the facilitators and introduced them in turn as they gave their report on the results and outcomes from their facilitated sessions. Technical issues meant that the breakout sessions were not recorded, but the note takers did an excellent job of capturing the discussion and the outcomes from each session.

The collaboration and discussions in all the sessions were impressive and lively, with everyone being actively engaged. The presentation from each discussion group can be seen in the master presentation of Day 2.

After each presenter, the Delegate Leader was invited to cast their vote on the recommendations of the facilitated groups as follows:

**Future Proofing Technological Skills: How can administrative professionals become technology ambassadors**  
*Facilitated by Heather Baker, note-taker Katherine Vaillancourt.*

*Outcomes, Recommendations, Actions*

#WASummit2022



## Future Proofing Technological Skills

### Associations & Networks

- ❖ "Spread the Word" – organize a tech event to educate and inspire your local communities, share expertise, provide mentorship for those that want to learn and highlight key topics: Change management, Hybrid Technologies, Importance of AI and cyber security.
- ❖ Create a hub for Resources (such as a portal) that your admin community can access
- ❖ Continue to promote Inclusivity – provide support and training for admin professionals that can and cannot access it ([i.e.](#) scholarship programs for events, student outreach, etc.)
- ❖ Identify "Technology Champions" and highlight in an online campaign to promote:
  - Digital storytelling and technological mentorship à positive promotion
  - Promote case studies
  - Highlight new technologies

### WA-Alliance

#### Building our Knowledge:

- ❖ Alliance Members to share project management tools that they use & the Alliance to promote these tools in a social media campaign or website portal. This will help promote cross-collaboration between members and associations.
- ❖ Develop a Technology Mentorship Program:
  - Create a plan on how this would work and share plan with Alliance Members to use as a template for their own Associations



**How can administrative professionals become technical ambassadors? Facilitated by: Heather Baker**

**VOTE:** The Delegates at the 12th WA-Summit endorse the outcomes and actions presented by the Future Proofing Technological Skills discussion group and where appropriate agree to add them to Administra.

**ACCEPTED**

**Fit For The Future:** How can we ensure the mental and physical wellbeing of administrative professionals in the post covid world of hybrid working?. Facilitated by Amy McKeown

**Outcomes, Recommendations, Actions**

## Fit For The Future - Action



The WA-Alliance will create a new goal in Administra – incorporating the strategies discussed by the Delegates:

### BE AWARE OF AND PROVIDE SUPPORT FOR MEMBERS TO MANAGE MENTAL HEALTH AND WELL-BEING



How can we ensure the mental & physical wellbeing of APs in the world of hybrid working? Facilitated by: Amy McKeown

**VOTE:** the Delegates at the 12<sup>th</sup> WA-Summit endorse the outcomes and actions presented by the Fit for the future discussion group and where appropriate agree to add them to Administra.

**ACCEPTED**

**The Global Skills Matrix Reloaded:** How can we take the GSM forward to the future? Facilitated by Lucy Brazier OBE,

**Outcomes, Recommendations, Actions:**

## GSM Reloaded: WA-Council Actions



- ❖ Create a model for a workshop on how to use the GSM, then train the trainers required.
- ❖ Create short 'explainer' video's
- ❖ Prepare a media kit.
- ❖ Prepare stories – case studies – that can be used in communication (also with the press) in order to:
  - ❖ Attract a 'big fish' for a legacy impact, eg: KPMG, E&Y, Boston Consulting Group, recruiters (eg: Robert Half)
  - ❖ SHRM (Society for Human Resources Management) in the US: convince them to 'rubber stamp' it. (eg: UK Career pathways - <https://nationalcareers.service.gov.uk/job-categories/administration>)
- ❖ Simplify the GSM, taking into account cultural (national and organisational) differences.



How can we take the Global Skills Matrix forward to the future? Facilitated by: Lucy Brazier, OBE

**VOTE:** Vote: the Delegates at the 12<sup>th</sup> WA-Summit endorse the outcomes and actions presented by the Global Skills Matrix discussion group and where appropriate agree to add them to Administra.

**ACCEPTED**

The Career behind the Job: How can we mobilize the administrative profession to elevate itself once and for all?  
Facilitated by Liz van Vliet,

*Outcomes, Recommendations, Actions*

#WASummit2022



## The Career Behind The Job

- ❖ Raise the admin visibility
- ❖ Prepare an on-one guide to describe the role
- ❖ Lunch and learn presentations about our role
- ❖ Credentialling
- ❖ Arrange thank you cards
- ❖ Becoming an active member of your country's association
- ❖ Mentoring of younger members
- ❖ Use the Global Skills Matrix via your HR department to promote and elevate the profession
- ❖ Build confidence to promote yourself, your skills and talk about your successes.
- ❖ Encourage your company to fund your membership of your country associations
- ❖ Build your profile through a LinkedIn profile
- ❖ Seek admin role models

How can we mobilize the administrative profession to elevate itself once and for all? Facilitated by: Liz van Vliet

#WASummit2022



## The Career Behind The Job

1. Develop a template for country associations to use to engage with HR departments to encourage organisations to fund membership fees for administrative professionals to join the peak body in their country/territory.
2. Develop a template for administrators to adapt that articulates the value they deliver in their role that can be incorporated in their LinkedIn profile and to describe what they do.
3. Develop a mentoring framework that associations can use to promote and structure a program for their members
4. Engage with admin influencers on social platforms to encourage them to support and promote the associations in their country/territory and the work of the WA-Alliance
5. Continue to promote the Global Skills Matrix

How can we mobilize the administrative profession to elevate itself once and for all? Facilitated by: Liz van Vliet

**VOTE:** The Delegates at the 12th WA-Summit endorse the outcomes and actions presented by the Career Behind The Job discussion group and where appropriate agree to add them to Administra.

**ACCEPTED**

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## 10. Presentation of Paper – Aliina Rowe, Executive Assistant, Deutsche Boerse Group

Helen Monument welcomed Aliina Rowe to present the paper “The Administrative Profession Defining a Role in Organizational Change,” written as the final project paper to complete her Diploma in Organizational Change at Warwick Business School in the UK. Aliina was supported by her Executive, Oliver Engels, the Chief Risk Officer of the Group.

Aliina’s presentation showed how Small Things show a way for assistants to address change by turning their attention and focus to what they can do now, in small ways, to engage and connect people to each other in order to build those strong foundations that are needed for organizational change in a deliberate and proactive way.

The paper written by Aliina Rowe including the slides can be found at this [link](#) on the WA-Summit Website.

## 11. Meet the new WA-Alliance Sponsor

This agenda item was put on hold until the AGM on 19th November.

## 12. Administra – World Action Plan – Eth Lloyd

Eth Lloyd was invited to show the latest updates to Administra and answer any questions Delegates may have on the changes. Administra can be found on the WA-Summit website.

“Administra is your World Action plan. It provides a record of many of the outcomes achieved at each WA-Summit. Some outcomes include a directive to include a specific point in a specific Goal in Administra. Other points are gathered through the development of tools and information to support both Administrative Professional Associations and individual Administrative Professionals.

Administra is set out in two parts. The first part is aimed at Administrative Professional Associations to help them to set their goals and strategic plans. The second part is aimed at Individual Administrative Professionals who can use it to gather ideas for their own personal goal setting during their performance appraisal.

The Global Skills Matrix is the most powerful and progressive tool the WA-Alliance has developed. It has the ability to make significant change in the perception and understanding of the Administrative Professional role. Consequently, after the 11th WA-Summit 2021 and the September 2021 launch of the Matrix, it was imperative that the Global Skills Matrix was represented in Administra. Additionally, we have included reference to the Workplace Harassment, Image of the Profession, and Diversity, Inclusion and Belonging Reports.

I will now present the changes and will do so first for the Administrative Professional Association and Networks, then for the Individual Administrative Professional, as they are laid out in Administra itself. Changes are highlighted in yellow.

### ADMINISTRATIVE PROFESSIONAL ASSOCIATIONS:

*These changes are shown in Administra for the Global Skills Matrix*

#### **GOAL 1: MANAGING ADMINISTRATIVE/OFFICE PROFESSIONALS SKILLS**

OBJECTIVE 1.1: ENHANCING THE PERCEIVED VALUE OF ADMINISTRATIVE/OFFICE PROFESSIONALS

#### *Additional strategy*

- As a priority embrace, support, promote and educate your members in the use of the Global Skills Matrix and do the same for your networks, partners, government, educators, workplaces, and business leaders

#### **GOAL 4: MARKET ASSOCIATION MEMBERSHIP TO ENCOURAGE ACTIVE PARTICIPATION OF YOUNGER PEOPLE**

OBJECTIVE 4.1: CREATE AWARENESS OF PROFESSIONAL AND PERSONAL BENEFITS OF BELONGING TO AN INTERNATIONALLY RECOGNISED ASSOCIATION

### *Additional Strategy*

- Make the Global Skills Matrix a critical tool in all marketing to younger people as it shows a clear career pathway within an international profession.

### **At the 11<sup>th</sup> WA-Summit 8 & 15 May 2021**

*The Task Force Leaders wished to ensure the reports they had developed, and the Summit Delegates had accepted, were reflected in Administra.*

### **GOAL 1: MANAGING ADMINISTRATIVE/OFFICE PROFESSIONALS SKILLS**

#### OBJECTIVE 1.4: RECOGNISE AND PROMOTE THE IMAGE OF THE PROFESSION

### *Additional Strategy*

- Share and promote the Identity and Image of Administrative Professionals Report and the associated templates

#### OBJECTIVE 1.5: TO ENCOURAGE BUSINESSES AND THE GLOBAL COMMUNITY TO VIEW THE ADMINISTRATIVE/ OFFICE PROFESSIONALS' ROLE AS A CAREER

Additional wording in the first Strategy

- Work towards Government support nationally in ensuring a school curriculum that creates awareness of and support for administration **as a career of choice**

### **GOAL 2: HANDLING SENSITIVE ISSUES AND ETHICAL OFFICE DILEMMAS**

#### OBJECTIVE 2.1: PROFESSIONAL ASSOCIATIONS/NETWORKS TO PROVIDE ENVIRONMENTS FREE FROM WORKPLACE HARASSMENT AND TO SUPPORT AND ENCOURAGE THEIR MEMBERS TO PROMOTE SIMILAR SAFE ENVIRONMENTS IN THEIR OFFICES

### *Additional Strategies*

- Share the WA-Summit Report and Appendices "Harassment in the Workplace – This far and no further" within your network/association to open the discussion on workplace harassment whatever its form.
- Maintain awareness of the high value and importance of encouraging and ensuring inclusivity within your network/association and workplace, sharing with your members, networks and all strategic partnerships and relationships the report on Diversity, Inclusion and Belonging presented at the WA-Summit in 2021.

### ***New discussion topics at the 2021 WA-Summit which led to further recommended changes to Administra.***

*Firstly:*

### **Digital Technology & AI - what strategies and tools are needed to upskill ourselves and others?**

Discussion led to 6 recommendations which you will have read in the 2021 WA-Summit Outcomes document:

- {Embrace the use of technology to automate tasks.
- Actively seek technology tools and applications that improve/enhance team engagement and collaboration.
- Be open-minded, seek out emerging technologies.
- Project Management is a crucial skill needed by today's admins.
- Increase your resource and knowledge base by building and growing your network.
- Enhance your knowledge of cyber security and its importance.}

*These suggested additional strategies have been included in Administra*

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### GOAL 3: MOVING WITH THE TIMES IN THE 21ST CENTURY

OBJECTIVE 3.2: BE AWARE OF CURRENT AND FUTURE TRENDS AND EMBRACE AND INCLUDE TECHNOLOGY TO ADVANCE ADMINISTRATIVE/OFFICE PROFESSIONALS

#### *Additional Strategies*

- Be open-minded and act as 'change agents' in the awareness and use of current and emerging technologies.
- Recognise the importance of AI and Cyber Security, the benefits and values they add to the administrative role.

OBJECTIVE 3.3: KEEP UP WITH TECHNOLOGY AND CHANGE

#### *Additional wording to Strategy*

- Research and promote latest technologies for use in the workplace for example in a post Covid-19 world promote knowledge of technology tools and applications to improve/enhance team engagement and collaboration regardless of location.

OBJECTIVE 3.4: IMPROVE THE ADMINISTRATIVE/OFFICE PROFESSIONAL'S LIFE BALANCE THROUGH THE EFFECTIVE USE OF THE MOST RECENT TECHNICAL ADVANCES

#### *Additional wording to Strategy*

- Help administrative professionals recognise the reality of 24/7 connectedness in the modern world and the potential negative impacts of this.

*Secondly:*

#### **How to attract and support the next generation of Administrative Professionals?**

Discussions lead to 9 further recommendations which you will have read in the Outcomes document:

- Survey young people to understand what they want from a career.
- Get involved with Career Days at local high schools.
- Partner with administrative programs in colleges.
- Educate the younger generation in Networking.
- Hold panels for students with professionals/industry leaders who started as administrative professionals.
- Partner with tech companies to determine how social media can attract the younger generation to this profession.
- Design a mentorship program geared towards younger administrative professionals.
- Hold a round-table event for executives/HR/administrative professionals.
- Get HR involved with mentoring/job shadowing/job descriptions. }

*These recommended additional strategies have been included in Administra*

### GOAL 4: MARKET ASSOCIATION MEMBERSHIP TO ENCOURAGE ACTIVE PARTICIPATION OF YOUNGER PEOPLE

OBJECTIVE 4.1: CREATE AWARENESS OF PROFESSIONAL AND PERSONAL BENEFITS OF BELONGING TO AN INTERNATIONALLY RECOGNISED ASSOCIATION

#### *Additional Strategy and additional sub-point to a strategy*

- Nationally provide encouragement to existing members to understand (e.g. through a survey) what young people want from a career:
  - Get involved with local Career Days at secondary schools.
  - Partner with administrative programmes in tertiary schools.

- Educate the younger generation in networking.
- Nationally investigate ....
  - Promote the initiative amongst members for them to offer internship to administrative professional students within their companies.

OBJECTIVE 4.2: MAKE USE OF MODERN TECHNOLOGY TO PROMOTE ASSOCIATION MEMBERSHIP

*Additional Strategy*

- Through your strategic partnerships seek HR support for mentoring/job shadowing/position descriptions to foster development and growth in younger and “new to the role” employees

OBJECTIVE 4.4: ATTRACT HIGH QUALITY SPEAKERS WITH RELEVANT TOPICS TO ASSOCIATION/NETWORK EVENTS

*Additional Strategies*

- Hold a round-table event for executives/HR/administrative professionals focussed on attracting the younger generation.
- Hold panels for students with professionals/industry leaders who started as administrative professionals.

OBJECTIVE 4.5: OBTAIN CORPORATE SPONSORSHIPS FOR ADMINISTRATIVE/OFFICE PROFESSIONAL ASSOCIATIONS

*Additional Strategy*

- Partner with technology companies to determine how social media can attract the younger generation to this profession.

**INDIVIDUAL ADMINISTRATIVE PROFESSIONALS**

*The Global Skills Matrix*

**GOAL 1: MANAGING YOUR ADMINISTRATIVE SKILLS**

OBJECTIVE 1.1: ENHANCE YOUR OWN VALUE AS AN ADMINISTRATIVE PROFESSIONAL AND THE IMAGE OF THE (YOUR) PROFESSION

*Additional Strategy*

- Make the use of the Global Skills Matrix in your own role to assist you with your own position description and your career pathway

**GOAL 4: ENCOURAGE AND INVOLVE YOUNGER PEOPLE IN YOUR ROLE**

OBJECTIVE 4.1: THE VALUE OF YOUR PROFESSIONAL ASSOCIATION/NETWORK

*Additional Strategy*

- Discuss the Global Skills Matrix as a valuable guide to a clear career pathway showing the levels and the required skills to achieve each level.

**11<sup>th</sup> WA-Summit 8 & 15 May 2021**

*The Task Force Leaders wished to ensure the reports they had developed, and the Summit delegates had accepted, were reflected in Administra*

**GOAL 1: MANAGING YOUR ADMINISTRATIVE SKILLS**

OBJECTIVE 1.1: ENHANCE YOUR OWN VALUE AS AN ADMINISTRATIVE PROFESSIONAL AND THE IMAGE OF THE (YOUR) PROFESSION

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*Additional Strategy sub-point*

- o Be aware of the Identity and Image of Administrative Professionals Report. Incorporate the thinking in that report and use the templates provided in your own management of your skills.

**GOAL 2: OFFICE ETHICS**

OBJECTIVE 2.1: WHEN AND WHEREVER POSSIBLE PROMOTE A WORKING ENVIRONMENT FREE OF WORKPLACE HARASSMENT WITHIN YOUR OWN WORKPLACE

*Additional Strategy*

- Read and whenever possible use the tools provided in the WA-Summit report and Appendices “Harassment in the Workplace – This far and no further” to understand the impact and importance of opening the discussion on workplace harassment whatever its form.

***This new discussion topic at the WA-Summit 2021 led to a further recommended change to Administra.***

**How to attract and support the next generation of Administrative Professionals?**

**GOAL 3: KEEPING UP WITH TECHNOLOGY FOR THE 21ST CENTURY**

OBJECTIVE 3.1: BE A LEADER IN YOUR USE OF TECHNOLOGY

*Additional Strategies and additional wording to one Strategy:*

- Undertake training to ensure you are current with and aware of the technology you and your organisation need. Especially technology to improve/enhance team engagement and collaboration regardless of team member’s location.
- **Be open minded and investigate** new technologies, recommend these within your organisation as and when appropriate.
- Project Management is a crucial skill, make use of technology to support that within your organisation.
- Enhance your knowledge of cyber security and its importance.
- Increase your resource and knowledge base by building and growing your own network.

Eth then asked for endorsement of the above changes through a vote:

**THAT** the Delegates at the 12<sup>th</sup> WA-Summit endorse the proposed updates to Administra

**ACCEPTED**

Helen Monument thanked Eth Lloyd for her presentation and stressed what a valuable and free resource Administra is for Associations and for individuals. She asked that associations make their members aware of this document and suggested using it when creating strategies for the coming year. Much thought and discussion at each Summit has gone into this document and it’s being kept up to date and relevant on behalf of the profession. The WA-Alliance is grateful to Eth Lloyd for her work and for continuing to be the guardian of this very important resource that can be found on the WA-Summit website [here](#).

## **13. Open Discussion and Any Other Business – Eth Lloyd**

There were no topics raised for discussion from the floor. The Chair had some additional items to share:

- Barrett Shaw, WA-A Communications Officer explained that a post-Summit Supplement will be prepared by the Communications Team. It will contain the outcomes and highlights from the Summit, details on the discussion topics and interviews and testimonials from the participants. He requested anyone who would like to share their Summit experience in an interview to contact him,

- Juanita Mort, WA-Summit Project Manager explained that each participant (Delegate and Observers) would be receiving a certificate of attendance from the Summit in the next week or so. The certificate will be sent to the same email address that was used at registration.

## 14. Close of Summit

Before the formal close, Eth Lloyd invited Joanne Gallop, President of AdminZ to confirm that they will host the 13th WA-Summit on 6 & 7 March, 2024 in Wellington, New Zealand. The Summit will be run prior to Executive Support Live event, so attendance at both will be possible.

### *13th WA-Summit in 2024*

Eth Lloyd then explained that for 2024, as it's a face-to-face event, an Expression of Interest from those who are intending to join us there – this is because of making commitments to hotels etc. There will be an expression of interest survey on the Summit website, with a link in the monthly newsletter. Two years may seem like a long time, but we know from experience how long the process can be for visa requests for New Zealand.

### *Call for Hosts for 2026 and 2028 Summits*

Helen Monument announced that the first bid to host the 14th WA-Summit in 2026 has been received from the Executive Committee of IMA. Their 52nd international conference will be held in Berlin, Germany in October 2026. The deadline for the bids is April 2023, so the WA-Alliance Council will make their final decision then.

And though it seems a long way away, we are calling for hosts for the 2028 World Administrators Summit. The deadline for submission for that will be at the next Summit in 2024. The WA-Alliance is very grateful that there is a degree of continuity for the Summits. It's been a rocky time the past two years and like everyone else, tough decisions have had to be made. We are confident that the future of the Summit is secure.

### ***Helen Monument then closed the WA-Summit as follows:***

"I can't believe how the time has flown. I'd like to thank the WA-Council: Barrett Shaw (USA), Ursula Wartha (Germany), Katherine Vaillancourt (Canada), Christine Stewart (Australia), Debra Chafe (Canada), Shirwyn Weber (UK) and Charon Maxime (Trinidad & Tobago) and Dee Holmes our Interim Secretary (New Zealand) or their hard work. We all understand the challenges of voluntary work and I am so grateful for their commitment to the WA-Alliance, it's a pleasure to work with them.

Also, a huge thank you to our four Summit facilitators: Lucy Brazier, Heather Baker, Liz van Vliet and Amy McKeown. We know you are very busy businesspeople, so we appreciate you giving freely of your time over the 2 days.

Thanks to Juanita Mort for her Summit Project Manager role. We all understand the need for efficient and effective administration of an event like this and Juanita has kept on top of the delegate credentialing, the registrations and communications for us.

Of course, many, many thanks to Eth Lloyd, our Summit Chair these past two Saturdays, she's steered us through once again with her usual calm professionalism. As our Council Advisor, she has been an absolute rock – working with us behind the scenes – not just for this Summit, and for taking care of Adminstra, but for being there as the fount of all knowledge for anything we need, whenever we need it. She gives guidance, advice and general common sense at the appropriate time and never fails to cheer me up in our weekly zoom calls, so thank you, my friend.

A huge thank you goes to our Summit sponsor, EMMRE. I'm sure many of you will take advantage of the special offer on their website. We feel it's an excellent partnership for the WA-Summit and have been delighted to work with Don Harms and his team.

There is work to be done – so thank you for that! And of course, we thank those people who put up their hands to volunteer to support us by being a member of a task force, we cannot do this without you. I'm delighted to have you on board with us.

Please reach out to us if you would like to be involved in the activities of the Summit – or the Alliance. We can always make use of committed, enthusiastic, creative thinkers who are passionate about what we do and want to join us on our journey to guide, develop, influence and elevate our profession.

For those who are here as observers, I hope you found the experience valuable and that it will have encouraged you to become a Delegate in the future – representing the voices of the administrative professionals in your country.

Last, but not least, thank you to the Delegates for giving us your valuable time and for your commitment to the WA-Alliance and the Summit.

I look forward to seeing most of you at the WA-Alliance AGM on 19th November, which is not only for the nominated representatives of our member associations, but open to all their members too, so please spread the word amongst your own networks. Indeed, we hope and expect Alliance members to communicate all our activities to their members, to encourage them to become engaged, subscribe to our newsletter, respond to our surveys, use the tools we have developed to support you in your roles, and to follow us on social media. The WA-Alliance is still in its infancy, and we have a long way to go. But with the support and advocacy of our association members and business partners, we hope to grow and develop our worldwide community.

I am immensely proud of what we have achieved this Summit and the ones that have gone before and hope that your passion and enthusiasm will stay with you after we've said farewell today. Yes, we are all volunteers, but there is so much dedication and love for our profession within this group, we need to keep that momentum going in the months and years to come. We have made so much progress together – with the reports we've produced, the awareness campaign and the global skills matrix all for the benefit of administrative professionals the world over. They may seem like small steps, but the impact is huge and not to be underestimated.

So, we come to the end of another Summit. It's totally different holding an online event, as we all know, and I can't wait to see everyone in person again. I hope you'll be able to join us in New Zealand in two years' time – I've already started saving.

We will be sending out the usual post-summit survey to get your feedback, so watch out for that - it's how we learn.

I know that everyone's time is precious, and the time zone is not always the friendliest for some of you so, finally, my heartfelt thanks go to each one of you who attended and participated these two days. I really regret not being able to talk to everyone in person - that's virtual meetings for you - it's been wonderful to see your faces on screen again. Stay safe. Thank you and farewell.”

## End of Day 2