



## Consolidated Outcomes 10<sup>th</sup> WASummit 2018

### Eth Lloyd, Chairman, WASummit Advisory Council

#### Outcomes from the 2015 9<sup>th</sup> WASummit Three Research Topics

#### 1. International Credentialing:

##### Recommendations

Our original objective, as asked by the Delegates at the 2015 WASummit, was

*To identify nationally recognised qualifications for business administration from around the world, that can be used as a benchmark to set a standard for International Credentialing and apply to administrative roles within an international framework.*

On investigation this was such a huge project, being undertaken voluntarily by the International Credentialing Team, that it required breaking into two stages.

This report covers:

##### Stage 1:

*To identify nationally recognised qualifications for business administration from around the world...*

The achievement of this objective to be acknowledged by the Delegates considering and accepting the following recommendations:

1. WASummit Delegates to recognise that we are part of an international framework to identify and advocate for:
  - a. relevant nationally recognised qualifications for administrative/office professionals' roles listed on individual countries National Qualifications Frameworks (NQF) around the world, and
  - b. professional development and training organisations and/or courses (non-NQF) that meet the ongoing needs for the development of administrative/office professionals focused on future-proofing the profession on the international stage; this may lead to strategic partnerships and sponsorship opportunities for the WASummit.

**ACCEPTED**

2. Encourage all Administrative/Office Professional Associations to contact their own country's National Qualifications Framework Authority (if they have one), and become involved in the development, revision and/or oversight of relevant qualifications (NQF) for administrative/office professionals i.e. Business (Administration) qualifications.
  - a. Amended to include: All administrative/office professionals to take responsibility for their own Education

**ACCEPTED**

3. Encourage associations and individuals to embrace "*Administra* - World Action Plan" to progress the goals and objectives; thus, supporting robust and ongoing professional development for administrative/office professionals, to keep ahead of the ever-changing business environment with a future focus.

**ACCEPTED**

4. Delegates are asked to agree to providing a mandate for the Advisory Council to develop:

Stage 2 (completion 2020):

*... a benchmark to set a standard for International Credentialing and apply to administrative roles within an international framework.*

Initially further development of the objective will be required to clarify the aims and objectives, but will include:

- a. designing an International Credentialing process within the international framework being advocated,  
Amended to read: “designing an International Credentialing process and Policy within the international framework being advocated, and
- b. include all nationally recognised Business (Administration) qualifications (NQF), as well as higher level other (non-NQF) training/professional development options (including professional certifications, etc) for administrative/office professionals.

**ACCEPTED**

## 2. International Position Titles:

### Recommendations

The International Position Titles Team was tasked with researching position titles internationally. To this end the survey “Position Titles, Tasks and Networking” was sent out globally. The data gathered has provided some understanding of position titles and the tasks with limitations as noted in the conclusions. Because titles reflect, to a large extent, the credibility, status and recognition of the position, discussions are required about how to best guide the development of the profession itself. It may be that, in future years, as administrative professionals advance their titles and responsibilities, the respect and recognition they seek will follow.

As an outcome of this research the following recommendations are made:

For this research to be more complete, a broader and more inclusive participation would be critical, therefore to assist outreach to broaden the community should be planned for. Worldwide relationships and partnerships with administrative professionals should be deployed and new regions and respondents targeted to disseminate surveys widely increasing both positional and global representation and participation. This can also be a focus of the Research Report from the International Networking Team which suggests a LinkedIn Group and running ongoing surveys.

1. Further consideration needs to be given to those titles which are uncommon and how they compare to the Executive and Administrative Assistant titles in terms of their job roles and responsibilities. Questions to be asked; are any of these titles new and evolving, or do they fit within the framework of the titles identified in this report:
  - a. This report addresses the current state of the administrative profession. However, it does not address how the profession itself *has evolved or will evolve* in the future.
  - b. It would be helpful to gather data to assist in exploring trends in the evolution of the profession – regarding titles, responsibilities and career paths. For example, a question could

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be: “Is there greater involvement with planning events, managing projects, and team leadership?” Skills development in these areas can lead career movement into other roles.

- c. Good questions for more experienced administrative professionals may be: “What are you doing *now* that you weren’t previously? How has your role evolved?”
  - d. Further research is needed to determine how titles and responsibilities are evolving – and to determine how/if we would like to influence and support the evolution.
2. To build upon the current data and to identify career path trends, the current data could be used to match respondents job tenure with their job responsibilities. A follow up survey of both entry level administrative professionals and experienced, high level administrative professionals would be helpful with the questions:
    - a. “As you become more experienced, what shifts in role or responsibilities do you see?”
    - b. “What skills and responsibilities are emerging?”
  3. To align position titles with position descriptions, questions 11-16 in the survey (see appendix), can be used to provide a template for job descriptions as can the Job Profiles in the report. The data from this report will contribute to the new discussion topic of “consistent position descriptions and career pathways”.
  4. This data will assist discussions on whether we can develop a Position Titles, Position Descriptions and Career Pathways Tool. This tool is to be aimed at assisting administrative/office professionals to determine or understand their own position titles, descriptions and career pathways within their own workplace environment. In a very broad and idealistic way such a tool may include:
    - a. A range of generic position titles internationally recognised and under which an individual can locate and/or include their own position title.
    - b. A range of position descriptions to match those generic titles to assist an individual to locate or develop their own position description to suit their own role.
    - c. A career pathway which incorporates those generic titles and position descriptions so that the individual may locate themselves and then determine their own pathway

#### New Recommendation/Outcome:

At the 10<sup>th</sup> WASummit 2018 discussion of this topic the Chairman proposed that as this topic is very complex, these recommendations are not ones that we can easily vote on. The next step is to consider position descriptions, at this 10<sup>th</sup> WASummit, where we will discuss more about the skillsets that go hand in hand with position titles and every part of the world is to be considered.

The Chairman suggested that as the recommendations of this report are only a beginning Delegates are asked to vote on this single new recommendation:

1. THAT this Report forms the basis for further discussions on Position Titles later in this 10<sup>th</sup> WASummit 2018

**ACCEPTED**

### 3. International Networking:

#### Recommendations

Our recommendation is:

THAT the WASummit Advisory Council create a new LinkedIn forum (Task Force) for all administrative/office professionals with:

1. **Membership:** This forum/group should aim to include a representative from each country in the world.
  - a. Entry to the LinkedIn group will require criteria for joining.  
Amended to read: Entry to the LinkedIn group will require codes of conduct for joining.
  - b. The group should be used as a vehicle to recruit administrative/office professionals from every country in the world, particularly those countries that do not currently connect with or participate in the World Administrators Summit.
  - c. Social media campaign and World Administrators logo to be used to encourage visibility of the platform.
  - d. Create hashtag/s to promote the group globally to encourage new administrative/office professionals to join and “network”.
  
2. **Content:** Content must be relevant to all (key issues, training, challenges, and discussion is needed about the “relevance” to each country as these will vary greatly in terms of need and cultural fit, and of course language and geographical location).
  - a. We believe that brief online “polls” throughout the year are a good way to garner direction in terms of content and needs.
  - b. This online platform could have quarterly “virtual” events or introductory events, eg: whereby administrative/office professionals can share best practice, learn from each other’s experiences. Also consider keynote speakers/trainers quarterly.
  
3. **Security:** Data capture for the group will belong to WASummit Advisory Council and must be securely protected.
  - a. The group to be moderated by WASummit Advisory Council or council members globally.
  - b. The platform should not be used as a market-place to “sell” for any 3<sup>rd</sup> parties, eg: selling places at conferences or selling products unless authorised by WASummit Advisory Council.
  - c. The group should be branded as a stand-alone entity “World Administrators Group/Members”.

That the aim of this Task Force would be to create a truly global network in terms of reach; effectively becoming the one place where the “voices of administrative/office professionals” are heard, allowing us to “Speak with one Voice”.

**ACCEPTED**

(NB: a Task Force is being formed; IMA Italy will lead, additional members being sought over the next month)



## Outcomes from Facilitated Group Discussions on the 2018 Topics

Outcomes to be SMART - specific, measurable, achievable, realistic and timebound.

### A. Outcomes on Digital Technology:

1. WASummit requests that all represented Associations and Delegates, where needed, are to be GDPR compliant and that this is reflected in the wording of *Administra*.
2. WASummit requests that it is noted that Administrative/Office Professionals will lead the way (seek to be change agents) in the awareness and use of current and emerging technologies, such as AI, Cyber Security and the benefits and values that they add to the administrative role.
3. WASummit requested that the wording in *Administra* is re-worded under 'work/life balance Goal 3, Objective 3.4' to reflect that we are now always connected as current realities.

**ACCEPTED**

### Additional outcome on Digital Technology:

1. The Chairman and Corina Wenzel (Germany) will work together; will provide a timeline for completion to the Advisory Council and ensure the outcomes noted above from the discussions are incorporated into *Administra*.

**ACCEPTED**

### B. Outcomes on Workplace Harassment:

1. Form a Task Force to come up with WASummit policy statement on workplace harassment.
2. The Task Force to create a code of conduct (by 2019) to be shared with Associations and is to include identifying workplace harassment and management of this.
3. WASummit Task Force to encourage Associations to collaborate with charities that deal with this issue and provide links to them on Association websites.
4. WASummit Task Force to create campaigns around workplace harassment and recommend each Association find or develop training courses so that it is country specific (by 2020).
5. WASummit Task Force to develop a checklist for individual administrative/office professionals to complete; demonstrating inappropriate behaviour.
6. WASummit to encourage Associations to share best practice for their country. Each Association's website should show useful information available within their country including links to assist e.g. charities, support networks, Government legislation, International Trade Union Agreements, etc.
7. WASummit Task Force to look at creating images of inappropriate behaviour so that Assistants know what is appropriate and what isn't. Contact details with correct support for each country.
8. A repository of stories of harassment, including examples, to be gathered by the Task Force and held on the WASummit website from administrative/office professionals and how the behaviour was dealt with. These stories to be written in English and kept anonymous.



#### Additional outcomes on Workplace Harassment:

1. The Task Force to lead this work will include: Susan Engelbrecht, Lead (South Africa), Angela Parker (Germany), Alison McKessar (New Zealand), Ingrid Dumon (Belgium)
2. WASummit Task Force to complete its code of conduct including workplace harassment by the end of 2019.
3. WASummit Task Force on Workplace Harassment, in consultation with the Advisory Council Chairman, is to revisit Goal 2 in *Administra* and clarify.

**ACCEPTED**

#### C. Outcomes on the Image of our Profession:

1. A Task Force was developed to undertake the following two recommendations including Eleni Rizikianou (Greece), Karin Helene (Sweden), Vania Alessi (Italy)
2. The Task Force in consultation with the WASummit Advisory Council to develop a white paper for administrative professionals to provide a global guideline for enhancing the identity and image of administrative professionals by the end of 2019 (Eleni Rizikianou).
3. The WASummit Advisory Council to promote this paper as a basis for education and training for new and/or existing administrative/office professionals and as a tool to seek dialogue in the working environment.
4. Create 3 templates for 'managing yourself' by the end of 2018 (Karin Helene and Vania Alessi):
  - Template for personal development and creating a personal portfolio
  - Template with ideas, action and processes for self-assessment, including an overview of tools
  - Template for performance appraisal with your manager, short term and long term

**ACCEPTED**

#### D. Outcomes on Position Descriptions and Career Pathways:

1. A Task Force was developed which includes: Andrew Jardine (UK), Cathy Harris (SA), Wendy Rapana (NZ), and Florence Katano (Uganda), with Veronica Cochran (USA) supporting.
2. Task Force member, Andrew Jardine, to initially contact the Position Titles and Credentialing teams to develop and agree a timeline.
3. The Task Force to create a unifying framework for administrative/office professionals and HR departments such that, irrespective of country, it is possible to identify levels of work – i.e. performance expectations, salary ranges and career pathways – for a given job/role profile.

**ACCEPTED**



## Outcomes from the Final Plenary Session

### Business Plenary Session

1. **Administra:** do the Delegates wish to continue updating and using *Administra*?

**Discussion:**

- Canada: Not in its current form. *Administra* should be updated as a historical record and as an Appendix
- The document should be treated as a strategic plan
- USA: Leave document as is and address change raised by Canada for the future, perhaps in 2020
- USA: Good idea for it to be a strategic plan and that change should be made to content rather than to format. We should be leading rather than stating change.

**Outcome**

THAT *Administra* is accepted to be updated in its current form by all countries present with consideration to be given to the format being changed in the future.

**ACCEPTED**

2. **Future of WASummit:** do countries present support continuation of WASummit in its present form?

- Organization has to become bigger, wider, better
- Is it not possible to have the summit more frequently?

**Outcome**

THAT WASummit events are continued to be held.

**ACCEPTED**

3. **Time-frame/frequency of WASummit:** the time-frame between WASummit events has changed over time to 2 years, 3 years, 4 years, 2 years, etc. so change is nothing new

- We should be more agile
- Summit meeting every 3 years is fine but perhaps interim meetings are required
- Another format is needed for another body to do the work needed alongside those who manage and arrange the WASummit
- Canada: Need to look at moving to every 2 years
- Norway: agree to having Summit every 2 years. Perhaps we need to consider holding it online to enable others participate as well

**Outcome**

THAT the frequency of WASummits moves from a 3-year to a 2-year cycle.

**ACCEPTED**

4. **Structure of the Advisory Council:** The Delegates need to consider a more sustainable way of continuing; consider a different model to make the organisation more sustainable and resilient.

- USA: The world is moving very fast. We need to look at a model that will be a way to keep up, lead up. How do we move the profession ahead, elevate, accentuate? Look at a model much like a strategic plan



- Canada: What does the WASummit look like post-today? What do the next steps look like and what are we looking at? How do we take the work already done and build on it to continue the work and the walk?
- Ambassador (Lucy Brazier): discussion must involve all of you. It shouldn't be just a few of us being involved. How do we continue to have those conversations in-between? Communication must be ongoing.
- Germany: The Chairman of the Advisory Council has given us opportunity. Everyone needs to accept the opportunity given to us.
- New Zealand: this is my (NZ Delegate) 5<sup>th</sup> Summit and agree we need to do them well.
- In the last few years, this forum has been run by volunteers.
- Thank you to the Chairman and those involved in facilitating this Summit, it has been amazing.
- Chairman: The Advisory Council will not make changes without consulting you, the Delegates.

### Outcome

THAT the WASummit continues with the structure as it currently is, with a new structural model to be further investigated over the next 12 months by the Advisory Council. Suggestions/outcomes from this investigation will be consulted on with Delegates before being agreed and put in place, preferably no later than 2020.

**ACCEPTED**

5. **The Advisory Council make-up:** In 2003, it was agreed that a representative from every country would make the council unmanageable. Therefore, the world was broken into regions, where each region was invited to provide 2 representatives for the Advisory Council. These regions have been amended over the past 15 years to better reflect actuality.
  - Two of the African regions present (Uganda, Angola - excluding South Africa as this area is established and had 2 representatives) were asked to discuss and come back with suggestion of how their regions should be made up.  
(Post note: immediately after the WASummit, Ghana who were unable to be present, approached the Chairman with a suggestion of West, East and perhaps North Africa, plus of course South Africa. The Chairman forwarded this email to Uganda, Angola, Nigeria and South Africa. They have been asked to collectively undertake discussions within Africa for perhaps four regions each with one Delegate, totaling four for the continent of Africa, better reflecting the make-up of other regions).
  - The European region currently includes Ukraine and Russia. The two Delegates present from those countries were asked to discuss and consider collectively providing two representatives from that grouping as a new region.

NB: The Advisory Council also enlists and co-opts individuals with special skills where those skills are not available on the Council.

### Final Comments:

1. If a Delegate would like a Certificate of Attendance, please email Chairman (Eth Lloyd).
2. International Credentialing: Wendy Rapana (New Zealand) will continue in her role to take this work to the next stage. Her current team to advise her if they wish to continue working with her on this team.



3. Every country that has a Code of Conduct, please forward this to the Chairman to help the development of an international WASummit Code of Conduct for all countries to refer to.
4. New Zealand was confirmed to be hosting the [11th WASummit](#). They agreed to host it in 2020 instead of 2021, after the change in time-frame agreed at this summit.
  - Distributed a pack from NZ including:
    - a letter of invitation from the Prime Minister of New Zealand, the Right Honourable Jacinda Adern
    - a letter of invitation from AAPNZ National President, (Alison McKessar) welcoming everyone to Wellington
    - a Chocolate Fish (a traditional New Zealand reward) included with the invitation to thank everyone in advance
  - The 2020 date may be sometime in February or March, the New Zealand summer, to avoid winter months
  - Please contact Advisory Council Chairman, Eth Lloyd, if you need a letter of support for travel, i.e. visa, etc.
  - New Zealand: Note you can travel to NZ on Air New Zealand through LOS ANGELES, SAN FRANCISCO, VANCOUVER, HOUSTON, SINGAPORE, LONDON, HONG KONG, TOKYO, SHANGHAI, BEIJING, along with many other airlines.
5. United States has put forward a bid to host a WASummit, within the required time-frame, for the [12th WASummit 2022](#).
  - IAAP CEO (Veronica Cochran): this forum was initiated by IAAP in 1992. It is time to come full circle and so in the spirit of full collaboration, they have put this bid forward.
  - IAAP COO (Melissa Mahoney): IAAP wish to renew the collaboration since we have missed the last couple of Summits. We know that we need to have this change; personally, she felt blown away emotionally by everyone and by this event.
  - IAAP will consider through the IAAP Foundation whether they may be able to help with funding or through a scholarship.
  - The USA would like their goal and the summit goal to be to bring in even more delegates and countries to participate.

There were no further bids received and therefore the 2022 hosting of the 12th WASummit by the USA was accepted and would be confirmed at the Closing Dinner that evening.
6. Two Delegates were asked to share what these two days have meant to them:
  - Uganda (Florence Katano): privileged to be part of this Summit.
  - India (Nita Rebello): first time attendee. Extremely valuable forum for learning and to understand what is happening globally; challenges across the globe and understanding how these challenges are being addressed.