

Former GWSAE Chairmen Voice Support for Consolidation

*Concerns Remain About
Retaining GWSAE's Culture*

By Dan Caterinicchia

Susan Sarfati, CAE, president and chief executive officer of the Greater Washington Society of Association Executives (GWSAE), has conducted enough Town Hall meetings in the last two months that it sounds like she has memorized nearly every detail of the proposed consolidation with the American Society of Association Executives (ASAE) and can anticipate many of the questions.

Nevertheless, Sarfati admits that some queries, such as how will GWSAE's culture be maintained and what will the new dues structure be, don't yet have concrete answers. But one thing was clear at the March 9 Town Hall in Tysons Corner, Va.: former GWSAE leaders support the consolidation.

"I feel better about the outcome now more than ever," Robert S. Morgan, CAE, president of Bottom Line Partners

Town Hall

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and former GWSAE chairman, told *USAE*. "I can't imagine two organizations trying harder to be open with their process."

Another former GWSAE chairman, Paul J. Greeley, Jr., CAE, president of the association/non profit strategic consulting practice at The Signature Group, agreed.

"I think it's a terrific process and a terrific idea made even more terrific by addressing very directly," all potential problems, Greeley told *USAE*. "The concern is where do you go locally to participate? The big issue is this question of culture and the advisory council opportunities give people the chance to participate and that came as a direct result of listening to what members have been saying."

But hearing exclusively from GWSAE members in these last four Town Halls wasn't originally part of the plan, said Ralph Nappi, CAE, GWSAE chairman-elect and president of the American Machine Tool Distributors Association. He said the most recent meetings were added as the need for them was identified, adding that is indicative of the fluid process started in January.

"We don't have all the answers yet. It's definitely a work in progress and a great opportunity to hear from you," Sarfati said to the approximately 15 people in attendance.

The advisory councils are like "communities of practice" where members can meet, network and try to solve common problems, Sarfati said, adding that there will be a CEO group, an emerging

leaders section, and possibly sub-regional groups within the D.C. area, such as an Alexandria, Va., or Fairfax, Va., group.

If GWSAE's culture is lost in the consolidation, another group will come along and fill that void, one audience member said. He asked how the advisory councils will show what progress they're making in attempting to retain GWSAE's culture throughout the consolidation process.

Sarfati said there have been numerous discussion at the staff and board levels on the topic and that a staff retreat last weekend was dedicated to coming up with a plan and structure to ensure GWSAE's culture moves forward.

"The time for ASAE's culture to adapt is now," with their new leadership in place and a transition on the horizon, Nappi said, adding that if the GWSAE and ASAE cultures don't mesh or anything else goes wrong, the consolidation will be abandoned. "At any point if this isn't right, it's all right we don't have to go."

But the goal is to accentuate the positives of both organizations while recognizing that maintaining the GWSAE culture is key, he said, adding that it has been discussed at 12 meetings in the last 10 months.

"We're not sure how, but it's loud and clear. We know we have to move in that direction," Nappi said.

When asked how the consolidation will better serve members outside the Beltway, Nappi said since ASAE and GWSAE will no longer be fighting for resources, there will be an increased focus on the rest of the country.

Sarfati reiterated that all of the groups' financial houses are in order and all of the staffs will remain intact. She added that GWSAE's net revenues from membership dues are \$250,000, which will be lost, but should be easy to make up nationwide.

"I don't see revenue going down except maybe in the first few years when we have to spend money to get the consolidation off on the right foot," Sarfati said.

The proposed consolidation involves ASAE and its Foundation, GWSAE and the Center for Association Leadership. ASAE will be the sole 501(c) 6 entity and the Center for Association Leadership will continue as a 501(c) 3 organization. If approved by its members, GWSAE as a separate organization will cease to exist. ASAE's Foundation and its education department would become part of the newly reconstituted Center.

Morgan said all the constituency groups will benefit: business partners will get more leverage, members outside the Washington, D.C. area will be better served and members inside the Beltway will not lose any of their volunteer opportunities or programs designed for emerging leaders.

Sarfati said the four Boards approved the consolidation proposal in concept in mid-January, and a detailed plan will be ready by mid-April for Sarfati and John Graham IV, ASAE's president and CEO, to review. After the two leaders have reviewed and approved the plan, it will be presented to the four Boards

on May 25.

An integration steering committee is putting together the detailed plan, which will include budget and staff projections, as well as proposals for enhancing education, membership dues and all other areas. The committee is comprised of senior staff members from all four groups, as well as lawyers, auditors and accountants, Sarfati said.

Assuming the four Boards approve the plan in late May, a 30-day notice will be posted giving GWSAE members instructions on how and when they can vote. Sarfati said the vote would then take place before July 1, which is the beginning of the fiscal year for all four organizations. Under the new structure, Graham would continue in his role as president and CEO of ASAE, and Sarfati would continue in her role as president and CEO of The Center in addition to becoming executive vice president of ASAE.

During a January Town Hall meeting, Jeffrey Tenenbaum, general counsel for GWSAE, said that according to Washington, D.C., law, 10 percent of the GWSAE membership must attend and cast a vote for the results to be legal and binding. Two-thirds of voters must approve the consolidation plan for it to go forward. At a minimum, 175 of the 1,750 association executive members of GWSAE will have to be present for the vote (for which no date has been scheduled), but voting by mail will also be accepted, Sarfati said. Per the bylaws of the association, no proxy voting is permitted.