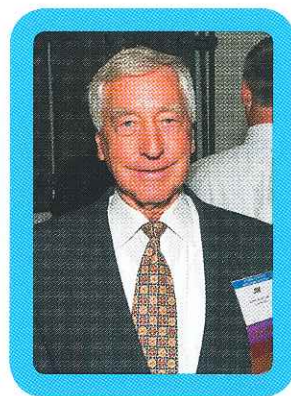


# LIVING LEGENDS: JIM MARTIN, CAE

*Life's Great Balancing Act Leads to a Satisfying Career*

BY MARY LOU JAY



**THE LIST OF** achievements for **Jim Martin, CAE**, at the Georgia Society of CPAs and GSAE is long and impressive. Martin served as executive director of GSCPA for more than three decades, expanding its programs and growing the association from a single employee to a staff of 29 and was president of GSAE from 1981 to 1982—helping start the GSAE Foundation and co-writing the GSAE Code of Ethics.

But it wasn't all work; Martin enjoyed balancing the serious side of his association activities with social events, and some of his fondest memories at GSAE revolve around those occasions. One favorite memory is the time he went to a GSAE masquerade party dressed as Barbara Bush. "We always had such a good time," he says.

Martin began his association career after graduating from The University of Georgia's Grady College of Journalism in 1961. After four years as magazine editor for the Georgia Motor Trucking Association, he accepted GSCPA's offer to serve as their executive director.

A highlight of the GSCPA years was the breakfast meeting Martin arranged in Washington, DC during the 1970s. "When Jimmy Carter was president, it occurred to us that we needed to take the Georgia CPAs to Washington so that we could recognize the people from the state who were working there," Martin recalls. Carter and several key people attended and so did all members of the state's Congressional delegation. The breakfast became an annual event—one later emulated by the American Institute of CPAs and many state CPA groups.

Martin also spearheaded an institutional advertising program for Georgia CPAs. "This was at a time when CPAs could not advertise on their own, but we began an educational advertising program, branding

CPAs," he says. This idea, too, was picked up by both the national and state CPA associations.

In recognition of his impact on the accounting profession in Georgia and the U.S., Martin was named one of the profession's 100 most influential people by *Accounting Today* in 1998.

A GSAE member for 50 years, Martin speaks appreciatively of the invaluable assistance he received from his many friends and mentors there. "I can hardly name a part of the work that I did within the CPA society that did not have some correlation with something in GSAE," he says. "It was a priceless reservoir of knowledge."

"To have the official designation as a Certified Association Executive (CAE) was very important in my work," he continues. "Accountants designated as CPAs felt that I was more qualified in all areas of association management."

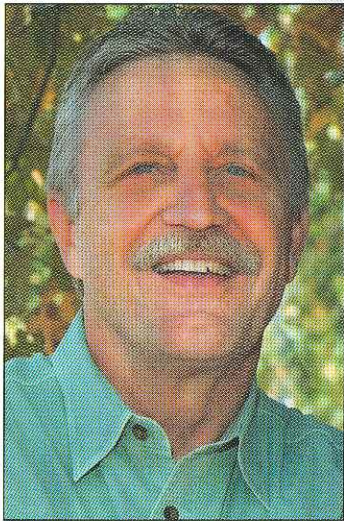
"My highest achievement in GSAE was receiving the Clifford M. Clarke award for the outstanding association executive in Georgia, which was awarded in the 1984-1985 year," Martin adds.

Although Martin was ready to retire in 2000, he admits it's been challenging adjusting to the quieter lifestyle in Lavonia, where he and his wife, Carolyn, enjoy their lakefront life. Martin keeps busy volunteering in several different organizations and is currently in the midst of setting up a community garden.

He reflects with satisfaction on his long tenure with both associations. "I would not change one thing during my 39-year career and my years of membership in GSAE as I served two outstanding, nonprofit organizations," he says. "GSAE gave me the opportunity and encouragement that made all the difference in my life and work." <



# Living Legends:



## Steve McWilliams, CAE

GSAE involvement set stage for a successful career  
Committee positions enabled him to develop skills

BY SHERYL S. JACKSON

**WHEN HE GRADUATED** from Georgia Southern University in 1973, Steve McWilliams, CAE wasn't sure what he wanted to do with his degree in English.

"I went to Macon where I got a job with Southern Association Services where I worked with 10 to 12 different clients," says McWilliams. "I ended up in Atlanta in 1976 with another association and that's when I met Gene Dyson and Jim Parkman."

After Dyson and Parkman welcomed him to Atlanta, they informed McWilliams that he would be involved in Georgia Society of Association Executives (GSAE). "Their insistence that I get involved immediately gave me an opportunity to learn from experts in association management during the formative years of my career," he says.

McWilliams didn't waste any time getting involved once he joined GSAE. "I joined GSAE in 1977, earned my CAE in 1979 and volunteered in a variety of positions that led to me serving as president in 1985 and 1986," he explains. "When I first joined, I wanted to serve on committees that had the quickest impact, so I chose membership."

GSAE is a tough but rewarding assignment for any volunteer, says McWilliams. "GSAE has to set the standard for members who are breaking all the records in their own associations. It's hard enough to represent people who do the same

job as you do, but the staff and volunteer leaders are always trying to find new, better ways to run an association."

When McWilliams first joined GSAE, there were few women and no racial diversity. "In the mid-80s, we saw more diversity and women were becoming a more important part of the organization," he says. While the association was welcoming new members of both genders and all races, there was still a struggle between association executives and corporate members, he says. "During my year as president, we opened up more meetings to corporate members and we strengthened our relationship with them." As association executives recognized the value of corporate members and corporate sponsorships, which helped GSAE offer more services to members, their acceptance grew, he adds.

Because his office at the Georgia Forestry Association is located in Forsyth, GA, about one hour south of Atlanta, McWilliams doesn't make it to as many meetings as he did when he was working his way through the committees and offices. He does keep an eye on GSAE for educational seminars, webinars and meetings that will benefit his staff and he does make it to special events. "I enjoyed everything I did with GSAE and I'm glad to see that the staff and volunteer leaders are still keeping the organization up-to-date and relevant to association managers today." ●

# “While We Live, We Serve:” The Legacy of Jim Loyd, CAE



“Our association community is about service and about connecting with other people. My entire life has been driven by volunteering and helping where and when I can, so the association community felt right to me.”

“**WHEN YOU INHERIT** something remarkable, it’s not your job as a volunteer leader to blaze a new trail. It’s your job to maintain that excellence.”

**Jim Loyd, CAE**, offers these wise words to anyone who is interested in taking on the formidable but rewarding work of leading an association. Loyd, who was president of GSAE from 1984 to 1985, says, “GSAE was such a well-run organization that all I had to do was maintain the high standard that had been set.”

While Loyd is extremely humble about his tenure, and although he stresses that he saw his role as that of a steward shepherding an already great organization, he ushered in some important milestones in GSAE history, including the official charter of the GSAE Foundation and the hiring of **Sharon Hunt, CAE** as GSAE’s executive director. During his time in office, GSAE also saw its operational processes become more standardized,

with the introduction of such now-indispensable tools as job descriptions and an organizational chart that showed how all of the pieces of GSAE worked together to create a remarkable whole.

Loyd’s road to the GSAE presidency is, aptly, paved with volunteerism and putting others before himself. “When I graduated from Presbyterian College in South Carolina, I taught English and physical education at a small private school in Carrollton, Georgia,” Loyd recalls. During that time, his wife’s father, who owned a tire store in Atlanta, died, and Loyd moved to Atlanta to help manage the business. After about two years, Loyd ended up managing another tire store. Subsequently, his friend Don Sentell, a sponsor member of GSAE, told Loyd of a job opening for a field services director of the Georgia Tire Dealers & Retreaders Association through the association management firm Association

*continued on page 14*

## 1960s and '70s

> **1960** – The name Georgia Society of Association Executives was officially adopted.



> **1968** – Patricia H. Duggan became GSAE’s first female president.

> **1970** – Past Presidents’ Council was created, along with three awards – the Stephen Styron Award, The Benson Skelton Award and The Clifford M. Clarke Award.

> **1974** – Corporate memberships (called Affiliates) were created.

> **1978** – Abit Massey, CAE served as chief elected officer of ASAE, and the Abit Massey Lecture Series was created.



> **1979** – The first Legislative Day program was held.



### **“While We Live, We Serve:” The Legacy of Jim Loyd, CAE**

*continued from page 12*

Services Atlanta, owned by GSAE Past President **Stewart Huey**, who introduced him to GSAE. Accepting that position let Loyd apply his firsthand knowledge of the tire industry and also develop the servant-leadership required of great association executives. “As a GSAE member, I began volunteering and became more involved,” says Loyd, who gradually took on higher leadership roles. “I didn’t set out to be GSAE president when I began volunteering. I volunteered because I cared, and I tried to instill that spirit in others.”

Our association community is about service and about connecting with other people,” he continues. “My entire life has been driven by volunteering and helping where and when I can, so the association community felt right to me.”

Outside of his professional life, Loyd has spent more than 30 years with Buckhead Baseball, a youth baseball league in Atlanta, as a coach, manager, and umpire. Thanks in part to his influence, many young players grow up to become adult volunteers like him. “The Presbyterian College motto, *dum vivimus servimus*—while we live we serve—has guided my life,” Loyd says. “The reward in association management has been similar. Seeing the spirit of volunteerism continue with new leaders was my confirmation of a job well done.” <

### **Ann McClure, CAE: Into the Unknown—with Confidence**

*continued from page 13*

of GSAE members. In 1996, the internet had only 10 million users, but forward-thinking leaders such as McClure already saw its potential in the association world, which exists, much as the Internet, to do one thing: connect.

“I selected Augusta as the meeting site because the city was developing a hands-on science and technology venue, Fort Discovery, directly along the river and near a fine hotel,” McClure says. “Technology! We were in early stages and needed to know more about how to involve the members we served in our jobs. With the idea of using the web to connect with members and communicate with each other, the Annual Meeting theme was ‘Connections,’ before our newsletter had that name.”

In many ways, McClure’s term as president is a master class in what to do when faced with uncertainty: embrace it, learn the way the sea rolls, and create a course rather than following one. “Looking philosophically at organizations like GSAE, there seem to be perpetual challenges: getting new members involved, finding new avenues of communication, evolving relationships with corporate members, what have you,” she says. “But every year new leaders bring a new brush to paint the scene with fresh, new colors, keeping the organization vibrant, leading its members on ever-changing paths to being leaders of knowledge and growing confidence.” <

## 2000s

> **2002** – The GSAE Foundation Internship Grant Program was established, and *connections* magazine was launched.



> **2007** – GSAE celebrated its 90th anniversary and named “90 Movers and Shakers” in the association community.

> **2009** – The GSAE Leadership Academy launched, and the Benson Skelton Award was renamed the Skelton-Massey Award to honor two legendary recruiters in our community.

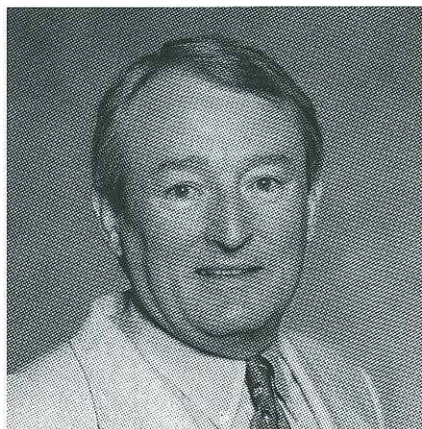
> **2014** – The Emerging Leader Award was renamed the Sharon Hunt Emerging Leader Award.

> **2015** – The Corporate Supplier Award was renamed the Peggy Seigler Corporate Member of the Year.

> **2017** – GSAE celebrates 100 years!



# Living Legends:



## Terry Dempsey, MBA, CAE

GSAE provided skills to move up in association management

BY SHERYL S. JACKSON

**NOT ALL CAREER** paths are carefully planned before you finish school, said Terry Dempsey, MBA, CAE, principal of Dempsey Management Services. Dempsey's first job in association management at the Medical Association of Atlanta (MAA) was, in his words, "a job I stumbled into through a connection I made at Georgia State University while working on my MBA."

In 1978, after working at MAA for a year, Dempsey's boss encouraged him to join the Georgia Society of Association Executives (GSAE). Although his experience as an Army officer prepared him for many aspects of his job, his GSAE involvement was more valuable to his career than he initially realized. "I didn't know at the time I joined [GSAE] that I needed more training, but I found myself taking on new responsibilities that were giving me skills I could use in my own association," he explained. "In hindsight, GSAE was dramatically important to my career."

Although Dempsey served as president from 1985 to 1986, he said, "You don't have to be president to benefit from GSAE involvement." Because GSAE is member-driven, there are many opportunities to learn, network and share ideas.

Dempsey's first committee involvement was with membership. "When I was asked to serve on the committee, I remember saying that I was a doer and would help any way I could, but I didn't know anything about membership," he said. He became chair of the membership committee

and discovered there were no other people on the committee and no member prospect list. "I asked a couple of people to help me and everyone said yes," he said. "At the time, I had no membership responsibilities in my job at MAA, so this committee gave me a chance to learn about membership recruitment and retention."

As president-elect, Dempsey worked closely with the GSAE president on several issues that would carry over into his year as president. "There was a smooth transition from one year to the next because of our ability to work together," he said.

He is most proud of the establishment of the GSAE Foundation. "We conceptualized the foundation and figured out what needed to be done during my year as president-elect," explained Dempsey. "During my presidency, we incorporated the foundation and set up the Board of Trustees." Working with the president and officers the year before his term made it possible for Dempsey to accomplish such a huge task in only two years.

Serving as past-president also allowed Dempsey to continue working with the foundation to get it going "full force," he said. Having leaders who can oversee important projects throughout their development and implementation keeps the organization moving forward, he explained.

"I'm also proud that during my year as president, we moved into strategic planning," said Dempsey. Several board members at the

time used strategic planning as a tool in their associations, so Dempsey asked them to help guide the GSAE board in its own planning. "We held strategic planning retreats to ask ourselves where we were going, why we wanted to go in that direction and how we were going to get there," he said.

This experience at GSAE enabled Dempsey to take the tool back to his own association. "Strategic planning is a powerful tool that I learned how to implement through my work with GSAE."

As he looks back on his GSAE involvement, several role models stand out. "Today, we call them mentors, but throughout my time with GSAE, I've met people who shared their experience with me to make me a better association manager." This was important to him as he started his new career, and Dempsey said, "Although they were my peers, I always felt like they were smarter and more experienced than I could ever be." In fact, Dempsey still refers to Cliff Clarke's (GSAE president from 1960 to 1962) "39 ways" as timeless advice on how to be an effective association manager.

But perhaps the greatest benefit of GSAE is the unique experience of serving as a volunteer leader, concluded Dempsey. "I've been on the other side of the table and I have a great deal of empathy for association leaders who volunteer their time. It makes me a more effective manager because I understand their perceptions and needs." ●





# Legends:

## Janet McCallen, CAE

Second female president took advantage of educational offerings

BY SHERYL S. JACKSON

**THOUGH SHE ENJOYED** the meetings, it took Janet McCallen, CAE, a year or two of membership in the Georgia Society of Association Executives (GSAE) before she took the plunge and began serving on committees. She served as GSAE president from 1986 to 1987.

"I joined GSAE in 1976, but I was working at my first job out of college so I wasn't ready to start volunteering for committees," said McCallen. "All the committees I joined were interesting, but the most enjoyable part of working on them was the other executives and experienced leaders I got to know."

McCallen said she was fortunate to have a boss who not only supported her involvement in GSAE, but also encouraged her to take advantage of opportunities to improve her knowledge and skills. "In 1977, the first Certified Association Executive (CAE) study course was offered in Georgia," she said. "I was not qualified to take the exam because I was not an executive director or chief executive officer of an association, but I was given permission to take the morning classes and study along with executives preparing to take the exam."

The time she spent in the class paid off immediately for her association because she learned more in the class in a short time than she ever could learn on the job, said McCallen. "In 1984, when I was named executive director, I took and passed the exam."

Her progression as a GSAE leader was not part of a plan, she said. "Basically, I served in positions for which I was chosen, with each position holding more responsibility. I either had to continue moving up the ladder or get off."

Though her year as president was eventful, McCallen said the most important part of her presidency was the year she served as president-elect. "I was fortunate to have served on many different committees and to have known a wide range of members," she said. "This became even more important during my year as president-elect because this is when I started selecting committee chairs for my year as president."

Selecting people to serve in volunteer positions requires as much thought and planning as hiring staff for your association, she said. "You need to know who is an idea person, a detail person or a creative person," she explained. "It's important to slot the right person into the right committee position in order to keep things working smoothly." During her year as president, it was critical to have volunteers who would put the time into their committees to make them work. "GSAE was with an association management company but we had a part-time executive director. A lot of what we accomplished that year was due to volunteer efforts."

McCallen's presidency is noteworthy for several reasons. She was only the second female to serve as GSAE president, with her term coming 18 years after the first female's term as president. A five-year strategic plan and a Code of Ethics were also adopted during her year as president. "Most association plans at the time were very linear and conventional," she said. "I encouraged people to have strategic conversations that helped us envision possibilities for the future that we may not have considered."

There are two very good reasons for association staff members to get involved in GSAE, according to McCallen. "First, you keep meeting people with more experience, skill and knowledge than you could imagine. They are accessible and willing to offer advice when you need help."

"The second reason is that volunteering for GSAE gives association staff members and executives a good perspective on what it's like to be a member," said McCallen. "Everyone has members of their own associations that they want to encourage to volunteer and increase involvement, but how do you motivate volunteers if you don't understand what it's like to be a volunteer?" All GSAE members can pick up ideas from GSAE activities and from fellow GSAE members. "I think it's important that association executives walk a mile in a volunteer's shoes to improve their own organizations." ●





# Living Legends: William A. "Bill" Kelly, CAE

GSAE membership gave Bill Kelly a chance to learn

BY SHERYL S. JACKSON

ALTHOUGH HE DIDN'T join GSAE until 1957, William A. "Bill" Kelly, CAE was already heavily involved in association management before joining the society. He was a one-man operation when he took over management of the Elberton Granite Association (EGA) in 1955, and he handled every job linked with running an association.

"I joined GSAE after meeting Cliff Clarke through a mutual friend," Kelly says. "GSAE was more of a club in those years rather than a large association, but it gave me an opportunity to learn from other people."

Although he joined GSAE in 1957, Kelly wasn't very active in his early years as a member. EGA was a new association and it took a great deal of his time to get it up and running, he points out.

"From Elberton, it was a day-long trip to go to a meeting and I wasn't able to give up full days," he explains.

Kelly became more active in the 1970s. "I earned my CAE in 1971 and was able to take the time to attend more GSAE functions," he says. EGA had reached the point where Kelly was no longer the only employee and scheduling himself to attend meetings was possible.

"I enjoyed learning how other associations operated and how other association executives handled some of the situations I was facing," he says.

When he accepted the position of GSAE president in 1987-1988, Kelly and the other officers set a goal to work more closely with the American Society of Association Executives (ASAE).

"I'm very proud of GSAE's support of ASAE's Association Defense Day in Washington, D.C.," Kelly says. Not only did GSAE contribute \$5,000 to underwrite the event, but 21 GSAE members paid their own way to Washington D.C. to educate congressional representatives about the effect upcoming legislation would

have on associations' ability to serve members, he points out.

"This was GSAE's first lobbying trip to Capitol Hill and it was very successful," he adds.

In addition to his pride in his other GSAE accomplishments—including breaking the 400-member mark, increasing the percentage of funds in the reserve account, and sponsoring a number of successful educational and trade events—during his year as president, Kelly is also proud of his accomplishments with EGA.

He retired in 1990, leaving the organization he grew from a one-man operation to a thriving association recognized as a leader in the granite industry. "During my time with EGA, we built a headquarters building completely out of granite and established a granite museum that is located with the headquarters building," he says. "I'm especially proud to say that EGA accomplished all of that without incurring any debt." ●



# LIVING LEGENDS:

## Rev. Paul Massey, CAE

Association skills prepared him for next career

BY SHERYL S. JACKSON

**ONE CAREER WAS** not enough for Rev. Paul Massey, CAE, president of GSAA from 1988 to 1989.

As an elementary and high-school teacher and principal for 13 years, he took the position of executive director of a builder and contractor's association in 1976.

"I still remember my first day as an association executive as if it were yesterday," Massey says. "I had a staff of three people and an empty desk in my office. What do I do now?" he recalls thinking, as he looked at the desk that first day.

"I heard about an organization of association executives, so I called one of the members who recommended that I read a book he had on association management and that I attend a GSAA meeting," he says. Not only did Massey read the book in one night, but he also went to the first meeting he could.

"GSAA was a much smaller organization in 1976 with most of the members association executives with 15 to 20 years of experience," remembers Massey. "I was fortunate because they took me under their wing, and I learned a lot about association management from their experience."

A smaller organization offered a lot of opportunities to get involved, and Massey did just that. "I jumped in and volunteered for the membership committee," he says.

As a new association executive, Massey found that after a couple of exciting months running a membership drive for GSAA, he knew how to do the same for his association.

"The experience of working with people who had run membership campaigns for years and seeing what went into a campaign helped me learn in a short time," he says.

Although Massey says there were no earth-shattering accomplishments during his three years as president-elect, president and past-president, he is very proud that the organization's membership grew dur-

ing the years without diminishing the camaraderie and friendship that the members shared.

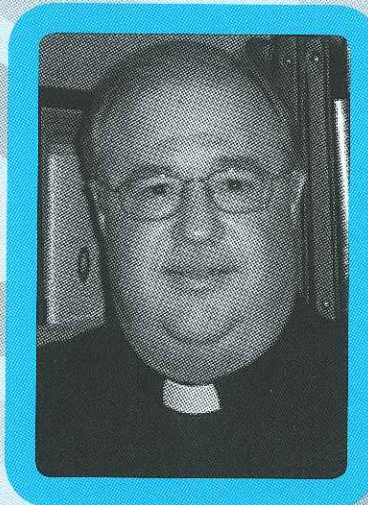
"At that time we held quite a few meetings outside Atlanta at resorts and hotels that wanted to show our members how well they could provide meeting facilities for their own associations," says Massey. "Because the resorts wanted our business, we were able to hold mini conferences at wonderful locations that enabled us to strengthen our own association and help our members with their meeting plans."

One of the most rewarding experiences related to GSAA was the CAE course and certification, says Massey. "GSAA provided a year-long intensive course to prepare me for the certification exam," he says. "The certification and the knowledge I gained preparing for it made this one of the most worthwhile things I did for myself."

Prior to retiring from association management, Massey volunteered in his church and then volunteered

to serve as an assistant pastor when he retired. "In 2004, my wife and I started a small mission church," he says. The work he does now is also very rewarding, and he often finds himself using association-management skills.

"When you work in an association, you can't force volunteers to do something, you have to lead by example. I found it to be the same way in a church," he says, laughing. "I've decided that a successful association manager is prepared to do anything." ◀





# Living Legends:



## Jack Warren, CAE, CMP

Warren relied on GSAE to learn association industry

BY SHERYL S. JACKSON

HE KNEW ALL about forestry when he accepted the position to manage the Forest Farmers Association, but Jack Warren, CAE, CMP, quickly discovered that he needed to know more than just forestry.

"I was managing an association that represented timberland owners in 15 states, but I did not know anything about association management," Warren explains. "The board of directors wanted to organize a foundation, so I knew I needed to find a way to learn more."

Warren joined GSAE in 1983 as a way to network with other association managers and to take advantage of educational opportunities.

"I immediately became active on committees, and I pursued the CAE certification," he says. "My board of directors and association members did not care if I was a CAE but I thought it was the right thing to do. I wanted to learn as much about my profession as possible and the CAE I earned in 1984 helped me lead my association."

One strategic goal set during Warren's year as president [1989-1990] was to move to a full-time staff for the association.

"We had a part-time director through an association-management company who did a terrific job, but our association was growing and we were placing more

demands on the management company," he says. "We were getting to the point that we were paying the management group as much as we would pay to hire our own staff."

His year as president saw membership growth and a significant increase in the numbers of people attending meetings, special events and the annual conference, as well. Warren attributes the 300-plus annual conference attendance figure and a holiday luncheon that set meeting records to his wife, Nancy, who was also an association manager and a member of GSAE.

"I was president and she handled the meetings," he says. In addition to selecting good locations, the key to good attendance was the quality of the programs. "You have to present good programs so people feel like their time was used well," he adds.

Although he and his board of directors achieved a lot during the year, he is most proud of the fact that Billy Payne—organizer of Atlanta's successful bid to host the 1996 Olympics—was introduced at a GSAE meeting.

"It was the very beginning of his efforts to organize a bid committee, and many Atlantans thought he was crazy," Warren says. "I'm proud to say that GSAE supported him by publicizing his efforts through our members at every step of the way." ●