Supporting Intellectual Freedom and Managing Divergent Belief Systems
How to Use this Deck

Use this deck as a strategic resource and guide tailored for CEOs and C-Suite executives, and by extension, staff and Board members. It serves as a tool to guide leaders in navigating and responding to the complexities arising from divergent belief systems.

This deck is provided by ASAE in partnership with McKinley Advisors.
What is the Association Insights Center?

A community of experts collaborating to face the increasingly complex environment and challenges ahead. In partnership with McKinley Advisors, the AIC provides critical, on-demand intelligence and tools to support association CEOs as they face the tough decisions yet to come.

The slides that follow provide a synthesis of the community’s work in 2023 to support CEOs in supporting intellectual freedom and managing divergent belief systems.
# Table of Contents

<table>
<thead>
<tr>
<th>Page</th>
<th>Section Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Framework for Managing Divergent Belief Systems</td>
</tr>
<tr>
<td>11</td>
<td>CEO Role: Listen</td>
</tr>
<tr>
<td>15</td>
<td>CEO Role: Facilitate</td>
</tr>
<tr>
<td>23</td>
<td>CEO Role: Assess</td>
</tr>
<tr>
<td>28</td>
<td>CEO Role: Protect</td>
</tr>
<tr>
<td>31</td>
<td>CEO Role: Act</td>
</tr>
<tr>
<td>35</td>
<td>Case Studies</td>
</tr>
<tr>
<td>39</td>
<td>Appendix</td>
</tr>
</tbody>
</table>
Framework for Managing Divergent Belief Systems
What are Divergent Belief Systems?

Divergent belief systems represent fundamental differences in the way individuals view, understand and perceive important issues.

These differences in beliefs go beyond simple and constructive differences of opinion in that they are highly emotionally charged, tend to be inflexible (i.e., individuals are unlikely to change their position), and they are oftentimes connected to a political or social identity. They may also be rooted in different interpretations of fact.
CEOs face a multitude of everyday challenges that they must address. The challenges associated with divergent belief systems are different. They are often characterized by:

**High stakes**
- High risk, strong implications and consequences of action may be severe; unique, likely without any precedent

**High complexity**
- Problem can be approached from multiple and competing perspectives, with multiple potential solutions – few or none of which are complete solutions; no single root cause

**High degree of uncertainty**
- Details and facts are unclear, or limited, and few reliable neutral sources or authorities exist

**High emotions**
- Parties feel highly invested in the outcome and may tie it to their individual identity

**High disagreement**
- Parties may not even agree on the problem, or on the facts involved in the issue

**High liability**
- Problem solvers are held liable for the consequences of their actions due to the breadth of potential impact

**High perception of threat**
- Parties may perceive that their health, safety or welfare is threatened by the issue
The CEO Role in Managing Divergent Belief Systems

Association CEOs, by definition, must be strong listeners, facilitators and protectors of their organization. They use these skills daily.

However, listening, facilitating and protecting require a more thoughtful, intentional and nuanced approach when dealing with divergent belief systems. These challenges demand comprehensive assessment from all angles and require clear and intentional action.

Research on this topic outlined a process for addressing challenges resulting from divergent belief systems, and insights collected from survey participants as well as AIC Thought Leadership Panel members highlighted examples of nuance. Secondary research illuminates strategies from the corporate sector to round out a thoughtful approach to facing these “wicked problems.”

Above all, we know that a variety of potential catastrophic long-term trends sit on the horizon – climate change, civil unrest, globalization and growing inequality. Association CEOs, Boards and staff members want to do the "right thing" but it’s becoming more challenging to know exactly what that is. In the corporate sector, successful companies have adopted a "blueprint for engaging with society in a positive way." Associations, comprised of members working toward a common purpose, are better positioned to do that than any other business.
Facilitate

Listen
Taking care to listen deeply and ensure stakeholders feel heard

Creating a consistent and structured approach

Assess
Evaluating the data in the context of mission, vision and values as well as those who are impacted

Caring for the safety of the association and its members

Act
Steering through uncertainty with clear intention and communication

Framework for Managing Divergent Belief Systems

Use this guide as a tool to reflect on your processes, refresh your approach and prepare your Board and staff for the next critical challenge.
1. Staff, Board members, experts, advisors all must be alert, listen for emerging issues and learn.

2. Diversify your sources to gather broad perspectives and seek out alternative points of view. **Identify the most likely biases** that could impact decisions.

3. Executive Director/CEOs provide structure, guidance, and consistency of approach.

4. Discuss issues that are relevant and critical to the association. Remind the Board that its duty is to the organization (not their emotions).

5. Does the issue relate to the organization’s mission/vision?

6. Does the issue relate to the organization’s values?

7. Can your association positively impact the issue or affected stakeholders?

8. Will the majority of members and stakeholders agree with speaking out?

9. Are there potential partners willing to lead or follow on this issue?

10. Assert the facts and defend the association against untrue accusations.


12. Ensure credibility, accuracy, and transparency.

13. Choose the message and messenger that most clearly expresses your view and aligns with communication strategy.

14. Ensure the Board and staff are aligned on the message.

*Exceptional Experiences.*
CEO Role: Listen
Listen

Make sure all are heard but do not rush or feel compelled to action. Advance relevant conversations.

- Gather broad perspectives and hear all sides. Identify and avoid biases that could impact decisions.

- Give everyone a voice and don’t fear debate. Remind stakeholders that this is the purpose of an association.

- Don’t rush things; don’t react immediately.

- Gather accurate information from members, staff and experts for the Board.

- Use information to pre-identify compelling issues and support rapid decision-making on when to take a stance.
The Art of Listening: Simon Sinek
Listening Checklist
Lessons learned from association CEOs

- Stay present, listen deeply
- Connect with and consider what is being asked of impacted groups
- Acknowledge and validate emotion
- Invite staff input
- Stay humble
CEO Role: Facilitate
Facilitate

Use a consistent, transparent, orderly and defensible process to hear all sides on relevant issues.

- Be the objective, dispassionate facilitator that provides a structure to hear from all sides in the form of respectful, solutions-oriented conversation.
- Discuss only issues that are relevant and critical to the association.
- Ensure a consistent approach, report outcomes.
- Work with the Board to determine the “language that will be used.”
Guidelines for Fostering Productive Conversations

1. Commit to active listening
   Listen for understanding, not to prepare your response or rebuttal.

2. Embrace diversity of perspectives
   And actively seek understanding. Difference maximizes success.

3. Don’t be afraid of vulnerability
   Sharing your feelings can lead others to be more understanding and opens doors to more opportunities.

4. Place equal measures on demonstrating respect, building trust and engaging with candor

5. Cocreate solutions
   The CEO’s primary role is to foster unbiased discussions and ensure alignment with the association’s core values. You don’t have to carry the burden of having all the right answers.

Embodying these attributes will enable deep, challenging and robust debates.
Discussion Questions to Foster Open, Constructive Dialog and to Ensure Alignment with the Association’s Core Values

- Does the issue relate to our purpose and/or strategy?
- How does the matter impact our members and stakeholders?
- How does the matter impact our field/profession?
- What are our choices for this engagement?
- What is the price of our silence?
- How does the issue relate to our values?
- Can we meaningfully influence the issue?
- Will our members agree with speaking out?


## Reflection Questions for CEO, Senior Leadership and the Board

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<tr>
<th>Question</th>
<th>Answer</th>
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<tr>
<td><strong>Will taking a stance on this issue authentically reflect our organization’s values?</strong></td>
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<tr>
<td><strong>How might our stakeholders, both internal and external to the association and its field, be affected by our response (or lack thereof) to this issue?</strong></td>
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<td><strong>What do our members expect or prefer in our response?</strong></td>
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<td><strong>Are we prepared for potential internal challenges or resistance that may arise from our involvement?</strong></td>
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<td><strong>Are we willing to commit to this cause beyond just a statement or initial action?</strong></td>
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<td><strong>What long-term changes could/should we implement to support this issue?</strong></td>
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<tr>
<td><strong>How does our response align with legal requirements and ethical standards?</strong></td>
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<tr>
<td><strong>Are we open to feedback and willing to adapt our approach based on outcomes?</strong></td>
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*Questions sourced and adapted from ChatGPT.*
Ensure consistency and transparency on the process to ensure fairness and the trust of stakeholders.

- Be transparent: have a pre-determined process and explain it (e.g., “we’re going to hold these opportunities to discuss” “the BOD will make the decision”).
- Scan the macro-environment to pre-identify issues that will accelerate action, similar to other forms of crisis planning.
- Clarify the Board’s position on when the association will become involved or take a position.
- Educate stakeholders on the association’s position and the rationale for it.
- Ensure actions align to the association’s position (e.g., keep a firm hold on materials/statements that are issued).
- Practice the process with your Board and staff to build capacity in decision making, ensure consistency in approach and continue to evolve process.
Under what circumstances will the association take which actions?

What rubric will the association use to understand the issue (i.e., is this issue directly connected to the mission?)

Provide briefs to the Board complete with a summary of the issue, pros/cons and the perspective of members, staff, experts, etc.

Establish the process that you will use to have discussions and gather information.

How will you ensure fairness and a safe space, while also making sure conversations are factual?

How much conversation will you have and who will you hear from?

How will you package the output of your conversations to the Board and remind them of their duties?

How will you communicate decisions back to stakeholders?
Facilitating Checklist

Lessons learned from association CEOs

- Explain the process
- Create psychological safety
- Check assumptions and biases
- Stay curious
CEO Role: Assess
Assess the Rationale

Be the voice that reflects and reframes the issues back to the mission, vision, values and strategy of the organization.

- Ensure that the mission of the association is at the core of the conversation while balancing differing opinions.
- Remind the Board how the conversation connects to the mission, vision, values and strategy of the association.
- Remind the Board that its duty is to the organization (not their emotions).
- Keep the discussion relevant to the association.
Are You Ready to Decide?

For Association Members

What are this decision's two most important side effects that might negatively affect its outcome? Have these side effects been considered?

- Side effect A
- Side effect B

In the Macro Environment

What are the two most important potential changes that might negatively affect the outcome of this decision? Have these changes been considered?

- Potential macro-environmental change A
- Potential macro-environmental change B

Inside the Organization

What are this decision's two most important side effects that might negatively affect its outcome? Have these side effects been considered?

- Side effect A
- Side effect B

Framework adapted from concepts initially published in McKinsey Quarterly.
<table>
<thead>
<tr>
<th>Does this issue relate to your mission/vision?</th>
<th>Does this issue relate to your organizational values?</th>
<th>Can your association positively impact the issue or affected stakeholders?</th>
<th>Will the majority of your stakeholders agree with speaking out?</th>
<th>Are there potential partners willing to lead or follow on this issue?</th>
<th>Number of yeses and position to take</th>
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<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>5 Yeses: Speak out as a leader about the issue.</td>
</tr>
<tr>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>4 or more yeses: Maybe speak out as a follower.</td>
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<tr>
<td><strong>Action:</strong> Consider evolving your mission/vision—you may be overlooking an opportunity.</td>
<td><strong>Action:</strong> Focus on mission/vision impact and positive impact(s) on the issue and/or affected stakeholders.</td>
<td><strong>Action:</strong> Craft a message that emphasizes how the issue relates to your mission/vision and values.</td>
<td><strong>Action:</strong> Conduct research to understand risk; engage with stakeholders to better understand perspectives. Evaluate potential for harm by inaction.</td>
<td><strong>Action:</strong> Do not speak out for now but continue to monitor</td>
<td>1 yes: Do not speak out for now but continue to monitor</td>
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Assessing Checklist
Lessons learned from association CEOs

- Engage trusted peers to reflect on all angles of the issue
- Reflect on the history of the association to identify founding values and principles that could influence your approach
- Consider how potential decisions recognize and reflect the humanity and individuality of all stakeholders
CEO Role: Protect
Navigate the necessity of the conversation, determine the need to take action or not, and provide the information needed for the Board to take action – always with the organization’s best interests, mission and strategy in mind.

- Defend the association against untrue accusations.
- Be an invisible influencer that reframes the conversation to the association’s mission and values.
- Do not act and do not adopt formal positions unless it is an issue critical to the association and in line with association’s best interests and strategy.
- Balance business considerations with emotional considerations. Weigh pros and cons of action/inaction.
- Bring information to the Board, including outside facilitator and expert advice and assistance of legal counsel, as necessary.
Protecting Checklist
Lessons learned from association CEOs

- Create a routine of engaging the Board and members in conversation about challenging issues to stay informed about perspectives and accelerate the association’s ability to respond
- Prepare a blueprint for engaging on challenging issues in a positive way
- Continue to iterate on your blueprint by initiating an after-action assessment
CEO Role: Act
Taking Action in the Midst of Divergent Belief Systems

The strategies discussed as part of Listen, Facilitate, Assess and Protect identify what association CEOs need to do to steer through challenging issues.

Taking action involves identifying how you will address the issue in light of your association’s mission, vision and values.

To execute, confirm two core underlying premises:

1) The action you are taking is rooted in clarity of purpose, goals and beliefs

2) The action you are taking is informed by direct communication with stakeholders, including employees
Steering Your Association through Uncertainty: Strategies for CEOs and Boards

Corporate organizations that successfully manage uncertainty intentionally engage their stakeholder communities in positive ways. These three strategies below offer practices that associations can use to navigate wicked challenges.

1. **Partner with Stakeholders**
   - Gain the trust of all stakeholders in your field or industry through ongoing dialog and invitations to engage.

2. **Build Alliances**
   - Engage directly with peer groups to understand their interests and compelling issues, as well as stay informed about the macro-environment.

3. **Make Principled Choices**
   - Take positions that are clear, consistent and in alignment with values and communicate them clearly.
Acting Checklist

Lessons learned from association CEOs

- Engage and educate all levels of staff in messaging to assure consistency and clarity
- Acknowledge and communicate the breadth of engagement on the issue
- Reflect on the consistency of decisions made on this issues and those preceding
- Communicate decisions clearly
Case Studies
Case Study: National Governors Association

- NGA launched the “Disagree Better” initiative to help leaders identify a more positive and optimistic approach to dealing with differences and disagree in a way that leads to finding solutions and solving problems, rather than engaging in endless bickering.
- The Disagree Better initiative aims to highlight existing solutions that various groups around the country are already implementing. It also involves featuring Governors who exemplify productive disagreement.
- The initiative acknowledges that conflict resolution requires effort and difficult conversations. It emphasizes the importance of healthy conflict to find common ground and improve families, communities, and the nation.

Case Study: National Organization of Minority Architects

- When the U.S. Supreme Court issued a ruling invalidating Roe v. Wade, NOMA was going ahead with its annual meeting in Nashville, but the ruling triggered a Tennessee law banning abortion in the state which was a direct challenge to NOMA’s organizational values.

- The *Dobbs* ruling was a unique concern for NOMA because members could be penalized for taking on projects that include women’s health clinics where these reproductive healthcare needs take place; NOMA had already faced some criticism among members for holding its conference in a conservative state.

- Their first step was acknowledging the challenge many members were facing. NOMA released a statement announcing a charitable donation to a social-justice organization in the state and took steps during the conference to address members’ concerns.
The American Library Association faced internal turbulence when the appointment of its president, a self-identified “Marxist-Lesbian,” sparked controversy within the organization. The appointment triggered varied reactions, leading to internal discord among members with contrasting ideologies. Disparate belief systems clashed, raising concerns about the association's leadership and its alignment with diverse viewpoints within its membership base.

To address this, the ALA initiated open forums and facilitated dialogue sessions. They aimed to foster understanding, respect, and inclusivity, acknowledging diverse perspectives while reinforcing the shared goal of promoting intellectual freedom and equitable access to information. Through these measures, the association navigated the complexities of managing divergent beliefs, emphasizing unity in purpose while valuing the richness of varied viewpoints within their community.
Appendix
Hear about themes like changing your mind because of better logic or stronger evidence (14:15), binary bias (19:00), and how similar values are not beneficial without disparity of views...dissent makes us smarter (23:15).
Sample Framework #1: ASAE
ASAE Evaluation Criteria

ASAE staff and leadership should consider the following when evaluating whether it is appropriate and advisable to make a public statement about national and societal issues:

- **Connection to the association management profession**: Issues specific to association management are most appropriate for statements.

- **Applicability to ASAE Board Approved Position Statements or guiding documents**: Issues that explicitly apply to a specific ASAE Board Approved Position Statement or guiding document (e.g., Strategic Priorities – Destination 2026, Standards of Conduct) are most appropriate for statements; issues must at least generally apply to a policy or guiding document and be consistent with ASAE’s Mission Statement for a statement to be appropriate.

- **Business impact**: Statements that would create threats to association business, membership, or brand reputation shall be considered with caution; the impact of inaction also must be considered.

- **National interest**: Issues of national interest are most appropriate for statements from a national association.

- **National trends**: Statements provided by other industry associations (e.g., US Chamber of Commerce, National Association of Manufacturers, SHRM, and US Travel) may influence ASAE’s statement strategy.

- **Message clarity**: Association statements should be issued only when there is a clear and concise message, including a specific call to action whenever possible.

- **Leadership and collaboration**: Association statements that demonstrate ASAE’s leadership or provide opportunity to collaborate are preferred.

Exceptional Experiences.
ASAE Decision-Making Process and Timeliness

**Decision-Making Process**
1. Use the Statement Criteria Scorecard to help evaluate if a statement is appropriate and beneficial.
2. Draft a potential statement according to the Statement Elements.
3. Vet the draft statement by the chief executive officer, Advocacy Council, executive committee, and/or board of directors, as appropriate.

**Timeliness**
To demonstrate leadership in alignment with the brand, ASAE should issue statements within 24-48 hours of an issue’s emergence. However, speed shouldn’t compromise strategy. It’s most important to get the statement right and vet through appropriate stakeholder groups.
The scorecard is a tool to help evaluate whether a statement is appropriate.

**“Significant risk to the association”** is defined as something that would have a measurable impact on ASAE’s membership, reputation, or financial stability. In some cases, ASAE’s policies might compel action even when there is significant risk. In other cases, lesser risks—such as distraction from current priorities—might be important enough to discourage action.

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<td>1</td>
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<tr>
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<th><strong>Further Review</strong> (Select all that apply)</th>
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<tr>
<td>1</td>
<td>Is one for which many related industry associations (e.g., US Chamber of Commerce and/or U.S. Travel Association) have made statements (Requires ASAE Executive Review)</td>
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<tr>
<td>1</td>
<td>Is one for which a planned statement could create a significant risk to the association* (Requires ASAE Board of Directors Review)</td>
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<td>Subtotal Score of at least 1 requires further review</td>
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ASAE Position Statement: Elements

Statements should be short, clear, meaningful, and appropriately toned. Preferably, all statements will:

• Include a specific call to action related to a clearly articulated goal. This helps ensure the statement is strategic and purposeful, rather than empty talk.

• Be as concise as possible (ideally 3 sentences or less), briefly articulating why ASAE is making the statement, with links to applicable ASAE policies or guiding documents and, if relevant, other supporting evidence. If additional commentary is necessary, the concise social-media-friendly core statement should be easily identifiable at the beginning of the larger statement.

• Avoid additional commentary that is unnecessary to achieve the above criteria.

• Avoid emotion-based statements attributed to the association itself (ASAE is “disappointed by” or “saddened by,” etc.). Statements of emotion are better expressed as statements from individual people, such as the president or CEO. The association as an organization or membership body has positions (policies, etc.) but not universal personal emotions.
ASAE Position Statement: Other Actions

The following steps should be taken when considering or releasing an association statement:

- Evaluate the impact on business operations. Even when a statement poses no serious threat to the association, issuing a statement is often significantly disruptive to routine business operations, distracting from other association messages and increasing member inquiries and feedback (positive and negative) that might merit a response by staff.

- Consider component and industry association collaboration, consultation, and information. In the least, ASAE should alert a directly affected allied state or location association or convention and visitor’s bureau (CVB) to a statement before it is issued. ASAE should also consider the perspective of other industry associations (e.g., US Chamber of Commerce, National Association of Manufacturers, SHRM, and US Travel).

- Clarify roles for managing questions and feedback. Identify a clear process to collect, review, and respond to questions or feedback.

- Communicate to Board and staff. Alert Board and staff when a statement is about to be released, with clear instructions about how to triage or otherwise respond to questions or feedback.
Sample Framework #2: American Society of Anesthesiologists (ASA)
Sample: American Society of Anesthesiologists (ASA) Framework

**Mission:** Advancing the Practice and Securing the Future

**Vision:** A world leader improving health through innovation in quality and safety

**Values:** Patient Safety, Physician-led Care and Scientific Discovery

**Strategic Pillars:**
- Advocacy
- Educational Resources
- Leadership and Professional Development
- Member Engagement
- Quality and Practice Advancement
- Research and Scientific Advancement
- Financial Performance and Operational Excellence

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**Other factors to consider:**
- What subject matter experts (SMEs) or committees can be consulted for input?
- Can ASA provide thoughtful and substantive commentary that is relevant to our key stakeholder audiences rather than just vague or speculative statements?
- Is there a key date or milestone that impacts when and why ASA would comment? Is timeliness important?
- Can ASA provide more on this topic? What resources and information can ASA contribute on the issue?
- How shall ASA represent significant diversity of opinion on an issue?
- What will be likely immediate responses/reactions to an ASA statement? Are there any unintended consequences, and is ASA prepared? What are the potential consequences if ASA does not comment on the issue?