

**Society of American Archivists
Council Meeting
May 1 – 2, 2024
Chicago, IL (Virtual)**

**Section Health Assessment Working Group Update
(Prepared by: Alison Clemens, Joyce Gabiola, Michelle Ganz, Lydia Tang)**

Executive Summary

The Section Health Assessment Working Group has accomplished the goals of its original charge. Over the span of the last two years, this group:

1. Coordinated the evaluation of all 47 sections on their compliance with the Governance Manual.
2. Conducted a survey to gather feedback on the value and structure of sections.
3. Drafted the Guidelines for Transitioning Sections
4. Led a town hall meeting to discuss the survey feedback and new Guidelines for Transitioning Sections and gather additional member feedback.

In this document, we will reflect on the process of our collective work, including analyzing pain points that we experienced and uncovered. We also include strong recommendations on the next steps, which include a need for a deep, holistic, human-centered introspection about how we build and maintain communities of connection, learning, and support.

Contextual Information

The Section Health Assessment Working Group (SHAWG) was founded in May 2022 per the recommendations of its original personnel: Courtney Chartier (SAA President 2020-2021), Dominique Luster, and Jasmine Jones. In August 2022, new Council members Lydia Tang and Joyce Gabiola joined SHAWG. In the fall of 2023, Alison Clemens and Michelle Ganz joined the group and Jasmine Jones rolled off the group to serve on the Executive Committee. In 2024 Dominique rolled off the working group.

SHAWG (and Council) have accomplished the following milestones to date:

Phase 1 Analysis - Council members assessed their liaison sections according to Governance Manual requirements and identified any sections that were not in compliance. Council liaisons were instructed to engage their section leadership in dialogue to support them in resuming compliance in governance or to transition them to a discussion group, merge with another group, or sunset them. Council liaisons were also instructed to work with Section leadership to make a joint recommendation to present to Council for approval.

1. SHAWG created a survey in spring 2023, which was open from April 3 through April 30. We received 449 responses. The data gave us qualitative and quantitative information

that have helped us thus far and will continue to inform future iterations of this Working Group to continue to explore models and possibilities for community interest groups.

2. The Council voted on the recommendations provided by Council liaisons to transition, merge, or sunset certain sections in July 2023. Since this vote, many issues have surfaced relating to a lack of communication by Council members with their sections and incomplete or inaccurate information on governance compliance. This has harmed relationships with section leadership and eroded membership's perception of Council.
3. We led a Section Health Forum on March 20, 2024, to summarize the work to date and gather additional feedback and input from membership. The following quote from an attendee summarizes the general mood of the event: "It is hard to feel that SAA is a place for us when decisions are made in Council absent any communication with section leaders. I am deeply disappointed in the handling of this process."

With hindsight, we have identified the following problems that have impacted this initiative:

- We need(ed) to be more people- vs compliance-oriented. It was not sufficient to simply evaluate sections based on the Governance Manual. People need to feel respected and supported, particularly in an environment in which they are volunteering their time and expertise. Sections also need to be supported by SAA and are not expected to conduct programming and initiatives without financial support. Additionally, sections are a legacy built by many of the leaders who shaped so much of our Society. Even if a section might not have as active leadership now, the legacy of that community needs to be honored, even if we support it into sunseting.
- Communication breakdown:
 - Some Council liaisons did not follow through with the Working Group's direction to communicate with their assigned sections during the assessment process and proposed that some of their sections be transitioned when they did not have sufficient information and did not engage in a supportive dialogue with section leadership to discover crucial information. Council as a result voted to transition sections and then had to overturn a few of those decisions once additional information and section leader feedback was received. This communication breakdown and under-informed voting on the Council's part damaged the Council's relationship with membership, and we are still navigating the effects of this.
 - There was no SAA web presence for this working group and therefore no stable online method to communicate this initiative. This led to broad SAA membership confusion and mistrust.
 - There were no accountability measures to ensure that Council members carried out their responsibilities as directed. We assumed consistency in this communication and have realized that in this initiative and more broadly, our communication practices, mechanisms, and expectations as Council liaisons need to be clarified and made as consistent as possible.
- Periodic reviews of sections are a whack-a-mole of addressing symptoms of structural issues that will continue to burden both SAA staff and volunteer leaders until they are thoughtfully and thoroughly addressed. The traditional model of SAA sections is steeped in hierarchy and formal structures of elections, annual reports, and an in-person annual meeting. Too much time and effort are consumed in maintaining structures versus focusing on liberatory connection and useful content. The section model needs to

be broadly and holistically re-envisioned to allow for administrative sustainability, accountability, member support, and true transformation.

Alignment with Strategic Priorities

Sections and supporting communities of practice align with GOAL 4: MEETING MEMBERS' NEEDS of the [SAA Strategic Plan](#).

Fiscal Impact

Administratively supporting 47 sections is an expense of SAA staff time and labor, as well as the unpaid labor of SAA volunteer leaders in leading their sections, doing programming, and organizing their annual meetings and elections. Re-envisioning the model of sections completely in SAA will allow the organization to refocus to align time, effort, and thus expenses.

Recommendation

The SHAWG recommends the following actions:

1. That Council approve the SHAWG to recruit up to 4 additional volunteer members (comprised of SAA members broadly, not restricted specifically to Council members) to pursue envisioning a new, *remote-first* model for Sections which support the following foundational principles:
 - a. Sections are valuable communities of practice that foster information-exchange, creativity of expression, and support for members.
 - b. The model for sections needs to be sustainable in terms of funds, staff and volunteer time, and administrative maintenance.
 - c. Council liaisons have a responsibility to support their sections through proactive communication and orientation to SAA's governance requirements. This allows us to hold section leaders and the associated Council liaison collectively accountable for compliance with governance responsibilities.

This "Phase 2" of the group will be encouraged to review the full survey responses closely, with particular attention to the ideas generated for future models of sections. They *may* conduct focus groups to gain broader feedback and buy-in. As a new, sustainable model of communities of practice is developed, the group would be encouraged to lead a Town Hall to communicate the model and form a transition plan from our current model.

2. That Council and Council liaisons move forward with the voted-upon recommendations to transition sections that have consented to transition or who are currently without leadership to discussion groups, merge, or sunset.
3. That Council pauses transitioning sections who object to the Council vote and who were not properly engaged in dialogue during Phase 1 by their previous Council liaison. These sections will be granted a 1-year extension to meet Governance compliance. Their current Council liaison is expected to be in open and supportive communication with them regularly, as determined by the Section chair(s) and the Council liaison. Section leaders are encouraged to invite their Council liaison to Steering Committee meetings to actively support and advise their sections.
4. That the SHAWG be added to the official list of working groups and be given a page on the SAA website to disseminate information, build trust and confidence through

- transparency, and promote accountability. The SHAWG can edit the page in real time.
5. That the SHAWG be involved with reviewing and potentially updating the annual report questionnaire that is required for all sections. Primary emphasis is intended to focus and streamline questions to continue to gather valuable feedback but also lessen the administrative burden of filling out a lengthy form.