Report on BSA Election Processes, Outcomes, and Recommendations for Reform

Botanical Society of America Election Reform Capstone Group

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Our Team

CTA, MY, BMF, IV

Information Gathering Process

Team members had some personal experience with election process:

- ○ **Imeña**, past Student Representative (2020-2022), current election committee member (2024)
- ○ **Brenda**, current President-Elect (2022-2025)
- ○ **MinYa**, past Student Representative (2018-2020), current Early Career PD Committee member (2023-2026)
- ○ **Catrina**, BSA Staff since 2011, attends and observes board meetings, follows process each year, member feedback

CTA

BSA Elections Context

Board of Directors (12): Elected Leadership

Executive Committee (6): President (1894), Past President (1982), President Elect (1982), Secretary (1894), Treasurer (1894), Program Director (1964)

Other Board Members (6): Director-At-Large for Development, Director-At-Large for Education, Director-At-Large for Publications, Director-At-Large for DEI, Student Representatives (2)

Elections Committee (6): Oversees BSA Elections

Chair: Past President, changes each year

Committee Members: 5 members, 3-year terms, includes 1 student representative, appointed by Committee on Committees

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Information Gathering:
Defining Current Election Process

What is the current election process?
- What is codified in BSA's written election policies/procedures?
- What is left to the discretion of election committee, and changes from year to year?
- What structural supports for election process exist (templates, rubrics, forms, form letters) and what is missing?

Strategies:
- Search of BSA's official policies and procedures
- Interviews with Heather Cacanindin, Cindi Jones (president 2020-2021)
- Examining past ballots, forms, candidate bios, emails, election committee reports

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"Dusty Corners" of BSA Website

*"**April:** Receive and count BALLOTS. In consultation with the President, notify the winners and other candidates of the outcome. Also, report to the Elections Committee - if they have not helped count the ballots **(given that the Committee is spread across the country, the Chair usually seeks permission to use other local BSA members to do the counting).**"*

- From outdated Past President job description on BSA website

Inconsistencies and Missing Information:
- Elections committee description included a Board of Directors ballot approval step not described in the election policies
- Broken links (404 error) for election committee description which had been updated and moved, outdated example form for a call for Nomination of Officers

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Current BSA Election Process

ELECTION RULES

Bylaws:
- high-level guidance only
- requires member vote to change
- updated 3 times since adopted in 1985

Policies and Procedures:
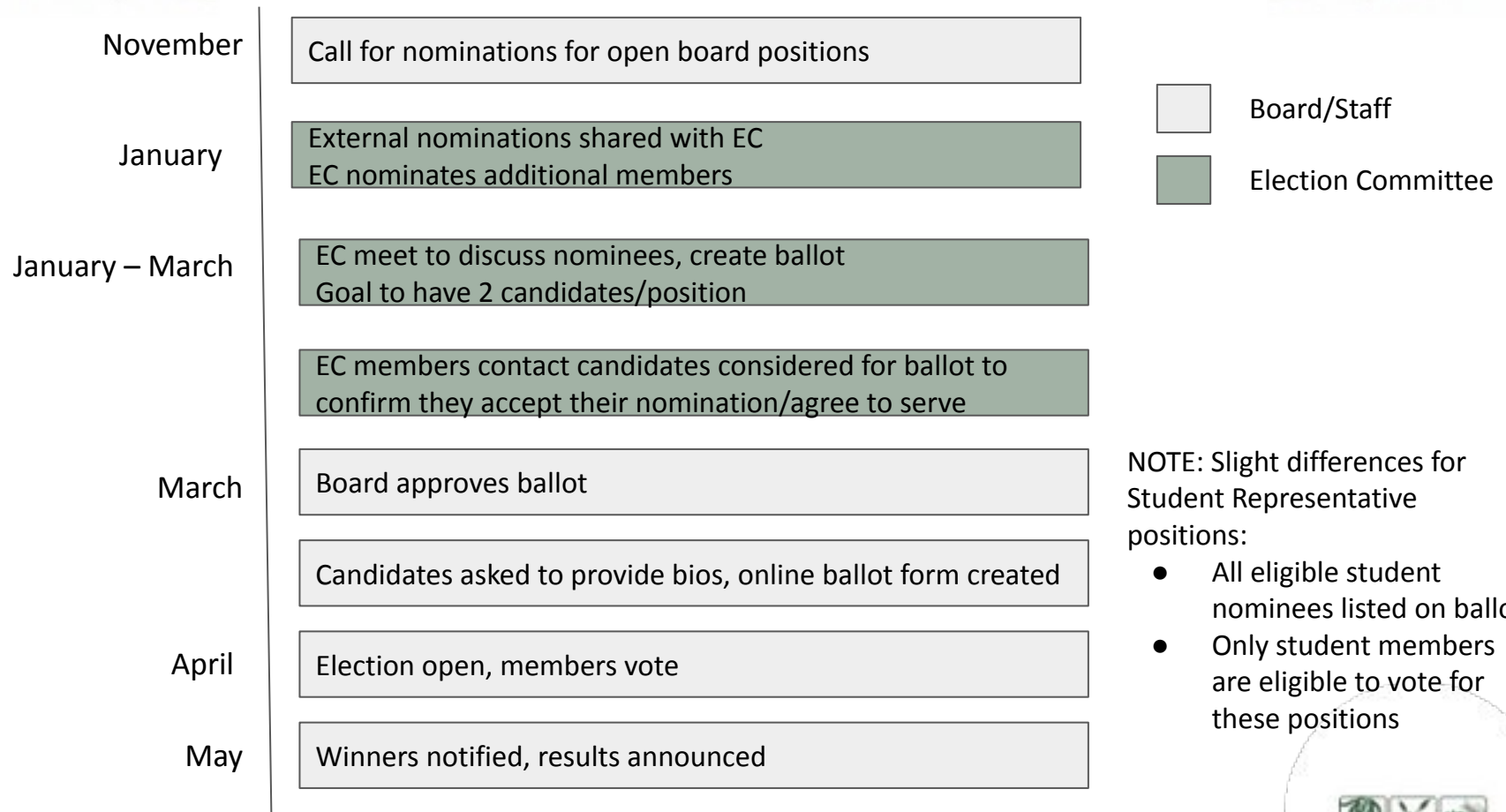- includes more detail
- requires BOD majority vote to amend

INFORMAL GUIDANCE

- role descriptions
  - Past President
  - Election Committee
- supports (existing templates, forms, samples)
- staff shepherding of process, shared historic perspective on request
- conversations among Presidents

LEFT UP TO ELECTION COMMITTEE

- EC internal nomination process
- nominee eligibility for ballot
- selection criteria
- EC internal processes
- communications with nominees
- contents of June/July EC report to council

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Summary of Current BSA Election Process

Month	Process
November	Call for nominations for open board positions
January	External nominations shared with EC EC nominates additional members
January – March	EC meet to discuss nominees, create ballot Goal to have 2 candidates/position
	EC members contact candidates considered for ballot to confirm they accept their nomination/agree to serve
March	Board approves ballot
	Candidates asked to provide bios, online ballot form created
April	Election open, members vote
May	Winners notified, results announced

Legend:
- Board/Staff
- Election Committee

NOTE: Slight differences for Student Representative positions:
- All eligible student nominees listed on ballot
- Only student members are eligible to vote for these positions

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Information Gathering: More Questions

What does the membership value in BSA leadership?
What do members want to know when considering candidates?

Strategy:
Drafted leadership-related questions for upcoming member survey

1. How well represented do you feel by BSA leadership current/past?
2. What changes would you like to see in BSA leadership in the future?
3. What do you look for/want to know when evaluating candidates for BSA's Board of Directors?
   a. Please Rank: Diversity, Commitment to Society, Name Recognition, Career Stage, Discipline, Vision for Future of BSA, Personal Connection, Personality/Character)
   b. Are there other things you would like to know when evaluating candidates, or other things you take into account when choosing a candidate? Please elaborate here:

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What tools and practices are working for other societies?

Helpful tools/practices others are using:

- Website [Election Hub](#) with transparent list of candidates in past elections from The Society for Integrative & Comparative Biology (SICB)
- Detailed [Leadership Handbook](#) from Society for the Study of Evolution
- [Balanced Board Matrix](#) (from American Society of Association Executives presentation by Tecker International)
  - Level 1: Individual Skill Sets
  - Level 2: Diversity of Perspectives
  - Level 3: Specific experience related to current/anticipated initiatives

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Balanced Board Matrix: Example

Instructions: Find the column with your name at the top. Go down the rows underneath your name and enter a "1" for all the items that apply to you. You can leave blank all those that do not apply to you. Please be sure to respond to both sections: "Skills, Experience, & Attributes" and "Demographic Background." You do not need to do anything on the second tab of the workbook. Your responses will auto-populate to that sheet. **Note:** If you intend to roll off the board at a time other than your Max Service Expiration Date (the end of your third term as defined in our ByLaws), please include your intended roll-off Month/Year in the "Voluntary Service Expiration Date" row.

Alumni (current/former camp volunteer)
Camp Parent/Guardian
Media/Communications/PR
Social Services

Demographic Background
Gender
Male
Female
Age
25-35
36-45
46-55
56-65
66+
Race/Ethnicity
African American/Black
Asian, Hawaiian, or Pacific Islander
White/Caucasian
Hispanic/Latinx
American Indian
Other
Geography
(city/state/region)
Diabetes
Has T1D
Immediate family member of T1D

Camp Hendon
Board Matrix Analysis

Priority Legend	
High	3
Medium	2
Low	1

	Level of Importance	Current Board Representation	Recruitment Priority
Skills & Experience			
Board of Director Experience	3	8	2
Finance/Accounting	2	3	2
Grant Writing	1	2	1
Diabetes Industry Rep.	2	0	2
Diabetes Care Knowledge (medical)	3	9	3
Project Management/Strategy Development	3	4	3
Alumni (former camper)	2	1	3
Alumni (former volunteer)	2	5	2
Camp Parent/Guardian	2	3	2
Senior Management/Leadership Experience	3	7	2
Human Resources/Personnel	2	1	2
Legal	2	1	3
Technology/IT	1	3	1
Social Services	2	2	3
Community Affiliation/Access (3+)	3	5	3
Fundraising	3	3	3
Marketing/Advertising	1	1	1
Media/Communications/PR	2	0	2

Demographic Background			
Gender			
Male		3	3
Female		7	
Age			
25-35		0	3
36-45		3	
46-55		5	
56-65		0	
66+		2	
Ethnicity			
African American/Black		0	3
Asian, Hawaiian, or Pacific Islander		0	3

CTA

Historical Context: Outcomes

What historical information exists related to election of past leadership and characteristics of past leaders?

Strategies:
- Analyzed what we could from past leader list on website
- Pieced together spreadsheet of election data past 5 years
- Identified past themes in BSA Presidential Address

CTA

Table 1. Summary of BSA Leadership from 1894 to 2023.

Leadership Position	Female	Male	Total
President 1894-2023	24	106	130
President 1987-2023	17	20	37
President 1894-1986	7	86	93
Secretary 1894-2023	10	24	34
Treasurer 1894-2016	4	22	26
Student Representative 2006-2023	12	6	18

*We would like to note here that the information representing gender categories is historical and that we hope the society will more accurately portray the gender spectrum when collecting demographic information in the future.

MY

Summary of election data of BSA officers 2018-2022

Information collected:
- Year
- Position
- Nominee
- Institution
- Nominated by
- Whether nominator served on BSA board prior
- Status (On ballot and elected; on ballot not elected; not on ballot)

MY

Summary of election data of BSA officers 2018-2022

- A total of 21 open positions (for 9 unique roles; 4 positions for 2018, 2019, 2021 and 2022; 5 positions for 2020)
- 89 names nominated for those positions, which counted for 70 people in total; those 70 nominees were from 56 different institutions.
- Among the 89 nominations:
  - 63 were nominated by others
  - 22 were self-nomination
  - 4 were recommended by the Election Committee

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Interestingly, these 63 nominations were made from only 33 different people, and only 6 (~18%) had not served on the BSA leadership by the time they made their nominations.

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On the contrary, only 3 of those 22 self-nominated candidates had served on the BSA leadership by the time of nomination, while the majority (~55%) of self-nomination were for the Student Representative positions.

MY

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- Among the 89 nominations:
  - 63 were nominated by others
  - 22 were self-nomination
  - 4 were recommended by the Election Committee

Among the 4 nominations recommended by the Election Committee, only one position originally had one candidate. In other words, three nominations made by the Election Committee were for positions that already had more than two candidates.

MY

Why election reform is needed & What we aim to accomplish with reforms

- Our candidate pools are not diverse

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- Leadership body rotating between the same group of people
- Responsibilities for different positions unclear
- Nomination process unclear
- Election process unclear
- No standardized way of collecting data

MY

Election Reform Recommendations

1. Clarify the categories of values, skills, and characteristics of BSA leaders most important to the membership, and provide the membership with enough information about candidates to fairly evaluate those things when casting their votes.

2. Be more transparent about qualifications/targeted recruitment needs for leadership positions, benefits and responsibilities of leadership positions, and the election process.

3. Be more intentional about leadership recruitment - recruit for a balanced board over time.

4. Make changes to the nomination process to provide more standardized information about nominees to the election committee.

5. Create clear, transparent guidelines for the elections committee.

BMF

Action Plan/Timeline

Who will be involved in implementing reforms?

- Heather Cacanindin - BSA Executive Director
- Brenda Molano-Flores - President Elect
- Imeña Valdes - Election Committee Member
- 2023-2024 Election Committee
- Ad-hoc election reform committee
- Min Ya - Early Career Professional Development Committee Member

BMF

Action Plan/Timeline

Pre-election Season:

- Create ad-hoc committee to assist with election reform 2023/2024 election cycle
- BSA staff assist updating current "job" description for each leadership position
- Election Capstone group will share recommendations and report from Capstone Group with the ad-hoc committee
- Ad-hoc committee will:
  - Get Membership Survey Feedback and discuss (results should be available pre-meeting in ~June 2023)
  - Incorporate feedback into election cycle plans
  - Create document (poster) describing election reform and new process
  - Get election reform recommendations approved by board
  - Create/Review job descriptions, rubric for nominee evaluations, forms for nominees, balanced board matrix categories, revise with feedback (DEI committee, election committee, advisory council?)

IV

Action Plan/Timeline

Proposed (and in progress) Election Timeline:

- **Nov 1**: Call for Nominations
- **Nov**: Botany 360 information session on serving in BSA leadership
- **Dec/Jan**: Election committee notified, prepare to meet in Feb
- **Jan 15**: Call for Nominations closes
- **Feb 1**: Nominees asked to complete online form by Feb 1
- **Feb**: Election Committee uses new rubric to evaluate nominees and create a ballot
- **Late Feb**: Nominees not selected for ballot are notified
- **Early March**: Board approves ballot
- **Late March**: Selected candidates on ballot asked to complete bio/bio posted on website
- **April 1**: Ballot opens
- **April 30**: Ballot closes
- **Early May**: Elected members notified, welcomed, get job descriptions, asked to complete balanced board matrix

IV

Action Plan/Timeline

Post-Election:

- Nominees/Candidates surveyed or interviewed about process?
- Records RE Election process archived? Report template used to transparently report out on activities of election committee?
- Discussion of changes to make to process for 2024/2025 Election cycle, documents, key dates revised as needed.

Conclusion

The Election Committee must have repeatable, transparent, and equitable processes and guidelines for the selection of candidates to be put on the ballot.

As part of the Capstone Project we have:
- Created a diverse Capstone Project working group to address the topic of the project (e.g., BSA staff, BSA leadership, and BSA members and future leaders).
- Provided documentation of the BSA election process (i.e, reviewing existing material, conducting interviews, and gathering statistics).
- Identified the historical gender biases associated with our leadership positions.
- Identified the need for reform to make the BSA election process as inclusive as possible (i.e., all groups).
- Identified areas of improvement.
- Made short and long term recommendations.
- Identified individuals that can assist with the development of better "job" descriptions for leadership positions (i.e., past serving members and BSA staff).
- Identified an individual that could implement the proposed changes (2024 Past President).

CTA, MY, BMF, IV

Questions for the Team

CTA, MY, BMF, IV