

Botanical Society of America
Systematics Section Annual Report for 2019-2020
Section Chair: Anna Monfils
Section Secretary: Harvey E. Ballard, Jr.
Submission Date: 16 July, 2020

The role of Section Chair was transferred to me from Amanda Ingram in November of 2018. This is the second annual report I have provided in my role as Chair for the Systematics Section. Harvey Ballard, Jr. continues in his dual role as BSA Section Secretary-Treasurer and ASPT Program Director. His appointment pre-dates my tenure as Systematics Section Chair.

Before getting into the report, I would like to take this opportunity to provide my sincere gratitude to Harvey Ballard, Jr. He has shouldered many of the duties associated with the Systematics Section and worked tirelessly to provide guidance and continuity. He is the author on the majority of the annual report, single handedly develops an annual program, and is supportive and positive when asked for assistance and clarity. Speaking for myself, it has been a pleasure to work with Harvey both personally and professionally.

According to the BSA bylaws, this will be my final year in my role as Chair of the Systematics Section. To assure an easy transfer to the new chair, I am providing a lengthier annual report that includes: A) Activities of the 2019-20 year, B) The expectations and timeline for the *de facto* responsibilities of the Systematics Section Chair, and C) the Bylaws with a brief discussion. It is my goal to provide a clear understanding of the position and responsibilities to any incoming Chair of this committee, and to promote a frank discussion of the current standing and potential direction of the committee long-term.

A) Activities of the 2019-20 year

This report reflects the plans for the Systematics Section during the COVID-19 crisis. The Botany 2020 meeting adopted a virtual format which shifted existing plans and affected the 2020 program. The notes relative to the annual meeting draw heavily from the ASPT Program Director Annual Report for 2019-2020 provided by Harvey Ballard, Jr.

Currently there are five specialty topic categories for contributed talks besides the broader "Systematics" topic, which is phylogenetically organized. These are "Biodiversity Informatics & Herbarium Digitization", "Biogeography", "Floristics & Taxonomy", "Macroevolution", and "Phylogenomics". In years past, the majority of contributed talk abstracts were submitted to "Systematics" (including a separate "Cooley Awards" talk session). However, for the first time, the other topics have remained at a level similar to previous years or even grown slightly, while "Systematics" is dramatically reduced in number of abstracts. Talks identified for ASPT Cooley Award consideration were down a bit this year but still comprised enough to fill up a slightly over-full nine-talk session. Number of posters was generally down in some topics.

In my capacity as BSA Systematics Section Chair, I reached out to Harvey and asked to see some of the activities done through ASPT to learn more about how the BSA Systematics Section could work with ASPT. Harvey shared the program process and schedule, requested feedback, and provided an opportunity for me to review the plan. There was no need for any changes after review. There are 16 separate sessions, with strong topics distributed throughout the five-day conference period. The session format of contributed talks for this year will consist of two 8-talk sessions on Monday, and three 8-talk sessions each day for Tuesday through Friday. This year, with 10 colloquia, 6 symposia, keynote talks, workshops and various events spanning the five day period, it was particularly challenging to find spots for the contributed talk sessions where a given session would not compete with similar topics AND where potentially conflicts of individual speakers could be avoided.

As you can see from the table below, 116 contributed talk submissions and 62 poster submissions were submitted this year, totaling 178 submissions—down a bit from 210 last year. “Macroevolution” talks were down and “Systematics” talks were way down but “Phylogenomics” went up a little. Poster submissions vacillated with subject. Overall, the total number of submissions was reasonably strong, with the percentage of decline in talks and posters similar to what we typically see during an “IBC” year (a year in which the “Botany” conference co-occurs with the International Botanical Congress).

	Total '20 ('19, '18)	Talks '20 ('19, '18)	Posters '20 ('19, '18)
Biodiversity Inform./Herb. Digit.	18 (24, 24)	14 (13, 12)	4 (11, 12)
Biogeography	27 (29, 24)	13 (15, 14)	14 (14, 10)
Floristics/Taxonomy	19 (23, 13)	11 (10, 13)	8 (13, 0)
Macroevolution	16 (21, 19)	12 (17, 16)	4 (4, 3)
Phylogenomics	34 (35, 41)	29 (25, 32)	5 (10, 9)
Systematics general category	64 (78, 94)	37 (53, 62)	27 (25, 32)
TOTAL FOR “SYSTEMATICS”	178 (210, 215)	116 (133, 149)	62 (77, 66)

This year, the Systematics Section anticipated providing funding support to the symposium in tribute to Vicki Funk. However this symposium was cancelled. Given the virtual format of the conference, ASPT and BSA Systematics section did not support undergraduate and graduate student field trips or banquet registration.

B) The expectations and timeline for the *de facto* responsibilities of the Systematics Section Chair

Below is the information I have been able to gather on the expectations of the Chair of the Systematics Section. It is provided here for clarity for the next Chair and to help with any efforts to reconcile expectations, requests, and alignment with the BSA Bylaws.

Timeline:

September: Nominations for the chair of the BSA systematics section.

December: Vote for symposia and request to commit funds to symposia and colloquium

July: Annual Report

Job description and expectations as stated in the nomination (edited for clarity):

As described in an email from the former Chair - The Chair is a liaison between BSA and ASPT. There is a lot of overlap in membership and most systematics related things are handled through ASPT, but the BSA Systematics Section has a few responsibilities mostly related to programming at the Botany meeting.

The tasks for the Chair are:

- 1) Review proposals for symposia and colloquia for the upcoming meeting and allocate funds to those that are selected (this is done in conjunction with ASPT)
- 2) Prepare a report for the BSA directors on the previous and upcoming meetings (Adapted from the ASPT program director, Harvey Ballard's report)
- 3) Attend the BSA council meeting on the Sunday of the Botany meeting
- 4) Attend the BSA business meeting

Nomination and process for elections:

Two candidates are nominated and a BSA Systematics Section wide election is held. Each candidate is asked to provide a single paragraph that includes, a) current position and as much of the candidates employment & educational history as makes sense to the candidate; b) research interests; and c) a sentence or so about why a candidate is interested in serving.

As an example for future candidates, I am providing a copy of the paragraph I submitted:

"Anna is a professor and director of the herbarium at Central Michigan University (CMU) in Mt. Pleasant, Michigan. My research includes molecular, morphological, and specimen-based research on systematics of the bulrushes (*Schoenoplectus* and *Schoenoplectiella*); adaptive management of aquatic invasive plants in the Great Lakes; and conservation of biodiversity in prairie fen wetlands. My research interests have included applications of digitized collections data with projects involving data workflow, data interoperability, and the relative contributions of small collections. I have ongoing educational research on biodiversity literacy and the use of digitized collections data. I have worked alongside iDigBio collaborators to develop the Small Collections Network, and currently serve on the steering committees of the Biodiversity Collections Network and SEINet. I am the SCNet liaison to for the Society of Natural History Collections. My work in the CMU collection and with the broad herbarium community has been integral to my professional development and active research program. I have been a member of BSA and ASPT since I was a graduate student and would be pleased to Chair the BSA Systematics Section and serve as a liaison between BSA and ASPT."

Additional clarity regarding the position is outlined below. The information is the result of direct inquiries regarding the Chair position and the function of the BSA Systematics Section:

Funding: The systematics section has funding. The chair of the committee needs to contact Heather Cacanindin to determine the amount available to sponsor activities. There's an endowment-type pot of money designated for Systematics; the Chair determines how to spend the income. It's not a large sum. The funds are typically used primarily to support symposia, with a lesser amount (or none at all, if decided by the chair) going toward colloquia. Some funds are used to support student applications for pre-conference field trips (though this has not been done since 2016). The Chair needs to connect with ASPT/Harvey Ballard to determine the amount committed. At the end of FY2019, the Systematics Section had \$26,842. It is suggested that the chair commit about 5% of these funds in any one year

Selection of symposia to fund: The chair has been deciding which symposia/colloquia to support, in consultation with the Treasurer/Secretary of the Systematics Section. Harvey Ballard, Jr. serves in this role and provides context in what ASPT is doing. The Section and ASPT do not have to agree. Annually, funds are generally split between 2-3 symposia that seemed most likely to be of interest to systematists and that also seemed *different* from symposia funded in years prior.

Meetings: Dating back to 2016, there is no evidence of a Systematics Section meeting.

General information: The section is autonomous and it is up to the section to determine the role they want to have moving forward.

C) The bylaws with a brief discussion.

For ease of communication I have included the current bylaws for the Systematics Section.

ARTICLE I. *Purpose*

The objectives of this organization shall be:

- I. To promote general interest and encourage research and teaching in systematic botany.

- II. To establish closer contacts between botanists concerned with systematic research and teaching.
- III. To cooperate whenever desirable and possible with other organizations in achieving these ends.
- IV. To act in whatever capacity it may find expedient as an organization of systematic botanists.
- V. To arrange a suitable program on systematic subjects in connection with the annual meetings of the Botanical Society of America, Inc. This program shall take any form deemed desirable for that meeting.

ARTICLE II. *Officers*

- I. The officers shall be a Chair and a Secretary-Treasurer.
- II. The Chair shall preside at all meetings of the Section, appoint all committees, serve as representative of the Systematic Section on the Council of the Botanical Society of America, Inc., and perform all other functions customary and prescribed for that office. The term of office is two years.
- III. The Secretary-Treasurer shall keep the records of the Section, carry on all necessary correspondence, be responsible for the collection of dues and handling of funds belonging to the Section, and arrange the programs of the sectional meetings. The term of office is three years.
- IV. Officers shall be elected at a regularly scheduled business session of the Section, announced as to time and place in the regular printed program of the annual meeting of the Botanical Society of America, Inc. They will assume office at the close of the annual meeting.
- V. Candidates for office shall be presented by a nominating committee of three which shall be appointed by the Chair.

ARTICLE III. *Meetings*

- I. The regular business meetings of the Section will be held in conjunction with the annual meeting of the Botanical Society of America, Inc.
- II. The Section may arrange special meetings whenever desirable.

ARTICLE IV. *Membership*

- I. There shall be two classes of membership as provided for in Article VIII (paragraph 1) of the Bylaws of the Botanical Society of America, Inc.
- II. Any member in good standing in the Botanical Society of America, Inc., may become an active member of the Section upon notice to the Treasurer of the Botanical Society of America, Inc., and the Secretary-Treasurer of the Section. The Secretary-Treasurer shall maintain the active membership roll of the Section by requesting, from the Treasurer or the Manager of Publications of the Botanical Society of America, Inc., a list of those members in good standing of the Society who have indicated their affiliation with the Systematics Section.
- III. The Section may, at its discretion, confer associate membership in the Section on persons who are not members of the Botanical Society of America, Inc. Associate members may not hold office in the Section, nor are they entitled to receive, gratis, publications of the Botanical Society of America, Inc.
- IV. Members of the Section shall pay yearly dues which can be used to defray incidental expenses of the Section. Changes in the amount of these dues shall be authorized by vote at the annual business meeting of the Section.

ARTICLE V. *Amendments*

These Bylaws may be amended by a three-quarters vote of those voting members present at a scheduled business meeting.

Items for Discussion

What is the role of the Chair?

De facto this position was described as a liaison between BSA and ASPT with few responsibilities. To my knowledge there has not been a meeting of the Systematics Section as far back as 2015 (based on available meeting minutes). There is no plan in place, or established tradition, relative to nominating new candidates for Chair and voting at the annual meeting. Anyone entering this role lacks institutional knowledge of the position or the section and a limited capacity to take meaningful action for the section. The Chair does not attend ASPT council meetings and is limited in their capacity to serve as a liaison.

I recommend we examine the role of the Chair to bring it into alignment with the Bylaws and establish some documentation for incoming Chairs with a timeline, responsibilities and potential action items (a preliminary draft was compiled above). A strong and involved Systematics Committee can work with the Chair to establish goals and action items to address the objectives of the section. There needs to be more transparency in the nomination process for leadership of this committee. The liaison role with respect to ASPT (and other societies) needs to be further developed.

What is the role of the Secretary-Treasurer?

Harvey Ballard has held this role for the Systematics Section for 12 years. This is remarkable and I credit his efforts in sustaining the committee and serving as the liaison between the ASPT and BSA. He has done an admirable job of planning the annual meetings and arranging the program. In all respects Harvey has carried the lion's share of the work on this committee and he has been quite gracious about advising me in the role of chair and providing opportunity for input on programming. We have been fortunate to have Harvey as the Secretary-Treasurer. We are, however, in violation of the bylaws in not nominating and electing the Secretary-Treasurer on a three year cycle. We are also losing an opportunity for checks and balances, and BSA representation, if the same individual holds this function of program planning for both societies.

I recommend we examine the role of the Secretary-Treasurer to bring it into alignment with the Bylaws. The Systematics Section of BSA needs to revisit the goals of the Bylaws to see if the current structure is providing an independent role for BSA in the planning of the annual conference programming. A strong Systematics Section, and a working sub-committee for meeting planning, would provide more community input and investment. There needs to be more transparency in the nomination process for the Secretary-Treasurer of this committee.

Why are there no meetings of the Systematics Section at the annual conference?

The Chair leads a Systematics Section that does not meet. Each Chair takes on this role for less than two years which is insufficient time to navigate the position and determine the role the Chair can serve or how the Section can function. If the Chair does not convene a meeting and create a shared set of short term goals in the first months of their position (something they would not know to do as there is no precedent), they lose the opportunity to establish goals with the section as they move out of their role after the second conference. They are rendered ineffective

due to the shortened timeline and lack of institutional memory or meeting structure within a functioning section.

I recommend establishing a transition year for the new and departing chair to overlap. I also believe the society needs to call for a meeting of the Systematics Section to determine roles and goals moving forward. There are goals in the Bylaws that are not addressed in the actions of the Section. The Bylaws need to be revisited to make sure they reflect the current goals of the BSA Systematics Section.

Respectfully Submitted by A. Monfils