



BOTANICAL SOCIETY OF AMERICA

Mission: To inspire and promote an inclusive global community committed to advancing fundamental knowledge and innovation in the botanical sciences for the benefit of people and the environment.

BUSINESS OFFICE REPORT - Fall 2023

I. Financial Update

BSA finances remain strong. Tricia and I have been working to finish off the fiscal year-end financial reconciliation as well as preparing for the upcoming audit of FY2023 (year-end of Sept 30). The Board has a draft FY2023 Profit and Loss Statement for review and a Budget-to-Actual financial report will be available for our next Board meeting after the audit work is complete. Although not finalized, it looks like we will end the fiscal year with a net operating loss of \$223,583, which is much better than our budgeted loss for FY2023 of \$292,948. This difference comes from having a very conservative budget that overestimated expenses and underestimated income. Although in recent months our investment performance has not been good, overall, during the last fiscal year, the investment account made gains of \$742,583.

Total giving in FY2023 amounted to \$95,461, an increase of 19% from the previous year. This includes a successful campaign to raise \$20K for a new AJ Harris Graduate Student Research Award and donations to the Bill Dahl Grad Student Research Awards, totaling \$32K. In FY2023, giving to the BSA Endowment was also up, ending the fiscal year at \$22,520, an 8% increase.

Key things to note about our fiscal year performance:

- 1) Our overall income from membership dues increased by 10%, mostly due to an increase in professional member dues enacted for 2023.
- 2) Publications income is down sharply (27%), due to the implementation of our new 5-year contract with Wiley. This was anticipated and planned for in our FY2023 budget.
- 3) Grant income and expenses are greater than last year. Activity and spending for our F2 Education/PlantingScience grant has picked up as we are in the heart of that project work in addition to spending for Botany & Beyond: PLANTS III and Indigenous Voices.
- 4) We are holding staff and Board travel to a minimum, but BSA related conference expenses are returning to more normal (pre-pandemic) levels of spending, with increased support for activities such as increased award spending, editorial payments and meeting travel, childcare, and student field trip support, etc.
- 5) This was the first year we pulled down funds from the investment portfolio to keep our operating bank balances above the \$400K required amount. The amount of \$175K was pulled in late September at the previous approval of the Financial Advisory and Investment Committees, the Board and Council.

As of September 30, 2023, our BSA Investment portfolio stood at \$7,130,941, which is a 10% increase from the previous date in 2023.

Recent Bank Balances as of Oct 31, 2023:

Conference Account: \$ 23,426
BSA Checking Account: \$173,809
BSA Money Market Account: \$410,317

II. Governance

Since our Botany conference meetings, I have been working on three main issues related to overall governance for the Society. First, I have been engaged in discussions with our staff, president and several organizations regarding sponsorships and new funding options to diversify BSA revenue streams. Some of these discussions involve the US Forest Service, Longwood Gardens, the Bureau of Land Management, and a few conference exhibitor companies. Staff prepared some proposals based on needs of the different organizations. I'm pleased to say that we secured our first sponsorship from Longwood Gardens of \$4500 to help advertise their Fellows Program. Open discussion with the Forest Service is in the works for a more substantial sponsorship during 2024.

Second, I have spent a good deal of time dealing with the leadership and management issues that surrounded the Botany & Beyond grant. After several months of mediation, the mediation process stalled due to lack of responsiveness of the mediator. At the same time, Pitzer College decided it was unwilling to take on a subaward for the grant and the PIs were unable to find a suitable subawardee for the Inclusive Teaching and Science Identity Workshop portions of the program. After we completed writing the annual report for year two of the grant, I held discussions with the PIs at which time they suggested it was time to terminate. BSA officers and I also had a conversation with the NSF Program Officer. At the suggestion of NSF, BSA will continue to manage the grant and expand and enhance the PLANTS portion of the programming while ending the involvement of Monfils and Poston. The changes to the grant have been submitted and approved by NSF. This project is now under the leadership of the BSA Executive Director.

Finally, we have been deeply engaged in year-end financial reconciliation for the conference books as well as BSA's finances. We prepared a list of potential audit firms with nonprofit and association experience and issued an RFP for a financial and single audit of our federal spending. The audit field work will be conducted in January with a written report ready this spring. The conference loss was one that, while not unexpected, was much larger than we imagined and thus, Tricia, Johanne and I worked through analysis and expense comparisons to better understand the loss and how to prevent it from happening in the future. Along with these financial matters, I have been working with Tricia on financial projections and facilitating conversations between our Financial Advisory Committee and other groups so we stay on top of the changing financial landscape for scientific societies like ours.

Other items I have been working on:

- Ramping up new committees and attending their meetings: DEI, Public Policy, Committee on Committees, Financial Advisory, Research Awards
- Working with the AISES staff and the Steering Committee for the LEAPS RCN: Indigenous Voices (BSA, ESA and Ent Society, and attending a Steering Committee and action planning meeting in DC
- Receiving feedback from the conference Ombuds and discussing potential future plans for services
- Handling BSA award payouts, reimbursements, end-of-year conference reconciliation
- Prepping the award descriptions and 2024 awards for opening to the community

- Participating in Botany 2024 planning and the program planning meeting
- Completing SEB/SoE 2023 final meeting reconciliation
- Preparing FY2024 Budget adjustments in light of the audit expense of \$30K, conference loss of \$16K and changes to the Botany & Beyond: PLANTS program

III. Membership and Communications

The 2023 membership totals as of November 1 are strong and similar to last year, with a slight overall decrease of 1.1%. The majority of the decrease is in the professional membership categories, which has had a slow decent since 2020. Student numbers have hit a plateau. This year, a Membership Ad-Hoc Committee was formed and have met twice so far. This group is tasked with looking at the BSA Strategic Plan to come up with goals and action items to increase membership, expand membership and benefits beyond academia, and to support the BSA international community. We are in the midst of renewal and giving season. Please consider making donations to the BSA Endowment and providing gift memberships to support the Society's future.

This year, we hosted 7 Botany360 events so far and currently we have 12 recordings that are made available on the Botany360 homepage. The Botany 360 Ad Hoc Committee has met several times this year and are planning several events for the first quarter of 2024. If you have ideas for Botany360 events, or want to coordinate an event, please contact Amelia Neely – aneely@botany.org We are also now accepting sponsors for these events.

BSA members were recently asked to complete a survey regarding social media use. The results of the survey show that a large percentage of our members are moving away from X (formally known as Twitter). It also shows that Facebook and Instagram are still appreciated and used, though perhaps not as widely as they once were (they are the other two current platforms we utilize). Lastly, the survey shows a definite interest in BlueSky, which is a newer platform that is currently receiving a lot of previous X users. One of the main reasons we created this survey was to see if the interest was there for us to start a BlueSky account. In our opinion the interest is more than there. It should be noted, that as of now, you have to have an “invitation” to join BlueSky. This month, staff will work together to come up with plan to roll out BlueSky keeping the invitation issue in mind. As of the time of the Board Meeting, you may already see that we have started the BlueSky account, we will work to get “invites” to anyone who would like one on the Board (email me at aneely@botany.org).

Instagram – 4,732 followers (up 409 since the July report)

Twitter – 21,420 followers (up 764 since the July report)

Facebook – 35,499 followers (up 53 since the July report)

Total Followers on all three platforms: 61,651 followers (up 1226 since the July report)

We ask that you please continue to use BSA's hashtags when you post on social media.
#BSAmembers #BSAstudents #BSAawards #BotanicalSocietyofAmerica

IV. Publications

The Publications Team has been busy since the Boise meeting:

***AJB* and *APPS* Call for Associate Editors:**

In late August, the BSA publications team launched an open call for Associate Editors for *AJB* and *APPS*, with the goals of adding depth of expertise and improving diversity on our editorial

boards. We strongly encouraged applicants from underrepresented groups and regions to apply. By the end of September, we received 83 applications from over 20 countries. *AJB* invited 14 and *APPS* invited 10 applicants to join our editorial boards as Associate Editors; other applicants were encouraged to become or remain engaged with the journals as authors and reviewers (and ECAB or committee members). Most terms begin in November, and the new AEs will be assessed after 1 year to determine whether the arrangement is working well for both parties.

Artificial Intelligence and Publications: Guidelines

At the Botany meeting in Boise, the editors of *AJB*, *APPS*, and *PSB*, along with the Director-at-Large for Publications, met and discussed the challenges and opportunities that AI will potentially offer to science. An ad hoc committee, chaired by Theresa Culley, was formed in September to discuss the issues of how generative AI is changing publishing—and what guidelines we should be providing for authors, reviewers, and editors. The committee is meant to have a one-year lifespan, roughly September 2023 to June 2024. In addition to drafting guidelines, the committee will produce an article for the *Plant Science Bulletin* that relates their findings about the AI landscape and what it means for publications.

The *Plant Science Bulletin*: Special Art & Science Features

The *Plant Science Bulletin*, entering its 70th volume of publication, is publishing a special multi-issue section on “Art in the Botanical Sciences: Past, Present, and Future.” Editor-in-Chief Mackenzie Taylor has been working with special section editors Nicolette Sipperly, Rosemary Glos, Kasey Pham, Patricia Chan, and Ashley Hamersma to present a wide variety of articles. These include numerous artist-scientist collaborations, integrations of art and science in museums, scientists’ and artists’ accounts of what drives their curiosity and exploration, and the role of art in teaching and herbarium curation. These articles will appear in the Fall issue.

APPS Recruiting Editor

APPS announced the Call for a new Recruiting Editor on 11 October with a deadline for applications of 15 November. We received 11 applications, with five applicants from Europe, two from the United States, two from Pakistan, one from India, and one from China. We expect the new Recruiting Editor to start in January 2024.

V. Education and Outreach

NSF DRK-12 F2 grant work is entering year Y4, a critical year for implementation and data gathering/processing for the research study. Collaborative teacher/scientist professional learning workshops took place this summer. Our first in-person workshop was held June 20-23 at BSCS Headquarters in Colorado Springs. We then had two online professional learning workshops the weeks of June 26-July 7. The final in-person workshop took place from July 17-20 in St. Louis at the Missouri Botanical Garden. We have had significant attrition on the teacher side for the workshops and implementation this summer and fall, and so we may need to repeat the recruitment process for a second year to get the numbers we need for the research. We had already planned to hold online sessions next year for the teachers who were our control group this year. Additional recruitment and another round would mean adding an additional online session as well as at least one more in-person session. We are contacting our Program Officer to explore the possibility of submitting a grant supplement to cover the additional cost of a second round of recruitment/implementation in summer/fall 2024 in order to gain ~30 additional teachers.

Thanks for helping with mentor recruitment! We have had 129 new mentors sign up in the last 6 months, which has helped tremendously with meeting the high need for mentors given the large volume of teachers and students participating this fall (over 1000 students, ~300 project teams).

BSA is currently represented on the steering committee of the **ROOT&SHOOT RCN** by Brenda Molano-Flores and Catrina Adams. Travel award applications for SACNAS/MANNRRS travel mentor/mentee pairs were due November 7. We've had ~54 applications, of these 11 have Botany as their first choice of conference to attend. Selection will take place over next month or so. BSA and ASPT will be asked to cover meeting registration cost for these attendees: likely 1-2 pairs for each society.

The Inclusive Conferences working group recommendations included many recommendations related to a conference community agreement and reporting mechanisms for creating accountability. Future suggestions to align practices with suggestions of the inclusive working group and sustainability of a new, more inclusive system of accountability will continue after being informed by the 2023 conference season. The rollout for a report of suggestions is June 2024, so not likely to be implementable suggestions for this summer's conference.

ROOT&SHOOT is **not planning to cover in-person Ombuds services for 2024 Botany** in Michigan. BSA staff is planning to get more details on what that means for any Ombuds services for our conference this year.

ROOT & SHOOT is planning to schedule two Bystander Intervention Trainings for members of the RCN again in 2024, provided by the [ADVANCEGeo partnership](#). These workshops will be held in February and late May/early June (dates TBD). There is also a plan to include an "advanced" version of the training for those who have attended before, or who are looking for more practice.

The ROOT & SHOOT Research Coordination Network (RCN), is forming a **Working Group to identify the needs and create recommendations for what should be included in an online curriculum on culturally responsive mentoring**. The Mentoring Working Group (MWG) would have as its charge to:

- Curate the appropriate materials for this mentoring curriculum;
- Identify speakers and/or existing programs;
- Create a template and method of delivering the mentoring program;
- Determine requirements for the awarding of certification;
- Discuss the role that professional societies have in the mentoring experience; and
- Discuss the specific needs of the plant science community.

The PlantingScience team attended the NABT conference, November 2-5, 2023, in Baltimore Maryland, and had a lot of interested teachers sign up for our mailing list.

Finally, a Symposium for Bessey Award winners, utilizing Bessey earmarked funds, was proposed in collaboration with the Teaching Section for Botany 2024.

Respectfully Submitted,
Heather Cacanindin
Executive Director