

**Botanical Society of America**  
**Systematics Section Annual Report for 2020-2021**  
**Section Chair: Anna Monfils**  
**Section Secretary: Harvey E. Ballard, Jr.**  
**Submission Date: 07 July, 2021**

The role of Section Chair was transferred to me from Amanda Ingram in November of 2018. This is the third annual report I have provided in my role as Chair for the Systematics Section. The Chair holds their position for two years. My Chair position expired at the 2020 BSA Annual meeting. I stayed on as Chair so we could hold an election for officers at the 2021 annual Botany conference. I will be appointing a nominating committee to propose candidates and confirm candidate's willingness to serve in time for this year's meeting of the Systematics section on Friday, the 23<sup>rd</sup> of July, 2021.

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. His role as program director runs through 2022. I recommend the Systematics Section nominate a Section Secretary-Treasurer in 2022.

I would like to take this opportunity to provide my sincere gratitude to Harvey Ballard, Jr. He is the author on the majority of the annual report and has single handedly developed a 2021 Systematics program.

**A) Activities of the 2020-21 year**

This report reflects the activities of the Systematics Section during the COVID-19 crisis. The Botany 2021 meeting adopted a virtual format which affected the 2021 program. The notes relative to the annual meeting draw heavily from the ASPT Program Director Annual Report for 2020-2021 provided by Harvey Ballard, Jr.

Currently, we have five specialty topic categories for contributed talks besides the broader "Systematics" category, which is phylogenetically organized. These are "Biodiversity Informatics & Herbarium Digitization", "Biogeography", "Floristics & Taxonomy", "Macroevolution", and "Phylogenomics". Last year, due perhaps to a combination of online venue and institutional COVID constraints on some participants' access to funding, the numbers of contributed papers and posters overall was down significantly. The numbers were closer to what one would expect during an "IBC year", when many yearly participants at the "Botany" conference must choose one or the other and follow the IBC conference. Contributed talks in the general "Systematics" category were dramatically reduced in number of abstracts, but talks for other topics remained at a level similar to previous years or even increased slightly. The number of posters was generally lower than in previous years in some topics.

Last year we created 16 sessions for 116 systematics-related contributed talks, and we hosted 62 systematics-related posters in the poster sessions. This year we had to create 24 sessions to accommodate 166 systematics-related contributed talks, and we are hosting 80 systematics-related posters in the poster sessions. As with last year, having 5 days to spread out sessions

rather than 3 days allowed us to minimize overlap among sessions with similar topics and reduce the number of concurrent sessions, providing a (theoretically) less frenetic conference experience.

As you can see from the table below, we received 166 contributed talk submissions and 80 poster submissions this year, totaling 246 submissions—all three values a significant to dramatic increase over the last two years. Contributed talk numbers were up in all categories except for “Biodiversity Informatics & Herbarium Digitization”. Poster numbers were up dramatically in “BI & HD”, “Floristics & Taxonomy” and “Phylogenomics”. In particular, participation in the “F&T” and “Phylogenomics” categories grew in a major way this year. A point I noted last year—significantly greater participation by a more diverse world population—continued this year, with more countries represented and more attendees from usually well represented countries, in presenters of contributed talks and posters. In other words, the online venue has continued to foster a more inclusive clientele for the “Botany” conference.

	<b>Total '21 ('20, '10)</b>	<b>Talks '21 ('20, '10)</b>	<b>Posters '21 ('20, '10)</b>
Biodiversity Inform./Herb. Digit.	<b>22</b> (18, 24)	<i>11</i> (14, 13)	<b>11</b> (4, 11)
Biogeography	<b>31</b> (27, 29)	<b>23</b> (13, 15)	8 (14, 14)
Floristics/Taxonomy	<b>39</b> (19, 23)	<b>20</b> (11, 10)	<b>19</b> (8, 13)
Macroevolution	<b>22</b> (16, 21)	<b>19</b> (12, 17)	3 (4, 4)
Phylogenomics	<b>64</b> (34, 35)	<b>37</b> (29, 25)	<b>27</b> (5, 10)
Systematics general category	<b>68</b> (64, 78)	<b>56</b> (37, 53)	<i>12</i> (27, 25)
<b>TOTAL FOR “SYSTEMATICS”</b>	<b>246</b> (178, 210)	<b>166</b> (116, 133)	<b>80</b> (62, 77)

As with last year, given the virtual format of the conference, ASPT and BSA Systematics section did not support undergraduate and graduate student field trips or banquet registration.

BSA chose to provide support in name for two symposia this year: *Collections-based systematics and biogeography in the 21st Century – A tribute to Dr. Vicki Funk* and *Enhancing Quality and Use of Herbarium Collection Data through Community Data Curation*.

## **B) Defining the role of the Systematics Section**

We are planning to hold a Systematics Section meeting at the 2021 Annual Botany Conference. We will be electing a new Chair for the Systematics Section and discussing the objectives of the Systematics Section.

Attached is the *BSA Systematics Section Annual Meeting Agenda; Questions for Discussion; By-laws* and *Current Practices*.

Respectfully submitted by Anna Monfils

**Botanical Society of America  
Systematics Section  
Annual Meeting Agenda  
2:00 pm Eastern  
July 23, 2021**

Section Chair: Anna Monfils

Section Secretary: Harvey E. Ballard, Jr.

- I. 2019-2021 report from the Botanical Society of America (BSA) Systematics Section  
Chair A. Monfils
- II. Presentation of Candidates for 2021-2023 Chair of Systematics Section
- III. Presentation on the By-Laws and role of the BSA Systematics Section
- IV. Discussion on the BSA Systematics Section

**Botanical Society of America  
Systematics Section  
Questions for Discussion**

What is the role of the Chair?

*De facto* this position was described as a liaison between BSA and ASPT; few responsibilities are designated relative to this position. 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 Systematics 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 of the BSA Systematics Section to bring it into alignment with the Bylaws and establish some documentation for incoming Chairs with a timeline, responsibilities, and potential action items (See *BSA Systematic Section By-laws* and *Current Practices of the Systematics Section*). A strong and involved Systematics Section 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 the Systematics Section and this may have been addressed in the recent BSA Bylaws. 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 Section 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 for this Section 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 ASPT and BSA.

I recommend we examine the role of the Secretary-Treasurer to bring it into alignment with the Section Bylaws and new BSA 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 and the new BSA Bylaws.

Are the current By-laws reflective of the new BSA Bylaws?

Do we need to broaden our objectives or actions to be more inclusive of the BSA partner societies with ties to Plant Systematics (e.g. SHC, IAPT, AFS, SPNHC, etc)?

**Botanical Society of America**  
**Systematics Section**  
**By-laws**

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.

**Botanical Society of America  
Systematics Section  
Current Practice and Timeline**

*Timeline:*

September: Nominations for the chair of the BSA systematics section (per 2018 experience).

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 (practice based on 2018 process):*

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 candidate's 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.

*Funding*

The systematics section has an endowment and budget decisions are made by the Chair (from November 2018 to July 2021 funding decisions were made in consultation with the Section Secretary/Treasurer). The most recent year report provided by Director Heather Cacanindin was provided in March 2021. At the end of FY2020 (9-30-2020), the Systematics Section had \$28,309.28. As of March 1, 2021 the account grew \$1025; annual dues contributed \$730 and other funds consisted of \$295. The grant grew by \$1025 in 2021. As of 3-1-2021, the account totals \$29,334.28.

Historically, the funds have been used to support symposia, with a lesser amount (or none at all, if decided by the Chair) going toward colloquia. Some funds have been used to support student applications for pre-conference field trips (though this has not been done since 2016).

*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 Systematics 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.