President’s Duties

1. Presides at meetings of the Council.
2. Conducts Council meetings according to the Agenda as prepared by the Secretary and puts all motions, if seconded, to discussion and to vote.
3. Coordinates mutual activities and responsibilities of the A.F.S. with the President and Secretary-Treasurer of the Pteridological Section of the B.S.A.
4. Appoints, as necessary, all committees.
5. Appoints, as necessary, the Membership Secretary, American Fern Journal, Fiddlehead Forum, and Pteridologia Editors, and Curators of Back Issues, the Spore Exchange, and Electronic Communications, whose appointments shall be confirmed by the Council.
6. BY MAY 1. — Confers with the Treasurer to appoint an auditor of the Society’s accounts.
7. AUG. — Presides at the annual meeting of the Council and then reports on Society business to the membership at the annual business meeting/luncheon.
8. AUG. — Following the annual Council meeting at which plans for the following year’s meeting and field trip will have been discussed, appoints a Local Representative (LR) for the meeting and one or more Foray Leader(s), and notifies the summer Meeting Coordinator (MC) of these appointments.
9. BEFORE 1 SEP. — Appoints, with the approval of the Council, a nominating committee consisting of a chairman and two members, none of whom shall be an officer.
10. BEFORE 1 OCT. — Forwards to the Secretary and the Membership Secretary, the name of a Judge of Elections and a list of nominees for each office plus biographical information for any proposed honorary members.
11. OCT. — In conjunction with the LR, prepares and sends a preliminary announcement for the November/December issue of Fiddlehead Forum giving the location and dates for next year’s meeting, the name and address of the local representative, and whatever preliminary information may be available about field trips and proposed symposia. The note should also mention that:
   a. A.F.S. members who wish to receive official registration forms automatically but who have not received them in the past receive should notify the Membership Secretary, and that
   b. A.F.S. members (especially those not holding professional positions in the plant sciences) who want to attend only the luncheon/annual meeting or field trip(s) should ask the Vice President for an informal registration form, which will be forwarded when available.
12. DEC. — In conjunction with the LR, prepares and sends an announcement for the January/February Fiddlehead Forum giving more details and expanding upon what was noted in the preceding paragraph about next year’s meeting, field trip, etc. This should include a call for papers (limited to 15 minutes) and posters and should provide the name and address of the person acting as Program Chairman for the meeting (to whom completed forms should be returned). See “calls for papers” published in prior years in Fiddlehead Forum. Mention also may be made of plans for meetings to be held in future years.
13. DEC. — Prepares an annual report to the membership for the January/February Fiddlehead Forum.

Vice-President’s Duties

1. Acts in place of the President, if the President is unable or unwilling to act.
2. Arranges and organizes the program at the summer meeting in alternate years (see Duties of the A.F.S. Program Chairperson).
3. Updates the description of the Society and its current officers on the A.F.S. page that appears in the annual meeting’s general program booklet. Submits this updated page with the program (in years when the A.F.S. is responsible for the overall fern program) or (in alternate years) sends it to the Pteridological Section’s program chair to be submitted with the program. The preceding
Secretary’s Duties

1. Conducts correspondence pertaining to the office, including general inquiries from the membership and the general public concerning pteridophytes and the A.F.S.
2. Notifies council members of meetings, requests items for the Council meeting agenda, and prepares and distributes the agenda.
3. Calls meetings to order in the absence of the President and Vice-President.
4. Records and distributes minutes of Council meetings.
5. Reports to the Council at its annual meeting/luncheon.
6. Received proposed amendments to the Constitution in writing and signed by three members in good standing and publishes them on the next ballot (if received before October 1), so that they can be voted upon.
7. BY 1 OCT. – Receives from the President the name of a Judge of Elections (usually coordinated with the Membership Secretary) together with a list of nominees for office(s) and honorary memberships with biographical information for the ballots and for publication in Fiddlehead Forum. Arranges with the Membership Secretary for ballot/dues notices and for their mailing labels.
8. BY 1 OCT. – Receives other nominations for offices, if endorsed by three members of the Society in good standing.
9. BEFORE 1 NOV. – Sends each member of the Society a ballot for the next election and the name and address of the Judge of Elections to whom each member shall send the ballot.
10. AFTER 15 DEC. – Receives from the Judge of Elections a true statement of ballots cast and then notifies:
   a. The President, giving all the results of the election;
   b. The candidates each receiving the largest number of votes of his or her election;
   c. The Editor of the Journal so appropriate cover two changes for the Journal may be made for the following year; and
   d. The Editor of Fiddlehead Forum for publication of the election results. (The Judge of Elections may have also informed the Editor informally.)
11. JAN.—Sends new Council members a copy of “Duties of Council Members and Other Appointees…” and a copy of the A.F.S. Constitution. (Copies of the Constitution are available from the Membership Secretary.)

Treasurer’s Duties

1. Answers inquiries about membership by sending applications and information forms.
2. Answers requests for information on the spore exchange, books on ferns, fern dealers, fern keys, and local affiliated clubs by sending xerox copies of Fiddlehead Forum articles.
3. Forwards requests for specific information on ferns to the appropriate Society officer or Council member.
5. Maintains a series of long-term certificates of deposit for endowment funds that mature at 3- to 6-month intervals.
6. Maintains a regular savings account to accumulate certificate of deposit account interest and regular account interest.
7. Maintains a checking account to pay all bills.
8. Pays all bills by check from the checking account based on receipts and written memoranda.
9. Periodically receives funds from the Membership Secretary and places them in the checking account in order to pay bills.
10. Withdraws excess interest from the regular savings account only when needed to pay bills and places it in the checking account.
11. Has stationary, envelopes, and forms printed by a professional printer for the Treasurer’s office and for other officers as needed.
12. BY MAY 1. – Prepares the Treasurer’s Report and sends copies to all Council members.
13. BY MAY 1. – Prepares proposed budget and sends it to all Council members with a ballot page so they may vote for approval or not.
14. BY MAY 1.—In consultation with the President, appoints a professional auditor to audit the Society’s books.
15. BY 15 MAY. – Files Form 990 with the Internal Revenue Service.
16. BY 15 MAY.—Sends annual report to the President, Council members, and Fiddlehead Forum.

Membership Secretary’s Duties

1. Records payments and reports receipts:
   a. Accepts dues and other payments from old and new members, subscribers, and agents for subscribers and members;
   b. Bills members, subscribers, and agents for dues;
   c. Bills delinquent members, subscribers, and agents;
   d. Generates an annual financial statement of receipts and submits it to the Treasurer.
2. Makes transfers:
   a. Deposits receipts into an A.F.S. savings account;
   b. Periodically sends the Treasurer receipts in the form of cashier’s checks.
3. Maintains the mailing list:
   a. Adds new members and subscribers to the mailing list;
   b. Makes changes to addresses of members and subscribers;
   c. Suspends excessively overdue members and subscribers;
   d. Deletes suspended members and subscribers from the mailing list.
4. Generates a mailing list (labels or database file) and label count for each Fiddlehead Forum and American Fern Journal mailing and sends them to the editor or printer.
5. Maintains British Pteridological Society relations:
   a. Accepts A.F.S. member dues for B.P.S.;
   b. Communicates balance of payments with the B.P.S. Membership Society;
   c. Requests that the Treasurer send a check in Br. Pounds to the B.P.S. to reconcile the account.
6. Communicates orders for missing and back issues to the Curator of Back issues:
   a. Generates one set of mailing labels for domestic addresses and 2 sets of mailing labels for foreign addresses. (The second set is used on customs declarations.);
   b. Makes Xerox copies of the labels for his own files as well as for the Curator of Back Issues.
7. Provides information relevant to memberships and subscriptions:
   a. Mails a green sheet and membership application blank to prospective members;
   b. Mails a welcome letter, a copy of the constitution, and a “Useful Fern Books in Print” handout to new members, but not to new subscribers. (The handout is not sent for the rest of the year after a new version is printed in Fiddlehead Fern Forum);
   c. Mails or e-mails an invoice to direct and agent subscribers, as they require.
8. Maintains and improves the accounting program and its documentation.
9. SEP. – Automatically mails or e-mails a newly revised rate sheet to agents.
10. SEP. – Prepares an annual statement of ownership, management, and circulation of the *Journal* and submits it as required by postal authorities. (The form no longer needs to be published in the *Journal*.)

**American Fern Journal Editor’s Duties**

1. Selects and communicates with Associate Editors
2. Establishes the format of the *Journal*.
3. Establishes criteria to which prospective authors should adhere in preparing manuscripts and publishes them periodically in the *Journal*.
4. Arranges for and communicates with reviewers of manuscripts.
5. Communicates with authors who have submitted manuscripts:
   a. Acknowledges receipt of manuscripts;
   b. Accepts or rejects manuscripts;
   c. Transmits reviews to authors indicating any necessary editorial changes;
   d. Queries authors regarding offprints and bills them appropriately, if this is not done by the printer.
6. Arranges for and communicates with reviewers of books and monographs.
7. Communicates with the printer:
   a. Marks manuscripts for printer (copy-editing);
   b. Delivers manuscripts (articles, shorter notes, reviews) to the printer on schedule;
   c. Revises page proofs.
8. Prepares covers for each issue, the annual title paper (including table of contents) on an unpaged center spread insert, and the annual index to the volume with errata.
9. Informs the Membership Secretary when mailing labels will soon be needed by the printer.
10. Informs authors of optional page charges after their papers are published.
11. Reports to the Council at its annual meeting.
12. Keeps records and receipts for all expenses (e.g., postage, envelopes, and telephone charges) and seeks reimbursement from the Treasurer.

**Pteridologia Business Manager’s Duties**

1. Maintains the mailing lists of *Pteridologia* standing orders, pre-publication orders, and agents, and produces mailing lists therefrom as necessary for promotion, shipping, and billing purposes.
2. Receives copies of *Pteridologia* from the printer, stores them, and invoices, packages, and ships them to purchasers and authors.
3. Receives payment for copies of *Pteridologia* and forwards checks and other monies received to the Treasurer of the A.F.S. for credit to the *Pteridologia* sub-account.
4. Authorizes payments for the expenses of desk-top publishing, printing, shipping, and mailing for debit to the *Pteridologia* sub-account.
5. Keeps an accurate and timely set of books reflecting all financial transactions concerning *Pteridologia*.
6. Keeps records and receipts for all expenses and seeks reimbursement from the Treasurer.
7. BEFORE 10 JAN. – Submits an annual financial report to the President and Treasurer of the A.F.S. and to the Editor of *Pteridologia*.

**Pteridologia Editor’s Duties**

1. Receives, acknowledges, reviews, has reviewed by associate editors and outside reviewers, accepts, and rejects manuscripts submitted to *Pteridologia*. 
2. Consults with the Business Manager, the Treasurer, and the author of each manuscript to develop a sound financial plan for publishing each accepted manuscript.
3. Edits manuscripts and consults with authors and reviewers concerning changes in manuscripts and with authors concerning submission of electronic manuscripts.
4. Prepares electronic manuscripts for desk-top publishing, and submits manuscripts to the printer in the form of camera-ready copy or boards or on disk as electronic files.
5. Solicits bids and lets contracts for printing and binding of Pteridologia and for shipment of copies of Pteridologia to the Business Manager.
6. Keeps records and receipts for all expenses and seeks reimbursement from the Treasurer.
7. AUG. – Reports on the condition of Pteridologia to the Council at its annual meeting or to the President in advance of the annual meeting.

Fiddlehead Forum Editor’s Duties

1. Selects art editor and other support staff (art, proofreading, mailing and typing).
2. Establishes the format for Fiddlehead Forum.
3. Coaxes and cajoles manuscripts, cartoons, etc., from potential contributors.
4. Accepts and otherwise selects small items and writes additional items to fit.
5. Edits manuscripts which are received on IBM-compatible disks (etc.).
6. Oversees formatting and layout by the art editor as camera-ready on boards or as electronic files.
7. Prepares an index periodically.
8. Takes original copy to the printer and brings back printed copies.
9. Obtains mailing labels from the Membership Secretary.
11. Keeps records and receipts for all expenses and seeks reimbursement from the Treasurer.
12. Reports to the Council at its annual meeting.

Curator of Back Issues’ Duties

1. Receives and stores print and microfiche copies:
   a. Receives the overrun of each Journal issue from the printer;
   b. For fulfillment and replacement sales, stores about 30 copies of each issue for the current year and 10 copies of each issue for the past 10 years in a readily available place.
   c. For back-issue sales, stores up to 20 copies of each issue from vol. 1-50 (1910-1960) and up to 100 copies of each issue from vol. 51-date) in deep storage (currently with Greg McKee at the Dept. of Botany, National Museum of Natural History, Smithsonian Institution);
   d. Stores microfiche sets for vol. 1-61. Also available from University Microfilms, Ann Arbor, MI.)
2. Maintains an original set of the Journal:
   a. Stores one complete set of the Journal in a safe, dry place, adding one copy of each issue as it is received from the printer;
   b. Xeroxcopies issues of this set that are out of stock as they are needed for back-issue sales.
3. Maintains an inventory of available back issues to use in answer to questions of availability and for the Treasurer’s annual report.
4. Handles claims for missing issues:
   a. Receives claims from members, subscribers, and agencies (often through the Membership Secretary) and accepts those made at least 30 days (domestic) or 60 days (foreign) after the date of issue;
   b. As necessary, validates claims against the membership lists provided by the Membership Secretary;
c. Keeps records for all claims for at least one year (on each claim letter or slip, marks action taken and date);
   d. Fills claims reasonably promptly.

5. Receives orders for back issues (cost for each issue/volume should be printed in the *Journal*, postage is additional) and for microfiches:
   a. Encloses forms for billing with the order (payment is made to the Treasurer);
   b. Requires prepayment (including cost of estimated postage) for foreign orders, Canada excepted:
      c. Advises customers before sending if any issues requested are not available.

6. Maintains records and receipts for all expenses (postage, photocopying, supplies, etc.). When amount totals $50-$100, and /or at the end of the calendar year, submits receipts and an itemized list to the Treasurer for reimbursement.
Outreach Coordinator

Title: Outreach Coordinator

Appointed by the President

Duties:

Coordinate information and activities of interest to amateurs (lay members).

Solicit articles and notices for the Unfurlings (column in the Fiddlehead Forum) and have them submitted to the editor of the column.*

Maintain the speaker’s list.**

Plan new projects of interest to amateurs (lay members) and with the approval of the A.F.S. Council enact them.

Send an annual report to the A.F.S. Council.

It is desirable but not mandatory to attend the A.F.S. annual council meeting.

*Since our amateur members have a variety of interest (general, gardening, natural history, travel, etc.) and different levels of knowledge the topics and reading level may vary from issue to issue. It is important to make the reading clear and to avoid technical terminology as much as possible. Pertinent illustrations may accompany the text. Important and interesting technical articles that can be rewritten so as to be understood by the amateur are welcomed. Be cognizance of copyright laws.

Deadlines for getting notices and articles to the Unfurlings editor are:

End of Nov. for issue 1 (Jan.-Feb. issue)
End of Jan. for issue 2 (Mar.-April issue)
End of Mar. for issue 3 (May-Aug. issue)
End of July for issue 4 (Sept.-Oct. issue)

**Keep the speaker’s list updated. Publicize the existence of this list to other plant societies (see our website of the San Diego Fern Society website for a list of other fern societies. Send out the speaker’s list when requested by other fern societies.
Duties of the American Fern Society Program Chairperson
to the Summer Annual Meeting

1. Introduction.—Normally, the A.F.S. has a field trip ending Sunday afternoon before the meeting begins, an A.F.S. Council meeting that Sunday evening, paper sessions the following Monday morning and afternoon, and a luncheon on Monday noon. There may also be a half-day or full-day symposium on Tuesday. The paper sessions and symposia are co-sponsored by the Pteridological Sections of the B.S.A., and the arrangements to be made may or may not fall to the A.F.S. Program Chairperson (PC).

2. A.F.S. Council members and the summer Meeting Coordinator (MC) are the best sources of information about A.F.S.-sponsored events. The sponsoring organization of the summer meeting may issue a “Manual for the Annual Meeting,” which should be examined for additions and changes that should be incorporated in this A.F.S. document.

3. The A.F.S. vice-President acts as PC for odd numbered years, and the Pteridological Section appoints their PC for even numbered years. The PC (1) receives abstracts and title submission forms and organizes them into programs and (2) prepares the program text for publication in the A.I.B.S. “General Program.” In years when the Pteridological Section, rather than the A.F.S., is responsible for the paper session, the A.F.S. PC should forward requests for abstracts and title submission forms to potential A.F.S. speakers who are not members of the Pteridological Section and who therefore do not receive these documents directly via the Botanical Society of America. Completed abstracts and title submission forms from these A.F.S. speakers should be forwarded directly to the Pteridological Section PC. Meeting the needs of these A.F.S. speakers will be facilitated through an announcement in Fiddlehead Forum. The PC does not act as a Local Representative (LR) in making arrangements for the field trip, meeting rooms, or luncheon, nor does the PC attend the meeting of the Committee on Local Arrangements held by sponsoring organization of the summer meeting at the meeting site during October prior to the meeting.

4. The PC’s schedule and duties for meetings falling in odd numbered years are as follows:
   a. OCT.-NOV. – Arranges for invited speakers at the symposium, submits symposium title to the MC, and provides, symposium speakers with an abstract and title submission forms (other symposium organizers may do all this).
   b. DEC.-JAN. – Distributes abstracts and title submission forms as requested by potential contributors.
   c. JAN.-FEB. – Receives completed abstracts and title submission forms. Notifies the A.F.S. LR of any non-standard audio-visual equipment that may be required (anything other than standard 2_2 carousel transparency projector). Only overhead projectors and 16mm film projectors are available; such equipment is rarely needed, and its use should be discouraged because it is expensive.
   d. Inquiries of the Program Director of the B.S.A. (see inside back cover of American Journal of Botany) whether he/she wants semi-formatted typescript of the program or fully formatted typescript with computer disks (see next paragraph) sent to him or to the MC.
   e. 25 FEB-10 MAR. – Assembles and schedules the program. Prepares the text for the “General Program” according to guidelines and formats furnished by the sponsoring organization, using the previous year’s program as an example; includes Council and Business meetings, field trip(s), luncheon, paper sessions, and symposia in the program. Submits semi-formatted typescript to the Program Director of the B.S.A. or completed and formatted program text to him/her or to the MC by the deadline established for the year, both as hard copy and on floppy disks, retaining duplicate copies as backups.
   f. 15MAR.-15 May. – Sends all cancellations, changes, additions, and deletions to the Program to A.I.B.S. as hard copy only, observing the deadline established for the year, to be
g. APR. – Notifies the speakers and session presiders as to the date and time they are to appear on the program. Encourages speakers to bring their transparencies in their own, labeled carousel.

h. 15 MAY-25 JUL. – Sends all cancellations, changes, additions, and deletions to the “General Program: to the MC as hard copy only, to be printed in the “Program Addendum” for distribution at final registration.

Duties of the American Fern Society Local Representative to the Summer Annual Meeting

1. Introduction.—Normally, the A.F.S. has a field trip ending Sunday afternoon before the A.I.B.S. meeting begins, an A.F.S. Council meeting that Sunday evening, paper sessions the following Monday morning and afternoon, and a luncheon on Monday at noon. In recent years, there have been separate field trips on Saturday and Sunday. There may also be a half-day or full-day symposium on Tuesday. The paper sessions and symposium are routinely co-sponsored with the Pteridological Section of B.S.A.

2. A.F.S. Council members and the summer Meeting Chairperson (MC) are the best sources of information A.F.S. sponsored events. The sponsoring organization may issue a “Manual for the Annual Meeting,” which should be examined for additions and changes that should be incorporated in this A.F.S. document.

3. The A.F.S. President must appoint a Local Representative (LR), preferably in August or September, and notify the MC of the LR’s name, address, telephone number, and fax number (if any). The LR (1) attends a planning meeting in October of the Committee on Local Arrangements and works with the MC to schedule all A.F.S. events at the summer Annual Meeting, (2) arranges for and may coordinate the field trip (especially if the field trip leader(s) are not local), (3) arranges for the fern luncheon, and (4) sends timely information for publication in “Fiddlehead Forum” emphasizing the field trips and annual meeting with luncheon and how A.F.S. members may participate, even if they are not going to register for A.I.B.S. Thus, the LR should cooperate with the Membership Secretary in preparing an A.F.S. registration form that parallels the A.I.B.S. form, but includes access only to the A.F.S. field trips and luncheon (see sample). This is sent to the Vice-President for distribution on request. The LR does not act as Program Chairman (PC) for the paper sessions or symposium; that duty falls to the A.F.S. Vice-President in odd-numbered years. The Membership Secretary will send mailing list data to A.I.B.S. on request; inform him of the date required and the contact person at A.I.B.S.

4. Field trip. – Although the sponsoring organization uses the term field trip, this is often referred to as a Fern Foray within the A.F.S. Depending upon circumstances of terrain and interest, one or two one-day field trips or one two-day trip may be scheduled. The usual number of field trip participants is 25 or 44, depending upon the roads to be traversed, transportation options (two 15-passenger vans or one 47-passenger bus), and competition from other meetings (Int’l Bot. Congr., Int’l. Assn. of Pteridologists). The Sunday field trip always ends at 5:00 PM, so that those who attend the A.F.S. Council meeting that evening will have time to prepare. The maximum number of tickets is equal to the number of bus seats less the number of leaders; or the number of van seats less the number of leaders, some of whom will drive the vans. The field trips must not run at a loss, and so the advertised price is the sum of the expenses divided by the number of tickets quite likely to be sold, somewhat less than the maximum number of tickets that could be sold (see sample calculation). In other words, divide expenses by 35 or 40 for a 47-passenger bus or 20 for vans. (If all the tickets are eventually sold, perhaps box lunches could be upgraded; if few tickets are sold, perhaps a smaller bus or one fewer van could be rented.) A.I.B.S. should be reminded...
that tickets should be printed with the precise departure point, if it is from a large facility like a convention center.

5. One bus or one or more vans are more reliable and more readily controlled transportation than are attendee’s private cars, and the problem of insurance liability is eliminated. Vans with drivers contracted through a transportation provider also eliminate insurance liability problems, but are costly. Vehicles (with or without drivers) can sometimes be obtained from a sponsoring university; if drivers are not hired, be sure to check into special qualifications like in-state driver’s licenses for volunteer drivers. Commercial rentals require that the drivers with their licenses and credit cards appear at the rental agency to receive and to return the vans. Collision damage insurance must be purchased from the rental agency because personal insurance does not cover 15-passenger vans, and mileage fees are also likely to apply. Always make reservations at the time of the planning meeting or shortly thereafter and confirm them on pickup day. If ticket sales are slow, it may be necessary to adjust the vehicle reservation downward just before the summer meeting.

6. Either box lunches (included in the field trip price) or restaurant stop(s) (not included in the price) may be used. Especially in hot and humid regions, a cold soft drink or water must be provided in iced coolers for mid-morning and mid-afternoon.

7. If lodging is required, a group of rooms should be blocked at a convenient motel until a certain date so that individuals can reserve a room with their own credit card at a group rate. This must be made known in the summer meeting field trip information in the “General Program,” as well as published in the *Fiddlehead Forum*.

8. Field trip leader(s) need to be knowledgeable about the flora, but all logistical matters of the field trips are left to the LR, especially if the leader(s) are not local. The leader(s) may be asked to prepare handouts of background information and/or species lists that are helpful to the attendees. If the leader(s) are local, they may be able to help with the arrangements, including coolers for soft drinks. Field trip leaders (but not the local representative) have their A.I.B.S. registration fee waived by A.I.B.S. They should write $0 on the registration form and add a note that they are a field trip leader and so exempt from the registration fee.

9. At the beginning of each trip, a person should be chosen who will agree to write a short report within a week or two for “*Fiddlehead Forum,*” and transparencies or prints should be solicited from attendees to be sent to the Editor for possible inclusion.

10. A.F.S. Council Meeting. -- This is scheduled for 7:00 PM Sunday because of Society Presidents’ dinner may be scheduled for 5:30-7:00 PM. A plain room with a table capable of holding 8-10 people should be reserved. In some years, the Council has elected to begin the meeting over dinner and may not have used the room provided. The MC should be told that this is a “closed meeting” with only the A.F.S. Council and invited guests in attendance.

11. Luncheon. – This is always held on Monday from 12 noon to 2 PM, either in the conference center or at a nearby hotel or restaurant. The luncheon is never held in the meeting room because it is impossible to make the change from lecture setup to banquet setup and back and still have enough time for the luncheon and annual meeting. It pays to shop around for price and menu. Try to hold the price to $15.00 or under; check prices for buffet-style service rather than waiters. The LR should review the proposed menu and price. A banquet setup with round tables of 8 or 10 people and no head table is preferred. Attendees usually number 40-64, depending upon competition from other fern meetings. Audio-visual equipment is not required. Because of problems of communication, once the LR has approved the menu and price, the MC and the sponsoring organization’s meetings staff alone should communicate with the caterer, including the number guarantee that must be provided two or three days before the event. If the number guarantee to the caterer had to be turned in early, the A.F.S. President may choose to buy and hold a few luncheon tickets and offer them for sale to latecomers, like attendees on multiple-day field trips.
12. Meeting Room. – A single room holding at least 60-65 people but no more than 100 should be scheduled for Monday morning and afternoon for the sessions of contributed papers and any symposium. (The LR must communicate with the A.F.S. or B.S.A. PC about this.) If a symposium is arranged, it should be scheduled for Tuesday (presuming no carryover of contributed papers) in the same room. A carousel-type transparency projector with zoom lens on a stand and with a remote control reaching to the front of the room, minimum 48” x 48” screen, lectern with light, and pointer are needed. A projectionist should be supplied through the MC. Be sure to check beforehand that equipment is in place and that a projectionist is available. (It is best to arrange beforehand with one of the attendees to volunteer as an emergency projectionist.)

13. LATE AUG. – With the help of the A.F.S. Council, appoints the field trip leader(s). In consultation with the field trip leader(s), chooses locales. Reminds the field trip leader(s) that their reasonable expenses for a pre-meeting scouting trip and field trip transportation, food, and lodging will be reimbursed by the A.F.S. (check with the A.F.S. Treasurer regarding needs versus money available, usually up to $100/person.

14. MID OCT. – Receives pre-meeting information from the MC.

15. LATE OCT. – At the usually 2-day planning meeting with the MC and the Committee on Local Arrangements, the LR:
   a. Checks with the representative of the host institution about field trip transportation, lunch, and lodging options and costs.
   b. Places a tentative reservation for vehicles with the host institution or with a van or bus rental agency.
   c. Checks with the meeting hotel or conference center about the tentative price and contents of box lunches.
   d. Makes a tentative budget of field trip expenses, including transportation, lodging and/or food (only if included in field trip price), sodas, ice & litter bags (only if provided by the field trip leader(s) or LR), tolls, parking fees, admission fees, etc. Estimates likely minimum and average attendance to establish a cost-per-person price for the field trip (A.F.S. will have to pay any deficiency; if the trip is low-cost, don’t hesitate to project a profit by dividing all costs by a minimal number of participants).
   e. Checks with the meeting hotel and nearby restaurants about the tentative price, gratuity, taxes and contents of meals for the Luncheon (the A.F.S. will have to pay any deficiency, so round the ticket price to the nearest higher $0.25 or $0.50 in setting the ticket price).
   f. Makes a tentative budget of Luncheon expenses and gratuities, and establishes a cost-per-person price.
   g. Checks convention center brochures or other information provided on possible rooms for the paper and symposium sessions and the Luncheon, and communicates suggestions to the MC.
   h. Requests that the MC provide a “society table” and an American Fern Society sign in the registration or exhibit area for display of A.F.S. membership and publication information.
   i. Submits preliminary information on all A.F.S. activities to Fiddlehead Forum.

16. MID-NOV. – Sends the MC information worksheets that were received at the planning meeting about:
   a. Field trip details for publication in BioScience, including date(s), mode of transportation, cost and whether meals and/or lodging are included, times of departure and arrival, brief description of the trip, maximum number of tickets, leader(s) names, addresses, and telephone numbers, and lodging reservation information, if any, and deadline for making reservations, if necessary;
   b. Social functions, meaning the Luncheon location and room name, cost, and maximum number of tickets to be sold;
   c. Workshop information if advance registration is necessary (A.F.S. has never done
d. Meeting room and audio-visual equipment request for the paper sessions and symposium session. And meeting room request for the Council meeting.

e. Sends final information on all A.F.S. activities to Fiddlehead Forum.

17. MID-DEC. – Sends the MC a “Registration Brochure Request” (provided by MC) informing the A.F.S. Membership Secretary to send pressure-sensitive labels or database data of our professional members (ca. 125) to the MC at the time desired. Makes sure that the MC has the Membership Secretary’s name and telephone number if necessary for follow-up. Checks with the MC for the response date (probably 1 February) and informs the Membership Secretary what is needed.

18. MID-JAN. – Reminds the Membership Secretary that the pressure-sensitive labels or database data of our professional members are due to the MC soon.

19. EARLY MAR. – Sends the MC (on worksheets the MC supplies) Luncheon meeting room data (numbers expected, room choice), even if some information has been supplied previously.

20. EARLY JUL. – Makes sure field trip leader(s) have their programs in hand; they may wish to provide handouts and will want to know how many to prepare. Makes sure that field trip leasers know where and when to meet the field trip and that arrangements for vehicles and drivers are complete.

21. TWO OR THREE DAYS BEFORE THE FIELD TRIP. – With the MC’s help, confirms all transportation and box lunch arrangements for the field trip. Makes sure that drivers or field trip leader(s) know the route or obtains maps and written directions to aid them.

22. TWO OR THREE DAYS BEFORE THE LUNCHEON.—Asks the MC to give the guarantees for the luncheon tickets sold or to be sold to the providers of the luncheon.

23. MORNING OF THE FIELD TRIP. – Makes sure vehicles are at the departure point ca. 30 minutes before departure and that box lunches, iced sodas, and maps and written directions are loaded, greets, collects tickets from field trip participants, obtains a list of participants’ names from the MC, the field trip leader(s), or by passing around a sign-up sheet, and introduces field trip leader(s) to the group.

24. AFTERNOON OF THE FIELD TRIP. – On return of the vehicles, thanks the field trip leader(s) and reminds them to submit receipts or an accounting of their expenses, and makes sure that no personal effects or coolers are left in the vehicles and that they are returned properly.

25. MORNING DAY OF THE PAPER SESSION. – Makes sure that the meeting room is properly set up with projection equipment, pointer, and table for display of A.F.S. materials. If asked, makes sure that A.F.S. materials are placed on the table.

26. BEFORE NOON ON THE DAY OF THE PAPER SESSION. – Makes sure that the captain of waiters knows that the LR or the A.F.S. President is in charge and that the luncheon is properly set up.

27. AT THE LUNCHEON. – Collects tickets as guests enter or after they are seated, unless the MC’s representative checks guests off on a list the MC’s list of attendees, receives the bill after the luncheon (if not sent directly to the MC), returns tickets to the MC as a head-count and reports on any deficiencies in the luncheon arrangements. (NOTE: the A.F.S. President can do this, if necessary.)

28. MORNING OF THE SYMPOSIUM. – Same as 12 above.

29. AFTER THE MEETING. – Reports to the A.F.S. President on the events that the LR was responsible for, emphasizing notable successes or deficiencies, and reminds the President to write a thank-you letter to the MC and the field trip leaders for their help in making A.F.S. participation in the meeting a success.