

Freshwater Mollusk Conservation Society



Procedures Manual

2017

Revision 4: February 2017

Contents

1.0	History and Purpose	4
2.0	Officers.....	4
2.1	Board of Directors.....	4
2.2	President.....	5
2.3	President-Elect	7
2.4	Past President.....	7
2.5	Secretary.....	7
2.5.1	FMCS Website / User Interface	8
2.6	Treasurer.....	9
3.0	Committees.....	16
3.1	Awards	16
3.1.1	Professional Awards	17
3.1.2	Student Travel Awards	17
3.1.3	Best Student Platform and Poster Awards.....	18
3.2	Environmental Quality and Affairs.....	19
3.3	Gastropod Distribution and Status.....	19
3.4	Genetics	20
3.5	Guidelines and Techniques.....	20
3.6	Information Exchange	20
3.6.1	<i>Freshwater Mollusk Biology and Conservation, the Society Journal</i>	20
3.6.2	<i>Ellipsaria</i>	23
3.7	Mussel Status and Distribution	25
3.8	Nominations	25
3.9	Outreach.....	25
3.9.1	Website.....	25
3.10	Propagation, Restoration and Introductions	26
3.11	Symposium.....	26
3.12	Ad-hoc Committees	26

3.12.1 *ad hoc* Committee on National Strategy Revision 26

3.12.2 *ad hoc* Committee on Ecosystem Services..... 27

4.0 Funding of Society or Committee Initiatives 27

Appendix A – Guidance for Organizing and Hosting FMCS Symposia 29

Appendix B – Guidance for Organizing and Hosting FMCS Workshops 33

1.0 History and Purpose

The Freshwater Mollusk Conservation Society (FMCS), incorporated as a 501(c) (3) in June 1999, is dedicated to the conservation of and advocacy for freshwater mollusks, North America's most imperiled animals. Membership in the society is open to anyone interested in freshwater mollusks who supports the stated purposes of the Society which are as follows: 1) Advocate conservation of freshwater molluscan resources, 2) Serve as a conduit for information about freshwater mollusks, 3) Promote science-based management of freshwater mollusks, and 4) Promote and facilitate education and awareness about freshwater mollusks and their function in freshwater ecosystems.

The purpose of this operations manual is to provide guidance to Society officers, committee chairs, and the general membership for the efficient operation of the Society. The duties of the Society officers, committee chairs, and general membership are detailed in the bylaws (available at <http://molluskconservation.org>). This manual provides guidance to officers and committee chairs so that they may effectively carry out the duties of their positions and meet necessary deadlines. This is intended to be a dynamic document, and as such each officer and committee chair should review his or her section of the manual annually and recommend any necessary changes to the Board of Directors. This manual was first approved in 2013, and it is recommended that it be reviewed and updated at least every 5 years to provide for the effective management of the Society. The immediate Past-President is charged with coordinating the review and update to this manual.

2.0 Officers

2.1 Board of Directors

The self-perpetuating Board of Directors of the FMCS is responsible for managing the affairs of the Society, and consists of the President as the presiding officer, the President-Elect, Past President, Secretary, Treasurer, and the Chairs of Standing Committees as defined in the By-laws (see Section 3). A committee may have co-chairs but only one vote on the Board of Directors.

The duties of the Board of Directors are:

1. To manage the business, functions, programs, and activities of the Society.
2. To establish dues and support levels for Active Members, Emeritus Members, Student Members, and Contributing Members.

3. To establish policy and promote the purposes of the Society.

The Board of Directors has 2 regular teleconferences per year and one in-person meeting. To keep the time reasonable for the teleconferences and allow in depth discussions where needed, the Board only focuses on a sub-set of committees during each teleconference. By necessity, the symposium committee will report during both teleconferences since they plan Workshops and Symposia. Of course, if there is a need for a specific report or action item from other committees not scheduled, they are added to the agendas.

1. March/April – in person meeting concurrent with the Symposium or Workshop.
2. July – Teleconference, with focus on Environmental Quality and Affairs, Genetics, Symposium, Information Exchange and FMBC, Mussel Status and Distribution, and Propagation, Restoration, and Introduction.
3. November – Teleconference, with focus on Awards, Symposium, Gastropods, Guidelines and Techniques, Nominations, Outreach, and ad hoc appointed committees.

2.2 President

The President is the chief executive officer of the society. The President presides at all meetings of the Board of Directors, transacts all of the usual, necessary and regular business of the society as may be required and, with prior authorization of the Board executes contracts, deeds, bonds and other evidences of indebtedness, leases and other documents required by the society. Presidential duties and event timing are outlined as follows (timeline assumes an April Symposium). The President assumes his or her duties after the April Symposium (odd years)

Year 1 (April to April)

1. Participate as an active member on the Symposium Committee
2. Write President's Messages for *Ellipsaria*, as needed/desired
3. Organize and preside over the required Summer (July) and Fall (November-December) Full Board Meeting (in person or by conference call), and any other meeting or conference call required to conduct the business of the Society.

4. Organize and preside over the required Spring (March-April) Full Board Meeting (usually held in-person at the Workshop location in even years, but can be by conference call, if Workshop is late). Work with the EXCOM to plan the Board Meeting agenda
5. Work on various personal initiatives
6. Appoints ad hoc committees and task forces as needed, and dissolves them when the tasks are completed
7. Ensure that Committee Chairs make progress on their tasks, keep their respective pages on the FMCS website updated, and report progress via *Ellipsaria*
8. Sign letters from the Environmental Quality and Affairs Committee, as needed and after getting consensus and comments from the Executive Committee (EXCOM; President-Elect, Secretary, Treasurer, Past-President), if required.
9. Communicate regularly with the EXCOM and Full Board or as needed on specific actions

Year 2 (April to April)

In addition to Year 1 Duties, during Year 2 the President:

1. Organize and preside over the required Spring (even-year) Full Board Meeting if Workshop is late
2. Organize and preside over the required Summer (July) and Fall (November-December) Full Board Meeting conference calls
3. Assist Nominations Committee with securing candidates for President Elect, Secretary, Treasurer (December-January)
4. Ensure electronic election is carried out in conjunction with publication of the March *Ellipsaria*
5. Organize and preside over the required Spring Full Board Meeting and formal FMCS Business Meeting held in-person at the Symposium location. Work with the President Elect and EXCOM to plan the Board and Business Meeting Agendas

2.3 President-Elect

The President-Elect acts as chief executive officer in the absence of the President. The President-Elect chairs the Symposium Committee (See Section 3.11). As the Chair of the Symposium Committee, the President-Elect:

1. Help secure location, hosts, and topic for the even-year Workshop
2. Ensure Workshop planning proceeds on schedule
3. Ensure Symposium planning proceeds on schedule and that the first call for abstracts is distributed in the September *Ellipsaria*; second call in December *Ellipsaria*, with an early January abstract deadline.
4. Help secure location and hosts for the odd-year Symposium and ensure planning proceeds on schedule

2.4 Past President

The Past President assists the President, President-Elect, Secretary, and Treasurer on an as needed or assigned basis. The Past President is charged with coordinating the review and update to the Society Bylaws and Procedures Manual. The Past President(s) are also tasked with fundraising for the Society.

2.5 Secretary

The Secretary records and preserves the minutes of the meetings of the Board of Directors and Business Meetings of the Society, coordinates with the webmaster to posts notices of all meetings of the Board of Directors and committees, and records and maintains records of all proceedings of the Members and Directors. The Secretary is also the contact person for sending out most FMCS email announcements, such as meeting notices, request for *Ellipsaria* and FMBC input, and other important requests to the membership. Notices for upcoming workshops or symposium should also be forwarded to the Unio listserv. Minutes of the Board meetings and Business meetings, whether conducted in person or by telecon, should be compiled and distributed to the Board for edits and corrections within 2 weeks of the meeting. Once corrected, the Secretary will forward them to the editor of *Ellipsaria* for publication. Meeting minute formats can be found in the past issues of *Ellipsaria*. The Secretary is also responsible for coordinating annually with the Treasurer to update the membership list of the Society, and maintain the membership database, including reviewing and updating the status of members. In addition the Secretary shall maintain copies of all official correspondence

of the Society (comment and advocacy letters, etc.). Upon the election or appointment of a new Secretary, the past Secretary shall organize and transfer all hard copy files, notebooks, and digital copies of all official correspondence to the new Secretary.

2.5.1 FMCS Website / User Interface

The FMCS website (<http://www.molluskconservation.org>) has an add-on “Widget” imbedded into the site, called “Wild Apricot” (<http://www.wildapricot.com/>). FMCS added this functionality as a more automated and effective way to manage the membership database. The site can be accessed at: <http://www.fmcs.onefireplace.org/> with the Secretary or other authorized user’s FMCS username and password. The FMCS Webmaster will have to manually assign the appropriate site access privileges to the new Secretary in Wild Apricot for that user to be able to access the interface, in the event of a change in Secretary.

One important note, the FMCS online database is a great asset but needs to be managed with care and confidentiality. The new system has many advantages over the old paper system; namely the credit card information for individuals is secured in a 3rd party system and not stored on hard copy membership and workshop forms. However, to date the database contains the emails of nearly 800 current and past members, as well as personal, confidential information that needs to be protected in strict confidence, so admin user passwords should be complex and requests for the membership lists need to be evaluated for merit before delivery.

Once access to the site is granted, the user should see the dashboard screen:

The screenshot shows the Wild Apricot dashboard interface. At the top, there is a navigation menu with options: Dashboard, Contacts, Web pages, Events, Members, Donations, Finances, Emails, and Settings. The user is logged in as Gregory Zimmerman, with options to change password, go to public view, or logout. The dashboard displays the current version as 4.6.6, released on 12 April 2014. Below this, there is a 'Contacts database' section with a table showing contact statistics. The table has columns for Contact type, Current, New in last 7 days, and New in last 30 days. The rows are: Total Contacts (778, 2, 7), Members (755, 2, 10), Donors (2, -, -), and Event attendees (431, -, 4). Below the contacts table is a 'Next 3 events' section with a table showing event details. The table has columns for Date, Title, Confirmed, Pending, and Total. The rows are: 24 Apr 2014, Non Member Registrati (18, 3, 21) and 24 Apr 2014, FMCS Member Registrati (48, 6, 54).

Contact type	Current	New in last 7 days	New in last 30 days
Total Contacts	778	2	7
Members	755	2	10
Donors	2	-	-
Event attendees	431	-	4

Date	Title	Confirmed	Pending	Total
24 Apr 2014	Non Member Registrati	18	3	21
24 Apr 2014	FMCS Member Registrati	48	6	54

The website is relatively user friendly from this point on. The main **Dashboard** screen provides a quick snapshot of the membership. The tabs at the top of the page provide access to other categories. The primary page used to compose emails and retrieve membership information, such as contact lists of the membership and committees, is the **Contacts** tab. In the Contacts tab, the simple search function can quickly find any member, and their status. This is useful for when a member needs to know the status of their membership, what email address is associated with it, etc. Contact lists based on search criteria can be exported to *.xml format, which can be opened in MS Excel or other spreadsheet program.

The Contacts screen can also be used to compose emails to the entire membership or other sub-set(s) of the membership such as committees; these email lists are based on search criteria. Search criteria can also be saved for future use. Email templates are available from the library or in sent messages for FMCS emails. These templates allow the user to add in images, and improve the production value of emails by changing font sizes, colors, etc. A key advantage of the templates is that they automatically re-format for mobile devices. Also, by turning on link-tracking, statistics on member usage of embedded links in emails, such as how many members log in to the newsletter, can be tracked.

2.6 Treasurer

The Treasurer is responsible for all finances and accounting of the Society.

A. Basic tasks that require attention include:

- a) Entering all financial transactions in accounting program. FMCS books are currently managed in QuickBooks (QB). Accounts are set up to track all income and expenses. We operate on a cash accounting basis.
- b) Income
 - i. Transactions include memberships, registration for symposiums/workshops, donations for miscellaneous items (hats, symposium/workshop proceedings, t shirts), interest
 - ii. Income payments

1. Members must initiate membership or workshop/symposium payments on our webpage (www.molluskconservation.org). The system generates an invoice. The invoice can be paid thru the webpage with PayPal or manually.
2. PayPal
 - a. To retrieve funds and transaction history from PayPal, log in to our PayPal account. Transactions: Go to history and set dates for the period you need. To keep a record of these transactions, download to a CSV which can be opened in Excel.
 - b. Payments: Go to retrieve funds and follow webpage directions. Payments will show up in our bank account in 3-4 days.
 - c. Refunds: Must be issued within 60 days of the transaction
3. Manual payments
 - a. Credit cards. Government credit cards cannot use PayPal. We have an account with Square to process credit card payments on a mobile device (e.g. smartphone, tablet). This system can accept Mastercard, Visa, AMEX, and Discover cards. To manually enter card numbers you will need:
 - i. CC number
 - ii. Expiration date
 - iii. Security code
 - iv. Billing zip code
 - b. Once the credit card transactions are input, enter the transaction(s) in QuickBooks, and go to the website account for that person and settle the invoice. If the payment is for a non-member symposium/workshop registration, you will need to credit them with a membership.

- c. Check payments: Deposit funds in bank account, enter transaction in QuickBooks, and settle the invoice on our website.
- c) Paying bills: Bills can be paid on-line through our US Bank account, by a check, or with our US Bank credit card. Several accounts are set up in QBs to track our outgoing funds.
- d) Reconciling accounts. Accounts to be reconciled monthly include:
 - i. Checking account
 - ii. Savings account
 - iii. Square credit card (income) account
 - iv. Credit card (payment) account (bill is due on the first of the month)
 - v. PayPal income account

In QBs go to Banking: Reconcile accounts and follow directions.

- e) Taxes
 - i. Taxes for 501(c) (3) organizations are due May 15 each year.
 - ii. File a 990-EZ (unless gross receipts are greater than \$200,000)
 - iii. An on-line service (efile.form990.org) is currently used to file our federal taxes.
 - iv. Previous years spreadsheets can be used to guide calculations
- f) Biennial Registration Report
 - i. This must be filed by August 31 in odd number years.
 - ii. Missouri Secretary of State (SOS) typically sends a postcard or email reminder
 - iii. Go to www.sos.mo.gov and follow directions.
 - iv. Our registration number is N00061715
- g) Government SAM account
 - i. Since we do business with the federal government, we are registered with SAM (System for Award Management, www.sam.gov)
 - ii. This registration needs to be updated periodically
 - iii. An email notification is sent as a reminder
- h) Membership tracking
 - i. Memberships are initiated and paid on our web page.

- ii. Members log in with their email and password to create or renew their membership.
 - iii. Note: members make several common errors you will need to correct. The most common is creating a new account by logging in with a different email. Accounts can be merged (follow directions within the web page).
 - iv. Membership dues are due on January 1 every other year. Dues can be paid with the symposium/workshop registrations (all non-member registrants receive a two year membership). A membership will need to be activated or renewed by the treasurer for non-member registrants.
 - v. Membership can also be paid separately from the workshop/symposium
 - vi. Any memberships that are paid after Nov 1 should be credited to the next year
 - vii. Following the symposium/workshop notify the web master to send out a notice to all lapsed members that their membership is due.
- i) Symposium/workshops
- i. Registrations
 - 1. Work with the symposium chair and web master to set up the on-line registration system.
 - 2. Settle all accounts that are paid manually.
 - 3. Set up memberships or renewals for those that pay as non-members.
 - 4. Check the system to make sure it credits each member properly.
 - 5. Generate periodic reports for the symposium chair.
 - ii. Other
 - 1. Sign any contracts
 - 2. Pay deposits and final bills
 - 3. Assist chair with getting state tax exempt status if needed
 - iii. On-site
 - 1. Assist with registration set up

2. Train registration personnel on Square register operation. (The Square credit card app works as a cash register system; all transactions can be processed and tracked using this app).
 3. Provide cash boxes and change
 4. Check in with registration desk periodically
 5. Collect all cash and credit card receipts at the end of the day.
- iv. Post-meeting
1. Pay the bills
 2. Enter all on-site transactions
 3. Reconcile money vs. records
- j) Treasurer's report. A treasurer's report is given at each board meeting (three times a year) and at the symposium business meeting. Reports can easily be generated in QBs. Go to Reports, Company and Financial, Profit and Loss. This report summarizes all transactions for the current fiscal year. A balance sheet (Reports, Company and Financials, Balance Sheet Standard) can also be generated. This report summarizes all assets and liabilities of FMCS since inception.
- k) Budget items. The Treasurer also keeps track of budget items and availability of funds for special projects and funding requests. Current budget items include:
- i. Web page expenses (\$5000 budgeted per year) and FBMC (expenses \$5000 per year) are typically funded through membership dues.
 - ii. Awards given at the symposium are funded from the previous symposium auction. Budget depends on the revenue from the previous symposium's auction. This can be found by generating a profit/loss statement for the previous symposium year. Auction income is entered as an income line item. We also keep a spreadsheet with a running total of award funds, as not all award funds are always used up each year.
 - iii. Funds available for special projects are dependent on the funds generated throughout the year from the symposium/workshop.

- B. Useful numbers
 - a) Tax ID 43-1855280
 - b) DUNS No. 602409901
- C. Useful webpages
 - a) www.molluskconservation.org
 - b) www.usbank.com
 - c) www.paypal.com
 - d) efileform990.org
 - e) www.sam.gov
 - f) User names and passwords can be obtained from the previous treasurer
- D. General schedule of tasks (note: many of these may be needed earlier or later depending on the timing of the workshop or symposium)
 - a) January
 - i. Ensure all of the previous year's income and payments are recorded
 - ii. Check for errors
 - iii. Reconcile accounts
 - iv. Enter all transactions in QBs
 - v. (QBs automatically resets income/expenses to 0 on Jan 1, however all transactions are available on the report for the previous Fiscal Year)
 - vi. Enter all memberships and symposium/workshop registrations
 - vii. Update QB and webpage accounts
 - viii. Communicate with symposium/workshop chair to ensure they have funds to pay bills or that invoices are sent to the treasurer and paid in a timely manner
 - b) February, March, April
 - i. Check for errors
 - ii. Reconcile accounts
 - iii. Enter all transactions in QBs
 - iv. Assist symposium/workshop chair as needed
 - v. Generate a Treasurer's report for the board meeting
 - c) May
 - i. Check for errors

- ii. Reconcile accounts
 - iii. Enter all transactions in QBs
 - iv. Reconcile workshop/symposium- make sure all bills were paid and all income received.
 - v. Send out dues notice
 - vi. Taxes due by May 15 (we will not owe any taxes, but fines are substantial if you miss this deadline for filing)
- d) June, July
 - i. Check for errors
 - ii. Reconcile accounts
 - iii. Enter all transactions in QBs
 - iv. Assist symposium/workshop chair as needed
 - v. Generate treasurer's report for the July board meeting
- e) August
 - i. Same as June/July
 - ii. Every other year (odd years) renew registration with Missouri SOS (if this is late, we will no longer be considered a non-profit)
- f) September, October
 - i. Check for errors
 - ii. Reconcile accounts
 - iii. Enter all transactions in QBs
 - iv. Assist symposium/workshop chair as needed
- g) November, December
 - i. Same as September/October
 - ii. Generate a treasurer's report for the November board meeting
 - iii. Check web page accounts to make sure memberships are credited to the next year
- E. Credit Card Security Requirements
 - a) When credit card information is received by either phone or email:
 - i. Information must be marked as CLASSIFIED
 - ii. Information must be locked in a secure place while awaiting processing.
 - iii. Once processed, information must be destroyed by shredding.
 - b) Only the Treasurer is allowed to receive credit card numbers. Treasurer is

responsible for securing information until payments are processed. Treasurer is responsible for destroying information immediately after processing.

- c) This policy needs to be reviewed and updated annually.
- d) An outgoing treasurer is responsible for ensuring the new treasurer is aware of and trained in these security procedures.

3.0 Committees

The purpose of the committees is to implement tasks identified in the National Strategy as decided by committee members or assigned by the Board of Directors.

3.1 Awards

Society awards are divided into professional and student categories. FMCS presents three professional awards, including the Clench Award, the Lifetime Achievement Award, and the Meritorious Service Award. The Society also provides a Regional Mollusk Meeting Assistance Award. FMCS grants three types of student awards, including student travel awards, best platform presentation and best poster presentation. Details on each of these seven award types can be found on the Society's website at <http://molluskconservation.org>. Each award category is evaluated by separate guidelines, but maintains the intent of the Society's award process. Unless an award specifies otherwise, candidates may:

- A. Be self-nominated or nominated by an individual or group;
- B. Be from North America or any other geographical area;
- C. Be FMCS members or non-members.

Recipients of these awards are announced every two years at the Symposium during the awards ceremony at the Business Meeting.

The FMCS Awards Committee is responsible for the administration and oversight of all FMCS awards. The duties of the Awards Committee are to:

- A. Solicit nominations and recommend recipients for each professional award given by the Society;
- B. Administer awards to students, including selecting the awardees in conjunction with a panel of independent judges;
- C. Coordinate all award activities with the FMCS Treasurer and EXCOM to ensure the timely and smooth implementation of award programs.

3.1.1 Professional Awards

- A. About 5 months prior to the symposium, place an announcement in *Ellipsaria* to solicit professional awards.
- B. About 5 months prior to the symposium, post an announcement on the FMCS and Unio Listserves to solicit professional awards.
- C. Assemble professional award packets and ensure that they are complete.
- D. Send the completed award packets to the EXCOM for their approval and record their votes.
- E. Notify the EXCOM that votes for the professional awards were accepted unanimously, or otherwise.
- F. Notify those individuals who nominated an individual for a professional award that they (and their support crew) are expected to give a brief (5 min) presentation on why the award recipient deserves this award during the business meeting.
- G. Make up plaques to present at the meeting (1 for each professional award, 1 for the past president, 1 for the best student platform and 1 for the best student poster).
- H. Announce the winners of the professional awards at the business luncheon during the symposium. Take photos of scientists receiving awards for *Ellipsaria*.

3.1.2 Student Travel Awards

- A. About 5 months prior to the symposium, place an announcement in *Ellipsaria* to announce the student travel awards.
- B. About 5 months prior to the symposium, post an announcement on the FMCS and Unio Listserves to announce the student travel awards.
- C. Determine how many awards can be offered (work with the symposium program chair to determine the total cost of the lodging and the treasurer to determine the funds available to support student travel).
- D. Assemble the student award packets and ensure that they are complete.
- E. Send the completed award packets and an excel file with award criteria to the award's committee members.
- F. Send an email to the treasurer to check if all student award applicants are indeed FMCS members.

- G. Have all members of the award committee independently rank all applicants.
- H. Have a conference call to discuss results of the independent ranking.
- I. Notify all students (with a cc: to their advisor) of their status with respect to the awards. Make sure to include a note to the award winners that their award covers lodging only (not movies, internet, etc...).
- J. Send an email to the treasurer and request that reservations get made in the names of the student awardees. Make sure that confirmation numbers are sent to the students.
- K. Announce the winners of the student travel awards at the business luncheon during the symposium. Take photos of students receiving awards for *Ellipsaria*.

3.1.3 Best Student Platform and Poster Awards

- A. Once we receive the tentative symposium program, place an announcement on the FMCS and Unio Listserves to solicit judges and ask the secretary to send an email to the entire FMCS membership.
- B. Assign judges to presentations (includes platform and posters). Try to accommodate judge's session preference and arrival/departure times. Goal is to have a minimum of 3-4 judges secured for every presentation in advance of the meeting (in some years, we were unable to secure enough judges in advance, so we sent an announcement to session moderators and asked them to request judges at the beginning of each session).
- C. Request a small meeting room to go over the student judging packets (usually on the second night of the symposium from 5-7 pm).
- D. Notify judges of their assignment via an email in advance of the meeting. This email should also tell them when and where to turn in their completed forms.
- E. Place judging forms, pre-labeled with the student name and session #, in the registration materials for each judge (for folks that arrive early to the meeting, you can hand the forms out during the opening night mixer).
- F. Set up a labeled box at the registration table for judges to turn in their completed forms.
- G. Make up plaques/certificates to present at the meeting (see 3.1.1G)

- H. Announce the winners of the best student platform and poster awards at the business luncheon during the symposium. Take photos of students receiving awards for *Ellipsaria*.

3.2 Environmental Quality and Affairs

The Environmental Quality and Affairs Committee identifies and reviews current environmental issues and develops official comments and position statements for the Society. Comments have ranged from developing support letters for conservation initiatives to review of Environmental Impact Statements. It typically draws from the expertise of Society members, as well as like-minded members from other societies. The co-chairs of the committee maintain a database of committee member areas of expertise to facilitate this process. The committee reviews issues brought forth by members of the society, and with approval of the President, drafts letters for the Presidents' (or their designee) signature. Steps to follow in the process include:

1. Member(s) of the committee review the issue and discuss options for responding with the President or Board of Directors (as necessary)
2. A draft letter is provided to the President or Board of Directors for review
3. The final letter is provided to the President, who signs the letter and forwards an electronic copy to the committee
4. The committee forwards the letter to the proper entity
5. An electronic copy of the letter is provided to the website developer for inclusion on the website and to the society Secretary to be retained as part of the society's official records.

3.3 Gastropod Distribution and Status

The goal of the Gastropod Distribution and Status Committee is to disseminate information about the conservation status of aquatic gastropods. Information is gathered from experts and then distributed through committee publications and the FMCS website. The duties of the Gastropod Distribution and Status committee are to promote:

1. A periodic review of the conservation status of North American freshwater gastropods.
2. A database of current distributional information/changes for gastropods.
3. Promote and assist regional fauna recovery efforts.

4. A common and scientific names committee that reviews primary literature for taxonomic changes and provides continuity with the selection of common names. The committee shall maintain a list of names on the society website.

3.4 Genetics

The main duties of the Genetics Committee relate to systematics, population genetics, and aquaculture/captive propagation, and include:

1. Further development of the use of DNA barcoding for identification of provisional species. Further development of nondestructive tissue sampling techniques is desirable. Creation of best practices “1-pagers.” These short documents would address topics such as vouchering of specimens, value of sampling at type localities, DNA barcoding, genetic concerns in creation of captive, augmented, and restored populations, etc.

3.5 Guidelines and Techniques

The Guidelines and Techniques Committee was formed to develop consistent best practices for freshwater mollusks because of a lack of standard practices for surveying, handling, and vouchering species among different organizations, agencies and individuals. The goal of the committee is to review and disseminate information regarding guidelines and techniques that minimize harm to freshwater mollusks.

3.6 Information Exchange

The development and distribution of scientific, technical, and non-technical information among society members, natural resource managers, policy and other decision makers, and to the public at-large are vital functions of this committee. Specifically, the Information Exchange Committee has oversight of FMCS web pages, the Society's journal and the newsletter.

3.6.1 *Freshwater Mollusk Biology and Conservation, the Society Journal*
Walkerana, initially founded in 1980 and edited by Dr. John Burch, was published by the University of Michigan until it transitioned to FMCS in 2011, and was published as *Walkerana – The Journal of the Freshwater Mollusk Conservation Society* from 2012 through 2014. The Society's online-only journal began publishing under the name *Freshwater Mollusk Biology and Conservation* in 2015

through an expansion of journal services and collaboration with Allen Press. FMBC publishes original papers that advance the knowledge of freshwater mollusk biology and enhances the conservation of these animals. Issues are published two times per year, in March and September. The journal is open-access and anyone may submit a manuscript however, all non-member authors are encouraged to join the Society to help defer the costs of publication. Articles addressing all aspects of the biology of freshwater mollusks are welcomed, including but not limited to, ecology, physiology, toxicology, reproduction, propagation, conservation, and restoration. Status and distributional surveys are acceptable provided that they have heuristic value and are used to compare previous studies and results. The Instructions to Authors, published current and back issues of the journal, and list of editorial board members and policies are maintained on the Society's Publication webpages.

3.6.1.1 Editors and Editorial Board

The editors shall be made up of three co-editors.

Each co-editor shall serve a term of three years. At the expiration of her/his term, the co-editor may renew their position for another three years or resign the position. A co-editor may serve no more than three consecutive terms. A co-editor may resign their position at any time, but she/he should make every effort to serve a full term.

A co-editor wishing to resign the position shall notify the other two editors two months prior to resignation. Prior to resignation, the three editors shall develop in consensus a ranked list of potential replacements. The resigning co-editor shall then contact potential replacements in the order of their ranking until a replacement is found. The resigning co-editor should make every effort to retain their position until a replacement is found.

Co-editor terms shall be staggered by approximately one year so that no more than one co-editor is replaced each year barring extenuating circumstances.

Members of the Editorial Board shall represent the broad disciplinary areas of science covered by the scope of the journal and the diversity of the membership among academia, government, non-government, and private organizations. Board members shall serve a term of three years. At the expiration of a term, a board member may renew their position for another three years or resign the position. A co-editor will be responsible for contacting the board members to inquire about their willingness to serve. A board member may serve no more than three consecutive terms. A board member may resign their position at any time by notifying a co-editor, but she/he should make every effort to serve a full term.

3.6.1.2 Handling of manuscripts

Incoming submissions shall be assigned to one of the three co-editors on a rotating basis. For example, paper 1 shall be assigned to editor A, paper 2 to editor B, paper 3 to editor C, paper 4 to editor A, and so on. The editors shall make every effort to adhere to this rotation to balance the workload among editors and to reduce the potential for preferentially handling papers of colleagues, etc. Deviations from the rotation may be made by consensus among the editors when necessary due to extenuating circumstances. Editors should refrain from accepting papers for which they have a conflict of interest, such as being a co-author. Once a paper is assigned to an editor, that editor shall handle all subsequent revisions of the paper through final review of galley proofs. Submission of revisions are assigned to the original handling editor by default and do not affect the rotating basis of assignment of new submissions.

Editors shall attempt to obtain two reviews of each manuscript. If obtaining two reviews would unduly delay handling of a submission (e.g., a non-responsive reviewer), it is at the editor's discretion to proceed with a decision with a single review, but such cases should be in the minority. An editor may solicit a third review when necessary and as long as this does not unduly delay handling of a submission.

After receiving a decision of 'accept pending revision' (major or minor) on a submission, authors shall have three months from the date of the decision letter to return a revised manuscript. Authors may request in writing an extension of up to three months beyond the initial deadline. Approval of these requests is at the discretion of the handling editor, but extension requests should be granted in most cases. All papers for which a revision is not received in six months from the date of the initial decision letter will be withdrawn by the handling editor. Withdrawn papers can be resubmitted at any time but must undergo a new round of review.

If a submission receives a decision of 'accept pending revision' (major or minor) but the editor determines that the authors have not satisfactorily addressed the reviewers' and editor's comments, the editor may, at their discretion, request another round of revision, request resubmission of the paper, or reject the manuscript.

Manuscripts receiving a decision of 'resubmit' must be submitted as a new submission and shall undergo a new round of review. A resubmitted manuscript shall be assigned to the handling editor of the initial submission except in extenuating circumstances. The editor may solicit reviews from the original reviewers or different reviewers.

Manuscripts receiving a decision of 'reject' shall not be accepted for resubmission unless they are substantially different than the original submission. The original handling editor shall evaluate whether or not a resubmission of a previously rejected manuscript warrants review.

3.6.2 *Ellipsaria*

Ellipsaria is the newsletter of the FMCS. Its primary purpose is to keep members informed about Society activities by publishing minutes of Society Board Meetings, requests and reports from the various committees, and announcements and other information about Society functions. *Ellipsaria* also includes meeting notices of other pertinent societies, announcements and

summaries from pertinent regional meetings, new publication notices, and informal research articles or comments on current issues affecting freshwater mollusks. This last purpose of the newsletter evolved from the Triannual Unionid Report, an informal newsletter distributed for several years prior to the formation of the FMCS.

In its present on-line only form, *Ellipsaria* is posted on the FMCS web site quarterly, by the first of March, June, September, and December. Contributions may be submitted by e-mail to the editor [presently John Jenkinson, jjjenkinson@hotmail.com] at any time but are due by the 15th of the month before each issue is posted (i.e., February 15, May 15, etc.). Contributors should expect to receive an e-mail acknowledgement of their submission from the editor.

When each contribution for an issue of *Ellipsaria* is received, it is logged into an issue-specific checklist and placed in an e-mail folder dedicated to that issue. At present, each issue of *Ellipsaria* is assembled in a Word document set up in two sections: basically, Society items and announcements, and contributed articles and last pages. Consistent formats for the newsletter masthead, headers and footers, page margins, and section headings are maintained by inserting all material into a standard template. The text of each contribution is converted into the newsletter text font [presently Bookman Old Style] and pasted into its likely position in the developing issue. Tables are adjusted to fit the font, font size, style, and page constraints of the newsletter. Graphics typically are evaluated in PhotoShop, and then pasted into the Word file as Windows Metafile images. When all contributions have been entered into the draft issue, the entire document is spell-checked, and then adjustments in article order and line spacing are made to minimize page break disruptions. The final version of the Word document is then converted into a PDF file that, at present, is sent by e-mail to the Society webmaster for posting on the FMCS website.

The present editor of *Ellipsaria* has chosen to provide two additional services to members of the Society. To help members remember the publication schedule for the newsletter, he typically drafts -- and asks the Society Secretary to distribute -- a reminder that all input for the upcoming issue will be due in 30 days, and an announcement when the latest issue has been posted on the

website. The present editor also has developed an Author Index for all contributed articles published in *Ellipsaria* that he updates annually. The most up-to-date version of this Author Index is posted on the Society website adjacent to the issues the newsletter.

3.7 Mussel Status and Distribution

The duties of the Mussel Distribution and Status committee are to promote:

1. A periodic review of the conservation status of North American freshwater mussels.
2. A database of current distributional information/changes for mussels.
3. Promote and assist regional fauna recovery efforts.
4. A common and scientific names committee that reviews primary literature for taxonomic changes and provides continuity with the selection of common names.

The committee shall maintain a list of names on the society website.

3.8 Nominations

The duties of the Nominations Committee are to seek viable candidates for the various offices of the Society every two years, publish the official statements of the candidates in *Ellipsaria*, and conduct the election in the December-January timeframe. In addition to the Chair of the Committee, the EXCOM members all help seek candidates for officers.

3.9 Outreach

The Outreach Committee has oversight of FMCS web pages. The Chair of the Committee works with the webmaster to implement changes or additions to the website.

3.9.1 Website

The FMCS maintains a web presence at <http://molluskconservation.org>. This website serves the outreach and education needs of the society, providing information about the biology, ecology, and conservation of freshwater mollusks. This website also serves as the membership portal for the society, where members are provided secure access to *Walkerana - The Journal of the Freshwater Mollusk Conservation Society* and *Ellipsaria*. The website is maintained by a webmaster (currently Sophie Binder)

3.10 Propagation, Restoration and Introductions

The Propagation, Restoration and Introductions Committee develops recommendations for best science and management practices for the various mollusk conservation strategies.

3.11 Symposium

The Symposium Committee is responsible for the planning and execution of all workshops and symposia, including selection of meeting location, local hosts, and topics to ensure that a smooth transition of files, memory and mode of operation, and lessons learned are transmitted. Member terms expire after the next subsequent Workshop or Symposium and as new officers are elected. The Guidance documents for the planning and execution of symposia and workshops are found in Appendices A and B, respectively.

Composition

Chair:	President-Elect
Members:	Chair/Co-Chair of Immediate Past Workshop
	Chair/Co-Chair of Immediate Past Symposium
	Society Officers (President, Secretary, Treasurer, Past President)
	Chair/Co-Chair of Upcoming Workshop
	Chair/Co-Chair of Upcoming Symposium

3.12 Ad-hoc Committees

From time to time, the President can appoint ad-hoc committees to undertake a specific task or project. Those committees serve at the will of the President, and can be dissolved when the tasks are accomplished or the work of the committee has otherwise ceased.

3.12.1 *ad hoc* Committee on National Strategy Revision

At the Spring 2011 Symposium, FMCS President Caryn Vaughn appointed an ad hoc committee to review and revise the National Strategy for the Conservation of

Freshwater Mollusks. The committee has fulfilled its purpose and the New National Strategy document was published in 2016.

3.12.2 *ad hoc* Committee on Ecosystem Services

The Ecosystem Services Committee was formed to review, disseminate and translate information regarding the various benefits that freshwater mollusks provide to natural ecosystems and people. Some of these benefits are their utility as ecological indicators, maintenance of water quality via biofiltration, biotransformation and biodeposition processes that can enrich aquatic food webs, “ecosystem engineers” that boost the complexity and stabilize bottom habitats, and potential future medical applications. Public awareness and support for freshwater mollusk conservation and restoration can be strengthened by information on the important role that they usually play in sustaining clean water and healthy habitats when the mollusks themselves are healthy and abundant. Ecosystems service studies have been limited. Outcomes can be difficult to convey to the public, often saddled with complex jargon. Therefore, the goals of the committee are to:

1. Develop outreach products for the society to share that translate ecosystem benefits into understandable terms and graphics.
2. Inventory and track scientific information regarding ecosystem service assessments and studies, so that outreach materials are substantiated.
3. Identify high priority actions and needs related to ecosystem service research or valuation.

4.0 Funding of Society or Committee Initiatives

Initiatives or projects may formally be solicited in writing to the Executive Committee at any time of the year, but at least 60 days prior to the nearest semi-annual (Spring or Fall) Board meeting. Any Committee Chair or Co-Chair may request funding provided it meets the following criteria: (1) the funding request will be used for mollusk or aquatic resource-oriented projects; (2) funding requests will not be used for politically-oriented activities; and (3) the funded activity is conducted through an FMCS Committee with a collaborative non-profit conservation organization, or an entity that qualifies as a 501(c) 3 organization. Written requests for funding,

at a minimum, should (1) identify the requestor, (2) provide the title, objectives, and methods that will be used to accomplish the project for which funding is requested, (3) state the amount of funding requested, (4) provide a brief overview of the expected results and how they will benefit the Society, and (5) state how funds meet the criteria listed above. A Committee can only make one funding request annually for an identified project. Funding requests from outside the Society, such as those from other Societies or other conservation organizations, can be considered subject to the availability of funds, real or perceived benefits, and other Society funding obligations, as long as the requests are consistent with the mission and goals of FMCS. These requests should meet the criteria and requirements set forth for requests for funding Society initiatives and projects. The Executive Committee will review all funding requests and upon unanimous vote can directly fund any requests up to \$1,000. If the funding request is greater than \$1,000, the Executive Committee will present the request for approval by the Full Board of Directors at the next semi-annual Board meeting. If a funding request requires approval by the Full Board, the Executive Committee will make the proposal available for review by Board members at least 15 days prior to the Board meeting. A majority vote will be necessary to approve the requested funding. All funding requests that are approved by the Executive Committee or the Full Board will be identified to the membership at the Biennial Symposium during the Treasurer's Report. All funding recipients are required to submit an annual progress report and a final report to the President and Executive Committee detailing disbursement of funds and results and impacts of the funded activity. The Board reserves the right to provide incremental funding for projects approved for greater than \$1,000 in total costs, pending satisfactory progress, and to terminate disbursement of funds to non-performing projects.

Appendix A – Guidance for Organizing and Hosting FMCS Symposia

LOGISTICS (18 months prior)

1. Determine date of meeting based on fewest conflicts with other professional society meetings (e.g., Freshwater Science).
2. Determine meeting location based on suitable local facilities and competitive bids. Request written estimates of costs from several prospective meeting facilities which includes an itemized breakdown of charges for rooms, food (meals, breaks), and audiovisual equipment. Compare prices to those of previous meetings and consult with the FMCS Executive Committee (EXCOM), if necessary.
3. Establish a program committee.
4. Establish an auction/sponsorship committee.
5. Establish a field trip committee.
6. Contact keynote speakers, if appropriate.

Facility Considerations

1. Ease of accessibility from major routes and modes of travel.
2. Size of the meeting facility--meeting room size and layout, adjoining lodging for approximately 250-300 people (2015 estimate).
3. Does the meeting facility offer government rates for lodging?
4. Does the meeting facility have maps, restaurant guides etc.?
5. Is the facility handicap accessible?
6. What are room rental costs? Are room rental costs waived if food service is purchased from the facility? Does the room cost include necessary audiovisual equipment (e.g., lighted podium with microphone, computers, pointers)?
7. Location and layout of space for morning and afternoon breaks.
8. Location of the registration desks. Is there enough adjoining space for job boards, welcome signs, sponsor signs?

Meeting Room Considerations

1. What is the primary meeting room layout? Will the speakers' podium and microphone be on a riser or on the floor? What is the proximity of the podium to the projection screen? Is the projection screen large enough and hung from the ceiling (i.e., can the projected images be easily seen from all areas of the room)? If there are windows in the room, can they be covered to prevent light interference with visuals?
2. Specify room set-up requirements. Classroom style has been the preferred set-up.
3. Discuss access to and from the meeting room. Ensure that access points are not disruptive of speakers.
4. Discuss control of room lighting for raising and lowering of lights between speakers.
5. Does the facility provide back-up audiovisual equipment?
6. Is the room temperature controlled individually by thermostat?

LOGISTICS (12 months prior)

1. Prepare a progress report outlining the meeting theme, potential keynote speakers, estimated budget, meeting schedule, and timelines for abstract submittal and registration and present this information to the FMCS EXCOM (work closely with EXCOM leaders on when the next EXCOM meeting is scheduled).

2. Develop meeting theme.
3. Develop ideas and list of potential contacts for short course, if appropriate.
4. Place a “save the date” announcement in Ellipsaria.
5. Finalize registration rates.
6. Prepare an announcement for the FMCS workshop, if appropriate.

LOGISTICS (10 months prior)

1. Send out the first call for papers to the Unio listserver and to Ellipsaria (coordinate with Ellipsaria editor closely on lead time needed)
2. Finalize decision on meeting location, facilities, and dates.
3. Complete organization of all committees.
4. Finalize conference theme and potential keynote speakers.
5. Finalize decision on short course title and instructors, if appropriate.
6. Communicate with awards committee regarding their needs for room space to tally student award winners.

LOGISTICS (6 months prior)

1. Finalize registration forms
2. Set up website for registration and open it for early registration
3. Finalize decisions on menu and schedule with the meeting facility.
4. Send out a second call for papers to the Unio listserver and to Ellipsaria (coordinate with Ellipsaria editor closely on lead time needed)

LOGISTICS (3 months prior)

1. Abstracts should be due to program committee.
2. Review abstracts after abstract submittal deadline.
3. Notify authors of receipt of abstract by email.
4. Provide the chair(s) of the awards committee with a list (name and email) of students who will be making platform and poster presentations at the meeting so that judging criteria can be mailed to each participant.
5. Finalize the program/agenda. Presentations should be organized by appropriate subject (e.g., conservation, culture, toxicology). The program should be developed based on the total number of abstracts received, subject areas covered, and the overall program schedule desired. It is important that the program committee schedule all student platform presentations and the poster presentations on the first 2 days of the conference to allow the Awards Committee enough time for tabulation of results.
6. Make contacts and selections for session moderators based on the expertise of the person as related to the session topic, their ability to be authoritative and keep the meeting on schedule, and facilitating the attendance of people who otherwise may not be able to attend the meeting.
7. Prepare a detailed map with directions to the meeting site.

LOGISTICS (2 months prior)

1. Contact the meeting facility and verify details for the conference (e.g., meeting rooms, audiovisual equipment, food needs and schedule, providing appropriate materials--office dividers or bulletin boards--for the poster displays, and boards for job listings and photos

from the previous meeting).

2. Finalize needs for poster boards for poster session(s).
3. Send out reminder via Unio listserver or the FMCS secretary that the deadline for early registration is about to close.
4. Close early registration, open late registration.

LOGISTICS (1 month prior)

1. Email letters to all platform presenters and session chairs reminding them of their presentation time, session, guidelines, and duties.
2. Finalize all audiovisual needs and identify the audiovisual person for each session.
3. Contact the meeting facility and verify details for the conference (e.g., meeting rooms, audiovisual equipment, food needs and schedule, providing appropriate materials (office dividers or bulletin boards) for the poster displays).
4. Finalize insurance needs with the convention center.
5. Prepare the final draft of the meeting program and proceedings and submit for duplication.
6. Inform the local press about the upcoming meeting (DO WE DO THIS??).
7. Contact the local chamber of commerce or visitor and convention center to see if they will provide name tags for meeting participants free of charge and to gather general information on restaurants etc. for meeting participants.
8. As registration forms and payments are processed, sort alphabetically and prepare receipts for each person.
9. Send out reminder via Unio listserver or the FMCS secretary that the deadline to reserve a hotel room at the discounted rate is quickly approaching.

LOGISTICS (3 weeks prior)

1. Place food order with hotel/convention center
2. Prepare name tags for participants (if not provided by the local convention center) or provide list of participants to local convention center for name tag preparation.
3. Collate meeting proceedings, participant receipts, and other registration materials for ease at registration table. Communicate with awards committee on getting judging forms into judges' registration packets.
4. Purchase or gather needed office supplies (e.g., push pins/Velcro for posters and signs).
5. Prepare numbered cards for identification of poster locations.
6. Get money for registration cash box, coordinate with Treasurer.
7. Hold meeting with registration and audiovisual volunteers to discuss procedures and for troubleshooting lights and projectors.
8. Prepare all meeting signs, sponsor banners etc.
9. Pack all needed supplies in boxes for transport (e.g., programs, guides, forms, name tags, registration supplies, meeting signs, banners, audiovisual equipment and pointers (if needed), and camera).

LOGISTICS (2 weeks prior)

1. Meet with local facility coordinator/event planner to review the items needed for the meeting and to provide a final count of pre-registered attendance for meals and breaks (based on the lead time needed by the facility)
2. Late registration closes.

3. Finalize field trip transportation and lunches.
4. Sign event resume, and final balance for credit card authorization guaranteeing payment.

LOGISTICS (3 days prior)

1. Provide the convention center a final number for meals and provide them a total head count for meeting spaces.

LOGISTICS (1st day of meeting)

1. Set up registration desk with programs, name tags, and other materials (box to return judging forms). Work with the Treasurer to set up credit card machine, etc.
2. Set up meeting signs.
3. Greet participants with a warm welcome and respond professionally to all requests.
4. Get all speakers to provide their presentation for uploading to the computers at least the night before their talks, if possible.

LOGISTICS (last day of meeting)

1. Remove registration materials.
2. Transfer all funds (money from registration, t-shirt sales, etc.) with corresponding accounting materials to the Treasurer.

LOGISTICS (1-2 weeks after the meeting)

1. Provide copies of bills from the meeting facility and others to the Treasurer for prompt payment.
2. Prepare thank you letters for key-note speakers, if appropriate.
3. Prepare an article summarizing the meeting for Ellipsaria.
4. Provide hard copies and electronic files of all program documents, letters, etc. to the Program Chairs of the next FMCS symposium.

Appendix B – Guidance for Organizing and Hosting FMCS Workshops

LOGISTICS (12 months prior)

1. Determine date of meeting based on fewest conflicts with other professional society meetings or popular holidays.
2. Determine meeting location based on suitable local facilities and competitive bids. Request written estimates of costs from several prospective meeting facilities which includes an itemized breakdown of charges for rooms, food (meals, breaks), parking, internet access, shuttle service from/to nearby airport, and audiovisual equipment. Compare prices to those of previous workshops and consult with the FMCS Executive Committee (EXCOM).
3. Establish a program committee.
4. Establish a poster session committee, if appropriate.
5. Establish a sponsorship committee.
6. Establish a field trip and/or special event committee.
7. Develop meeting theme.
8. Brainstorm potential keynote speakers.

Facility Considerations

1. Ease of accessibility from major routes and modes of travel.
2. Size of the meeting facility--meeting room size and layout, adjoining lodging for approximately 125 people.
3. Does the meeting facility offer government rates for lodging?
4. Does the meeting facility have maps, restaurant guides etc.?
5. Is the facility handicap accessible?
6. What are conference room rental costs? Are conference room rental costs waived if food service is purchased from the facility or a minimum number of booked hotel rooms? Does the room cost include necessary audiovisual equipment (e.g., lighted podium with microphone, computers, pointers)? Will they provide a complimentary business room?
7. Location and layout of space for morning and afternoon breaks (Note: these should not be in the same room as the speakers due to noise levels).
8. Location of the registration desks. Is there enough adjoining space for job boards, welcome signs, sponsor signs?

Meeting Room Considerations

1. What is the primary meeting room layout? Will the speakers' podium and microphone be on a riser or on the floor? What is the proximity of the podium to the projection screen? Is the projection screen large enough and hung from the ceiling (i.e., can the projected images be easily seen from all areas of the room)? If there are windows in the room, can they be covered to prevent light interference with visuals?
2. Specify room set-up requirements. Classroom style has been the preferred set-up.

3. Discuss access to and from the meeting room. Ensure that access points are not disruptive of speakers.
4. Discuss control of room lighting for raising and lowering of lights between speakers.
5. Does the facility provide back-up audiovisual equipment?
6. Is the room temperature controlled individually by thermostat?
7. Will they provide easels for posters (if a poster session is planned) and are they an additional cost or will they allow you to bring them in.

LOGISTICS (10 months prior)

1. Prepare a progress report outlining the meeting theme, potential keynote speakers, estimated budget, meeting schedule, and timelines for abstract submittal and registration and present this information to the FMCS EXCOM (work closely with EXCOM leaders on when the next EXCOM meeting is scheduled).
2. Place a "save the date" announcement in Ellipsaria.
3. Contact and line up keynote speakers.

LOGISTICS (8 months prior)

1. If a contributed poster session is planned, send out the first call for papers to the Unio listserver and to Ellipsaria (coordinate with Ellipsaria editor closely on lead time needed)
2. Finalize decision on meeting location, facilities, and dates. Coordinate with FMCS president to schedule a date, time, and location for the EXCOM meeting during the workshop.
3. Complete organization of all committees.
4. Finalize potential keynote speakers.
5. Prepare a draft budget and draft registration forms. Think about if you are going to waive registration fees for invited speakers.

LOGISTICS (4-6 months prior)

1. Work with website designer and FMCS treasurer to set up website for registration and open it for early registration.
2. Work with the hotel to decide when they need final decisions on menu and schedule.
3. Send out a second call for papers to the Unio listserver and to Ellipsaria (coordinate with Ellipsaria editor closely on lead time needed)

LOGISTICS (3 months prior)

1. Abstracts due.
2. Review abstracts after abstract submittal deadline.
3. Notify authors of receipt of abstract by email.
4. Finalize the workshop program/agenda.
5. Finalize details on field trips and other events.
6. Prepare a detailed map with directions to the meeting site.

LOGISTICS (2 months prior)

1. Contact the meeting facility and verify details for the conference (e.g., meeting rooms, audiovisual equipment, food needs and schedule, providing appropriate materials--office

dividers or bulletin boards--for the poster displays, and boards for job listings and photos from the previous meeting).

2. Finalize needs for poster boards for poster session(s).
3. Send out reminder via Unio listserver or the FMCS secretary that the deadline for early registration is about to close.
4. Close early registration, open late registration.

LOGISTICS (1 month prior) depending on events or activities may need to confirm bus reservations, etc.

1. Email letters to all platform presenters and session chairs reminding them of their presentation time, session, guidelines, and duties.
2. Finalize all audiovisual needs and identify the audiovisual person for each session.
3. Contact the meeting facility and verify details for the conference (e.g., meeting rooms, audiovisual equipment, food needs and schedule, providing appropriate materials (office dividers or bulletin boards) for the poster displays.
4. Finalize insurance needs with the meeting venue.
5. Prepare the final draft of the meeting program and proceedings and submit for duplication.
6. Inform the local press about the upcoming meeting, if appropriate.
7. Contact the local chamber of commerce or visitor and convention center to see if they will provide name tags for meeting participants free of charge and to gather general information on restaurants etc. for meeting participants.
8. As registration forms and payments are processed, sort alphabetically and prepare receipts for each person.
9. Send out reminder via Unio listserver or the FMCS secretary that the deadline to reserve a hotel room at the discounted rate is quickly approaching.

LOGISTICS (3 weeks prior)

1. Place food order with hotel/convention center
2. Prepare name tags for participants (if not provided by the local convention center) or provide list of participants to local convention center for name tag preparation. This may be set up to do automatically after late registration closes.
3. Collate meeting proceedings, participant receipts, and other registration materials for ease at registration table.
4. Purchase or gather needed office supplies (e.g., push pins/Velcro for posters and signs).
5. Prepare numbered cards for identification of poster locations.
6. Get money for registration cash box, credit card machine, coordinate with Treasurer.
7. Hold meeting with registration desk and audiovisual personnel to discuss procedures for registration, and for troubleshooting lights and projectors.
8. Prepare all meeting signs, sponsor banners etc.
9. Pack all needed supplies in boxes for transport (e.g., programs, guides, forms, name tags, registration supplies, meeting signs, banners, audiovisual equipment and pointers (if needed), and camera).

LOGISTICS (2 weeks prior)

1. Meet with local facility coordinator/event planner to review the items needed for the meeting and to provide a final count of pre-registered attendance for meals and breaks

(based on the lead time needed by the facility)

2. Late registration closes, now you can produce the name tags.
3. Finalize field trip or event transportation and lunches.
4. Sign event resume, and final balance for credit card authorization guaranteeing payment.

LOGISTICS (3 days prior)

1. Provide the convention center a final number for meals and provide them a total head count for meeting spaces. Each venue may have its own deadlines for this.

LOGISTICS (1st day of meeting)

2. Set up registration desk with programs, name tags, and other materials (box to return judging forms).
3. Set up meeting signs.
4. Greet participants with a warm welcome and respond professionally to all requests.
5. Get all speakers to provide their presentation for uploading to the computers at least the night before their talks.

LOGISTICS (last day of meeting)

1. Remove registration materials.
2. Transfer all funds (money from registration, t-shirt sales, etc.) with corresponding accounting materials to the Treasurer.

LOGISTICS (1-2 weeks after the meeting)

1. Provide copies of bills from the meeting facility and others to the Treasurer for prompt payment.
2. Prepare thank you letters for keynote speakers.
3. Prepare an article summarizing the meeting for *Ellipsaria*.
4. Provide hard copies and electronic files of all program documents, letters, etc. to the Program Chairs of the next FMCS workshop.