

# Freshwater Mollusk Conservation Society



## Procedures Manual

2014

Revision 3: November 2014

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## **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 *Walkerana*, 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 *Walkerana* input, and other important requests to the membership. 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 secure in a 3<sup>rd</sup> 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 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 include Total Contacts (778, 2, 7), Members (755, 2, 10), Donors (2, -, -), and Event attendees (431, -, 4). Below the contacts table, there 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 include '24 Apr 2014 Non Member Registrati...' (18 confirmed, 3 pending, 21 total) and '24 Apr 2014 FMCS Member Registrati...' (48 confirmed, 6 pending, 54 total).

Contact type	Current	New in last 7 days	New in last 30 days
<a href="#">Total Contacts</a>	778	2	7
<a href="#">Members</a>	755	2	10
<a href="#">Donors</a>	2	-	-
<a href="#">Event attendees</a>	431	-	4

  

Date	Title	Confirmed	Pending	Total
24 Apr 2014	<a href="#">Non Member Registrati...</a>	18	3	21
24 Apr 2014	<a href="#">FMCS Member Registrati...</a>	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](http://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 a credit card machine through Bank of America. To manually enter card numbers you will need:
      - i. CC number (Master Card or Visa only)
      - ii. Expiration date
      - iii. Security code
      - iv. Billing address (street number and zip code)
    - b. Once the credit card transactions are input, settle the account and print out the settlement details. Enter 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. 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](http://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](http://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 credit card machine operation and how to keep accounts straight
  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.
  6. Settle the credit cards daily
- 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 *Walkerana* (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.
    - 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](http://www.molluskconservation.org)
- b) [www.usbank.com](http://www.usbank.com)
- c) [www.paypal.com](http://www.paypal.com)
- d) [efileform990.org](http://efileform990.org)
- e) [www.sam.gov](http://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 – Trustwave
  - 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 four professional awards, including the Clench Award, the Lifetime Achievement Award, the Meritorious Service Award, and the Regional Mollusk Meeting Assistance Award. FMCS also grants three types of student awards, including student travel awards, best platform presentation and best poster presentation. Details on each of these six 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 Unio Listserv 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 Unio Listserv 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 Unio Listserv 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 public 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 *Walkerana - The Journal of the Freshwater Mollusk Conservation Society*

*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 it is now the Society's online-only journal. Issues are published two times per year, in March and September. Anyone may submit a manuscript to the journal, 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.

### **3.6.2 *Ellipsaria***

*Ellipsaria* is the online-only newsletter of the FMCS. It includes society news, meeting presentation abstracts, job postings, meeting notices, publication announcements, informal articles about ongoing research, and comments on current issues affecting freshwater mollusks. This format evolved from the *Triannual Unionid Report*, an informal newsletter distributed for several years prior to formation of the FMCS. *Ellipsaria* is posted on the FMCS web site quarterly, in March, June, September, and December. Contributions may be submitted at any time but are due by the 15th of the month before each issue is posted (i.e., February 15, May 15, etc.).

## **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 expects to have a final product by the winter of 2014.

#### **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.

## 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 (1<sup>st</sup> 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. I did, but most is publically available on the web, then I tailored it specific to our group so as not to overwhelm
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 (1<sup>st</sup> 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.