



OPERATIONS MANUAL

**The International Plant
Production Society, Inc.
Southern Region of North America
(IPPS-SRNA)**

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MISSION STATEMENT

We, the members of the International Plant Production Society, Southern Region of North America (IPPS-SRNA), are joined together by a common interest in the propagation and production of plants – as part of a global plant production knowledge network. “To Seek and To Share” is our motto, as we “seek” new propagation and production ideas and techniques for enhancing Horticulture/ Green Industry and developing new plants. We enthusiastically “share” that which we learn. Ultimately, through our interactions with one another, we strive to increase our plant propagation and production knowledge. With this knowledge, we hope to increase profitability in our industry and to beautify the landscape for this and future generations.

SECTION I - GENERAL ORGANIZATIONAL INFORMATION

A. Governance

1. Name

The name or title by which this organization shall be known in law is

"The International Plant Production Society, Inc. - Southern Region of North America" (IPPS-SRNA)

Copies of the regular Southern Region letterhead shall be supplied, upon request, to the Directors and Chairpersons of IPPS-Southern Region Committees as needed.

2. Purpose

"Purposes - The purposes of the IPPS Southern Region of North America are to promote and encourage area, region, national, and international interest in research and education in plant propagation and production in all its branches of Horticulture/ Green Industry through: a) the sponsorship of an Annual Meeting to provide a forum for research reporting, lectures, tours, and public discussion on plant propagation and production; b) dissemination of plant propagation and production knowledge through the publications of the *IPPS Combined Proceedings*, IPPS web page, social media, and other publications of the Region; c) the development of mutual understanding among individuals and organizations concerned with the science and profession of plant propagation and production."

3. Organization

The IPPS- Southern Region of North America was incorporated in 1976 as the sixth region affiliated with the International Plant Production Society.

The term for which the IPPS- Southern Region of North America is organized shall be perpetual.

The U.S. Internal Revenue Service granted IPPS- Southern Region of North America exemption from federal income tax under section 501(c)(5) of the Internal Revenue Code.

4. Constitution and By-laws

The Region is governed by its Constitution and By-laws, which provide authority for all legitimate Region activities and outline basic rules of procedure.

- a. The Constitution and By-laws can be amended at any annual business meeting by a 2/3rds (67%) vote of the members present and voting, provided such amendment is presented in writing to the members of the organization at least two months prior to the meeting by the Secretary.
- b. No amendment to the Constitution and/or Bylaws shall be valid if such amendment conflicts in any way with the Constitution or Bylaws of the International Plant Production Society, Inc. in the judgment of the Board of Directors of the International Plant Production Society, Inc.
- c. In all other respects, this corporation adopts the Constitution and Bylaws of the International Plant Production Society, Inc. and such Bylaws will remain in effect for the corporation until specifically amended as provided above.

5. Operations Manual

IPPS- Southern Region of North America Operations Manual. There shall be a manual that specifies the standard operating policies and procedures (SOP) of the Region and serves as a reference on all matters of the Region's operation. The manual may be amended or revised at the discretion of the Executive Committee at any regularly called meeting.

6. Administrative Year

The Administrative Year of the Region shall commence with the adjournment of the Annual Business Meeting of each year and shall conclude with the adjournment of the next succeeding Annual Business Meeting. The fiscal year begins July 1 and ends June 30, of the following year.

7. Rules of Procedure

The rules of procedure of all bodies of the Region shall be according to *Roberts Rules of Order* (latest edition), so far as applicable and when not inconsistent with the Constitution and By-Laws. The rules of procedures may be suspended by a majority vote of those present and voting at the meeting.

Minutes of Meetings - The presiding officer of each body (*i.e.*, committee) of the Region shall be responsible for forwarding accurate minutes of all meetings promptly to the Secretary/Treasurer and Editor.

8. Dissolution of the Region

All the property of the Region and accumulation thereof shall be held and administered to effectuate the above-described purposes. In the event of the dissolution of the Region no Member, director, officer, or any private individual shall be entitled to share in the disposition of any of the Region assets and all such assets shall be distributed for their stated purposes or to scientific, educational, or charitable corporations, trusts, or foundations meeting the requirement of the Internal Revenue Code of 1954 or the corresponding provisions of any subsequent revenue law.

B. Membership

1. Membership - Eligibility, Admission, Duration

Eligibility - Any person in accords with the purposes of the IPPS- Southern Region of North America who is actively engaged in plant propagation and production of plants and/or in related businesses, teaching, research or extension shall be eligible for membership in accordance with the Constitution and

By-laws. Members must be willing to share their knowledge and experience in plant propagation and growing as they may have. Potential members should meet all requirements as set forth by Article 3, Section 3.3 of the International Constitution. The Executive Committee shall prescribe the procedures for application for membership (including payment of dues) and benefits, privileges, and duties of the membership. There shall be no limit to the number of members.

Duration of Membership - Membership in the Region shall continue until terminated by death, failure to pay the annual dues, or as otherwise provided in these by-laws.

IPPS- Southern Region of North America supports the concept that a concerted effort shall be made to involve women, minorities, and the handicapped in the mainstream of the Region's affairs and activities.

2. Classes of Membership (with Benefits)

Classes of Members: Members shall be divided into classes as follows: Active Members and Complementary Student Members.

2.1 - Active Members. Any person engaged in the propagation and production of plants and/or in teaching and research related to plant propagation, production, and all branches of the Green Industry. Active members can be commercial or non-commercial. Privileges of Active Membership shall include electronic access of the *IPPS Combined Proceedings* and other regularly distributed digital publications as decided by the Executive Committee; the right-to-vote and hold elective office; to serve on Committees; to be eligible for election as a Fellow of the Region; and to receive other privileges as designated by the Executive Committee. The annual dues are set by the International and IPPS-SRNA.

2.2 – Complementary Student Members. To enable 2-year and 4-year students of higher education, graduate students, and military veterans to gain exposure to the Green Industry, IPPS, and the profession of plant propagation and production. Privileges of Student Membership shall include electronic access to the *IPPS Combined Proceedings* and other regularly distributed digital publications, as decided by the Executive Committee. There are discount rates for students and veterans attending the annual meeting, and conference scholarships for qualified individuals.

3. Resignation, Suspension, and Expulsion of Members

Resignations - A member may withdraw from the Region by contacting the Secretary/Treasurer.

Suspension and Expulsion of Members - A Member may be suspended or expelled for cause by a vote of the Executive Committee at any meeting of the Executive Committee, provided the written notice of the proposed suspension or expulsion and a copy of the charges brought against such Member shall be mailed to the Member at the last known address, at least 30 days prior to date of the meeting of the Executive Committee at which such suspension or expulsion shall be considered. *See Addendum A on IPPS-SRNA Anti-Harassment Policy and Complaint Procedure Policy*, including possible expulsion.

4. Membership Year

Membership Year - The Membership Year shall be a 12-month period as determined by the Executive Committee. Presently, it is January 1 to December 31.

5. Membership Directory and Membership Record System

IPPS will publish members' names, addresses, email addresses, etc. on the IPPS International website, which is found in the "members only" area of this website. The Sec-Trea will maintain an up-to-date list of all members. Membership lists are for individual use and not intended for publication or mailing lists.

C. Executive Committee

1. Composition of the Executive Committee

Composition - The Executive Committee normally consists of thirteen voting members. There are ten elected, voting members (President, 1st and 2nd Vice Presidents, Immediate Past President, four Directors, International Delegate and Alternate International Delegate; three voting members who are appointed annually by the Executive Committee: Secretary/Treasurer, Editor, and Digital Communications Director; in years the IPPS-SRNA hosts the International meeting, there is a fourteenth voting member, the International President, who is elected by the general membership

2. Terms of Office and Vacancies

Terms of office shall begin at the close of the Annual Business Meeting following the election, and end at the close of the next Annual Business Meeting (or subsequent Annual Business Meeting when terms are for more than one year.) No person may hold two elected offices concurrently. No elected officer may serve more than two consecutive terms in the same office.

The Executive Committee shall have the authority to fill vacancies occurring in elective positions until the next annual meeting at which time the members shall elect a replacement.

3. Authority and Responsibilities

The Executive Committee shall have all the powers conferred on it by law, by the Certificate of Incorporation, and by the By-laws. The Executive Committee is the governing and policy-making body of the Region. Without limiting the generality of the foregoing, but by way of illustration, it shall be the duty of the Executive Committee to:

- a. manages the property and affairs of the Society;
- b. determines the scope and extent of the activities of the Region and define and carry out its policies;
- c. prescribes the procedures for application for membership;
- d. determines the rate of annual dues;
- e. accepts contributions and sponsorships;
- f. invests and reinvests funds of the Region
- g. elect, appoint, employ, and dismiss such officers, and employees as the Executive Committee shall deem it necessary or desirable, and delegate such powers of the Executive Committee as may lawfully be delegated; and
- h. fill vacancies occurring in elective positions between meetings. This may be done by mail, telephone ballot, or by virtual conference when necessary.

The Executive Committee shall arrange for the Annual Business Meeting, Special Business Meetings, the Annual Meeting, and such other convocations of Members as appropriate. Aside from membership alone, the Executive Committee is the ultimate power of the Region. However, much of this power is allocated to the Secretary/Treasurer, and to various other Committees, officers, and representatives of the Region.

4. Meetings and Reports

There are regularly scheduled meetings of the Executive Committee (EC) during the year. There will be a June, mid-year meeting prior to the annual meeting, an Executive Committee meeting at the beginning of the annual meeting and a Post Conference Executive Committee meeting on the last day of the annual meeting. There are also periodic, scheduled virtual meetings called by the President.

Special meetings of the Executive Committee may be called by the President or upon petition of any

three (3) members of the Executive Committee. The Secretary must give a two (2) week notice of such special meetings. Special meetings may be facilitated by a conference call or other appropriate means.

The Secretary-Treasurer shall request all Committee Chairpersons submit written reports to reach the Secretary/Treasurer at least four weeks prior to the Executive Committee Meetings at the mid-year and annual meetings, so that the reports can be included in the agenda for the meeting.

5. Quorum

Seven members shall constitute a quorum in meetings of the Executive Committee.

6. Voting

The vote of a majority of the Executive Committee present shall be necessary for the transaction of any business. The President shall vote only in case of a tie.

7. Policies of the Executive Committee

Policies of the Executive Committee pertain to subjects not specifically dealt with in the Southern Region's Constitution or By-Laws, but which were established by Executive Committee action or adhered to by mutual consent. These Policies may be changed or amended by Executive Committee action at any regularly called meeting. The Executive Committee shall have full authority to conduct the affairs of the IPPS Southern Region, subject to the constitutions and By-Laws of the Southern Region and of the International Plant Production Society.

D. Elected Officers

1. Elected Officers

The ten elected officers of the Region shall be the President, First Vice President, Second Vice President, past President, four Directors, International Delegate, Alternate International Delegate. In years the IPPS-SRNA hosts the International meeting, an International President is elected.

Officer Liability

Elected and appointed officers shall not be liable for acts or omissions made in good faith except in the event of willful malfeasance. Elected officers shall serve without pay. All elected and appointed officers must sign a Conflict-of-Interest Policy Statement, *see Addendum B.*

2. Terms

The President, First Vice-President, and Second Vice-President shall be elected at the Annual Meeting from among the membership at the business meeting. They shall hold offices for one (1) year and shall not serve for more than two (2) terms. Two directors shall be elected each year at the annual business meeting from among the membership of the Southern Region. They shall hold office for two (2) years making a total of four directors on the Executive Committee. The International Delegate and Alternate International Delegate are also elected at the annual business meeting by the membership. They serve 2-years each, so an Alternate International Delegate is committing to serve for four years. During years the IPPS-SRNA hosts the International meeting, an International President is elected for a 1-year term as Vice-President, and the following year, President of the International.

3. President

The President shall be the chief executive officer of the Region, a voting member of the Executive Committee, and an ex-officio (voting) member of all Standing Committees, with the exception of the Nominations Committee. The President shall have the general powers of supervision and management

usually vested in the office, subject, however, to the right of the Executive Committee to delegate any specific power(s) to any other officers of the Society.

4. First Vice President

The First Vice President shall serve as a voting member of the Executive Committee and, in the absence of the President, shall perform the duties of the President and other such duties as may be prescribed by the Executive Committee or the By-laws, or as delegated by the President. The individual also serves on the Education Endowment Committee, and Membership Communications Committee.

The First Vice President is responsible for the Annual Meeting Program and chairs the Program Committee.

5. Second Vice President

The Second Vice President shall serve as a voting member of the Executive Committee, and chairs the Sponsorship Committee, Necrology Report Committee, and Resolutions Committee. Additional responsibilities include chairing, leading, promoting, and coordinating sponsorship activities of the region. This individual also serves on the Membership Communications Committee. The Second Vice President shall perform other duties as may be prescribed by the Executive Committee, or as delegated by the President. This individual will facilitate communication from the EC Board and brief the Fellows of current society issues, seeking their input, at the annual Fellows Breakfast.

6. Directors

The Directors shall serve as voting members of the Executive Committee, and as ex-officio members on Committees as assigned by the President.

The Directors shall work closely with the Committees in administering and assisting committees with their responsibilities, and also to be a liaison with the Region Members. First-year Directors will also serve on the Membership Communications Committee and Sponsorship Committee. Second-year Directors serve on the Secretary/Treasurer, Editor, and Digital Communications Director Review Committee. Directors are to assist with running the annual meeting. *See Section II-E for further duties.*

7. International Delegates

The Society is under the direction of an International Board of Directors which shall be constituted as follows: One voting Director (i.e., International Delegate) from each Region, plus the International Officers. There is one non-voting alternate delegate from each region. The IPPS- Southern Region International Delegates (one voting delegate and one non-voting alternate) shall be elected by the membership at the annual business meeting. All regions have alternate delegates, the main purpose being to establish continuity from the alternate gaining experience in the affairs and workings of the International Board before he or she steps up to be the voting International Delegate. In years the Southern Region hosts the International meeting, the membership elects a Vice-President of the International (to serve the year before hosting the International meeting) - who becomes the President of the International the year the Southern Region hosts the International. Their responsibility is chairing/organizing the International tour to culminate at the IPPS-SRNA annual meeting.

Qualifications:

1. A history of service as an officer or Executive Committee member of the Southern Region with extensive knowledge of the Region's affairs.
2. Knowledge of the International Board's responsibilities.

3. A commitment to attend the International Board Meetings – both in person and virtual.

IPPS-SRNA Committee Assignments and Duties:

Committee assignments in the IPPS-SRNA for the *International Delegate* are Chair of Early Career International Exchange Program, Chair of Margie Jenkins IPPS-SRNA Industry Conference Scholarship, Chair of Coach Vince Dooley IPPS-SRNA Student Scholarship, and a member of Audit Committee. The *Alternate Intl. Delegate* will serve on the Education Endowment Committee, Membership Communications Committee, Early Career International Exchange Program, Margie Jenkins IPPS-SRNA Industry Conference Scholarship, and Coach Vince Dooley IPPS-SRNA Student Scholarship Committee.

The Intl. Delegate will give periodic written and oral reports, assisted by the Alt. Intl. Delegate - as requested by the Executive Committee and President. In years the IPPS-SRNA hosts the International Meeting, the International President from the SR chairs the International Award of Honor Selection Committee.

Term of Position:

Delegate (International Board Member) - two (2) years, and no Delegate may serve more than two (2) terms. *Alternate* - two (2) years, and no alternate Delegate may serve more than two (2) terms.

Remuneration:

Both the International Delegate and the Alternate International Delegate serve without pay. Travel expenses of the Delegates not paid by the International Board will be reimbursed by the Southern Region. This includes: the Alternate's travel expenses, meals, parking to and from the International Board Meeting are paid by the Southern Region. The Region will reimburse the tour and registration fees of the Delegate and Alternate Delegate - and Vice-President and President of the International in the two years leading up to the Southern Region hosting the International meeting.

Should an International Delegate or Alternate International Delegate be unable to serve out their term, the Executive Committee shall be responsible for choosing a replacement delegate.

E. Appointed Officers

1. Secretary-Treasurer

The Secretary-Treasurer shall be appointed annually by and serve at the discretion of the Executive Committee and shall be responsible directly to the Executive Committee for all operations of the Region. The Secretary-Treasurer shall be responsible for: keeping all records of the region; collecting membership dues and other accounts; managing the financial and business affairs of the Region, with the aid of, and in consent with, the President; and administering all programs and service functions of the Region in accordance with policy established by the Executive Committee. The Secretary-Treasurer is responsible for communicating and corresponding the day-to-day business of the Region. The individual is to assist the Digital Communications Director in maintaining the Region's webpage with appropriate documents, information, and photo illustrations, as needed.

Qualifications:

1. Organizational Skills.
2. Management Experience.
3. Financial & Budgetary Acumen.
4. Serve as custodian of all organizational funds. His/her accounts shall be reviewed annually by the

Audit Committee. Each year at the mid-year Board meeting, the Audit Committee will recommend to the Executive Committee (EC) if a formal audit is necessary. The EC is to vote on the Audit Committee's recommendation. (From By-laws Section 10-C). Current policy is to conduct a *Full Audit* or less expensive *Financial Review* every 5-years (years ending in 5 or 0).

5. Communications, writing and computer skills.

Remuneration: Annual stipend for the Secretary-Treasurer position shall be determined by the Executive Committee.

Term of Position: The Secretary-Treasurer shall be appointed by and serve at the discretion of the Executive Committee and shall be directly responsible to the Executive Committee.

Type of Position: The Secretary-Treasurer will be treated as an independent contractor, and not as an employee of the Southern Region IPPS.

2. Editor

The Editor shall be appointed annually by and serve at the discretion of the Executive Committee (EC) and shall be responsible directly to the Executive Committee. The Editor will attend Executive Committee meetings. The job requirement/effort includes 50%-time editing/working with speakers/authors/program chair; 25% time helping with organization/leadership of the SR, attending meetings, recording and transcribing minutes from yearly zoom calls to mid-year EC meeting to the Annual Conference EC, Annual Business Meeting, and Post EC Meetings; and 25% time is assisting the President and Executive Committee on special projects/issues.

Qualifications:

1. Membership in IPPS-SRNA.
2. Horticultural knowledge including specific understanding and familiarity with propagation and growing topics discussed in annual Southern Region programs.
3. Good editing skills.
4. Competency with voice recording, word processing, scanning and printing technology.
5. History of consistently meeting deadlines.

Remuneration: Annual stipend for the Editor position shall be determined by the Executive Committee.

Term of Position: The Editor shall be appointed by and serve at the discretion of the Executive Committee and shall be directly responsible to the Executive Committee.

Type of Position: The Editor will be treated as an independent contractor, and not as an employee of the Southern Region IPPS.

3. Digital Communications Director

The Digital Communications Director (DCD) shall be appointed annually by and serve at the discretion of the Executive Committee - and shall coordinate activities with the Secretary-Treasurer. The DCD will attend Executive Committee meetings.

Qualifications:

1. Membership in IPPS-SRNA
2. Competency in designing and maintaining websites
3. Create the content for monthly newsletters

4. Graphic design skillset
5. Knowledge of Facebook and other media platforms for creating a social media strategy
6. Communication & marketing skills for retaining & recruiting new members
7. Leadership in managing and chairing the Membership Communications Committee

Remuneration: Annual stipend for the DCD position shall be determined by the Executive Committee, including compensation based on meeting annual goals for obtaining new members.

Term of Position: The DCD shall be appointed by and serve at the discretion of the Executive Committee and shall be directly responsible to the Executive Committee.

Type of Position: The DCD will be treated as an independent contractor, and not as an employee of the Southern Region IPPS.

F. Committees

1. Standing Committees

The twenty-one Standing Committees of the Region shall be as follows: Audit Committee, Fellows Screening Committee, Meadows Award Selection Committee, International Award of Honor Selection Committee, Financial Advisory Committee, Local Site Committee, Long-Range Site Committee, Auction Committee, Sponsorship Committee, Membership Communications Committee, Education Endowment Committee, Necrology Committee, Nominations Committee, Program Committee, Resolutions Committee, Secretary-Treasurer, Editor, and Digital Communications Director Review Committee, Charles Student Research Competition Committee, Dr. Vivian Munday Young Horticulture Professional Work/ Scholarship Committee, Early Career International Exchange Program Committee, Margie Jenkins IPPS-SRNA Industry Conference Scholarship Committee, and Coach Vince Dooley Scholarship Committee. Members of each Standing Committee must be members of the Region; they shall be appointed following standard operating procedures (SOP) of the *IPPS-SRNA Operations Manual* as hereinafter provided and shall serve from the close of the Annual Meeting held in the year. They are appointed until the close of Meeting held in the year in which their terms expire, unless otherwise specified.

2. Special Committees

On approval by the Executive Committee, Special Committees shall perform specified duties or assignments on a continuing basis for as long as needed. Requests to the Executive Committee for the establishment of Special Committees may be initiated by the President, the Vice-Presidents, or a petition of 15 or more Members to the Executive Committee.

A special Committee may be continued for several years, or for as long as it serves a needed purpose.

3. Ad Hoc Committees

On approval of the Executive Committee, Ad Hoc Committees shall perform special tasks as needed. Members of the Ad Hoc Committee shall be appointed or reappointed by the President or First Vice President. Ad Hoc Committees are often structured for special tasks of short duration, and when the task is completed, the Committee is discharged.

4. Committee Meetings and Communications

Committee Meeting - The year of action for Committees extends from one Annual Meeting to the next.

Committee Communications - Between Annual Meetings, most Committee work is conducted by correspondence, telephone, email, personal visitations, or virtually. Committees, such as the Membership Communications Committee, have monthly virtual meetings.

5. Committee Reports

Reports of Region Committees are given to the Executive Committee at the mid-year, June EC meeting, and at the annual business meeting and conference.

SECTION II - DUTIES AND RESPONSIBILITIES OF OFFICERS, DIRECTORS, AND INTERNATIONAL DELEGATES

A. President *See Addendum G: President Checklist and Timeline*

1. During or immediately following the Annual Meeting the newly elected President shall:
 - a. Appoint Chairpersons of Necrology Committee and Resolutions Committee, in consultation with the Secretary-Treasurer.
 - b. Follow up on any new business, suggestions or problems indicated at Annual Meeting. (i.e., Proposed changes in Constitution, site problems, promotion.) This may involve special committees, correspondence with the Executive Committee members, etc.
 - c. Appoint directors to serve ex officio on various committees.
 - d. Serve as an ex-officio member of all committees except the Nominating Committee.
 - e. Act on personal ideas for the advancement of the Society, in conjunction with the Executive Committee.
2. During the year, between Annual Meetings, the President shall:
 - a. Maintain liaison with First Vice President on next year's Annual Meeting plans.
 - b. Maintain liaison with the Local Site Committee Chairperson on next Annual Meeting plans to ensure planning and arrangements are progressing on schedule.
 - c. Meet in mid-June at the next Annual Meeting site with the Executive Committee, and the Local Site Committee to review and approve preparations for the upcoming Annual Meeting.
 - d. Handle or personally delegate all correspondence of the Region which does not fall specifically within another job description.
 - e. Maintain liaison with the Secretary/Treasurer regarding the business of the region and ensure cooperation and support from other Officers and Directors.
 - f. Maintain communications with the Secretary-Treasurer and International Delegates to ensure all obligations and responsibilities to the International Board and to other Regions are met and discharged in a timely and business-like manner.
 - g. Check with Secretary-Treasurer on developing agendas for all Executive Committee meetings.
 - h. Conduct the mid-year EC meeting and scheduled, virtual Executive Committee meetings during the year.
3. At the Annual Meeting following his/her election, the President shall:
 - a. Conduct the Executive Committee meeting prior to the General Sessions.
 - b. Welcome members and guests at the beginning of Session 1. (A copy of these introductory remarks should be given to the editor for publication in the *Combined Proceedings of the IPPS*).
 - c. Conduct Annual Meeting (General Meeting) of the Membership.
 - d. Serve as Master of ceremonies at the Annual Banquet, Awards Ceremony and Live Auction.
 - e. Greeting and welcoming members (especially new members) and guests to the Annual Meeting.

- f. Relay appreciation to appropriate individuals, welcome the newly elected President and pass the gavel. At the conclusion of the meeting, pass the bell to the 1st Vice- President.

B. First Vice President *See: Addendum H: 1st Vice-President Checklist and Timeline*

1. Prepare the program and line up the speakers for the annual meeting, as Chair of the Program Committee.
 - a. Coordinate with local site committee chairman on arrangements of tours and speaker sessions for the meeting.
 - b. Request input from recent Program Chairpersons on how to set up a successful program.
 - c. Solicit potential topics and proposed speakers for next year's program at the scheduled annual meeting.
 - d. By correspondence and telephone, firm up program, speakers, moderators, (including "Questions Box Moderator[s]"). *Prepare a draft copy of the program and send it to the Secretary-Treasurer one month prior to the mid-year June EC meeting.* This will be reviewed at the mid-year, June Executive Committee meeting. The Early Career International Exchange talk needs to be scheduled earlier in the program – to give the speaker more visibility.
 - e. Have a final copy of the program to the Secretary-Treasurer to meet publication deadlines by June 1.
 - f. In writing, remind each speaker and moderator of his/her date, time, topic, and length of presentation. Send names and addresses of speakers and moderators to Editor and Secretary-Treasurer (target date - June 15).
 - g. Obtain a brief resume from each speaker for the moderator to use when he or she introduces the speaker. *See: Addendum H for sample biography and talk synopsis.*
 - h. Determine whether any speaker needs any special audio/visual equipment. Work with the local site committee and Secretary-Treasurer to obtain such equipment.
2. Oversee the general operation of the meeting room.
 - a. Make sure moderators keep the meeting on time and have the Certificates of Appreciation to present to the speakers. *Be aware that two directors are assigned to the meeting room and one should take care of the lights, the other the audio/visual (or they will delegate someone to do it - if so, First Vice President should know to whom the task has been delegated.)* These directors and Vivian Munday Scholarship students should also assist with the microphones for questions from the floor.
 - b. At conclusion of the Annual meeting, gather Question Box, microphone lavalieres, IPPS tripod and IPPS emblem, and other IPPS props and given to the Secretary/Treasurer to store them until the next Annual meeting.
3. Coordinate with the Secretary-Treasurer about funds available for "special" speakers. *The First Vice President may have at his/her discretion \$2,000 to spend on non-IPPS member speakers.* The Secretary-Treasurer should be informed of any special arrangements, complimentary registration or rooms, travel, etc. made with any speaker. In general, it is a good idea to remind speakers they are responsible for their own registration, room reservations, and travel arrangements. Registration can be waived for non-IPPS members attending the conference for the day of their talk.
4. Coordinate with the Secretary-Treasurer on the pre-meeting tour inspection to be held the prior year before the meeting.
5. Attend all Executive Committee meetings.
6. Serve on the Education Endowment Committee, and Membership Communications Committee.

7. In the absence of the President, chair meetings of the Executive Committee and General Membership meeting. Also carry out other duties of President if necessary.
8. Maintain the gavel and bring it to the next annual meeting.
9. At the end of the annual conference, chair the Post-EC meeting as the new President.

C. The Second Vice President *See: Addendum I: 2nd Vice-President Checklist and Timeline*

1. Take over duties of First Vice President if that officer is unable to serve.
2. Become acquainted with duties of all officers.
3. Attend all Executive Committee (EC) meetings.
4. Prepare the Certificates of Appreciation for the sponsors. Have these ready before the Annual Meeting for signature by the President. Get blank certificates from the Secretary-Treasurer.
5. Coordinate with the "Fellows" Committee, of which the Second Vice President is an ex-officio member. Schedule, host and chair an informal "Dutch-treat" breakfast with them during the Annual Meeting. This is scheduled ahead of time with the Secretary-Treasurer who sends out date, time, and location for Fellows to attend.
6. Chair the Fellows breakfast meeting. This includes leading discussion of pertinent matters on behalf of the membership of the Region, and the EC. Fellows are used as a sounding board – and asked for their input. The 2nd Vice-President later reports suggestions and recommendations of the Fellows to the Executive Committee.
7. At the Annual Meeting, distribute a "call for papers" to help next year when the Second Vice President advances to the post of First Vice President and Program Chairman. Survey all members of the Region for their input on topics, speakers, etc. for the next annual meeting. Develop a questionnaire and distribute it during bus tours and the conference – asking for membership input in program topics and speakers.
8. Presents Certificates of Appreciation to the Sponsors at their tables during the morning of 1st day of education talks.
9. Make the presentation of the Fellows Award to the recipient(s) at the Annual Meeting.
10. Chair and coordinate (in collaboration with the Secretary-Treasurer) the Sponsorship Committee for the administrative year. Begin actively seeking conference sponsors prior to January of the conference year. *See: Addendum F: Sponsorship Letter and Payment Form.*
11. Chairs the Fellows Award Committee, Necrology Committee and the Resolutions Committee; serves on the Membership Communications Committee.

D. Immediate Past President

1. Assist the President in any way possible.
2. Attend Executive Committee meetings.
3. Lead and review status of Strategic Plan progress and action items at the mid-year EC meeting.
4. Provide continuity between former Executive Committee members, current Executive Committee members, and the Southern Region membership.
5. Advise the Executive Committee of any uncompleted projects whose completion would benefit the Society and/or the Southern Region.
6. Work with Local Site Chair to recruit local, first-time attendees to the Annual Conference. There are four Margie Jenkins Industry Scholarships available for *1st time professional attendees* with a **June 1 deadline**.
7. Serve on the three-member Nominations Committee with two (2) previous past presidents.
6. Serve on the five-member "Meadows Award" Selection Committee.
7. Chair the Audit Committee.

E. Directors

1. Attend Executive Committee meetings.
2. Attend Annual Business meeting.
3. Provide a conduit for input to the Executive Committee with the general membership.
4. Provide guidance for policy decisions of the Executive Committee.
5. Coordinate with those in charge of the Annual Meeting and assist where help would be beneficial -- at the Registration desk, as welcomers, in the meeting room, i.e., controlling lights, assisting with document distribution and counting votes at the annual business meeting, etc. (*Encouraging members to return to the meeting room in a timely fashion is always helpful.*)
6. Serve on special projects or committees when requested by the officers.
7. First-year and Second-year Directors will also serve on the Membership Communications Committee; First-year Directors serve on and the Sponsorship Committee, and Second-year Directors on the Secretary/Treasurer, Editor, and Digital Communications Director Review Committee.

F. International Delegates

1. Attend International Board of Directors' meetings.
2. Provide a conduit for input from the Southern Region membership and the Southern Region Executive Committee to the International Board.

3. Provide guidance for effective management of the Society's affairs.
4. Attend Southern Region Executive Committee meetings and report to the Board on International activities and business affairs.
5. There should be coordination of dates, places, and times of all scheduled International meetings so the Southern Region does not overlap other Regional annual meetings – and visa-versa.
6. Attend the Fellows "Dutch-treat" breakfast scheduled during the Annual Meeting and brief the Fellows on IPPS issues.
7. Attend the Southern Region Annual Meeting and report to the Membership on International activities and business affairs.
8. Committee assignments in the IPPS-SRNA for the *International Delegate* are Chair of Early Career International Exchange Program, Chair of Margie Jenkins IPPS-SRNA Industry Conference Scholarship, Chair of Coach Vince Dooley IPPS-SRNA Student Scholarship, and a member of Audit Committee. The *Alternate Intl. Delegate* will serve on the Education Endowment Committee, Membership Communications Committee, Early Career International Exchange Program, Margie Jenkins IPPS-SRNA Industry Conference Scholarship, and Coach Vince Dooley IPPS-SRNA Student Scholarship Committee.
9. The *Intl. Delegate* will give periodic written and oral reports, assisted by the *Alt. Intl. Delegate* - as requested by the Executive Committee and President. In years the IPPS-SRNA hosts the International Meeting, the *International President from the SR* chairs the International Award of Honor Selection Committee along with the Intl. Delegate, most recent Past-President, and the chair of the Nominations Committee.

G. Appointed Officers

G1. The Secretary-Treasurer

1. Provide copies of minutes of previous Executive Committee meetings.
2. Provide copies of Treasurer's report at regularly scheduled Executive Committee meetings and at Annual Meeting and provide monthly updates of the financial status to the Executive Committee.
3. Retain minutes of all Executive Committee meetings, and of General Business meeting of the Membership. (These minutes to be furnished to Secretary-Treasurer by the Editor.)
4. Provide copies of minutes of all Executive Committee meetings and General Business meeting of past year, and copies of Treasurer's report, for members attending the General Business meeting.
5. Have all EC members sign the IPPS-SRNA Conflict of Interest Policy Statement.
6. Prepare proposed budget for Executive Committee action at mid-year Executive Committee meeting.
7. Throughout the year keep in close touch with President and First Vice President.

8. Membership:
 - a. Provide list of new members of the Southern Region of the Society to the Executive Committee.
 - b. Manage annual conference registration, creating data base of participants, events registered for, payments, etc.
 - c. Maintain list of Southern Region members and their up-to-date addresses and email addresses.
 - d. Make above three lists available to members of Executive Committee, members of Membership Committee, and to others where appropriate.
 - e. Maintain file of membership status.
 - f. Receive all applications for membership from new members, deposit payment, add to member file and send welcome letter that includes any relevant information.
 - g. Notify Southern Region members who are delinquent in participation requirements and encourage them to return to good standing. Send an updated list of paid members each June so unpaid SR members are not an issue with the International.
 - h. Instruct members of Membership Communications Committee as to general duties.
9. Annual Meeting & Mid-Year EC Meeting Related
 - a. Attend the mid-year, June Executive Committee (EC) meeting, meet with officers and Local Site Committee(s) at the upcoming Annual Meeting site to review and approve preparations.
 - b. Arrange for printing of programs, registration forms, tickets, and other materials for registration packet.
 - c. Registration packets are made available digitally, and currently by snail mail, to Southern Region Members, other Region and International Secretaries, new member applicants, and others upon request.
 - d. Provide local site committee with necessary registration materials.
 - e. Accept Annual Meeting receipts, deposit them or arrange for a registration company to provide these services and pay all Annual Meeting expenses.
 - f. In conjunction with First Vice President, officers of the EC at the mid-year, June meeting, and adherence to Southern Region and Executive Committee policies - ***set registration fees.***
 - g. Arrange for plaques, special citations, speaker Certificates of Appreciation, special identification ribbons and name tags for use during Annual Meeting and at Annual Banquet.
 - h. Assist Local Site Chairperson and his/her local committee(s) in any way needed with planning, arranging, and conducting the Annual Meeting.
 - i. Accept all registrations, and/or arrange for a registration company to provide these services prior to Annual Meeting, provide Local Site Committee Chairperson with needed information from the registrations.
 - j. Prior to the Annual Meeting, email all current and new Executive Committee members and committee chairpersons, including Local Site Chairs, a list of their job responsibilities (SOP) from the *IPPS-SRNA Operations Manual*, inform them of posted information on the regional website, and follow-up with Post-Conference emails – with a link to the *IPPS-SRNA Operations Manual*.
 - k. Work with Editor to have photos of student and member award presentations, new members and annual meeting activities and tours, etc. – forwarded to Digital Communications Director for posting on the IPPS-SRNA web page and other social media venues.
 - l. Serve on Membership Communications Committee, Early Career International Exchange Program Selection Committee, Coach Vince Dooley Scholarship, and Finance Committee.
10. Provide agendas for Executive Committee meetings, coordinating with the President, and others as necessary.
11. Handle general correspondence for Southern Region.

12. Work closely with all Southern Region committees and serve ex-officio on those committees to which appointed by President.
13. Work closely with all Southern Region officers and directors in conducting and promoting the affairs of the Region.
14. Handle the daily affairs of the Southern Region, and other duties as Executive Committee may direct. These include, but are not limited to:
 - a. Releasing Society and Regional information
 - b. Printing membership applications
 - c. Writing letters of appreciation
 - d. Maintaining contact with other IPPS regions
 - e. Coordinating and overseeing IPPS Southern Region booths to attract new members and dispense Society information
 - f. Notify committee chairpersons (and others as necessary) to have their reports as needed for the Executive Committee meetings and the Annual Meeting
15. Handle fiscal affairs of the Southern Region under the direction of the Executive Committee.
 - a. The Secretary-Treasurer is the custodian of all organization funds. His/her accounts shall be reviewed annually by the Audit Committee. Each year at the mid-year Board meeting, the Audit Committee will recommend to the Executive Committee (EC) if a formal audit is necessary. The EC is to vote on the Audit Committee's recommendation.
 - b. Prepare a one-, two-year, and three-year annual operating budget for approval by the Executive Committee.
 - c. Receive and pay Southern Region bills, keeping receipts and records in an orderly and professional manner, submitting monthly and annual financial reports. Send monthly credit card statements to the Editor. Coordinate with the Audit Committee, Finance Advisory Committee and approval by the EC. Submit annual income tax filing for the region.
16. Provide the International Executive Director and SRNA Digital Communications Director with:
 - a. Names, addresses, and telephone numbers of elected/appointed officers, including International Director and Alternate, regional committee members.
 - b. Program of annual meeting and any other pertinent meetings for inclusion in the International Newsletter/ International IPPS website.
 - c. Dates, places, and times of all IPPS-SRNA scheduled meetings.
17. Provide the International Executive Director with:
 - a. Name, mailing address and other membership directory information, and dues for all new and reinstated members. Be sure to indicate status of reinstated members. (International Membership year is calendar year.)
 - b. Members should now update their own information (mailing and email addresses) online; the Secretary-Treasurer can assist upon request. The Sec-Tres can assist upon request.
18. Provide the other Regional Secretaries with:
 - a. Transfers of Membership
 - b. Pertinent items of business, newsletters, etc.
19. When necessary, send news releases regarding IPPS Southern Region activities to trade

magazines and other publications. Maintain Sec-Tres -to-Sec-Tres communications with other regions.

20. The Southern Region Secretary-Treasurer will annually submit an announcement seeking nominations from the general membership to be submitted to the Secretary-Treasurer for the Southern Region IPPS Sydney B. Meadows Award of Merit and Fellows of the IPPS-SRNA. The Secretary-Treasurer also helps announce solicitations for the Dr. Vivian Munday Young Horticulture Professional Work/Scholarship, Early Career International Exchange program, Margie Jenkins IPPS-SRNA Industry Conference Scholarship, and Coach Vince Dooley SR-IPPS Student Scholarship. The Secretary-Treasurer will also provide this information with the appropriate committee chairs.

G2. The Editor

1. Assist the 1st Vice-President (annual Program Director) with instructions and deadlines for speakers in preparing their presentations and submitting their papers for publication in the *Combined Proceedings of the IPPS*.
2. Shortly after the Annual Meeting program is completed, notify speakers of deadline dates and format specifications for manuscripts to be considered for publication in the *Combined Proceedings of the IPPS*. Follow up with requests to speakers who have not submitted their papers at the Annual Meeting – both during and after the meeting.
3. Help speakers with writing/ editing assistance as needed.
4. Attend all Executive Committee meetings, record minutes, and submit minutes to Secretary-Treasurer within one month after meetings.
5. Attend Annual Meeting sessions, including the Annual Business Meeting and Executive Committee meetings. Provide minutes of Annual Business Meeting to Secretary-Treasurer within one month after meeting.
6. At or prior to Annual Meeting, collect from all speakers electronic and/or hard copies of manuscripts presented.
7. Within two months after the Annual Meeting, send an electronic copy of the *Annual Meeting Report*, the names and addresses of new officers, directors, and committees for the upcoming year, and all committee reports to the International Editor.
8. Within two months of the annual conference edit all manuscripts, send edited manuscripts to the International Editor for publication in the *Combined Proceedings of the IPPS*.
7. On receipt of the galley proofs from the International Editor, email send a copy to each speaker for approval and correction, allowing two weeks for return. Review second copy for errors.
10. After all corrections are made, return the corrected galley proof to the International Editor. This completes the work of the Southern Region Editor in preparation for the *Proceedings*.
11. Work with Secretary/Treasurer and Digital Communications Director to have photos of the Executive Committee officers and directors, student and member award winners, new members and annual meeting activities and tours.

12. Assist the Digital Communications Director with the SR-IPPS web page for updates and developments.
13. Serve on Education Endowment Committee.
14. Work with the President and Executive Committee on special projects during the year.
15. Review monthly financial documents/ credit card statements supplied by the Secretary-Treasurer – as recommended in a 2025 audit review - in support of the Secretary-Treasurer and Executive Committee's fiscal responsibilities.

G3. Digital Communications Director

Overall responsibilities of the Digital Communications Director (DCD) include: a) design and maintain the SRNA website, b) develop the content for the monthly newsletters, c) create a social media strategy through Facebook and other appropriate media platforms, d) create graphics including sponsorship logos and other info graphics for monthly newsletter, social media, and website, e) help lead in the retention & recruitment of new members through appropriate media platforms and other communications, and f) Chair the Membership Communications Committee.

Specific Monthly/ Annual Tasks of the Communications Director

1. Post information for the upcoming Annual Meeting, as it becomes available.
2. Post edited papers from the past annual meeting, supplied by the Editor.
3. Post information from the poster presentations.
4. Post information about the upcoming student competition and exchange programs.
5. Post and archive announcements such as the President's message.
6. Build, distribute, and archive the monthly e-newsletter.
7. Post and archive award recipients.
8. Post and maintain contact information of the current Board of Directors.
9. Update sponsor information on website and in e-newsletter.
10. Develop a schedule for posting, editing, refreshing, and removing time sensitive content. Review this schedule annually.
11. Develop a schedule for refreshing photos.
12. Provide analytics to the Board on web and social media usage.
13. Troubleshoot and repair the website, as needed.
14. Participate in planning for future changes to the website.
15. Report problems or issues to the International Web Master.
16. Attend the Annual Conference.
17. Be available during oral presentations, business meeting, and both Board meetings.
18. Be available to attend the mid-year Board meeting.
19. Attend Board of Director conference calls.
20. Chair the Membership Communications Committee scheduled conference calls.
21. Present a web user seminar at the annual meeting when requested.
22. Make announcements during the annual meeting requesting content.
23. Take photos during the annual meeting for specific and general content to complement those taken by other sources.
24. Develop a plan for signing up new members through the website.
25. Create a comprehensive Facebook social media strategy.
26. Keep the Facebook page current.

27. Provide social media analytics.

28. Set goals for obtaining new members via outreach and social media platforms each year – *and expect compensation based upon reaching these goals.*

The Digital Communications Director (DCD) will work with the Secretary/Treasurer. The Secretary/Treasurer will distribute content to the DCD. Content may also come directly from the Regional Editor as well as the President and other EC members.

SECTION III - AWARDS & SELECTION COMMITTEES

The selection committee members of the three awards are selected by standard operating procedures (SOP) from the *Operations Manual* and not elected.

A. Sidney B. Meadows Award of Merit – IPPS, Southern Region of North America

Sidney Meadows was a distinguished nurseryman, honored horticultural leader, humanitarian – and one of the founders of the IPPS-SRNA. He was a long-time nursery ambassador, and avid supporter of education, research, and the Green Industry/Horticulture. In 1976, at the 1st IPPS-SRNA meeting in mobile, Alabama – Sidney Meadows planned the nursery tours. Meadows was a frequent speaker at IPPS conferences, highly respected, a great mentor – and exemplified the IPPS motto: To “Seek and Share”. In 1990, the IPPS-SRNA initiated the Sidney B. Meadows Award of Merit.

Purpose of the Sidney B. Meadows Award of Merit

- To honor and recognize outstanding individuals for their contributions to the nursery/Green industry, plant propagation, and production in the Southern Region of North America.
- This is the highest honor the IPPS-SRNA bestows upon a member.

Criteria

- a. Is a current member of the Southern Region IPPS
- b. Has made an outstanding contribution to the IPPS and to plant propagation and production
- c. Dedication to the ideals of the society to "seek and share"
- d. Award cannot be presented to an individual more than once
- e. Desirable that the individual has been recognized as a Fellow of the Southern Region IPPS.

Award Committee

- a. Composed of five members: 3 most recent past presidents and 2 most recent recipients of the award
- b. *The chairperson is the earliest elected past president, i.e., senior past president. The chairperson is rotated off the committee after each year.*

Nomination Process

- a. Any member can nominate an individual for consideration. The Secretary-Treasurer must receive this nomination by **June 1**.
- b. Requests for nominations are included in the Southern Region E-Newsletter asking for nominations to be submitted to the Secretary-Treasurer from the general membership to pass onto the Chairperson.
- c. If there are no nominations from the membership, the Secretary-Treasurer will submit a list of potential nominees for the committee to consider from membership files, which contain past positions held, contributions to the IPPS, propagation, and other worthy achievements.
- d. After receiving this information from the Secretary-Treasurer, the Chairperson sends the list of potential awardees, along with any information received by the Secretary-Treasurer, to committee members in June.

- e. Each committee member ranks the top three (3) candidates and submits the information back to the Chairperson who tallies up the score: 1st = 10 points, 2nd = 7 points, and 3rd = 4 points. There should be a column to indicate that no submitted candidate should be considered for that particular year (i.e., the award does not need to be given annually.) This scored information, with the award winner's name, is forwarded back to the Secretary-Treasurer. Prior to the award presentation, the selection is kept confidential.
- f. The Secretary-Treasurer has a plaque made up (by September) for the awardee (the Secretary-Treasurer should personalize this each year - see samples.)
- g. It is the Chairperson's responsibility to write a biographical sketch of the awardee and forward it to the Secretary-Treasurer. Meadows Award is presented at the Annual Awards Banquet by the Chairperson, or in their absence, the President.
- h. *Note* - The Sidney B. Meadows Award of Merit is not required to be awarded annually, but is awarded in years when there is an outstanding member who meets the criteria.

B. Fellows of the Southern Region IPPS

Purpose of the Fellows

- a. To honor and recognize outstanding individuals for their contribution to the nursery/Green industry and to plant propagation and production in the Southern Region. This program was started in 1993.
- b. To serve as a forum for fellowship and information exchange among long term IPPS members who may no longer directly participate on the Southern Region IPPS Board.
- c. At the discretion of the current board of directors, the Fellows can be used as a potential sounding board for current and long-term issues, strategic planning and future direction of the Southern Region IPPS.

Mechanics

- a. The Fellows meet for a "Dutch-treat" breakfast during the Annual IPPS meeting. The 2nd Vice President will chair and the Secretary-Treasurer and International delegate shall be present to brief the Fellows on IPPS issues.
- b. In the event the current board of directors requests an ad-hoc committee of Fellows to be formed, a rotating chair will be selected among those Fellows present at the meeting.

Criteria and Eligibility

- a. Election as a Fellow of the IPPS Southern Region is an honor. A Fellow is recognized for contributions to the nursery/ Green Industry in the Southern Region and to plant production and propagation.
- b. A Fellow must be an active member of the Southern Region with at least 10 years membership in the IPPS.
- c. To enhance the intent of election as a Fellow, it is recommended that no more than two individuals per year may be selected as a Fellow. Each new class of Fellows will be recognized at the Annual Business Meeting or Annual Banquet and presented with a Fellow's plaque.

Nomination Procedures

- a. During early spring, the Secretary-Treasurer will send out an announcement to the general membership asking for nominations of Fellows.
- b. The sponsor of a nominee shall be an active member of the society. The sponsor is to contact the Secretary-Treasurer and request a nomination packet, which must be completed by the sponsor and submitted back to the Secretary-Treasurer by **June 1**.
- c. No current board member is eligible for election as a Fellow until after his/her term expires.

Screening Committee Selection

- a. The nomination committee selects the Fellows Screening Committee members via standard operating procedures (*SOP*) from the *Operations Manual* and not elected.
- b. The Fellows Screening Committee shall be composed of four (4) members and chaired by the 2nd Vice-President. At least two of the members must not be current members of the Executive Committee Board.
- c. Each year one new committee member will be rotated on for a three-year term.
- d. A selection committee member may serve no more than two (2) continuous terms.

Action by the Screening Committee

- a. Upon receipt of the completed nomination documents from the Secretary-Treasurer, each committee member will rank the top five candidates (#1 = 10 points, #2 = 8 points, #3 = 6 points, #4 = 4 points, and #5 = 2 points) and mail such votes to the current 2nd Vice-President.
- b. As chairman, the 2nd Vice-President will report the committee's recommendation to the Secretary-Treasurer. The committee's recommendation should be made at the June mid-year Executive Committee Meeting. The 2nd Vice-Presidents presents the Fellows Award to awardees at the Annual Awards Banquet. Prior to the award presentation the selection is kept confidential.

C. International Award of Honor

The IPPS International Board established the International Award of Honor in 1986 to recognize outstanding members from different IPPS world regions who exemplify the IPPS motto “To Seek & Share” - in the global plant production knowledge network. An awardee is chosen from the Region that is hosting the International meeting. The award is given by the IPPS International board and presented by the International President. The four awardees to date from the IPPS-SRNA include Charles Parkerson, Richard “Dick” Marshall, Fred Davies, and Donna Fare.

Purpose of the International Award of Honor

- a. This is the sole award given by the IPPS International Board of Directors
- b. To recognize an outstanding member from the IPPS for their contributions and professionalism in “Seeking and Sharing” Green industry/ plant production and propagation knowledge globally and in their Region.
- c. The awardee is chosen from the IPPS-SRNA in the year our Region hosts the International meeting.

Criteria & Eligibility to selected from the IPPS-SRNA

- a. The individual is an outstanding member of the IPPS-SRNA who exemplifies the IPPS commitment to “seek and share”.
- b. For their International and Regional contributions to the profession of plant propagation, production and Horticulture/ Green Industry.
- c. For exceptional and distinguished service to the IPPS-SRNA as a member and in leadership roles.
- d. It is desirable that this individual will be recognized as a previous Meadows Awardee and Fellow of the IPPS-SRNA.

Award Committee

The four-person committee will be chaired by the International President from the IPPS-SRNA, and also composed of the International Delegate, the most recent Past-President, and the chair of the Nominations Committee

Nomination Process

- a. In the year prior to hosting the International meeting, the Chair of the committee will query her/his committee and also seek the counsel of other IPPS-SRNA members in developing a *confidential* short-list of eligible candidates.
- b. After consultation, the Chair will make a short-list of the top five-candidates in January of the year the IPPS-SRNA hosts the International meeting. It is the responsibility of the chair and committee to establish a ranking system of candidates. A zoom meeting or other venue is preferable for the committee to agree on the ranking system – and discuss the top five candidates – *without voting*. At a later date, the four committee members will rank their top three (3) candidates and submit the information back to the Chairperson who tallies up the score: 1st = 10 points, 2nd = 7 points, and 3rd = 4 points. If there is a tie between the two top candidates then committee should convene to make a final decision.
- c. In confidentiality, and **by May or earlier**, the Chair forwards the name of the awardee to the IPPS Regional President and Secretary-Treasurer -who has a plaque made to present to the awardee during the fall when the SR hosts the international.
- d. It is the responsibility of the Chair to develop a “Dedication” article of the awardee to posted on the International Webpage and/or published with the year’s *IPPS Combined Proceedings*.
See <https://ipps.org/donna-fare/>
- e. The Award is presented by the International President (Chair) in the presence of the International Board at the International dinner hosted by the SR. The International President later recognizes the awardee in the presence of the SR membership at the SR annual banquet and/or during the first day of the regular SR annual conference.

SECTION IV - OTHER, STANDING COMMITTEES

Committee work is a very important function of the organization. All committee chairs are expected to participate in the Executive Committee mid-summer meeting either virtually or through previous reporting to the Secretary-Treasurer or President. The time and location will be determined by the President. All standing committees are selected by standard operating procedures (*SOP*) from the *Operations Manual* and not elected.

The remaining 18 standing committees are as follows:

A. Audit Committee

Purpose

To provide annual monitoring of the financial records of the Southern Region.

Make-up of Committee/How Members are Chosen

Three (3) members, consisting of the Past President, the President, and the International Delegate. The Past President shall serve as chairperson.

Term

Concurrent with their respective terms of office.

Duties and Responsibilities

- a. Evaluate the accuracy of the Region's financial records at least annually.
- b. Report on its findings to the Executive Committee at its June mid-year meeting
- c. Report on the findings of the annual audit for the membership at the Business Meeting during the Annual Meeting.
- d. Make recommendations to the Executive Committee if an official audit is needed. Current policy is to conduct a *Full Audit* or less expensive *Financial Review* every 5-years; years ending in 0 & 5.

B. Finance Advisory Committee

Purpose

The Finance Advisory Committee (FAC) is a standing advisory committee making recommendations to the Secretary-Treasurer and Executive Committee on prudent investing of funds for the long-term financial health of the IPPS Southern Region of North America (SRNA). This includes recommendations for a previously established **Reserve Fund** (\$125,000) - and a **Sustainability Fund** – using appropriate financial instruments. The IPPS-SRNA Executive Committee (EC) is responsible for managing the financial affairs of the society – and relies on the FAC for input. It is the responsibility of EC to task the Finance Advisory Committee with specific financial goals for the organization.

Make-up of Committee/How Members are Chosen Up to four members, plus the Secretary-Treasurer are nominated by the Nominating Committee and approved by the Executive Committee – following *Standard Operating Procedures (SOP)*. The appointed members vote among themselves who will serve as Chair, and as Co-Chair. The Secretary-Treasurer is also a voting member. Other than the Secretary-Treasurer, members need not be on the current EC. FAC members have expertise in investing, finance and/or business management.

Term

To stagger the initial committee - there will be two members on 2-year terms and two members on 3-year terms. At the end of their term, each committee member may serve additional three year term(s) – based on the recommendation of the Nominations Committee and approval of the Executive Committee. There is no term limit to how many 3-year terms a member may serve. The committee is approved by the Executive Committee (EC) and not voted on by the general membership. The Secretary-Treasurer is a permanent member. There are two signatures on money investments/transfers: the Secretary-Treasurer and the Chair of the Finance Committee. The Secretary-Treasurer is the point of contact with the financial institution(s) selected.

Duties and Responsibilities

1. Develop an investment policy as part of the *Sustainability Fund* for the long-term financial health of the SRNA. This includes recommended investment firm(s) and suggested mutual funds/ other financial instruments. Likewise, review and make investment recommendations for the *Reserve Fund*.
2. Recommend to the EC the retention or dismissal of outside professionals such as custodian banks, investment managers, and investment advisors.
3. Monitor and evaluate the performance of all service providers by regular review of reports provided to the Committee and by meetings with the service providers.
4. Receive and review reports from staff, investment advisors, and investment managers regarding the status of assets within the investment portfolio.
5. Undertake any other activities set forth in any investment policy statement (or amendments thereto), adopted by the EC.
6. Via a scheduled virtual meeting or other appropriate means, the FAC meets quarterly to jointly monitor the funds invested of the Region - for both the *Reserve Fund* and the *Sustainability Fund*. A quorum for the meeting includes the Secretary-Treasurer and three other members. The Chair of the FAC writes a synopsis of each meeting for distribution to the FAC – and EC if requested.

7. Quarterly meetings include evaluation of investment policies adopted by the EC, the investment activities, and the risk management controls and process related to investments continue to effectively contribute to meeting the goals and objectives set for the investment portfolio.
8. Report to the Executive Committee (EC) twice a year with recommendations for the Region's invested funds for approval by the Executive Committee at its June mid-year meeting, and at the Annual Meeting. This report may be submitted virtually or in writing - in lieu of personal attendance.
9. The investment statements should be sent to the IPPS-SRNA office for the EC to have full access.

Additional Information and Guidelines

The policy of the Southern Region IPPS is to maintain a ***Reserve Fund*** for the viability of the organization should adverse weather or unforeseen events (i.e., pandemic, etc.) prevent the annual meeting - depleting annual revenue generation. The goal is to accumulate \$125,000 for emergency/reserve funds as a line item, to be placed in reserve via low risk financial instruments (bond funds, CD's, money-market funds, etc.). Some monies need to be accessible for yearly operation expenses in-between new sponsorship funding. The ***Reserve Fund*** of \$125K is currently in CDs – but can be placed in other safe, profitable investments.

Through annual contributions the ***Sustainability Fund*** is meant to be invested in mutual funds with monies not needed for 4-5 years, i.e., low-cost S&P 500 index, Total Market index, mixed equity/bond fund, etc. – at the recommendation of the Finance Advisory Committee and approval of the Executive Committee.

Yearly contributions are at the discretion of the SRNA-Board, i.e., with an annual goal of at least \$10,000/year, from a combination of a budgeted line-item, auctions, and/or funds available at the end of each fiscal year. The annual contribution is with the approval of the Executive Committee.

C. Local Site Chair/Committee *See: Addendum J: Local Site Chair/Committee Checklist & Timeline* Purpose

Except for obtaining speakers, the purpose of this committee is to arrange the necessary ingredients of a smooth and successful annual meeting and host the membership and guests to an enjoyable and educational visit to the chosen site.

Make-up of Committee/How members are chosen

The chairperson is elected by the membership four (4) years before her/his area hosts the meeting. The individual selects a committee of unlimited (but dedicated) volunteers to attend to the many details of staging a successful Annual Meeting.

Term

The committee has been in existence for four years, although it is normal for several members to perform most of their responsibilities within the final 1 to 2 years before the meeting is in their locale.

a. In the event the chairperson cannot fulfill his/her duties, a replacement will be determined by the officers of the Executive Committee, including the President, 1st Vice-President, Sec-Treasurer, etc., in consultation with the Long-Range Site Committee chair for a decision.

b. *See Addendum K: IPPS Conference Planning Outline & Timeline* for the Local Site Chair and Committee – which contains key needs and dates in planning, developing and conducting the Annual Conference.

Duties and Responsibilities of Local Site Committee Chairperson

- a. *Hotel*: It is never too early to start looking and investigating which hotel would be suitable to host our IPPS meetings. Cost, location, convenience, stability of management, size, experience in conventions, willingness to accommodate, and general appearance are all important factors to consider. The Secretary-Treasurer uses HelmsBriscoe management, a hotel contracting company, for hotel options and contracting.

Contracts should be signed at least 2 years prior to the meeting date. Members want a nice hotel at reasonable prices. The hotel should be at least a 3-star property. The Secretary-Treasurer can provide a list of past hotels that have hosted our meetings in the selected area. The Sec-Treasurer will be in contact with HelmsBriscoe management – to help with pricing and booking of hotels. The Secretary-Treasurer will assist – and sign all contracts. *Initial hotel site meeting between the local site chair/committee and hotel sales manager is done prior to signing the contract.*

The Sec-Treasurer will provide you and the hotel with a history of attendance and hotel use. The hotel should have restaurants and/or other restaurants within close walking distance. The Secretary-Treasurer will need to fill out a credit application with the hotel. Many hotels will provide shuttle service free to IPPS guests from the airport. Special treatment can generally be arranged for Vice-President and President. Check on upgrades for special guests and officers. Ask the hotel management about complimentary rooms based on IPPS room usage.

Establish a close relationship with the Sales Manager. Have periodic phone conversations and occasional lunches to keep things rolling.

[Running meetings has become more challenging – hotels in urban areas have become quite expensive, the price of buses for tours has more than doubled since COVID. *Other venues rather than just the usual large hotel complex – with their expensive food and room occupancy requirements, etc. can be considered by the Local Site Committee*].

- b. *Other Hotel Details* [These details must be included in the hotel contract].
- i. Can an early breakfast buffet be arranged for our large group?
 - ii. Arrange a smaller separate meeting room for executive meetings, membership communications committee, site committee and general use, available at all times.
 - iii. Arrange for executive dinner or lunch and meeting time with hotel, Secretary-Treasurer and President.
 - iv. Arrange for any other special breakfast, such as the Fellows Meeting Breakfast.
 - v. Be sure the large meeting room is large enough. The hotel meeting space should be for 250+ attendees, with the seminar room seating in a classroom or theater/classroom combination. The banquet space should be for at least 200 attendees.
 - vi. Check audio-visual equipment, availability and cost.
 - vii. Discuss room arrangements.
 - viii. Schedule refreshments during breaks. Ask for sponsorship from suppliers and nursery associates to offset costs. The Secretary-Treasurer and Sponsorship Chair can assist with sponsorship info.
 - ix. Check on parking availability for those who drive.
 - x. A year prior to the annual meeting at the location - plan a site inspection during the mid-year, June, EC meeting with the Sales Manager of the hotel Secretary Treasurer, 1st Vice-President and other officers of the Executive Committee. Ask for a staff hotel management meeting including registration, kitchen, security, housekeeping, and other key hotel departments the day before the

meeting starts. Professionalism of the hotel will greatly enhance the process of our meeting. *Costs for the meeting, lodging and food must be available for discussion at the mid-year, June, EC meeting.*

- xi. Coordinate with the Secretary-Treasurer and Digital Communications Director so that on-line registration for the meeting and hotel is available by *1 July*.
 - xii. Ask for the possibility of box lunch preparation for use on bus tours.
 - xiii. Work with hotel on expected arrival of members at airport to schedule transportation.
 - xiv. Try to get meeting rooms at no charge.
 - xv. Plan for the Ice Cream Social & Question Box.
 - xvi. Arrange for adequate bar help after tours and in prime time.
 - xvii. *Check every few weeks to make sure that the same Sales Manager is still on the job.* This seems to be a problem in a lot of hotels. A new manager may be clueless about your meeting.
 - xviii. Try to get the hotel to agree to a cut-off date for reservations about 2 weeks prior to the meeting. Historically, most of our registrations come in less than a month before meeting time.
 - xix. Try to get a check-out time of 1:00 - 1:30 p.m. on the last day of the meeting. We usually run right up to 12:00 noon before adjournment.
 - xx. Ask for a block of rooms a little larger than the anticipated need. This figure can be reduced as the meeting date approaches, but additional rooms are often hard to come by a few weeks prior to the meeting. Take care when determining the number of rooms in the room block, while we want enough for our needs we do not want to have to pay for unused contracted rooms.
 - xxi. Ask the hotel about the availability and costs of easels for poster display.
 - xxii. Work very closely with the Program Chairman so times and events will be coordinated.
 - xxiii. Report to the Executive Committee during their June, mid-year meeting.
 - xxiv. Involvement of local IPPS members: Plan a meeting of local IPPS members. The initial meeting could be a social affair and then discuss the upcoming meeting. Include everyone. These people can be of great help in making your meeting successful. Volunteers for tour scheduling, bus arrangements, special hospitality functions, tour guides and other tedious jobs can be found. After the initial meeting, another one may not be necessary. As site chairman, you can manage the whole affair by phone, zoom, etc. Again, a professional hotel contract company is used to secure hotel accommodations, i.e. working with Sec-Tres Foster and HelmsBriscoe management – for pricing and booking of hotels.
- c. *Tours and Buses:* Designate a local IPPS member to take charge of scheduling at visiting nurseries and to make arrangements for bus services. Otherwise, you will have to do it. Shop for competitive prices and serviceable buses. Closely time nursery visits and in-transit times. Allow for a tight, but not hectic, schedule that will return to the hotel at a reasonable time. Stress to all tour hosts the need to stay on schedule. Refreshments at every nursery are not necessary. Two nurseries can share the cost if necessary. The Southern Region *officially discourages* the practice of taking private, rental or university vehicles on tours during the Annual Meeting for reasons of liability and inconvenience to the hosts.

Tour bus guides/captains should be on each bus to tell of points of local interest. Microphones or megaphones should be available for nursery and bus tour guides. They should know the route and assist with parking, loading and unloading of the buses. Bus guides/captains should make coolers of water/drinks available at each stop. *See Addendum M: Bus Captain Handbook, Tour Descriptions, Bus Signs.*

Bus arrangements need to be flexible, allowing for short-notice additions or cancellations according

to our needs. Run the bus routes and tours for specific times and scheduling. Future tours are being scheduled during the week to avoid weekend nursery tours with difficulty in nursery staffing.

- i. At the June preview meeting, have the member who is responsible for the tours on hand and prepare for a dry run visit to all tour sites.
 - ii. Touch bases with your nurseries and tour sites several weeks prior to the meeting. Give them approximate times of arrival and departure on the tour dates.
 - iii. Try to arrange for enough tour guides at each facility so that the group can be broken up into as many small groups as possible; people can hear better and more questions can be asked. Emphasize with all tour sites the importance to our society of an organized tour at every stop, explaining to each group the method of operation, why they perform certain procedures, etc. Each site should provide a brief, concise handout giving history, purpose, size, crops propagated, etc. *to be distributed on the bus prior to arrival at each stop*. Never have groups "dumped" at a tour site and be told, "Look around and if you have any questions, just ask!"
 - iv. After the meeting, send letters of thanks to the owners or managers of all the toured facilities.
- d. Registration: The Secretary-Treasurer is responsible for registration. Use large type on name badges, double print on both sides. Plain white tags keep with the intent and focus of the name and affiliation. Registration may be outsourced to a registration company while the Secretary/Treasurer retains overall responsibility.
- e. Hospitality - Create a feeling of extended hospitality by yourself, your city, and area to IPPS members by their involvement. Tend to detail and put final touches together. Think about prior meetings, problems presented, irritations present, and work to avert similar situations. Arrange for a recommended restaurant list and a list of area attractions.
- f. Other Items
- i. Arrange for appropriate amount of food at food functions. This saves embarrassment to all involved. Work with the Secretary-Treasurer on this – particularly for any vegetarian/vegan needs.
 - ii. Have the names and telephone numbers of the people to contact in case there is a problem with the buses, food caterer, hotel service, etc. Be sure that they are in management positions so there will be no delay in correcting a problem.
 - iii. At least six months before the Annual Meeting, check with Auction Committee Chairperson to be sure Auction plans are on schedule.
 - iv. Include key members of your local-site committee in their respective parts of June preview meeting.

Duties and Responsibilities of Local Site Committee Members

- a. Think back to the most successful Annual Meetings you have attended and duplicate or improve on what made them successful meetings.
- b. Extend hospitality to all members and guests.

Additional Information and Guidelines

- a. Consult with previous Local Site Committee members and the Secretary-Treasurer who will gladly help you with details. Utilize the *IPPS-SRNA Operations Manual*, including *Addendum K: IPPS Conference Planning Outline, Checklist & Timeline*.
- b. Keep good records and notes in an orderly manner on planning the conference to pass on to the next Local Site Chair.

D. Long Range Site Committee

Purpose

Provide continuity in scheduling and staging successful Annual Meetings in all areas of the Southern Region IPPS.

Make-up of Committee/How Members are Chosen -

The six members are selected based on the year and location the Southern Region will hold its annual meeting. The local site committee chairperson from the previous year's meeting will serve as committee chairperson. Four members will serve as Local Site Chairs during the subsequent years the Southern Region meets in their location. The 6th member is the most recent Past-President.

Duties and Responsibilities

- a. Select a site for the Annual Meeting in advance. *It is strongly encouraged that future sites be selected four years from the current meeting site.*
- b. Select an IPPS member who agrees to serve as Local Site Committee Chairperson. This person should have attended multiple Southern region conferences and preferably had planned other events.
- c. Coordinate with the Nominating Committee to place him/her for selection to the Long-Range Site Committee. This person will be responsible for staging a successful Annual Meeting.
- d. Monitor the progress of all upcoming meeting plans. Offer constructive suggestions and assist the Local Site Committees in any way possible.
- e. The Chairperson should report on all upcoming meeting plans at the summer Executive Committee meeting, the Annual Meeting Executive Committee meeting, and the Annual Meeting business session.
- f. **See Addendum K: IPPS Conference Planning Outline, Checklist & Timeline** for the Local Site Chair and Committee - which contains key needs and dates in planning, developing and conducting the Annual Conference. The Secretary-Treasurer helps future Local Chairs with planning & logistics.

Additional Information and Guidelines

The Long-Range Site Committee meets during the Annual Meeting when decisions cannot be made via conference calls or virtual meetings.

E. Auction Committee **See Addendum N: Plant Auction Information, Checklist & Timeline**

Purpose

The purpose of the auction in conjunction with the annual meeting is to generate revenue for educational needs of the society in a fun yet organized fashion, while moving new/rare plants into the trade. Unique, non-plant items are also bid on. Revenue is used towards the Southern Region Endowment Fund managed by HRI at the discretion of the Executive Committee during the fiscal year of the auction. There is both a live auction and a silent auction (that closes prior to the live auction).

History

The first auction was held in the Maryland meeting in 1991 and has continued since. The Auction Committee was later established in 1996. The Annual Awards Banquet and Live Auction now occurs on Tuesday night.

Procedure

An Auction Chairman, Vice Chairman, Local Coordinator and/or Committee solicits items for the auction.

Selection of the Committee & Chairperson

The Auction Committee is selected by Local Site Chairman.

Responsibility

Committee members are responsible for the intake of donated plants, maintaining and displaying plants in an organized manner and selecting 12-15 plants for the live auction. Committee members are to monitor the silent action room during the hours it is open and help those with winning bids collect their plants and non-plant items after the auction. The Auction Committee is also responsible for protecting the carpet and tables used in the auction room.

Personnel Required for the Live Auction:

Auctioneer:	A qualified and competent Auctioneer is needed.
Bid Spotter:	Located with Auctioneer, show items and assist with spotting bids.
Floor Bid Spotters:	2 to 4 people to be sure no bids are missed.
Runner:	3 or 4 people carrying items to buyers.
Plant Promoters:	When available – a recognized expert to humorously describe plants to the audience during the auction.
Salesclerks - Auction Checkout:	Secretary Treasurer along with people selected by the Secretary Treasurer, including Vivian Munday Interns are responsible for tabulating silent auction bids and collecting payments.
Auction Chairman:	Coordinates the total Auction in conjunction with the Local Site Chair, Auction Vice-Chair, and the Secretary/Treasurer
Auction Vice Chairman:	Sees that all physical arrangements are in place for the auction. Arranges to get all auction materials properly displayed and tagged. This person will become next year's Auction Chair.

Physical Requirements of Live Auction Room

- a. Generally held in the same room as the Annual Banquet.
- b. Reliable Sound System - 2 microphones preferred.
- c. Riser to put auctioneer above audience level. A small platform accommodating 4 to 6 people is desirable.
- d. Attendee name tags are to be numbered, and this number is to be used as the bidder number.

Silent Auction

- a. To speed-up and reduce the number of items in the Live Auction. Both plants and non-plant items are bid on at the Silent Auction. The Silent Auction closes prior to the live auction.
- b. Each item will have an I.D. number on its description sheet. There is also a master list of items, item numbers and donors.
- c. Three-part carbonless forms are currently the best format to be used for bidding.

Collection

Collection payments for all purchases should be made by the end of the Auction. If at all possible, collect before leaving the banquet dinner site.

F. Sponsorship Committee *See Addendum F: Sponsorship Letter and Payment Form*

The Southern Region of the International Plant Production Society is dedicated to providing the best factual educational experience possible for its members – and outreach to the Green Industry and cultivating students and new members. To accomplish this goal, it is helpful to have businesses and individuals underwrite events to keep the cost affordable for the membership. The Sponsorship program was started in 2007 and essential for the financial solvency of the Region and greatly enhancing educational programs for members, the Green Industry and students.

Selection of the Committee & Chairperson

The Sponsorship Committee Members are: 2nd -Vice-President (chair), local site chair, and the two 1-Year Directors. These members are selected by SOP.

Sponsorship levels and benefits are currently:

Sponsorship Levels			\$5,000- Platinum	\$2500- Gold	\$1000- Silver	\$500- Bronze
Access	3-NA Regions	1-NA region	1-NA region	1-NA region	1-NA region	1-NA region
Complimentary Registrations (including tours)	3; at any NA Region	3	2	1	0	0
Sponsorship recognition plaque	All NA Regions - yes	yes	yes	yes		
Logo on screen during PowerPoint breaks	All NA Regions - yes	yes	yes	yes		
Announcements and banquet and welcome reception	All NA Regions - yes	yes	yes	yes		
Manned Display Table in Sponsorship Room at hotel (Mon-Wed)	All NA Regions - yes	yes	yes	yes		
Company name posted at sponsored event	All NA Regions - yes	yes	yes	yes	yes	
Sponsorship sign outside education session	All NA Regions - yes	yes	yes	yes	yes	yes
Sponsor category is listed on outside of brochure	All NA Regions - yes	yes	yes	yes	yes	yes
Sponsor listing on Regional Website with link	All NA Regions - yes	yes	yes	yes	yes	yes
Company profile in three NA Regional Newsletters, social posts (Facebook, Twitter, Instagram)	All NA Regions - yes					

1) No exhibits presenting non-plant products or services will be allowed in the meeting room. This especially applies to speakers from non-plant companies who will not sell products during talks.

2) It is permissible to allow Southern Region signage to list sponsors who have contributed to an event in the lobby outside the meeting room or in separate exhibit room. This includes use of a company logo. All contributors will have similar layout of this recognition. At the discretion of the site committee, sponsorship levels may be presented.

3) If a company sponsors a specific event, such as an ice cream social, there may be special recognition for that event outside of the meeting room without listing other meeting sponsors.

- 4) Signage always should be tasteful.
- 6) Tote bags, tee shirts, etc. designs must be pre-approved by the board and ordered by the secretary/treasurer.
- 7) At the discretion of the site committee, a separate room or space may be designated for sponsors to display information on their company. This right may be limited to certain sponsor levels.
- 8) At the discretion of the site committee, a company may sponsor a bus used for tours provided only the sponsor company name, city, state, phone number and logo are listed on the bus.
- 9) Sponsor names may be acknowledged from the podium by the site chairman or officer; sponsorship names can also be digitally displayed on screens during breaks in the meeting room and during the annual banquet.
- 10) Sponsors may be granted the right to attend the meeting sessions at no additional cost. Sponsorship level will determine if and how many full registrations, banquet tickets, meeting sessions, tours, etc. a sponsor may receive. This is to be determined by the Executive Committee.
- 11) When a specific policy is not in place, the executive committee will make the final decision of what is appropriate. The guiding principles are: to be tasteful and “low key” with sponsorship acknowledgements.
- 12) Violations will result in the loss of the right of a company to participate at any time in the future unless specifically allowed by the executive Committee.
- 13) The Executive Committee may, from time to time, amend this policy to fit changing conditions affecting the Society.

G. Membership Communications Committee

The Membership Communications Committee is made up of the previous “Membership Committee” and “Technical Communications Committee”. The roles and responsibilities of the Membership Communications Committee include coordination of information for the monthly newsletter, social channels; coordinating specialty events at the annual meeting; communicating about current meeting planning, including speakers, tours and sponsorship; coordinating membership outreach programs – from retention of current members to recruitment of new members to solicitation of new members from the current year’s meeting area.

The 8-person committee will be chaired by the Digital Communications Director. Other committee members include: the Secretary-Treasurer, International Alternate Delegate, 1st & 2nd Vice-Presidents, two 1-year Directors, Local Site Chair, Intl. Alternate Director, and Sec-Tres.

There are two classes of membership in the IPPS-SRNA: Active Members and Complementary Student Members.

Active Members. Any person engaged in the propagation and production of plants and/or in teaching and research related to plant propagation, production, and all branches of the Green Industry. Active members can be commercial or non-commercial. Privileges of Active Membership shall include electronic access of the *IPPS Combined Proceedings* and other regularly distributed digital publications as decided by the Executive Committee; the right-to-vote and hold elective office; to serve on Committees; to be eligible for election as a Fellow of the Region; and to receive other privileges as designated by the Executive Committee. The annual

dues are set by the International and IPPS-SRNA.

Complementary Student Members. To enable 2-year and 4-year students of higher education, graduate students, and military veterans to gain exposure to the Green Industry, IPPS, and the profession of plant propagation and production. Privileges of Student Membership shall include electronic access of the *IPPS Combined Proceedings* and other regularly distributed digital publications, as decided by the Executive Committee. There are discount rates for students and veterans attending the annual meeting, and conference scholarships for qualified individuals.

Complementary Student Membership expires after two-years, but both matriculating students and military veterans can reapply. Individuals are encouraged to become Active IPPS-SRNA Members during their professional career.

On the IPPS-SRNA website both Active Membership and Student Membership can be applied for on-line, and a pdf of membership application forms can also be printed off from the website and mailed to the Secretary-Treasurer.

For retaining and recruiting new members, the Membership Communications Committee responsibilities also include:

- a. Present advantages of membership and recruit potentially good members.
- b. Promote and make membership applications available to prospects and assist them in the application process – via the personal contact, the IPPS-SRNA website, and contacts with the Secretary-Treasurer.
- b. Devise and execute a plan for recruiting new Active Members and Student Members.
It is critical to focus on contacting and recruiting potential industry members and students from local, regional community colleges and universities in the area where the Annual Meeting is occurring.
- c. Provide relevant information to members via e-newsletters, social media, and other methods as necessary on a regular basis.
- d. To assist the Secretary-Treasurer by personally calling/contacting Active Members who have not renewed their membership.
- e. During the annual conference and/or annual banquet, both the President and Chair of the Membership Communications Committee shall announce and recognize new members for the current year.

H. Education Endowment Committee

Background

In 2017, the Southern Region- IPPS Educational Endowment Fund (SREE) was initiated with a base donation of \$20,000 from an anonymous donor. The SREE is managed by HRI, and was in an unrestricted, non-interest-bearing account. At the June 2026 mid-year Board meeting the principal had grown to \$172,000 – so the EC voted and petitioned HRI to switch the SREE to a restricted, interest bearing account. The goal of the SREE is to support SR education outreach and scholarship programs. The SR outreach education programs currently support Vivian Munday Young Horticulture Professional Scholarship/Work Program, Early Career International Exchange Program, Charles Student Research Awards Program, the Margie Jenkins Industry Scholarship for Industry Professionals, and Coach Vince Dooley SR-IPPS Student Scholarship.

The SR has developed unique, educational opportunities that other organizations do not offer. Monies are annually taken out of the general funds and/or annual auction donations for maintaining the educational

program. The SR goal is to take money directly from the Education Endowment in future years. The Education Endowment gives the SR more flexibility to continue supporting education and outreach programs, by not diverting monies from general funds - which help supplement the annual education support cost to the general membership, i.e., *Sponsorship monies supplement the annual registration rate: \$575 in 2026*. The current SR goal is to get to \$200K principal to *supplement* annual scholarships. Auction money will be placed into the Education Fund until the \$200K principal is reached (6% return = \$12,000/year). Additional monies will need to be generated to raise the principal beyond \$200K. The annual contribution is at the discretion of the EC. The five scholarships cost around \$17,000/year (2026).

A marketing brochure ([see Addendum C](#)) was developed for the HRI-managed SR-Education Endowment, which includes information on legacy gifting. The intent is to accelerate funding of the Endowment. The SREE could be enhanced by monies from estates, stock options, required minimum deduction contributions (RMDs), etc. Contributions can be paid directly to HRI as a 501(c)3 (for the SREE) - so that donors receive tax credit. There is a form that can be downloaded electronically from the SR webpage. All SR members also receive the Education Endowment brochure in their membership renewal forms.

Committee Members

The six committee members include: Chair, Charles Student Research Competition; Secretary-Treasurer; Editor; 1st Vice-President; International Alternate Delegate; and member-at-large

Responsibilities

The Committee assists with annual fund-raising activities, promotion, and recommendations to the Executive Committee about funding the SREE - and also maintaining and developing educational and outreach programs for the IPPS-SRNA.

I. Necrology Committee

Purpose

Communication both to and from the membership on the death of any member or close friend of the Southern Region IPPS.

Make-up of Committee/How Members are Chosen

The 2nd Vice-President chairs this 1-person committee.

Term

One Year

Duties and Responsibilities

- a. Receive information from the membership of the death of any member or close friend of the Region.
- b. Maintain communication throughout the year with the Secretary-Treasurer.
- c. Report on the membership at the Annual Meeting.

J. Nominations Committee

Purpose

Recommends members for officers, directors, international delegates, and key positions to lead the Region to be voted on at the Annual Business Meeting.

Make-up of Committee/How Members are Chosen

The three (3) most recent past presidents of the Region. The Chairperson is the earliest elected past president, i.e., senior past president.

Term

A committee member serves for three years, with one new member coming on each year and the senior past president rotating off after 3 years.

Duties and Responsibilities

- a. Meet or correspond prior to the mid-year June EC Meeting to consider members suited to fill elected offices and key positions.
- b. Secure assurance of prospective nominees of their willingness to serve if elected.
- c. Offer a slate of nominees consisting of at least one nominee for each elective office for a vote of the membership at the Annual Business Meeting of the Region. *The slate should be available at the mid-year June Executive Committee Meeting for approval by the board – and later included in the Annual Conference meeting packet.*

Additional Information and Guidelines

- a. Consider an individual's qualifications for duties to be performed, balanced geographic representation, and a balance between commercial and academic members.
- b. The chairperson should arrange for communication by all committee members on potential candidates prior to the mid-year June EC meeting, and the Annual Conference.
- c. The Executive Committee positions are voted on by the membership at the Annual Business Meeting. The Secretary-Treasurer, Editor and Digital Communications Director are appointed annually by the Executive Committee. Members of the 21 standing committees are determined by standard operating procedures – and not voted on.

Selection of International Delegates

Planning for future delegates on the International Board needs to synchronize with the next time the SR hosts the International and there is an International President from our region. Our regional delegates need to understand the logistics/responsibilities involved in hosting the International. The Nominations Committee needs to be cognizant of the International schedule. It is recommended that candidates be selected at least 8-years in advance with the final selected candidate ear-marked to serve as the International President/International Tour organizer. [*Nominations are opened at the Business Meeting for the membership to vote/approve*]. In the past, the SRNA has not made the International selection process so far in advance – but the selection needs to be done strategically – particularly since the rotation will occur more rapidly with the Japan Region folding – and only 7-International regions remaining. Serving on the International is a significant time commitment.

K. Program Committee

Purpose

Organize an educational program geared to the membership's interests.

Make-up of Committee/How Members are Chosen

The 1st Vice President serves as Program Chairperson. He or she may appoint additional members to this committee as needed.

Term

One (1) year.

Duties and Responsibilities

Preparation of the program for the annual meeting. A detailed listing of the duties and responsibilities of the

Program Committee can be found in Section II, B, "First Vice President" – and **Addendum H: 1st Vice-President Checklist and Timeline.**

L. Resolutions Committee

Purpose

To extend appreciation on behalf of the membership to all those responsible for the success and growth of the IPPS Southern Region during the past year.

Make-up of Committee/How Members are Chosen

The 2nd Vice-President chairs this 1-person committee.

Term

One (1) year.

Duties and Responsibilities

- a. Deliver a Resolution Committee report at the Annual Business Meeting expressing appreciation to and recognizing individually those who made contributions throughout the year and at the annual conference. These might include officers, committee members, board members, local site committee members, hosts for tours, and other contributors.
- b. Email a file copy of the Resolutions Committee to the Editor for inclusion with the Annual Business Meeting minutes within two weeks of the Annual meeting conclusion.

M. Secretary-Treasurer, Editor, Digital Communications Director Review Committee

Purpose

To evaluate and make recommendations to the Executive Committee on the performance and remuneration of the Secretary-Treasurer, Editor and Digital Communications Director.

Make-up of Committee/How Members are Chosen

Three (3) members, the immediate Past President, and the two 2nd-Year Directors shall comprise this Review Committee. The immediate Past President shall serve as chairperson.

Duties and Responsibilities

- a. Review and evaluate the individual performance of the Secretary-Treasurer, Editor and Digital Communications Director prior to the Executive Committee summer meeting. For guidance, evaluations can be based on the officer's respective job descriptions in the *Operations Manual*.
- b. Report to the Executive Committee at its mid-year June meeting regarding past performance, current expectations, and any recommendations for change.

N. Charles Student Research Competition Committee

This program was begun, in 1985, with the objectives to: 1) stimulate student research and career interest in the propagation and production of plants in Horticulture/ Green Industry and 2) raise the quality of educational programs through student participation and interaction with the membership at Annual Conference of the IPPS-SRNA. Awards are 1st-\$1000, 2nd- \$500, 3rd- \$250, 4th -\$200 - plus a \$500 travel stipend /awardee.

In 2007, the program expanded, supporting up to 4 graduate poster presenters at \$500 travel stipend/awardee. Student registration is also comped for the 4 oral presenters and 4 poster presenters selected. In some years, as many as 12-15 students have applied to compete (paper and oral presentation). The Committee/Review Panel is composed of industry and academia who evaluate and rank student research papers. Students with the top-ranked papers are invited to make oral presentations at the annual meeting - from which the final selection is

made; remaining students are encouraged to give poster presentations. And all students are encouraged to publish their papers in the *Combined Proceedings of the IPPS*. In 2024, the IPPS- SRNA Student Research Awards program was renamed: *Charles Student Research Awards Program* in recognition of Charles Parkerson and the late, Dr. Charles Gilliam of Auburn University - for their long-term contributions and mentoring of students. At the Annual banquet - students competing in the oral competition are recognized during the *Thetford Research Awards Ceremony* - in memory of the late, Dr. Mack Thetford of the University of Florida - for his leadership and contributions to the Charles Student Research program.

Purpose

To stimulate student research interest in propagation, production, and all aspects of the Green Industry; to enhance IPPS-SRNA educational programs and outreach through student participation; to expose students to the IPPS and Green Industry; to cultivate young careers in the Green Industry.

Make-up of Committee/How Members are Chosen

The committee Chair (1-year) and Co-Chair (1-year) are annually selected by the Nominations Committee. The Chair then develops a review panel (1-year) by soliciting IPPS-SRNA members from industry and academia as volunteer judges - to read and rank the written papers and later evaluate the top four oral presentations at the Annual Conference.

Term

One (1) year.

Duties and Responsibilities

Each spring (March or April) the Chair sends out letters and uses social media - making teachers, professors, scientists around the southeast aware of the IPPS-SRNA Student Research Competition. Information is also posted about the competition on the IPPS-SRNA website, including posting of last year's winning student papers. Titles are due to the Chair by **August 15** so we know there will be adequate papers for the competition at the Annual Conference. The manuscripts are due in by **September 1**. The manuscripts are sent out to the review panel *without* the authors' names and addresses, i.e., they are identified as Paper A, B, C, etc. The review panel members individually rank the papers and email their rankings to the chairperson. The Chair shall not rank manuscripts unless there is a tie.

The Chair notifies the top four students that they have been selected to compete for oral presentations of their papers at the annual meeting. The Chair also notifies students of the next top-four ranked papers and invites them to give poster presentations at the annual meeting. The Chair is responsible for the eight students submitting revised manuscripts to the Editor for review; all are awarded \$500 travel stipends and encouraged to share hotel rooms with other students. Other students not selected in the "top eight" are also encouraged to give poster presentations and have their papers published in the *Combined Proceedings of the IPPS*. The Chair introduces the student speakers and students giving poster presentations to the membership during the Annual conference and banquet. The chair presents the *Thetford Research Awards* to the four oral competitors at the banquet. The four Additional student papers can also be presented as posters at the Annual Conference – and supported with a travel stipend - at the discretion of the Executive Committee.

O. Dr. Vivian Munday Young Horticulture Professional Work/Scholarship Committee

This program was established in 1997, as the *Vivian Munday Undergraduate Awards Program* - in memory of Dr. Vivian Munday, Professor of Horticulture, University of Georgia. Dr. Munday was passionate about: undergraduate students, all flora and fauna, the IPPS-SRNA, and her job as editor for 18 years. The scholarship work program is to support worthy undergraduate students and introduce them to the IPPS-SRNA and the Green Industry.

In 2013, the program was reorganized as the *Vivian Munday Young Horticultural Professional Scholarship Work Program*. It includes students in horticulture/ agriculture with a career interest in the Green Industry/ Horticulture. The program is geared to introduce students to career opportunities in the Green Industry, Horticulture and the IPPS – global plant production network. Awardees actively participate at the annual meeting – helping with and attending the educational sessions, nursery tours, and general assistance with running the conference. A goal is to enhance educational interaction with the students and green industry professionals. Through greater engagement / participation between students and professionals - awardees are encouraged to become future members of the society. There are four individuals (4-pack) selected. The awardees receive free registration, banquet tickets and tours, and co-share a hotel room at the conference for an equivalent value of \$500. A meal stipend of \$100 is given at the discretion of the Executive Committee.

Purpose

- a. To create a scholarship/work program to provide financial assistance to horticulture students and young horticulture professionals interested in attending the annual meeting in exchange for work during the annual meeting.
- b. Work assignments will be designed and scheduled so that scholarship recipients will be able to participate in the majority of the meeting events.
- c. Scholarship recipients will report to the Secretary-Treasurer for assignments. Examples of assignments: assist with the plant auction, conference registration, assist the audio/visual technician during the educational program, nursery tours, etc. Assignments help the meeting progress smoothly and scholarship recipients gain a sense of involvement with the IPPS.

Make-up of Committee

The Selection Committee is composed of the Secretary-Treasurer, International Delegate and Alternate International Delegate. The International Delegate serves as Chair.

Term

One (1) year.

Eligibility of Applicants

- a. A nonmember/first time attendee is preferred.
- b. Applicant must either be a horticulture student, young horticulture professional (less than five years as a horticulture professional) and/or veteran.
- c. Priority will be given to applicants in the host and adjacent states to the annual IPPS-Southern Region meeting.
- d. Scholarship recipients must agree to report to and perform work assignments as set forth by the Secretary-Treasurer.

Award

- a. Each year a maximum of four (4) scholarships will be provided. A full registration for the meeting will be provided by IPPS-SRNANA as well as half the cost of a hotel room. Scholarship recipients are encouraged to share a hotel room or cover the cost of half the hotel room rate.
- b. No money is to be exchanged. The approximate value per recipient is \$500 - \$900 when the shared hotel room is included, plus \$100 meal stipend, based on Executive Committee approval.

Funding

- a. SRNA-IPPS to budget up to \$3,600 annually. This includes a \$100 meal stipend (as needed) and paid, shared hotel rooms.
- b. Members may support this program with a line-item donation on the annual meeting registration form

and membership dues renewal form.

Procedure and Selection of Recipients

- a. The description, application instructions, and application are to be posted by the webmaster on the SRNA website.
- b. It shall be the responsibility of the Vivian Munday Committee with the assistance of the Executive Secretary/Treasurer to notify IPPS faculty members at universities, junior colleges, and technical schools in the state of the annual meeting and adjacent states of the scholarship/work opportunity.
- c. The Vivian Munday Committee is encouraged to solicit the help of IPPS members and others involved in the horticulture field to make eligible young horticulture professionals and students aware of the scholarships.
- d. It shall be the responsibility of the Secretary/Treasurer to relay submitted applications to the Vivian Munday Committee for their review.
- e. Selection of the recipients shall be determined by the Vivian Munday Committee.
- f. Applications must be submitted to the Secretary/Treasurer by **1 June**.
- g. Notification to the winning students/young horticulturists shall be made promptly so as to facilitate their plans to attend the annual meeting (at least 60 days prior to the annual meeting).
- h. It shall be the responsibility of the Secretary/Treasurer to notify the scholarship recipients. It is the responsibility of the Secretary/Treasurer and local site chairperson to instruct the scholarship recipients about the time and location to report on duties upon arrival at the annual meeting.

P. Early Career Exchange Program Committee

In 2013, the IPPS-SRNA began the *Early-Career Exchange* program with the European (former GBI) Region. This is an outreach program to attract and educate early career nursery/ green industry professionals. The goal is to interchange early career nursery/ green industry professionals between international regions – and give an early career professional the opportunity to learn about the industry/ profession in another world region of the IPPS. The IPPS-SRNA awardee is currently hosted by the European Region – visiting regional nurseries and attending their annual conference. In years where the Eastern Region North America (ERNA) hosts the European Exchange person – the SRNA will send one individual to the ERNA or Western Region North America – budgeted for \$2000. Each region comps the regular registration cost as a courtesy.

The Award is up to \$2,000 (plane, other travel expenses – based on receipts, registration, etc.) for a professional from the IPPS-SRNA to go to Europe. Typically, the European Region covers additional travel expenses during the exchange. In addition, the IPPS-SRNA reciprocally hosts the European Region's exchange professional. The Southern Region provides a shared hotel room and complimentary conference registration to the European Region's exchange professional. Up to \$500 support may be supplied for the SR host of the European exchange guest.

Funding

The international periodically pays \$2,000 for travel & expenses on a rotating basis. However, in most years the IPPS-SRNA contributes \$2,000 towards the awardees travel (plane, other travel expenses), plus some reimbursement to help the local SRNA host cover some of their expenses in hosting the professional from the European region in their visit to IPPS-SRNA and green industry tour.

Make up of selection committee

The committee is composed of the International Delegate (Chair), International Alternate, and Secretary-

Treasurer. The committee makes recommendations to the Executive Committee by or before **July 1**; the application deadline is **June 1** [It is important that the awardee be notified to have ample time to make travel arrangements – at least two months in advance].

Eligibility & Requirements of applicants

Applicants must be a member in good standing of IPPS Southern Region. Must provide a completed Early Career International Exchange Program application by the stated deadline. The application form can be downloaded from the IPPS-SRNA website – and includes education, references, employment experience, and a 200-word essay. In a future IPPS-SRNA Annual Conference, the awardee is expected to give a presentation and about their international IPPS experience.

Q. Margie Jenkins Industry Scholarship Conference Committee

Margie Jenkins was a long-time member of the IPPS-SRNA - who started her nursery/green industry career later in life. She became a mentor for everyone and was deeply passionate about plants. Under her leadership, the Jenkins Farm and Nursery enlarged and prospered, and “Ms. Margie” became recognized as a botanical authority across the Gulf States. She was a frequent guest speaker and lecturer at nursery and botanical organizations. She received awards from many nursery associations and was the first woman to be inducted into Louisiana's Department of Agriculture Hall of Distinction. Ms. Margie was passionate about mentoring – and introducing new plants to the green industry. She exemplified the IPPS motto: “To Seek and Share”.

Purpose

- a. To enable individuals who are employed or self-employed in the Nursery/Green Industry to attend an International Plant Production Society – Southern Region of North America (IPPS-SRNANA) meeting for their first time. <http://sna.ipps.org/>
- b. The award will cover full-registration [educational program, tours and banquet (\$500-plus)].

Criteria

- a. Must be employed or self-employed in the nursery/green industry.
- b. Award will be presented to an individual who has never before attended an IPPS-SRNANA conference.
- c. Preference is for awardees to be local from the region where the annual meeting takes place.
- d. Required: Application form, plus recommendation letter from employer or customer; application form downloaded from IPPS-SRNA website – and sent to Secretary-Treasurer
- e. Deadline: **1 June** to receive application; annual IPPS-SRNA Conference normally occurs in October.
- f. Recipients to write a short summary of their Conference highlights to post along with their photo on the IPPS-SRNA website.

Selection Committee & Responsibility

Committee members include the International Delegate (Chair), International Alternate, and Secretary-Treasurer). Responsibilities include promoting the Scholarship Award in the region of the Annual Meeting, contacting the local state Green Industry/Nursery Association, and making personal contacts with local industry professionals.

Funding

Funding can come from soliciting members from the previous and current years' registration (gifting form with registration), the IPPS-SRNA Education Endowment Fund, and Auction monies. It is envisioned that in future years – as many as 6 local professionals will be selected (\$3,000-plus) for the scholarship.

R. Coach Vince Dooley IPPS-SRNA Student Scholarship Committee

This program was established in 2023 in honor of the late Coach Vince Dooley from University of Georgia. Coach Dooley was an enthusiastic supporter of landscape horticultural plants. The scholarship is intended for students with career plans for production in the Green Industry. Candidates do not work at the conference but rather use this opportunity to network with IPPS members and identify employment opportunities. Eligibility is for Juniors or Seniors in 2- or 4-year ag science/ horticulture programs. The Scholarship covers student registration, hotel, and travel (actual flight costs or mileage reimbursement), plus \$250 spending money. The awardee will share a room with other scholarship winners.

Purpose

- a. Must be a junior or senior in 2- or 4-year ag science/ horticulture programs with career plans to work in production in the Green Industry.
- b. To provide the awardee the chance to meet and interact with IPPS industry professionals – and to identify employment opportunities.
- c. The awardee will need to attend the IPPS-SRNA annual conference.
- d. The Scholarship covers student registration, hotel room (shared with another scholarship winner), and travel (actual flight cost or mileage reimbursement), plus \$250 spending money.

Criteria

- a. Must be a junior or senior in 2- or 4-year ag science/ horticulture programs with career plans to work in production in the Green Industry.
- b. Required: Application form, 400-word statement of Green Industry career plans, plus recommendation letter from faculty advisor; application form downloaded from IPPS-SRNA website – and along with 400-word statement and letter of recommendation - sent to Secretary-Treasurer.
- c. Deadline: **1 June** to receive application; annual IPPS-SRNA Conference normally occurs in October.

Selection Committee

Committee members include the International Delegate (Chair), International Alternate, and Secretary-Treasurer. Responsibilities include promoting the Scholarship Award. The program is to be promoted in the Southern Region E-newsletter, social media and any other practical means along with the other scholarship opportunities.

Funding

To be funded as a line item in the budget until IPPS Education Endowment Fund at HRI reaches the amount from which can fund the program. The scholarship is funded/valued up to \$1425 annually.

ADDENDUM A – Anti-Harassment Policy and Complaint Procedure



The International Plant Production Society, Southern Region North America (IPPS-SRNANA) is committed to a learning environment in which all individuals are treated with respect and dignity. Each individual has the right to participate in a professional atmosphere that promotes equal opportunities and prohibits unlawful discriminatory practices, including harassment. Therefore, IPPS-SRNANA expects that all relationships among members and people participating in sponsored events will be free of discrimination and harassment.

It is the policy of IPPS-SRNANA to ensure equal opportunity without discrimination or harassment on the basis of race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty or status as a covered veteran. IPPS-SRNANA prohibits any such discrimination or harassment.

IPPS-SRNANA encourages reporting of all perceived incidents of discrimination or harassment. It is the policy of IPPS-SRNANA to promptly and thoroughly investigate such reports. IPPS-SRNANA prohibits retaliation against any individual who reports discrimination or harassment or who participates in an investigation of such reports.

Definitions of Harassment

Sexual harassment constitutes discrimination and is illegal under federal, state and local laws. For the purposes of this policy, sexual harassment is defined as unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature.

Sexual harassment may include a range of subtle and not-so-subtle behaviors and may involve individuals of the same or different gender. Depending on the circumstances, these behaviors may include unwanted sexual advances or requests for sexual favors; sexual jokes and innuendo; verbal abuse of a sexual nature; commentary about an individual's body, sexual prowess or sexual deficiencies; leering, whistling or touching; insulting or obscene comments or gestures; display of sexually suggestive objects or pictures; and other physical, verbal or visual conduct of a sexual nature that is personally offensive.

Harassment on the basis of any other protected characteristic is also strictly prohibited. Under this policy, harassment is verbal, written or physical conduct that denigrates or shows hostility or aversion toward an individual because of his/her race, color, religion, gender, sexual orientation, national origin, age, disability, marital status, citizenship, genetic information or any other characteristic protected by law or that of his/her relatives, friends or associates, and that a) has the purpose or effect of creating an intimidating, hostile or offensive environment; b) has the purpose or effect of unreasonably interfering with an individual's participating in sponsored events or c) otherwise adversely affects an individual's opportunities to benefit from sponsored events.

Harassing conduct includes epithets, slurs or negative stereotyping; threatening, intimidating or hostile acts; denigrating jokes; and written or graphic material that denigrates or shows hostility or aversion toward an individual or group at IPPS-SRNANA events or programs via e-mail, phone (including voice messages), text messages, tweets, blogs, social networking sites or other means.

Individuals and Conduct Covered

These policies apply to all IPPS-SRNANA members and event participants whether related to conduct engaged in by fellow attendees or someone not directly connected to IPPS-SRNANA (e.g., an outside vendor, consultant or customer).

Conduct prohibited by these policies is unacceptable at IPPS-SRNANA sanctioned activities, including, but not limited to, conferences, field trips, meetings and social events.

Complaint Process

Individuals who believe they have been the victims of conduct prohibited by this policy statement or who believe they have witnessed such conduct should discuss their concerns with the IPPS-SRNANA current President, Past President, President-Elect, Sec-Treasurer or other Executive Committee Board member.

IPPS-SRNANA encourages the prompt reporting of complaints or concerns so that rapid and constructive action can be taken. The complaint should be documented via a written document or email with the date, place and full description of the incident that occurred. The Policy Committee, composed of the President, Past-President, Secretary-Treasurer and Editor, will review the case. The accused will be given the opportunity to respond to the complaint. Any reported allegations of harassment, discrimination or retaliation will be investigated promptly. IPPS-SRNANA will make every effort to keep all details of the harassment confidential as circumstances permit; however, due to the nature of harassment and its investigation, IPPS-SRNANA cannot and does not guarantee confidentiality.

If the investigation confirms, to the satisfaction of the Policy Committee, that harassment has occurred, the Policy Committee will take appropriate disciplinary action up to and including expulsion from the IPPS-SRNANA and future sponsored activities.

Retaliation against an individual for reporting harassment or discrimination or for participating in an investigation of a claim of harassment or discrimination is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

False and malicious complaints of harassment, discrimination or retaliation may be the subject of appropriate disciplinary action by the Policy Committee.

ADDENDUM B – Conflict of Interest Policy & Disclosure Form



It is in the best interest of The International Plant Production Society-Southern Region, NA (IPPS-SRNA) to be aware of and properly manage all conflicts of interest and appearances of a conflict of interest. This conflict-of-interest policy is designed to help directors, officers, employees and volunteers of the IPPS-SRNA identify situations that present potential conflicts of interest and to provide the IPPS-SRNA with a procedure to appropriately manage conflicts in accordance with legal requirements and the goals of accountability and transparency in the IPPS-SRNA operations.

Conflict of Interest Defined

In this policy, a person with a conflict of interest is referred to as an “interested person.” For purposes of this policy, the following circumstances shall be deemed to create a Conflict of Interest:

A director, officer, employee or volunteer, including a board member (or family member of any of the foregoing) is a party to a contract, or involved in a transaction with IPPS-SRNA for goods or services.

A director, officer, employee or volunteer, (or a family member of any of the foregoing) has a material financial interest in a transaction between the IPPS-SRNA and an entity in which the director, officer, employee or volunteer, or a family member of the foregoing, is a director, officer, agent, partner, associate, employee, trustee, personal representative, receiver, guardian, custodian, or other legal representative.

A director, officer, employee or volunteer, (or a family member of the foregoing) is engaged in some capacity or has a material financial interest in a business or enterprise that competes with IPPS-SRNA.

Other situations may create the *appearance of a conflict* or present a *duality of interests* in connection with a person who has influence over the activities or finances of the nonprofit. All such circumstances should be disclosed to the board or staff, as appropriate, and a decision made as to what course of action the organization or individuals should take so that the best interests of the nonprofit are not compromised by the personal interests of stakeholders in the nonprofit.

Gifts, Gratuities and Entertainment. Accepting gifts, entertainment or other favors from individuals or entities can also result in a conflict or duality of interest when the party providing the gift/entertainment/favor does so under circumstances where it might be inferred that such action was intended to influence or possibly would influence the interested person in the performance of his or her duties. This does not preclude the acceptance of items of nominal or insignificant value or entertainment of nominal or insignificant value which are not related to any particular transaction or activity of the IPPS-SRNA.

Definitions

A "Conflict of Interest" is any circumstance described in Part 1 of this Policy.

An "Interested Person" is any person serving as an officer, employee or member of the Board of Directors of the IPPS-SRNA or a major donor to the IPPS-SRNA or anyone else who is in a position of control over the IPPS-SRNA who has a personal interest that is in conflict with the interests of the IPPS-SRNA.

A "Family Member" is a spouse, parent, child or spouse of a child, brother, sister, or spouse of a brother or sister, of an interested person.

A "Material Financial Interest" in an entity is a financial interest of any kind, which, in view of all the circumstances, is substantial enough that it would, or reasonably could, affect an Interested Person's or Family Member's judgment with respect to transactions to which the entity is a party.

A "Contract or Transaction" is any agreement or relationship involving the sale or purchase of goods or services, the providing or receipt of a loan or grant, the establishment of any other type of financial relationship, or the exercise of control over another organization. The making of a gift to the IPPS-SRNA is not a Contract or Transaction.

Procedures

Prior to board or committee action on a Contract or Transaction involving a Conflict of Interest, a director or committee member having a Conflict of Interest and who is in attendance at the meeting shall disclose all facts material to the Conflict of Interest. Such disclosure shall be reflected in the minutes of the meeting. If board members are aware that staff or other volunteers have a conflict of interest, relevant facts should be disclosed by the board member or by the interested person him/herself if invited to the board meeting as a guest for purposes of disclosure.

A director or committee member who plans not to attend a meeting at which he or she has reason to believe that the board or committee will act on a matter in which the person has a Conflict of Interest shall disclose to the chair of the meeting all facts material to the Conflict of Interest. The chair shall report on the disclosure at the meeting, and the disclosure shall be reflected in the minutes of the meeting.

A person who has a Conflict of Interest shall not participate in or be permitted to hear the board's or committee's discussion of the matter except to disclose material facts and to respond to questions. Such person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.

A person who has a Conflict of Interest with respect to a Contract or Transaction that will be voted on at a meeting shall not be counted in determining the presence of a quorum for purposes of the vote.

The person having a conflict of interest may not vote on the Contract or Transaction and shall not be present in the meeting room when the vote is taken, unless the vote is by secret ballot. Such person's ineligibility to vote shall be reflected in the minutes of the meeting. For purposes of this paragraph, a member of the Board of Directors of the IPPS-SRNA has a Conflict of Interest when he or she stands for election as an officer or for re-election as a member of the Board of Directors.

Interested Persons who are not members of the Board of Directors of the IPPS-SRNA, or who have a Conflict of Interest with respect to a Contract or Transaction that is not the subject of Board or committee action, shall disclose to their supervisor, or the Chair, or the Chair's designee, any Conflict of Interest that such Interested Person has with respect to a Contract or Transaction. Such disclosure shall be made as soon as the Conflict of Interest is known to the Interested Person. The Interested Person shall refrain from any action that may affect the IPPS-SRNA's participation in such Contract or Transaction.

In the event it is not entirely clear that a Conflict of Interest exists, the individual with the potential conflict shall disclose the circumstances to his or her supervisor or the Chair or the Chair's designee, who shall

determine whether full board discussion is warranted or whether there exists a Conflict of Interest that is subject to this policy.

Confidentiality

Each director, officer, employee and volunteer shall exercise care not to disclose confidential information acquired in connection with disclosures of conflicts of interest or potential conflicts, which might be averse to the interests of the IPPS-SRNA. Furthermore, directors, officers, employees and volunteers shall not disclose or use information relating to the business of the IPPS-SRNA for their personal profit or advantage or the personal profit or advantage of their Family Member(s).

Review of policy

Each director, officer, employee and volunteer shall be provided with and asked to review a copy of this Policy and to acknowledge in writing that he or she has done so.

Annually, each director, officer, employee and volunteer shall complete a disclosure form identifying any relationships, positions or circumstances in which s/he is involved that he or she believes could contribute to a Conflict of Interest. Such relationships, positions or circumstances might include service as a director of or consultant to another nonprofit organization, or ownership of a business that might provide goods or services to the IPPS-SRNA. Any such information regarding the business interests of a director, officer, employee or volunteer, or a Family Member thereof, shall be treated as confidential and shall generally be made available only to the Chair, the Executive Director, and any committee appointed to address Conflicts of Interest, except to the extent additional disclosure is necessary in connection with the implementation of this Policy.

This policy shall be reviewed annually by each member of the Board of Directors. Any changes to the policy shall be communicated to all staff and volunteers.

CONFLICT OF INTEREST DISCLOSURE FORM- IPPS SOUTHERN REGION OF NORTH AMERICA

Date: _____

Name: _____

Position (employee/volunteer/Board member): _____

Please describe below any relationships, transactions, positions you hold (volunteer or otherwise), or circumstances that you believe could contribute to a conflict of interest between the International Plant Production Society – Southern Region of North America and your personal interests, financial or otherwise:

_____ I have no conflict of interest to report

_____ I have the following conflict of interest to report (please specify other nonprofit and for-profit boards you (and your spouse) sit on, any for-profit businesses for which you or an immediate family member are an officer or director, or a majority shareholder, and the name of your employer and any businesses you or a family member own):

1. _____

2. _____

3. _____

I hereby certify that the information set forth above is true and complete to the best of my knowledge. I have reviewed, and agree to abide by, the Policy of Conflict of Interest of the IPPS-SRNA.

Signature: _____

Date: _____

Policy Adopted from a template policy provided by the Minnesota Council of Nonprofit Organizations
June 2020

ADDENDUM C – IPPS-SRNA Education Endowment Fund Brochure



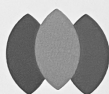
IPPS-Southern Region Education Endowment Fund



Sharing Plant Production Knowledge Globally

Southern Region
of North America

and



Horticultural
Research Institute

The  AmericanHort Foundation

IPPS-Southern Region Educational Endowment Fund

The IPPS-Southern Region Educational Endowment Fund through HRI was established with a \$20,000 contribution from an anonymous donor. IPPS Southern Region is working to build this Endowment Fund with a goal to create long-term funding to support educational and outreach activities of IPPS-SR.

Programs like the Vivian Munday Young Hort Professional Scholarship/Work Program (which provides students the opportunity to attend the IPPS-Southern Region annual conference), our Early Career International Exchange Program, the Margie Jenkins Scholarship for Industry Professionals, and the Charlie Parkerson Student Research Awards Program will be supported by your donations.

You can support the IPPS-Southern Region Educational Endowment Fund through HRI in a number of ways including a cash gift, gifts of stock, through planned giving, or through a qualified charitable distribution (sometimes called a charitable IRA rollover gift).

How to Give

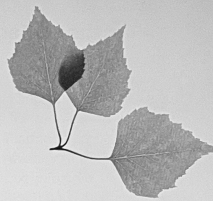
Cash Gifts

Cash gifts offer industry professionals, businesses, and organizations the opportunity to immediately put resources to work through Horticultural Research Institute. You can send checks payable to the Horticultural Research Institute, 2130 Stella Court, Columbus, OH 43215 marked with your support for the IPPS-Southern Region Educational Endowment Fund or you may send a one-time or monthly gift via credit card at this link: <https://secure.givelively.org/donate/horticultural-research-institute-endowment-fund-inc/ipp-southern-region-education-fund>.

Legacy Gifting

Qualified Charitable Distributions
(Also referred to as Charitable IRA Rollover Gifts)

The Qualified Charitable Distribution (QCD) is an excellent way for donors aged 70 ½ and up to show your support



for the Horticultural Research Institute and receive tax benefits in return. As you plan your required minimum distributions (RMD), consider using your IRA account to make the most of your charitable giving (i.e.: transferring up to \$100,000 from a traditional IRA while potentially receiving income tax benefits). Please consult your tax or financial advisor regarding your specific tax situation.

Gifts of Stock

Gifts of highly appreciated stock can hold significant financial benefits for you, while fulfilling your philanthropic goals. Giving stock may eliminate the capital gains tax that would otherwise be due had the stock been sold. Additionally, you may become eligible for a charitable income tax deduction of the full fair market value of the stock, rather than the purchase price. For more information about a stock gift, call 614-884-1155 or email JenniferG@AmericanHort.org.

Planned Giving

A commitment to HRI through a planned gift ensures a future of research and scholarship excellence. While cash gifts are the most popular, there are other strategies that address your interest in supporting HRI, but also provide you with income and tax benefits.

HRI welcomes the opportunity to work with you to remember the industry in your future plans. A planned gift is one you arrange during your lifetime with the benefit to HRI deferred. Planned gifts create a permanent legacy through the eventual establishment of endowed research and scholarship funds.

Planned gifts made through trusts, bequests, charitable gift annuities, and other long-term arrangements enable individuals of all means to create a permanent legacy through the eventual establishment of endowed scholarships and programs.

Donors who provide support for HRI in their will are recognized as HRI Heritage Club members. Other options include creating a trust or charitable gift annuity, naming HRI as the beneficiary of a retirement or life insurance plan, and donating tangible personal property.

Support the Work

Please help us continue work on your behalf. Become a supporter of the Horticultural Research Institute. Contributions are tax-deductible.

Name: _____

Company: _____

Address: _____

City, State & Zip: _____

P. _____

Email: _____

I am interested in speaking to HRI about the IPPS-Southern Region Educational Endowment Fund:

- ☐ Stock Transfer
- ☐ Qualified Charitable Distribution
- ☐ Planned Giving

Please accept my gift toward the IPPS-Southern Region Educational Endowment Fund at the following level:

- ☐ Custom Amount: _____
- ☐ \$100 ☐ \$500
- ☐ \$250 ☐ \$1000

Donations payable to Horticultural Research Institute, RE: IPPS-Southern Region Educational Endowment Fund.

- ☐ Check (No. _____)
- ☐ Credit Card (or give online at <https://secure.givelively.org/donate/horticultural-research-institute-endowment-fund-inc/ippssouthernregioneducationfund>.)

Cardholder: _____

Card No.: _____

Exp. Date: _____ CVV Code: _____

Signature: _____

Return to: Horticultural Research Institute
2130 Stella Court, Columbus, OH 43215
P. 614.487.1117 F. 614.487.1216
JenniferG@AmericanHort.org



Horticultural Research Institute

The  AmericanHort Foundation

What is the Horticultural Research Institute (HRI)?

Horticultural Research Institute supports scientific research and students for the advancement of the horticultural industry. HRI was established by industry leaders on the premise that no one could better direct needed research to advance horticulture than the very people who work in it. We adhere to that same vision today: we fund and guide horticultural research efforts with direct input from industry professionals. It is the strong foundation upon which to build the industry.

Horticultural Research Institute
2130 Stella Court, Columbus, OH 43215
Phone 614 884 1155

WWW.HRIRESEARCH.ORG

Strategic Partnership
to help the industry
Thrive!

IPPS

Sharing Plant Production Knowledge Globally

**Southern Region
of North America**



Horticultural Research Institute

The  AmericanHort Foundation



ADDENDUM D - IPPS-SRNA Whistleblower Policy



GENERAL

IPPS-SRNA Code of Ethics and Conduct requires directors, officers, employees, and contractors to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As representatives of IPPS-SRNA, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations.

REPORTING RESPONSIBILITY

It is the responsibility of all directors, officers, employees, and contractors to comply with the Code and report violations or suspected violations in accordance with the Whistleblower Policy.

NO RETALIATION

No director, officer, employee, or contractor who in good faith reports a violation of the Code shall suffer harassment, retaliation or adverse employment consequences. Any director, officer, employee, or contractor who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of position. This Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within the Organization prior to seeking resolution outside the Organization.

REPORTING VIOLATIONS

The Code addresses the Organization's open-door policy and suggests that employees and contractors share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, the president is in the best position to address an area of concern. However, if you are not comfortable speaking with the president, or you are not satisfied with his/her response, you are encouraged to speak with another board member whom you are comfortable in approaching. This board member is required to report suspected violations of the Code of Conduct to the Board. The President has specific and exhaustive responsibility to investigate all reported violations. The board is responsible for investigating suspected fraud.

ACCOUNTING AND AUDITING MATTERS

The Audit Committee of the board of directors shall address all reported concerns or complaints regarding corporate accounting practices, internal controls or auditing. The board of directors shall notify the audit committee of any such complaint and work with the audit committee until the matter is resolved.

ACTING IN GOOD FAITH

Anyone filing a complaint concerning a violation or suspected violation of the Code must be acting in good faith and have reasonable grounds for believing the information disclosed indicated a violation of the Code. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

CONFIDENTIALITY

Violations or suspected violations may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

HANDLING OF REPORTED VIOLATIONS

The president will notify the sender and acknowledge receipt of the reported violation or suspected violation within five business days. The president will also notify the IPPS-SRNA secretary-treasurer. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.

- Approved by the IPPS-SRNA Executive Committee on 11 August 2023.

Source

Based on Copyright 2004, National Council of Nonprofit Association, www.councilofnonprofits.org

The National Council of Nonprofit Associations (NCNA) is the network of state and regional nonprofits associations serving over 22,000 members in 46 states and the District of Columbia. NCNA links local organizations to a national audience through state associations and helps small and mid-sized non-profits; manage and lead more effectively, collaborate and exchange solutions; save money through group buying opportunities; engage in critical policy issues affecting the sector; and achieve greater impact in their communities.

ADDENDUM E - Organization Record Retention Policy



IPPS-SRNA ORGANIZATION RECORD RETENTION POLICY

The IPPS-SRNA (“Organization”) takes seriously its obligations to preserve information relating to litigation, audits, and investigations.

The information listed in the retention schedule below is intended as a guideline and may not contain all the records the Organization may be required to keep in the future. Questions regarding the retention of documents not listed in this chart should be directed to the President.

From time to time, the President may issue a notice, known as a “legal hold,” suspending the destruction of records due to pending, threatened, or otherwise reasonably foreseeable litigation, audits, government investigations, or similar proceedings. No records specified in any legal hold may be destroyed, even if the scheduled destruction date has passed, until the legal hold is withdrawn in writing by the President.

File Category	Item	Retention Period
Corporate Records	Bylaws and Articles of Incorporation	Permanent
	Corporate resolutions	Permanent
	Board and committee meeting agendas and minutes	Permanent
	Conflict-of-interest disclosure forms	4 years
Finance and Administration	Financial statements (audited)	7 years
	Auditor management letters	7 years
	Payroll records	7 years
	Check register and checks	7 years
	Bank deposits and statements	7 years

	Chart of accounts	7 years
	General ledgers and journals (includes bank reconciliations)	7 years
	Investment performance reports	7 years
	Equipment files and maintenance records	7 years after disposition
	Contracts and agreements	7 years after all obligations end
	Correspondence — general	3 years
Insurance Records	Policies — occurrence type	Permanent
	Policies — claims-made type	Permanent
	Accident reports	7 years
	Safety (OSHA) reports	7 years
	Claims (after settlement)	7 years
	Group disability records	7 years after end of benefits
Real Estate	Deeds	Permanent
	Leases (expired)	7 years after all obligations end
	Mortgages, security agreements	7 years after all obligations end
Tax	IRS exemption determination and related correspondence	Permanent
	IRS Form 990s	7 years

	Charitable Organizations Registration Statements (filed with Minnesota Attorney General)	7 years
Human Resources	Employee personnel files	Permanent
	Retirement plan benefits (plan descriptions, plan documents)	Permanent
	Employee handbooks	Permanent
	Workers comp claims (after settlement)	7 years
	Employee orientation and training materials	7 years after use ends
	Employment applications	3 years
	IRS Form I-9 (store separate from personnel file)	Greater of 1 year after end of service, or three years
	Withholding tax statements	7 years
	Timecards	3 years
Technology	Software licenses and support agreements	7 years after all obligations end

1. Electronic Documents and Records.

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an e-mail message, the message should be printed in hard copy and kept in the appropriate file or moved to an “archive” computer file folder. Backup and recovery methods will be tested on a regular basis.

2. Emergency Planning.

The Organization's records will be stored in a safe, secure, and accessible manner. Documents and financial files that are essential to keep the Organization operating in an emergency will be duplicated or backed up at least every week and maintained off-site.

3. Document Destruction.

The Secretary/Treasurer is responsible for the ongoing process of identifying its records, which have met the required retention period, and overseeing their destruction. Destruction of financial and personnel-related documents will be accomplished by shredding.

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

4. Compliance.

Failure on the part of those who to follow this policy can result in possible civil and criminal sanctions against the Organization and its employees and possible disciplinary action against responsible individuals. The President and Board Chair will periodically review these procedures with legal counsel or the organization's certified public accountant to ensure that they are in compliance with new or revised regulations.

- Approved by the IPPS-SRNA Executive Committee on 11 August 2023.

ADDENDUM F - Sponsorship Letter Invitation & Payment Form



International Plant Production Society
Southern Region North America
2025 Sponsorship Form (*Example*)

Re: International Plant Production Society Southern Region - Annual Meeting Sponsorship Invitation

The International Plant Production Society, Southern Region of North America (SRNA), cordially invites you to sponsor our upcoming annual meeting, scheduled for 19-23 October 2025, at the DoubleTree Orlando at SeaWorld, Orlando, FL.

Event Overview: This highly anticipated event gathers professionals from across the green industry and academia for unparalleled educational programs and tours. Your sponsorship plays a pivotal role in managing costs and ensuring our members access the best opportunities available in horticulture today.

Mission of IPPS

1. Sharing knowledge, information, and skills
2. Supporting lifelong career achievements
3. Enhancing professional recognition
4. Advancing research, education, and horticultural integration

Unique Attributes of IPPS:

1. Global reach and diverse knowledge base
2. Focus on individual membership, fostering personal connections within the industry
3. Promoting collaboration among growers, researchers, educators, and industry professionals.

Your Sponsorship Impact: By sponsoring our event, you contribute directly to the success of this significant horticultural gathering. Detailed sponsorship levels and benefits are enclosed for your review.

Next Steps: For more information on the event and sponsorship opportunities, please refer to the enclosed materials. A member of our event planning committee will follow up with you soon to discuss how we can collaborate effectively. We eagerly anticipate your participation in this influential event shaping the future of horticulture in our region.

Best regards,

Richard May, Sponsorship Chair

Todd Gentry, Local Site Chair

(850)539-6495 richard@maynursery.com

(352)223-4434 todd.gentry@cherrylake.com

Sponsorship Levels	North American	Diamond	Platinum	Gold	Silver	Bronze
	\$8500	\$8,000	\$5000	\$2500	\$1000	\$500
Complimentary Registrations (including tours)	3	3	2	1		
Sponsorship recognition plaque		Yes	Yes			
Sponsorship recognition certificate				Yes	Yes	
Logo on screen during power point breaks	Yes	Yes	Yes	Yes		
Announcements at banquet and welcome reception	Yes	Yes	Yes	Yes		
Manned display table in Sponsorship Room at Conference Center (Mon-Wed)	Yes	Yes	Yes	Yes		
Company name posted at sponsored event	Yes	Yes	Yes	Yes	Yes	
Sponsorship sign outside education session	Yes, at all three North American conferences	Yes	Yes	Yes	Yes	Yes
Sponsorship list in Participant Registration Packet	Yes, at all three North American conferences	Yes	Yes	Yes	Yes	Yes
Sponsor listing on Regional Website with link	Yes, on all three North American websites	Yes	Yes	Yes	Yes	Yes

IPPS-SR 2025 Conference Sponsorship Payment Form
Conference Dates: 19-23 October 2025 Orlando, FL
(Example)

Please make your check payable to:

IPPS-SR International Plant Production Society Southern Region

Mail to: IPPS SR 4661 Crystal Drive Columbia, South Carolina 29206 Federal EIN: 75-2212643

Company Name _____

Mailing Address _____

City, State, Zip, _____

Contact Person _____

Email _____ Phone _____

Sponsorship Level

North American \$8,500 _____

Diamond \$8,000 _____

Platinum \$5,000 _____

Gold \$2500 _____

Silver \$1,000 _____

Bronze \$500 _____

To Pay by Credit Card

Card Number _____

Expiration date: _____

Security code on back of card _____

Name on card _____

Signature _____

Credit card mailing address and zip code _____

☐ For additional information contact: Donna Foster (803) 743-4284 scplant@bellsouth.net

ADDENDUM G - President Checklist & Timeline

(Developed by Brie Arthur & Elliott Hallum)



ROLE OVERVIEW

The President provides overall leadership for the Southern Region and serves as the primary coordinator among the Executive Committee, committee chairs, Local Site Committee, and IPPS leadership.

The President's role is to:

- Keep committees moving toward their goals
- Provide guidance and support
- Stay informed about Annual Meeting planning
- Coordinate Executive Committee activities
- Maintain communication with committee chairs
- Lead Board and business meetings
- Support the 1st VP, 2nd VP, and Local Site Committee
- Work closely with the Executive Secretary

Remember: This is a team effort. You don't need to manage every detail, but you do need to know what is happening and make sure the right people are communicating.

IMMEDIATELY AFTER THE ANNUAL MEETING

Handoff & Update the 1st VP Checklist - While the Annual Meeting is still fresh:

- Update the **1st VP Checklist**
- Add lessons learned
- Note changes that should be made for next year
- Send the updated checklist to the next 1st VP
- Send the updated checklist to the Editor for inclusion in the *Operations Manual*

The 1st Vice-President becomes the new President at the end of the annual conference – and chairs the Post-Conference EC Meeting.

POST-CONFERENCE BOARD MEETING

Post-Conference Issues

- Resolve any outstanding issues
- Follow up on problems or concerns
- Address any "post-conference drama" promptly and professionally
- Make sure unresolved issues are documented for future leadership

Prepare the Agenda in Advance Do this before the Annual Meeting.

You will likely be tired and stressed after the meeting, so don't wait until the last minute to make the agenda.

Suggested Agenda

1. Introduce the new Executive Committee members- *COMMUNICATION DIRECTOR ARTHUR NEEDS A GROUP PHOTO*
2. Introduce the new Site Chair
3. Introduce new committee chairs

4. Schedule for the Summer Executive Committee/Board Meeting
 - Traditionally held at the following year's Annual Meeting hotel
5. Review the Annual Meeting
 - What went right?
 - What went wrong?
 - What should change?
6. Record lessons learned
7. Identify follow-up items
8. Assign responsibilities and deadlines
9. Establish date for mid-Year, June EC meeting.

ESTABLISH ANNUAL COMMITTEE COMMUNICATION

Coordinate with all committee chairs to establish regular conference calls throughout the year.

President's Role

- Establish a regular communication schedule
- Participate in committee calls when possible
- Provide guidance and support
- Help remove obstacles
- Keep committees aligned with regional goals
- Follow up on action items

Recommendation: Join committee conference calls when possible. Being present helps the President understand what committees need and allows you to support their initiatives.

COMMITTEE GOALS & ACTION ITEMS- (*This changes annually*)

Early in the year, send each committee chair a clear outline of:

- Committee purpose
- Annual goals
- Specific action items
- Expected deliverables
- Timeline/deadlines
- Report on expectations

Send committee goals to all chairs

The goal is to make sure every committee understands **what it is responsible for accomplishing during the year.**

- The *Operations Manual* contains committee duties & responsibilities (posted on SRNA website).

Local Site Committee

The Site Committee should ideally remain in regular communication throughout the year.

- Stay informed about Annual Meeting planning
- Participate in calls when appropriate
- Provide guidance
- Help resolve logistical or organizational issues

EXECUTIVE COMMITTEE COMMUNICATION

Maintain regular contact with the key people responsible for regional activities.

1st VP — EDUCATIONAL PROGRAM

- Stay in touch with speakers
- Review progress on the educational program

- Help resolve speaker/program issues
- Make sure deadlines are met

2nd VP — SPONSORSHIP

- Stay in touch regarding sponsorship
- Review sponsorship progress
- Help with difficult or strategic sponsor relationships
- Make sure sponsorship goals are on track

LOCAL SITE COMMITTEE

- Stay informed about Annual Meeting details
- Provide input when needed
- Attend appropriate Site Committee calls
- Support the Site Chair

Remember: The Site Chair and committee are your partners. You may have experience or advice that can prevent problems before they occur.

EXECUTIVE SECRETARY — DONNA FOSTER

- Reach out to Sec-Tres Foster as needed
- Keep her informed of important decisions
- Coordinate Board meetings and agendas
- Ask questions early rather than waiting until a problem develops

Donna is an essential resource and partner for the President.

WINTER EXECUTIVE COMMITTEE CONFERENCE CALL

Schedule a winter conference call to discuss issues that need attention or resolution.

Historically, **early December and/or January** have worked well.

Suggested Agenda:

- Committee updates
- Membership
- Sponsorship
- Annual Meeting
- International activities
- Financial/endowment matters
- Outstanding issues
- New business
- Action items and deadlines

ANNUAL SUMMER BOARD MEETING

Schedule During the Post-Conference Meeting

Historically, the Annual Summer Board Meeting is held in **June** at the following year's Annual Meeting hotel not to overlap with Father's Day. Set meeting agenda with Secretary-Treasurer.

Typical Schedule

Sunday

- Arrive
- Informal dinner

Monday

- Board meeting

- Meeting typically ends around **2:00 PM**
- Lunch included

Important

- Coordinate with the Local Site Chair
- The Local Site Chair of next year's meeting gives a presentation of proposed activities, nursery tours, pertinent issues
- Confirm hotel/meeting logistics
- Confirm attendance of Executive Committee members
- Bus company options. Bus contract needs to be signed by or before December.

PRE-CONFERENCE BOARD MEETING

Schedule the Pre-Conference Board Meeting for **Sunday evening before the Annual Meeting.**

Coordinate with Sec-Treasurer to prepare the agenda.

Ask every person to provide a brief meeting/update report.

Review

- President
- 1st VP
- 2nd VP
- Editor
- Secretary-Treasurer
- Committee Chairs
- Local Site Chair (s): current annual conference & next-year's conference
- International Delegates
- Other appropriate leaders

Certificates

- Sign Speaker Certificates
- Sign Sponsor Certificates
- Confirm certificates are complete and ready for distribution

AT THE ANNUAL MEETING: BEFORE THE MEETING

Education Room

- Arrive early
- Check room setup
- Confirm education program is ready
- Check in with 1st VP
- Check that moderators are prepared

Opening Remarks

Prepare:

- Welcome/opening remarks
- Brief introduction to the meeting
- Important housekeeping information

ANNOUNCEMENTS

Keep a running list of items for the **1st VP** to announce throughout the meeting.

Possible announcements:

- **Please turn cell phones to silent**
- Question Box location
- Exchange Representative introduction

- Ask all students to stand
- Take a Student to lunch/dinner
- Auction promotion
- Sec-Treasurer announcements
- Other schedule reminders

ANNUAL AWARDS BANQUET

- Announce the evening program
- Serve as Master of Ceremonies (MC) to guide the event flow and maintain crowd energy.
- Announce/Introduce: 1st Vice-President, 2nd Vice-President, others on the evening program.
- Meadows Award Chair normally presents the Meadows Award - following 2nd V-President's presentation of Fellows Award.

ANNUAL BUSINESS MEETING

The President is responsible for leading the Annual Business Meeting.

Before the Meeting

- Develop the agenda with the Sec-Tres
- Review required business
- Review of previous minutes
- Know what motions/reports need to be addressed
- Confirm presenters
- Prepare to keep the meeting on schedule

During the Meeting

- Follow the approved agenda
- Recognize speakers appropriately
- Keep discussion focused
- Make sure required business is addressed
- Record decisions and action items

INCOMING PRESIDENT

Prepare a short speech regarding your time as president, the value of the society and introducing the new president.

- Thank-you message
- Introduction of the incoming President
- Recognition of their upcoming role

Make the transition positive and supportive and have the award plaque for you available!

LEADERSHIP REMINDERS

Delegate

You are the President, **not the person responsible for doing everything.**

Your job is to:

- Set direction
- Communicate expectations
- Support committee chairs
- Identify problems early
- Make decisions when needed
- Keep the Executive Committee moving

Communication

When in doubt, communicate. Keep regular contact with:

- Sec-Tres Foster
- Communications Director Arthur
- 1st VP
- 2nd VP
- Site Chair
- International Delegate

Enjoy the Meeting- Be present and try to enjoy yourself. Problems will arise. That is part of the job. You don't have to solve every problem personally, use your team. *Talk to Brie for a pick-me-up!!*

TRANSITION TO PAST-PRESIDENT

- Lead and review status of Strategic Plan progress and action items at next year's mid-year EC meeting.
- Provide continuity between former Executive Committee members, current Executive Committee members, and the Southern Region membership.
- Advise the Executive Committee of any uncompleted projects whose completion would benefit the Society and/or the Southern Region.
- Work with Local Site Chair to recruit local, first-time attendees to the Annual Conference. There are four Margie Jenkins Industry Scholarships available for *1st time professional attendees* with a **June 1 deadline**.

ADDENDUM H - 1st Vice-President Checklist, Timeline, Speaker Information Form, Letter to Speakers

(Developed by Brie Arthur & Elliott Hallum)



ROLE OVERVIEW

The **1st Vice President's primary responsibility is coordinating the Annual Meeting educational program**, including recruiting speakers, developing the program, coordinating moderators, and ensuring speakers and presentations are ready for the meeting.

This is a significant and time-consuming responsibility. **Start early and keep the speaker process moving throughout the year.**

Important reminders

- Pay attention to what the President does during the Annual Meeting. **Next year, it is your turn!**
- Stay involved with the Local Site Committee throughout the planning process.
- Keep the next 2nd VP informed so they can begin preparing for their role.
- Keep good records and update this checklist each year.

IMMEDIATELY AFTER THE ANNUAL MEETING

Thursday Post-EC Meeting Informal Meeting

Coordinate with the President and Sec-Tres Foster:

- **Mid-Year Summer meeting** – the meeting date, agenda, and issues needed to be addressed
- **Conference calls** - the December and early winter virtual meetings.

Update the 2nd VP Checklist

- Make notes while the Annual Meeting is still fresh in your mind
- Record what worked, what didn't, and what should be changed
- Pass on notes to Editor for *Operations Manual*

Main Responsibility: ANNUAL MEETING SPEAKERS

Target: Approximately: 20 speakers- look at the current schedule

Speaker Recruitment:

- Start recruiting as early as possible
- Ask the **Local Site Committee** for recommendations first
 - This can help identify strong regional speakers
 - Local recommendations can also help attract new attendees
- Be thoughtful about how many people you approach
 - **Don't over-ask:** people can be offended if they are repeatedly solicited

Speaker Information:

- Use the existing Excel program template from the previous year's program chair to create and maintain the speaker spreadsheet.
- **Collect:** Speaker name, Company/organization, Contact information/email, Presentation title, Program description (75-100 words), Biography (75-100 words), Headshot photo, Presentation details (PowerPoint; video; other technology needs), Travel information, if needed, and Registration status

Speaker Materials

Send each speaker:

- Speaker Form - *see Addendum H -1st President Checklist*
- Speaker Agreement - *see Addendum H -1st President Checklist*
- Paper and Speaker Guidelines – Editor Davies sends updated guidelines/info with a speaker memo template to 1st Vice-President to send to speakers.
- *See sample of speaker Didier Hermans' brief biography, presentation title, and description of presentation.*

Share completed information with the Communications Director: Brie@BrieGrows.com for use in newsletter and social media

- ☐ Speaker photos
- ☐ Bios
- ☐ Program descriptions

Speaker Compensation / Registration

As of 2020:

- Non-IPPS Speakers *can* receive comped educational-session registration – *upon request*
 - Speakers must pay for: Tours, Banquet, Travel, Lodging

Important: Speakers are responsible for arranging and paying for themselves: Travel, Hotel, Registration/meeting expenses. *However, under exceptional circumstances non-IPPS member speakers may be subsidized.*

Sponsorship-Supported Speakers

If a company is sponsoring a speaker:

- Check with the Sec-Tres regarding the sponsorship amount
- Confirm whether the sponsorship level includes complimentary registration
- Clarify who is paying registration for the sponsored speaker and sponsor representative

ANNUAL TIMELINE

OCTOBER — BEGIN SPEAKER RECRUITMENT

Early October the year before

Send the initial speaker request email and include: Speaker expectations.

Clearly explain:

- IPPS does not cover travel
- IPPS does not cover hotel
- IPPS does not cover registration beyond the applicable speaker benefit
- Speaker is expected to submit a paper/presentation according to the guidelines

[There is \$2,000 budgeted for speaker registration/travel on as needed basis for 1st VP to use in consultation with the Sec-Tres; if requested, a non-IPPS member speaker can have their full registration (early-bird) comped].

Goal: Begin building the program immediately after the current Annual Meeting.

FIRST WEEK OF DECEMBER

- Editor Davies sends updated guidelines/info with a speaker memo template to 1st Vice-President during 1st week of December to send to speakers by early January.

JANUARY — COLLECT SPEAKER INFORMATION

First Week of January

Send the IPPS Speaker Form & Speaker Agreement Form *see Addendum H -1st President Checklist*

The form should collect all information needed for the Annual Meeting program and schedule spreadsheet.

- Set a firm deadline
- March 1 is a good target
- Follow up with anyone who has not submitted information

Tip: Don't wait for late information to hold up the program. Begin chasing missing information early.

MARCH 15 — FINALIZE SPEAKERS FOR PROGRAM

Finalize the Annual Meeting educational program

- Send finalized program to Donna
- Confirm presentation titles
- Confirm speaker names and organizations
- Confirm schedule and session placement
- Identify any remaining gaps in the program
- Have 1-2 back-up speakers for last minute replacement; members of the EC can help fill-in

APRIL 15— FINALIZE MODERATORS FOR PROGRAM

Recruit approximately 7-8 moderators, depending on the final program schedule.

- Ask the Sec-Tres for a list of last-years attendees to select moderators from
- Ask Local Site Chair for moderator suggestions
- Prioritize newer members when appropriate
- Match moderators with sessions
- Recruit additional moderators if needed; members of the EC can help fill-in
- Don't forget moderators for the Question Box

Provide moderators with:

- Speaker bios
- Session information
- Moderator script
- Instructions for managing Q&A
- Timekeeping expectations

MAY 1 – Sec-Treasurer Foster needs the FINAL speaker information/ titles, moderators - for developing the Annual Meeting Program Brochure;

May 31 - Conference Highlights & Hotel information promoted through e-news and social media

JUNE MID-YEAR EC MEETING

- Send the Editor a spreadsheet of speakers, titles, contact info/emails at the mid-year June EC meeting
- Discuss your program, any concerns/issues that need to be addressed

MID-JUNE – Final copy from Sec-Tres/graphic artist of brochure as PDF to post and send out

JULY — TRAVEL & REGISTRATION REMINDER

Send speakers an email containing:

- Hotel registration information/link
- Annual Meeting registration information/link
- Airport information
- Recommended airport for arrival/departure
- Reminder that speakers are responsible for making their own travel arrangements

AUGUST

Editor Davies sends out paper and speaker guidelines and sample articles to presenters during 1st week of August. His memo also includes registration, program and hotel information and links, sample papers from previous years. Speakers can email their papers to the Editor - by the last Friday before the annual meeting. *Speakers are encouraged to contract the Editor to assist with their talks and preparing papers.*

SEPTEMBER — EARLY REGISTRATION REMINDER

Before the Early-Bird Deadline

Send another reminder to all speakers.

Include:

- Hotel registration link
 - Annual Meeting registration link
 - Early-bird registration deadline
 - Airport/travel information
 - Reminder to finalize travel arrangements
-

OCTOBER — FINAL SPEAKER & MODERATOR PREPARATION

Contact **every speaker and moderator**.

Confirm:

- Speaker is attending
- Presentation title is correct
- Schedule is correct
- Moderator is confirmed
- Any last-minute changes
- Presentation has been prepared

Expect last-minute changes and be prepared to adjust the program.

Collect Presentations

Ask speakers to:

- Bring a copy of their paper/Word file for Editor Davies – or email prior to meeting
- Bring a copy of their presentation on a **USB drive** – to be uploaded the day before their presentation
- Follow the meeting's AV requirements

Provide:

- AV contact information
- Where presentations should be delivered
- When presentations should be loaded
- AV contact email (Scott Langlois or current AV contact)

Goal: Have presentations loaded before speakers take the stage whenever possible.

MODERATOR PREPARATION

October

Send moderators:

- Moderator script
- Speaker bios
- Session schedule
- Q&A instructions
- Timekeeping instructions

Printed Materials

- Print moderator scripts
- Print speaker bios
- Prepare **5-minute warning signs**
- Prepare **1-minute warning signs**

Bright-colored paper works well for time-warning signs.

Moderator Instructions

Make sure moderators understand how to:

1. Introduce the speaker – very short introduction – 1-min max.
2. Keep the session on schedule
3. Manage the question-and-answer period
4. Use the Question Box when appropriate
5. Give speakers time warnings – there is also a time-clock
6. Wrap up Q&A and the session on time

SPEAKER CERTIFICATES

Before the Annual Meeting:

- Prepare speaker certificates
- Have the President sign them

AT THE ANNUAL MEETING

Before the Educational Sessions

Education Room

- Arrive early
- Check the room setup
- Put out the **Question Box**
- Put out pens and paper
- Locate the light dimmer switch
- Assign someone to operate the lights –the responsibility of the two 2nd Vice-Presidents
- Check in with AV
- Confirm speaker presentations are loaded
- Locate all moderators
- Give moderators their printed scripts and speaker bios

DURING THE MEETING

Keep a running list of announcements and reminders.

Possible Announcements

- **Please turn cell phones to silent**
- Question Box location
- Scholarship winner introductions
- Ask all students to stand
- Student lunch/dinner arrangements
- Auction promotion
- Donna's announcements
- Other important schedule reminders

At the Post-EC meeting - The 1st Vice-President becomes the new President at the end of the annual conference – and chairs the Post-Conference EC Meeting.

- *See Addendum G: The President Checklist & Timeline* - for setting the agenda of the Post-EC. Meeting.

LESSONS TO CARRY FORWARD

- **Start early.** Speaker recruitment is the biggest job.
- **Keep the spreadsheet current.** It becomes the master source for program information.
- **Communicate repeatedly.** Speakers appreciate reminders when deadlines are clear.
- **Stay connected to the Local Site Committee.**
- **Confirm everything in October.** Last-minute changes are inevitable.
- **Get presentations to AV early.**
- **Give moderators clear instructions and printed materials.**
- **Arrive early every day.**
- **Watch the President closely — you are preparing to take over the role!**

+++++

Biography : Didier Hermans runs the family-owned nursery Herplant with his brothers, joined by the next generation, specializing in Buxus and Taxus. With over 40 years of experience, numerous publications, and extensive research collaborations, he is widely recognized as an expert in Buxus cultivation and breeding.

Title: Breeding Better Buxus

Description: In his presentation, Didier Hermans will explain the development and breeding process of disease-resistant Buxus varieties, including the introduction of BetterBuxus[®]/ BetterBoxwood[®]. He will share insights from decades of research, including scientific collaborations with international institutes, and highlight the challenges and innovations in improving plant resilience. Additionally, he will illustrate how these new varieties are successfully applied in historical and castle gardens across Europe, where they contribute to the preservation and restoration of traditional garden designs.





IPPS-SRNA SPEAKER INFORMATION FORM

Complete and Return before 1 February

Email:

Phone:

Thank you for agreeing to speak at the International Plant Production Society Southern Region Annual Meeting in October

Hotel Information:

Address:

Phone:

Link:

Educational sessions will be held on: October **x to y, 20zz**

* If you have a preferred time or date please indicate in the form below.

PREFERRED PROGRAM DATE/ TIME:

PRESENTER NAME (for printing):

PROFESSIONAL TITLE/ EMPLOYER (for printing):

EMAIL ADDRESS:

CELL PHONE (for emergency use during conference):

WEBSITE ADDRESS:

PROGRAM TITLE:

PROGRAM DESCRIPTION (150 words max):

BIOGRAPHY (100 words max):

PLEASE ATTACH HEADSHOT (high res preferred):

Letter to Speakers-Program Chair

Date

Dear ,

Thank you so much for agreeing to speak at the International Plant Production Society Southern Region Annual Meeting. The meeting take place on October xx-yy The host hotel is:

IPPS SR meetings attract a diverse group of professional growers, propagators, students, and nursery industry related businesses from across the southeast US and beyond.

Presentations are 20 minutes long with Q&A at the end of each presentation session. Please have your presentation saved on a USB flash drive and provide ample time for our technical crew to have it loaded in advance of your scheduled time. Please make sure that you have tried out the remote/ laser pointer to advance your slides.

A big concern of the International Plant Production Society is meeting the publication deadlines for the *Combined Proceedings of the International Plant Propagators' Society*. This is why you are being asked to submit your word-processed manuscript on a USB-flashdrive or via email, preferably in a PC-compatible format for Microsoft Word for Windows. For ideas on how you might write your paper, you may want to review the *Combined Proceedings of the International Plant Production Society*. https://ipps.org/wp-content/uploads/2025/05/combined_proceedings_73_2023.pdf

Please note that the manuscript should be double-spaced with one-inch margins.
Editor, Fred Davies [f-davies@tamu.edu] will be sending you more info about your paper and presentation in August.

In preparing your topic for IPPS- SRNA, please keep in mind that we are a diverse group from experienced growers to newcomers. Also be mindful of the IPPS motto: to seek and share plant knowledge globally. This is not a forum for sales, but rather an opportunity to share your experience and knowledge.

At your earliest convenience, please send confirmation of agreement via email including your best contact information, a brief bio (100 words), a headshot, and a short summary of your topic (100-250 words).

As the schedule is confirmed I will be in touch with a specific day and time. Tentatively educational sessions will be held on Tuesday, October xx (am/pm) and Thursday October xx (am).

Please contact me with any questions. I truly appreciate your participation and I look forward to your program at IPPS- SR.

Sincerely,
IPPS SR Program Chair
Email

ADDENDUM I - 2nd Vice-President Checklist & Timeline

(Developed by Brie Arthur & Elliott Hallum)



ROLE OVERVIEW

The 2nd Vice President has several responsibilities throughout the year, with **sponsorship coordination as the primary role**.

The 2nd VP also:

- Participates on the Membership Communications Committee
- Participates in all Board meetings and conference calls
- Manages the annual sponsorship process
- Coordinates Fellows nominations, selection, and Award presentation at Annual Banquet.
- Presents the Fellows Award at the Annual Banquet.
- Prepares the Resolution Report
- Prepares and presents the Necrology Report
- Chairs and organizes the Fellows Breakfast
- Begins preparing for the transition to 1st VP
- Supports the President and 1st VP as needed
- Creates and distributes the “call for papers questionnaire” to survey members at annual meeting – asking for input, program topics and potential speakers; coordinate with Communications Director Arthur about electronic input options.

Important: Use this role as an opportunity to learn how the organization operates. Pay attention to what the President and 1st VP are doing because you will be taking on those roles in the near future.

YEAR-ROUND RESPONSIBILITIES

BOARD MEETINGS & CONFERENCE CALLS

- Participate in all Board meetings
- Participate in Executive Committee conference calls
- Stay current on regional business
- Be prepared to answer questions from the general membership
- Keep notes on decisions and action items relevant to your responsibilities

SPONSORSHIP: PRIMARY RESPONSIBILITY OF THE 2ND VP

The goal is to establish and maintain strong relationships with IPPS Southern Region sponsors.

Keep a Master Sponsorship Spreadsheet

The spreadsheet should include:

- Business name
- Primary contact
- Email
- Phone
- Sponsorship level
- Amount due
- Amount paid
- Payment Date received
- Logo received

- Thank-you sent
- Certificate prepared
- Special sponsorship arrangements
- Notes/follow-up
- 2nd V-P should receive a copy of the most current Sponsorship spreadsheet for your template from Sec-Tres Foster or last sponsorship chair

Communication

Keep the sponsorship spreadsheet organized and share it with the Executive Secretary at least once each month.

At the conclusion of your term:

- Send the complete sponsorship records to the incoming 2nd VP
- Include contact information
- Include notes about sponsor relationships
- Identify outstanding commitments
- Explain the process to the incoming 2nd VP

A well-maintained spreadsheet makes the transition dramatically easier.

SPONSORSHIP ANNUAL TIMELINE

NOVEMBER–DECEMBER

Thank Previous Sponsors & Introduce Yourself

Following the Annual Meeting:

- Send thank-you email or letter to previous year's sponsors (Brie sent holiday cards)
- Introduce yourself as the new 2nd VP
- Thank them for their support
- Introduce the following year's Annual Meeting

Include:

- Meeting dates
 - Meeting location
 - Hotel
 - Sponsorship opportunities
 - Sponsorship levels
 - Payment information
 - Sponsorship levels
 - Payment instructions
 - Sec-Tres Foster can assist with this
-

JANUARY–MARCH: ACTIVE SPONSORSHIP OUTREACH

Stay in regular contact with sponsors through:

- Email
- Phone calls
- Personal contacts
- Mailed correspondence

Consider Mailing a Hard Copy

- Sponsorship letter
- Sponsorship levels
- Payment instructions
- Executive Secretary/Donna Foster payment information

Do not assume everyone will pay online. Many sponsors continue to mail checks, so make it easy for them to

know where and how to send payment.

When a Sponsor Commits

- Record commitment in sponsorship spreadsheet
- Send a thank-you card
- Confirm sponsorship level
- Confirm payment instructions
- Follow up with Donna regarding payment

Recruit New Sponsors

Ask other IPPS members, particularly members who live near the Annual Meeting location to contact businesses they know.

Personal introductions are valuable: A warm introduction from an IPPS member is often much more effective than a cold email or phone call.

SPONSOR CHAIR REPORTS TO SEC-TREASURER FOSTER STATUS OF SPONSORSHIPS

- **15TH FEBRUARY** – First Report
- **15TH MAY** – Second Report – listed in *Addendum K – Conference Planning Outline, Checklist, Timeline*

APRIL–JUNE: FOLLOW-UP & SPONSOR PROMOTION

Continue regular contact with sponsors.

- Send thank-you cards
- Call sponsors
- Send follow-up emails
- Request company logo
- Confirm correct company name
- Confirm sponsorship level
- Confirm payment status

Request Logos: high-quality logo for use in:

- Website
- Social media
- Printed materials
- Annual Meeting materials
- Sponsor recognition

Sec-Tres Foster may already have logos from previous years, but requesting an updated logo provides a useful reason to reconnect with the sponsor.

Registration Information

Provide the hotel and Annual Meeting registration links as soon as they become available.

This allows sponsors to make travel arrangements early.

JULY–OCTOBER: FINAL SPONSOR FOLLOW-UP

Continue contacting sponsors who have not responded.

- Follow up with non-responsive sponsors
- Confirm sponsorship commitments
- Confirm payments
- Confirm logos
- Confirm correct business names
- Keep Sec-Tres Foster updated
- Update the master spreadsheet

Monthly Check With Sec-Tres Foster

- Who has paid?
- Who still owes payment?
- Who has provided a logo?
- Are there any unusual sponsorship arrangements?
- Are any certificates needed or corrected?

AT THE ANNUAL MEETING — SPONSORS

The goal is to make every sponsor feel **welcomed, appreciated, and connected to IPPS.**

- Introduce yourself
- Thank sponsors personally
- Spend time with them
- Introduce sponsors to other IPPS members
- Help them connect with attendees
- Make sure they know where they should be
- Check on them throughout the meeting
- Recognize their contribution

Sponsor relationships are about more than collecting checks. Build relationships that encourage continued support.

SPONSOR CERTIFICATES-

Donna will send sponsor certificates to you in advance.

Before Leaving for the Meeting

- Confirm certificates have arrived
- Confirm correct business names with Sec-Tres Foster
- Bring all certificates to the Annual Meeting
- Have the President sign the certificates
- Arrange certificates in presentation order
- The 2nd V-Pres recognizes and presents certificates to sponsors at the end of the 1st morning education program.

RESOLUTION REPORT

Prepare the annual Resolution Report using previous years' notes as a starting point.

Before the Meeting

- Locate previous year's Resolution Report
- Update information
- Make appropriate changes
- Confirm names and dates
- Review for accuracy
- Email completed report to **Editor Davies** before the Annual Meeting

During the Business Meeting

- Present the Resolution Report
- Be prepared to answer questions
- Note any changes or additions

NECROLOGY REPORT

The Necrology Report recognizes current and former IPPS Southern Region members who have passed away.

Before the Meeting

Sec-Tres Foster will send an email to the membership requesting information.

- Monitor responses
- Ask members for additional information
- Confirm names and relevant details
- Prepare the final list

During the Annual Meeting

This is the **first report presented during the business meeting.**

- Present the list
- Ask attendees whether anyone has been missed
- Add any additional names
- Conclude with a moment of silence

Handle this responsibility with care and respect.

FELLOWS SELECTION: NOMINATIONS

Sec-Tres Foster will email the general membership requesting nominations. The 2nd VP coordinates the Fellows selection process.

Responsibilities

- Monitor nominations
- Collect applications
- Provide applications to the Fellows Selection Committee
- Coordinate committee review
- Organize committee discussion
- Facilitate consensus
- Confirm final recipients
- Prepare award presentation materials

CONFIDENTIALITY

Fellows recipients are confidential. Share recipient information ONLY with:

- Executive Secretary Donna Foster
- Current President
- Current 1st VP

This ensures that key leadership knows the information in case someone needs to step in and make the announcement.

Do not circulate the names broadly before the award ceremony.

Number of Fellows

There is **no limit on the number of Fellows who may be awarded.** Generally, two or less to keep it unique.

FELLOWS & MEADOWS AWARD CEREMONY

The Fellows & Meadows Award is presented during the Annual Awards Banquet and Live Auction. The Fellows Award(s) are presented before the Meadows. The 2nd VP presents the Fellows Award, and the Meadows Award Chair presents the Meadows Award.

Prepare the Fellows Presentation

1. Explain the Award: Begin by explaining what becoming an IPPS Fellow means.

This is especially important for new members who may not understand the significance of the honor. You can read the Fellows description from the website (also in the *Operations Manual*).

2. Introduce the Recipient

Using information from the submitted application:

- Write a thoughtful introduction or use the information provided in the nomination
- Highlight the recipient's contributions
- Explain their qualifications

- Describe their service to IPPS and/or the horticulture industry

3. Present the Award

- Announce the Fellow
- Invite recipient to come forward
- Read the introduction
- Present the plaque
- Pose for photographs

Plaques should be in a box near the stage.

Before the Ceremony

- Confirm plaques are present
- Confirm names are correct
- Confirm pronunciation
- Have presentation notes ready
- Coordinate with AV/photographer if appropriate
- Fellows Awardee(s) presented before Meadows Awardee

FELLOWS BREAKFAST

Purpose: The Fellows Breakfast is not simply an information session.

Use the Fellows as a resource. Longtime Fellows have valuable institutional knowledge and can provide perspective and advice based on their years of experience with IPPS.

The Fellows Breakfast is generally held:

- Morning of the first day of Education Session
- At the hotel
- Approximately one hour
- Dutch treat meal

Before the Meeting

- Check the printed schedule for exact time and location
- Confirm breakfast arrangements
- Prepare information to share
- Review relevant Executive Committee updates

During Breakfast

Allow approximately 15-20 minutes for everyone to settle in and eat. You have a maximum of 40-minutes for discussion & input.

Then:

- Share important information from the Executive Committee Board Meeting
- Provide updates on IPPS business
- Discuss relevant regional issues
- Ask for advice and feedback
- Take notes

PREPARING FOR THE 1st VP ROLE

At the conclusion of the Annual Meeting, you advance to **1st VP**.

The primary responsibility of the 1st VP is developing the educational program, including:

- Speaker recruitment
- Speaker scheduling
- Program development
- Moderator recruitment
- Speaker communications

Begin Early

Presenting at IPPS is *pro bono*, and speakers historically have not had travel or other expenses covered. Because many professionals schedule speaking engagements *+12 months in advance*, contact potential speakers early.

Initial Speaker Inquiry

Clearly explain:

- When will the meeting occur
- Where it will occur
- Why you are inviting them
- IPPS speaker expectations
- That IPPS does *not pay for or cover travel expenses* (Exceptions exist for Registration and some travel of non-IPPS speakers).
- Registration expectations/benefits applicable to that year's policy
- Hotel expectations
- That a *paper is requested to be published in the Combined Proceedings of the International Plant Production Society*. (The Editor will help with the process).
- They will be given instructions & guidelines for their talks and papers by both the 1st V-P and the Editor – and any help needed.

Include:

- Speaker Agreement
- Title of talk
- Meeting dates
- Meeting location
- Hotel information when available
- Registration information when available

Important

Respect speakers' schedules by giving them as much advance notice as possible.

Provide the hotel and registration links as soon as they become available so speakers can make arrangements.

HANDOFF TO THE NEXT 2ND VP

Before the Annual Meeting concludes:

- Update sponsorship spreadsheet
- Organize sponsor contacts
- Document payment status
- Document outstanding sponsor commitments
- Record sponsor preferences/relationships
- Save current sponsorship materials
- Record useful sponsor contacts
- Document lessons learned
- Email complete records to incoming 2nd VP

ADDENDUM J - Local Site Chair/Committee Checklist & Timeline

(Developed by Brie Arthur & Elliott Hallum)



PURPOSE & COMMUNICATION

The **Local Site Chair/Committee** should maintain regular communication with:

- Sec-Tres: Donna Foster
- Digital Communications Director: Brie Arthur
- President
- 1st Vice President
- 2nd Vice President

Remember: We are a team. The Local Site Chair does not have to manage the meeting alone. Stay in communication, ask questions, and keep the Executive Committee informed of progress.

LOCAL SITE COMMITTEE

Recommended Structure

The committee should include:

- **1–2 Local Site Chairs** (Chair, Co-chair)
- **4–8 committee members**
- **Establish an Auction Chair/Committee** - *See Addendum N – Plant Auction Infor & Plant form sheets*

Divide responsibilities among committee members. Key areas include:

- Hotel coordination
- Tour planning
- Local sponsorship outreach
- Transportation
- Local logistics
- Plant Auction(s) – silent & live
- Meeting-day assistance
- Speaker support
- Student volunteers/helpers

MASTER TIMELINE

TWO YEARS BEFORE THE ANNUAL MEETING

Hotel Selection

- Identify **3–5 potential hotels**
- Send hotel information to **Sec-Tres Donna Foster who handles the rest.**
- Donna will have HelmsBriscoe contact the hotels and gather financial information
- Share hotel proposals and financial information with the Executive Committee
- Obtain Executive Committee approval of the meeting budget/location
- The Sec-Treasurer signs the hotel contract.

Goal: Establish the hotel and meeting location early enough to allow adequate planning. Contract with hotel needs to be signed 2-years before the meeting.

ONE YEAR BEFORE THE ANNUAL MEETING

The Summer Board Meeting is held at the **following year's Annual Meeting hotel**.

*When considering a non-nursery site like a botanical garden, please gather all potential fees - such as rental facilities, chair and table rentals, tickets costs, tour guide fees, insurance, A/V and electrical, and include with your recommendation to the board. These details are critical for the meeting budget.

Local Site Chair Responsibilities

- Attend the Mid-Year June Board Meeting – to present a report on logistics, hotel, tours, etc.
- Tour/inspect the hotel and meeting facilities
- Review meeting spaces
- Ask questions about facility logistics
- Identify potential issues before the Annual Meeting year begins

The Local Site Chair needs to attend this meeting in person.

ANNUAL MEETING — ONE YEAR PRIOR

LOCAL SITE CHAIR ATTENDANCE REQUIRED

The Local Site Chair **MUST attend the Annual Meeting one year before their meeting.**

Prepare a **20-minute presentation** introducing the upcoming Annual Meeting.

Include:

- Meeting location
- Hotel
- Tours
- Attractions
- Local horticulture/industry
- Preliminary schedule
- Other information that will encourage attendance
- Prepare PowerPoint presentation
- Share PowerPoint with the Communications Director for promotional use

Post-Conference Board Meeting

- Provide an update on the upcoming Annual Meeting
- Answer questions from the Executive Committee
- Identify any decisions that need to be made
- Status of bus company options/contract - bus contract signed by or before December.

MID-WINTER EC Virtual CONFERENCE CALL (mid-Dec, Jan, and/or Feb)

Local Site Chair

- Participate in the Executive Committee virtual board meeting
- Present a progress update on the Annual Meeting
- Report on:
 - Hotel
 - Tours
 - Transportation – bus company options/contract finalized
 - What Airport(s) to use – for Annual Meeting Brochure
 - Sponsorship
 - Local logistics
 - Outstanding needs/questions

FEBRUARY: SITE CHAIR — TOURS & LOGISTICS

- Finalize tour stops
- Begin local sponsorship outreach
- Confirm bus/transportation contract
- Drive the tour routes personally
- Confirm travel times between stops
- Identify parking, loading/unloading, and restroom needs
- Identify any potential accessibility issues

MARCH: SEC-TREASURER FOSTER DOES THE FOLLOWING WITH THE HOTEL:

- Sends/coordinates hotel registration
- Confirms hotel information is accurate
- Confirms registration details and deadlines

MARCH: LOCAL SITE CHAIR:

- Recruit Local Industry Professionals to Attend Conference
- Work with the *Past-President* to reach out/ contact local industry professionals about attending the October annual conference.
- There are at least **4 *Margie Jenkins industry Scholarships*** available to cover registration of 1st time industry attendees. There is a ***June 1 application deadline*** for the scholarships.

JUNE: LOCAL SITE CHAIR — FINALIZE TOUR DETAILS

All tour details should be completed and sent to Donna for inclusion in the **online conference brochure**.

Confirm:

- Tour stops
- Tour schedule
- Transportation
- Departure/return times
- Tour descriptions
- Addresses/locations
- Meal arrangements
- Special requirements
- Sponsor information
- Pricing/details needed for registration
- Final tour route

Drive the complete route before finalizing the schedule.

JUNE MID-YEAR BOARD MEETING

- Provide an update on the Annual Meeting (usually a written report)
- Status of Auction Committee - logistics
- Review of outstanding issues
- Confirm that all major logistics are on schedule

JULY REGISTRATION OPENS

Annual Meeting registration goes live. Send communications to local businesses and colleges promoting registration.

Include:

- Meeting registration link
- Hotel registration link
- Registration deadlines
- Meeting dates
- Tour information
- Recommended airport
- Transportation/travel information
- Auction logistics

Be clear about which airport attendees should use for arrival and departure.

OCTOBER FINAL CONFERENCE CALL

Hold the final planning call to identify and resolve missing details.

You, Site Chair, 1st Vice-President, Communications Director.

Review:

- Hotel
- Meeting rooms
- Tours
- Transportation
- Sponsors
- Registration
- Speakers
- Moderators
- AV
- Signage
- Student helpers
- Meeting-day logistics
- Outstanding questions

At this point, identify anything that could become a meeting-day problem and resolve it before arrival.

PRE-CONFERENCE BOARD MEETING

SITE CHAIR — REQUIRED

Attend the pre-conference Board Meeting which is held at the hotel the Sunday evening before the first day of tours.

- ☐ Provide final meeting update
- ☐ Review important logistics with the Executive Committee
- ☐ Confirm schedule
- ☐ Identify any last-minute changes
- ☐ Confirm responsibilities for meeting week

DURING THE ANNUAL MEETING

SITE CHAIR RESPONSIBILITIES

Stay visible and available throughout the meeting.

Monitor:

- ☐ Hotel/meeting facility
- ☐ Tour departures and returns

- ☐ Transportation
 - ☐ The Secretary-Treasurer is responsible for Registration issues.
 - ☐ Unexpected logistical problems
-

POST-CONFERENCE BOARD MEETING

Attend the post-conference Board Meeting.

Review the Meeting

Discuss:

- ☐ What worked well?
- ☐ What didn't work?
- ☐ What should be changed?
- ☐ What should future Site Chairs know?
- ☐ What expenses or reimbursements remain?
- ☐ What follow-up is needed?

Handoff to Future Site Chair

- ☐ Share useful contacts
- ☐ Share vendor information
- ☐ Share tour contacts
- ☐ Share hotel contacts
- ☐ Share transportation contacts
- ☐ Share sponsor contacts
- ☐ Share lessons learned
- ☐ Provide recommendations for the following year's Local Site Chair

A good handoff is one of the most valuable things you can leave for the next committee.

ADDENDUM K – Conference Planning Outline, Checklist & Timeline



The IPPS-SRNA Conference is the vehicle by which Southern Region provides education and networking for members and others in the industry. Planning for this event is a long-term commitment and takes the skills and time of many people. Each Local Site Chair (LSC) and Committee should make their own detailed timeline of their specific duties and needs working within these dates. Much of the detail info is needed in early summer and with spring being the busiest time for folks in our industry, having as much as possible done before the spring rush is preferred.

2-3 Years Out

Local Site Chair (LSC) makes presentation to Long Range Site Committee for hosting an IPPS-SRNA Annual Meeting. Site Committee makes recommendations to the SR Board, and the board makes the final decision on location.

The Board and LSC should review past conference budgets and schedules to get an idea of how the conference works. Now is the time to make changes specific to the location or re-evaluate events and scheduling.

After Board approval of the location The Sec/Tres along with the LSC will work together to secure meeting facilities and hotel rooms. Then Sec/Tres will sign the facility contract and all other contracts. *The LSC and Auction Chair should attend the IPPS-SRNA conference, prior to theirs, to observe events & procedures.*

Facilities and Tours

The local site chair should select a small group to help with the various duties: managing the auction, scouting tour locations, tour bus captains, researching tour bus contracts, food and beverage selections, etc.

Secure Hotel / Meeting facilities

The LSC works through SR Secretary/Treasurer and usually a meetings procurement contractor (Helms Briscoe is currently the company we use) - secure a meeting space and hotel room block. Local Site Chair / Committee members should visit the short list of possible facilities to determine the most appropriate for IPPS. This process will take at least a month and sometimes much longer.

Items to consider

Adequate meeting space for Seminars, auction (tables and space to walk around), registration, tour buses to load and unload, Sponsor tables (approx. 12), poster displays (17+), banquet, food and beverage options, and all within our price range.

Meeting Space Requirements

- Seminar space for approx. 250, classroom set up or theater / classroom combination
- Audio Visual equipment.
- Banquet Space for 200.
- Room for Plant Auction (tables) and ease of unloading and receiving plants.
- Conference Registration area.

- Committee Meeting rooms (Long range site committee, Membership committee, Fellows (breakfast). Executive Committee Pre-conference meeting.
- Executive Committee Post-conference meeting and lunch.
- Annual Meeting (usually held in seminar room).
- Poster displays.
- Ideally, exhibitors, poster displays and break area in the same space.

Tour

Tour stops should offer interesting or unique ideas for attendees. It would be nice if all tour stops were IPPS members but usually that is not possible so non-member nurseries and industry related facilities should be considered. Garden Centers, Botanical gardens, Research Centers are good options also. Selected tour sites should provide a short description of the facility and photo or company logo for the conference brochure. These should be sent to the Sec/Treas.

Proposals for Bus Contract should be solicited a 1+ year out; thus, the tour stops and routes need to be determined at least a year out also. The Sec/Tres. signs the contract.

LSC should determine if Porta Johns/ portable toilets are needed for Tour stops. If so, make arrangements to have them available and coordinate with tour stop management on placement.

Tour Stop Considerations

- Does the facility offer something interesting for attendees?
- Does the distance from hotel and other tour stops work well?
- Does the stop have enough staff to talk to a large group (divided into small groups)?
- Can the roads and layout of the facility handle full size buses?
- Can lunch be held at sites visited during the lunch hour? (Space, tables, chairs, covering in case of rain, etc.)
- Some sites may be rural, thus limited options for lunch caterers.
- Caterers need to have vegetarian/vegan/gluten free meal options

□ Bus Captains

Refreshments on Buses

Bottled water, crackers etc. Check with bus company for their restrictions on what can be brought on the buses.

Tour stops Handouts

LSC gathers this information and works with Sec/Treasurer on having copies on the buses.

Social Events

Opening night (Monday) event

This is a wonderful kick off for the conference, however it is the *least important* so if the budget has to be cut this is the first event to be eliminated. This is a 60–90-minute event - just light food and beverage. It's not always dinner - depends on price and other options, etc.

Ice Cream Social / Question Box

The Question Box is loved by some and others have no interest. The ice Cream social is a way to attract some of the latter even if they do not participate in QB. The moderator needs to be someone who can keep the speakers on task and not let it be dominated by a few. Kevin Gantt, Judson LeCompte, and Tom Yeager have

done a good job at this in the past. The room for Question Box should be for about 100. Not everyone participates so the main seminar room may be too large. The Sec/Tres will provide the question cards.

Banquet and Auction

If LSC feels the schedule needs to deviate from the usual: Monday Tour, Monday evening social (optional, depending on the budget), Full Education on Tuesday; Banquet & Auction on Tuesday evening, Wednesday Full Day Tour, Question Box/Ice Cream Social Tuesday evening; Thursday education ending at noon, the LSC should notify the Executive Committee for approval and coordinate with the Education Chair (1st VP) ASAP.

TIME-LINE YEAR PRIOR TO ANNUAL CONFERENCE

12-14 Months Out

Education Chair (1st VP) begins contacting possible speakers and putting program together. Confirmed speakers should provide presentation title, bio, a 2-3 sentence seminar description and written version of presentation for Proceedings. Education chair should provide speaker list and contact info to Editor (Fred Davies) so that Editor can contact speakers about format for Proceedings.

Student Speakers – Charles Student Research Chair, Sandy Wilson, co-Chair, Kris Criscione, will coordinate the student competition and supply the student speaker name to Sec/Treas. The 1st VP/Education Chair should allow time on the program for the student presentations, awards (at Dinner Banquet), and sponsor acknowledgment. This also includes an allocated time for poster presentations (during breaks and first-day education presentations/ Tues 4:30-5:00).

12-14 Months Out

Sponsorship Chair (2nd VP) should begin making a list of possible sponsors and work with Secretary/Treasurer on Sponsor request letter.

LSC and Auction Chair should attend IPPS-SRNA conferences to observe how tours and auction work.

Registration

Secretary/Treasurer will manage registration alone or with a registration company.

Budget /Registration Fees

The Executive Committee has final approval of the budget and registration fees. The Secretary/Treasurer will stay in contact with the LSC reviewing the budget so that registration fees are determined early in the process and can be included in conference brochure. LSC & Secretary/Treasurer work out registration fees. All invoices should be sent to Secretary/Treasurer for payment.

Sponsorship

The 2nd Vice President is the Sponsorship Chair. The duties are to solicit corporate sponsorship for the conference. The Sec/Tres & the previous sponsor chair will provide a list of past sponsors. The Chair should begin soliciting sponsorships immediately following the last conference. Possible Local sponsors can be contacted even earlier. LSC and committee should help with local sponsors.

Promotion / Advertising

The Secretary/Treasurer will send the conference brochures (or pdf version but additional copies can be provided for the LSC committee to give out at state and regional meetings, etc. E-blasts and social media will be handled by the Digital Communications Director. Sec/Treasurer and LSC will provide information about the promotions.

TIMELINE DURING YEAR OF ANNUAL CONFERENCE

February

- 15th 1st report from Sponsor Chair to Sec-Treas. Foster; Sponsor Chair checks in with Sec-Treas monthly up to the annual conference.
- 28th Budget and registration fees complete – Local Chair & Sec-Tres Foster
- 28th Budget/Fees to EC to approve - Foster

March 15 - Finalize Speakers The Education Chair should provide speakers with full names (and titles where appropriate), a properly worded seminar description and title, seminar time slot, ready to be added to the promotional brochure to Sec-Treasurer Foster and Digital Communications Director Arthur.

April 15 - Finalize Moderators

April 30 - Registration prices, early bird fee deadline, etc. to Sec/Tres to create registration form (LSC to Secretary/Treasurer); IPPS Board has final approval on registration fees.

May

- 15th Sponsor Chair checks in with Sec-Treas.
- 15th Brochure text (speakers, seminar titles program, sponsors, photos, sponsor logos -everything) to graphic artist for brochure layout. This information is provided by the Local Chair and Education Chair and sent to the early bird fee deadline, etc. to Sec/Tres to create registration form (LSC to Secretary).
- 31st Sec/Tres, Sponsor chair, Local Chair and Education Chair 1st proof brochure, changes, corrections, additions. Conference highlights & Hotel information begin in the e-news.

16 weeks out (Mid-June)

- 15th Final copy of brochure to printer (Sec/Tres/graphic artist)
- Start posting Sponsor logos to website (Sec/Tres and Digital Communications Director)

12 weeks out (Mid-July)

- 15th registration link from Secretary-Treasurer to Digital Communications Director to post in coming weeks – Sec/Tres
- 15th *online registration opens*
- 15th *pdf of brochure posted online* – Digital Communications Director
- 25th *brochure mail out to membership (Sec/Tres) -or PDF (mailing may no longer be best)*
- Ship brochures to various IPPS members to give out at their nurseries and other trade shows. (Sec/Tres)
- Request for auction plants begins in e-news.

8 weeks out (Mid-August)

- Email Blast highlighting: Hotel registration info
- 15th Registration Reports start
- Early bird registration deadlines highlighted in e-news

6 weeks out

- 1st Updates/Changes for onsite brochure to Sec/Tres.

- Start Weekly Registration head counts to Local Site Chair – Sec/Tres.
- LSC, 1st VP, and others proof on-site brochure, proper room assignments, speaker info, etc.

5 weeks out

- news of highlights

4 Weeks out (Mid Sept)

- On-site brochure to printer –Sec/Tres/
- News highlighting: plant auction donations, registration link

2 weeks out

- Email Blast highlights

After Conference

- LSC may need to ship boxes back to IPPS Office if Sec/Tres flies instead of driving to conference.

Auction

The Plant Auction is a fund raiser for SR educational programs and the SR/HRI Education Endowment. The Auction Chair needs to be organized and available starting the Saturday evening before the conference through Thursday morning. Plants (and non-plant items) begin coming in on Sunday evening. The auction rooms should be set up with adequate tables (ordered from the hotel), covered with plastic as necessary, plastic covering the carpet as necessary. SR will provide 3-part carbons bid sheets for bidding and a plant description sheet to be completed by donors. Auction Chair and committee are responsible for placing plants in an organized manner for viewing, labeling with plant description sheets, monitoring bid sheets for replacement when full, determining plants for silent auction #1 and #2, and Live auction. An auctioneer is also needed. We hope for an auctioneer who will trade auctioneering for dinner at banquet and/or payment of no more than \$250 \$200. It is helpful if a master list of donors and plants is made as plants come in.

See Addendum N – Plant Auction Information & Plant Sheet Description

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Posters

Contact Sec-Tres for number of easels for posters needed. Drs. Sandy Wilson and Kris Criscione coordinate this program – Charles Student Research Competition.

+++++

CONFERENCE SCHEDULE DRAFT. May change from year to year. There will probably be some changes to the seminar schedule - but that is mostly a 1st VP issue. (sample)

Sunday

4:00 p.m. Hotel Check in begins

4:00- 8:00 p.m. Registration Open (Location) and Auction Plants Accepted (Location)

8:00 - 10:00 PM Executive Committee Meeting

Monday

6:00 A.M. -9:30 A.M. Registration Open (Location)

7:30 A.M. Load Buses for Tours (Location, which area of the hotel)

7:45 A.M. Buses Depart

- A.M. Arrive at
- A.M. Depart
- A.M. Arrive at
- A.M. Depart
- Lunch at
- P.M. Depart
- P.M. Arrive at
- P.M. Depart
- P.M. Arrive at
- P.M. Depart
- P.M. Arrive at back at hotel
- P.M. Kick Off Social (optional) (Location)

➤ Time for *Student Research & Green Industry Posters* to be set-up (Location)???

(Dinner on your own or catered – depending on year)

5:00 P.M. - 9:00 P.M. Registration open (Location)

Noon. - 9:00 P.M. Auction Plants Accepted (Location)

Tuesday

6:00 A.M.- 5:00 P.M. Registration Open (Location)

6:15 A.M. - 7:15 A. M. Long Range Site Committee Meeting (Location)

6:30 A.M. - 7:30 A.M. Fellows Breakfast (can be Monday or Tuesday morning- Tuesday is best)

7:00 A.M. Vendor Setup (Location)

7:00 A.M. Time for *Student Research & Green Industry Posters* to be set-up (Location)

7:30 A.M. Silent Auction begins

7:30 A.M – 8:00 A.M. Visit with Sponsors (Location)

8:00 A.M. President Welcoming Remarks & Question Box Promotion (Location)

Introduction of Scholarship Recipients, Exchange Program Participants, Students in the audience;

Local Site Chair Remarks concerning Wednesday Tour Schedule;

President, Introduction of Moderator for Session 1;

8:10 A.M. Moderator Session #1

8:15 A.M. seminar

8:35 A.M. seminar

8:55 A.M. seminar

9:15 A.M. Questions & Answers for Session 1 Speakers, Moderator

9:25 A.M. Recognition of New Members, Membership Chair, any special awards

9:35 A.M. *Poster Pitch*, TBA - *Suggest two 30-min time blocks to view posters*

9:55 A.M. Refreshment Break- Visit with Exhibitors- Visit Silent Auction-Posters

10:15 A.M. Moderator Session #2/Sandy Wilson – Charles SR-IPPS Student Research Competition

10:25 A. M. First Student Speaker

10:45 A.M. Second Student Speaker

11:05 A.M. Third Student Speaker

11:25 A.M. Fourth Student Speaker

11:45 A.M. Questions & Answers for Student Speakers / Education Chair
11:55 A.M. Sponsor Recognition – 2nd Vice-President/Sponsorship Chair
12:05 Meeting announcements

Noon LUNCH (on your own) - Take a student to lunch
Noon Silent Auction Group 2 begins

1:30 P.M. Moderator – Session #3
1:35 P.M. seminar
1:55 P.M. seminar
2:15 P.M. seminar
2:35 P.M. Questions & Answers
2:45 P.M. Refreshment Break, Visit with Exhibitors
3:00 P.M. Moderator – Session #4
3:05 P.M. seminar
3:20 P.M. Seminar
3:40 P.M. seminar
4:00 P.M. seminar
4:20 P.M. Questions and Answers; Announce Weds Tour Information
4:35 P.M. Visit Posters & Visit Exhibitors
5:30 P.M. Silent Auction closes
6:00 P.M. Social – cash bar
7:00 P.M. Awards Banquet and Live Auction (Location)
9:00 P.M. Banquet and Live Plant Auction Ends
9:00 -11:00 P.M. Auction Check out (Location)

Wednesday

On the Wednesday tour there is usually an attendee survey passed out on the buses.

6:00 A.M. - 9:00 A.M. Registration Open (Location)

7:30 (flexible – earlier or later) Buses leave

- A.M. Arrive at
- A.M. Depart
- A.M. Arrive at
- A.M. Depart
- Lunch at
- P.M. Depart
- P.M. Arrive at
- P.M. Depart
- P.M. Arrive at
- P.M. Depart
- P.M. Arrive at back at hotel

- Dinner on your own
- 8:00 P.M. Ice Cream Social
- 8:15 -10:00 P.M. Question Box

Thursday

7:00 A.M. – 9:30 A.M. Registration Open
8:00 A.M. Welcoming Remarks, President (Location)
8:05 A.M. Introduction of Moderator for Session 5; President or 1st VP
8:05 A.M. Seminar
8:25 A.M. Seminar
8:45 A.M. Seminar
9:05 A.M. Questions and Answers for Session 5 Speakers
9:15 A.M. Annual Business Meeting, President Presiding
10:15 A.M. Refreshment Break – Visit with Vendors, View Posters
10:30 A.M. Introduction of Moderator for Session 6
10:35 A.M. Seminar
10:55 A.M. Seminar
11:15 A.M. Seminar
11:35 A.M. Seminar A Sneak Peak of SR-IPPS next year's meeting
11:55 A.M. Questions and Answers for session 6 Speakers
12:00 P.M. Education Session and Conference Concludes. *Thank you for attending!*
12:30 P.M. Executive Committee Post-Meeting Luncheon (Location)

+++++

Vivian Munday Interns

description:

Use:

- Interns help with registration, auction, and limited duties on the tours (They are not to be bus captains, etc. just helpers).
- 1-2 interns need to help at registration Monday morning right until the bus leaves. Too many last minute badge pickups and on-site registrations for Sec/Tres Donna Foster to handle alone.

ADDENDUM L - Nursery Tour Worksheet



IPPS Nursery Tour Worksheet

Organization Name: _____

Physical Location: _____

Primary Contact (name and cellphone): _____

Secondary Contact (name and cellphone): _____

Estimated day and time of tour arrival: _____

Length of tour: _____

Coach bus parking: _____

Restrooms: " building " portable toilets

- Which building(s)? Directions? _____

- Portable toilet vendor and cost (" send the bill to IPPS unless it's part of event sponsorship):

Refreshments (the buses will have water and soda for the day): " Yes " No

- If yes:
 - Location, directions, timing: _____

 - Food: " Pastries/bread-based snacks " Fruit " Other: _____
 - Drinks: " Water " Coffee " Soda " Other: _____

Medical aid station: " Yes " No

- Which building(s)? Directions? _____

Private space for medical needs: " Yes " No

- Which building(s)? Directions? _____

Tour plan:

- Number of groups: _____
- Number of stops: _____
 - Describe stops: _____

- Method of rotating between stops: _____

- Moving people: " Walking " Riding " Other: _____
 - If riding, mode of transportation: _____

- Where will coach buses park to pick up? _____

If this location is also a lunch location (estimate 250 attendees for preliminary planning):

- Where will lunch be held? " Sit-down " Boxes
 - Sit-down option:
 - Do tables and chairs need to be rented? " Yes " No
 - Is the area covered? " Yes " No
 - Does a tent need to be rented? " Yes " No
 - How big? _____
 - Box option:
 - Where will the boxes be picked up? _____

 - Eat on the bus or elsewhere? _____

- Catering vendor and cost (" send the bill to IPPS unless " it is part of event sponsorship):

Handbook developed by Cheryl Boyer, Local Site Chair, Tulsa, OK, 2024
& Jeremy Pickens, Local Site Chair, Mobile, AL 2021

Bus Captain Handbook



Tulsa, Oklahoma
October 27-30, 2024

Cheryl Boyer cell: (785) 320-0066

First of all, THANK YOU!

You are awesome and we're super grateful for your help guiding our participants through the tour experiences.

Sunday, October 27

- Bus 1—Redbud
 - Kayla Morrison (OSU Student, Vivian Munday Scholarship winner)
- Bus 2—Filbert
 - Laura Payne (OSU Extension)
- Bus 3—Ironwood
 - Carolan Schaefer (OSU Extension)
- Bus 4—Pawpaw
 - TBD

Tuesday, October 29

- Bus 1—Redbud
 - Kayla Morrison (OSU Student, Vivian Munday Scholarship winner)
- Bus 2—Filbert
 - Laura Payne (OSU Extension)
- Bus 3—Ironwood
 - Dustin Stoll (Stoll Design Tulsa)
- Bus 4—Pawpaw
 - Bailey Singleton (OSU Extension)

Backup Bus Captains: Hiram Baldwin, Rhonda Helvick

Tasks

- Welcome participants to the bus
- Introduce yourself
- Give them the details of where we're going next and how long we'll be driving at the beginning of each drive.
 - If there is a special event (meal, bar, etc.) give those details on arrival.
- Mention points of interest over the microphone
- On arrival, open the bus storage compartment outside so people can grab bottled water.
- QUESTION BOX cards: Periodically pass these around and keep them visible in the front seat with the tour items so people can grab them when getting on and off the bus. These are for the session on Tuesday night.
- Candy: periodically pass around the bus
- Bus driver tip: On the last drive of the day, pass around the bag to collect a tip (\$5 to \$5 per person per day, recommended). Present the tip to the driver at the end of the day. There will be a notecard included—you can have people sign it or not, use it or not.
- Remind people to clean up after themselves (bus driver will have a trash bag)

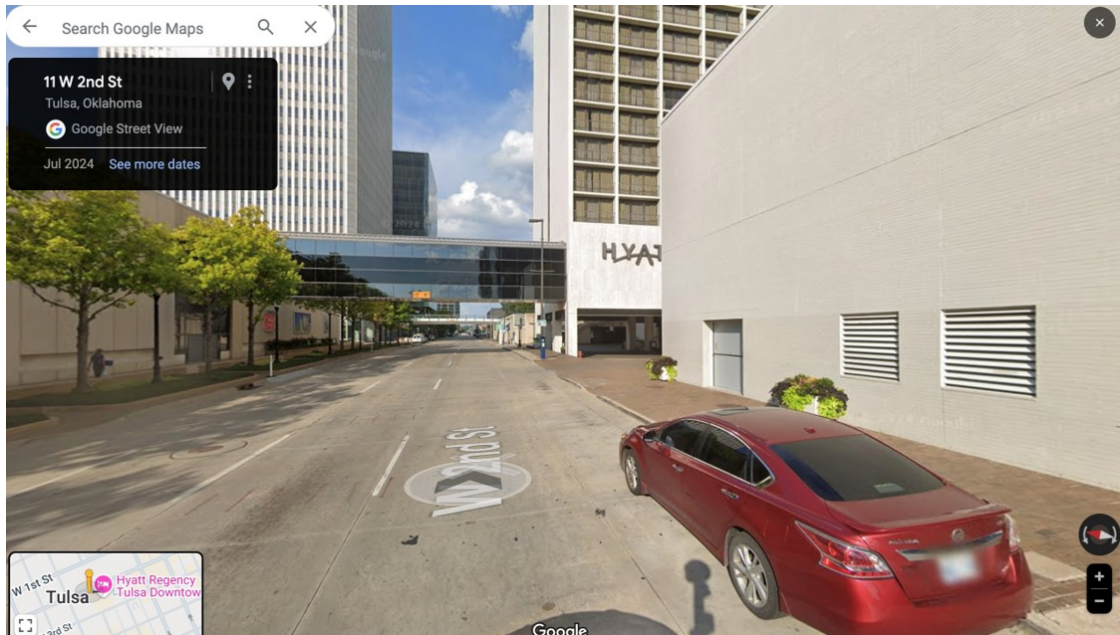
Sunday Tours

Clay is the lead bus driver for Village Travel.

Sunday Hotel Departure

- Parking is in the garage adjacent the hotel
 - \$21/day
 - IPPS can reimburse
- Meet upstairs in the hotel lobby at 7:15 a.m. to pick up coolers (with ice) and other items for the bus
- Buses will line up on 2nd Street
- People will mill around and start loading at 7:30 a.m.
 - 45-ish people per bus (they hold 56 people)
- Depart at 7:45 a.m.
- Cheryl will drive the chase vehicle with extra water
 - 2013 Toyota Rav4, silver

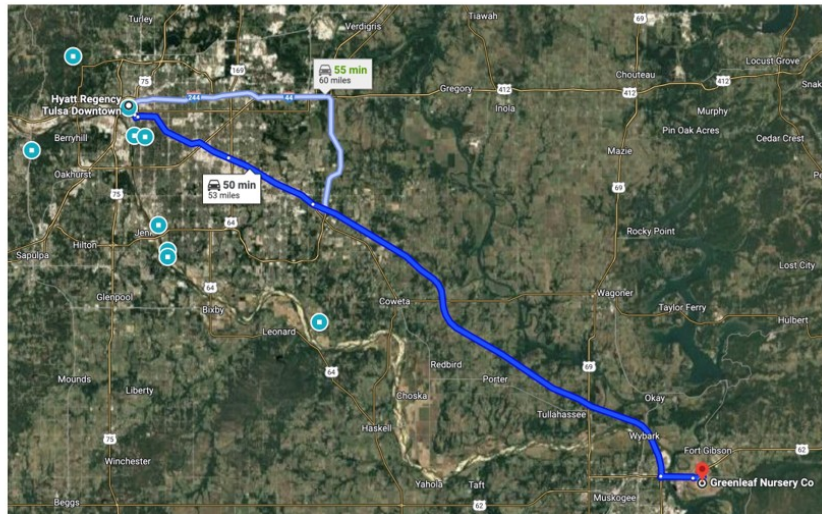




1st Stop: Greenleaf Nursery, Fort Gibson

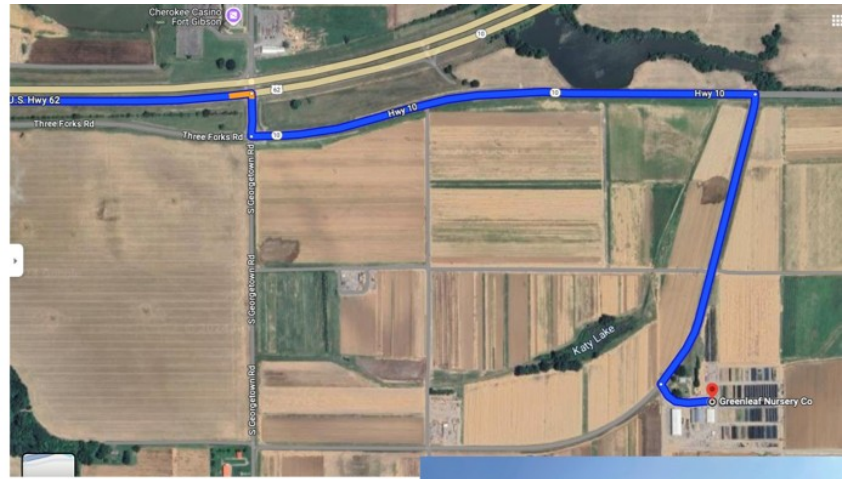
Drive time: 51 minutes

Arrive: 8:45 a.m.



Greenleaf Nursery, Fort Gibson

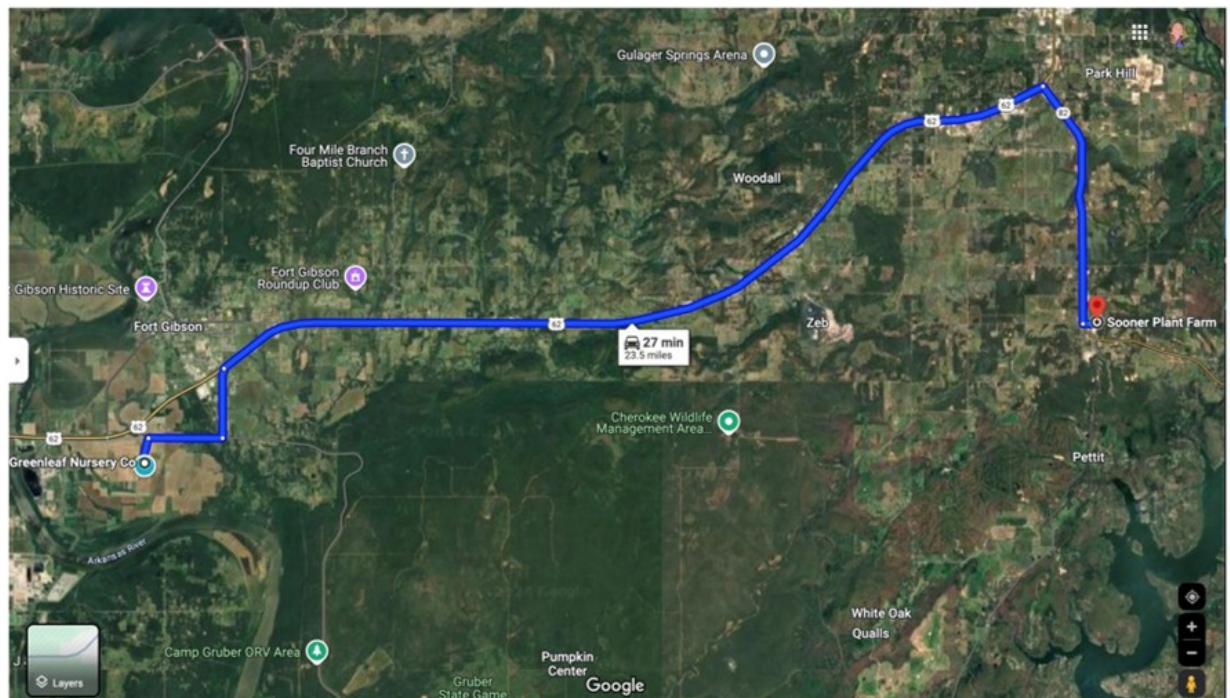
- Park by the barn or along the road if staff is directing traffic.
- Portable toilets available
- Doughnuts and coffee planned
- Private space for medical needs (First aid and nursing mothers) is available in barn offices.
- Tours: walking and some guided tours on the buses (1 hour total)
- Load buses: 9:45 a.m.
- Depart: 10:00 a.m. (earlier if we're ready)
- Pass out Sooner Plant Farm handout



Drive time: 30 minutes

2nd Stop: Sooner Plant Farm

Arrive: 10:30 a.m.



Sooner Plant Farm

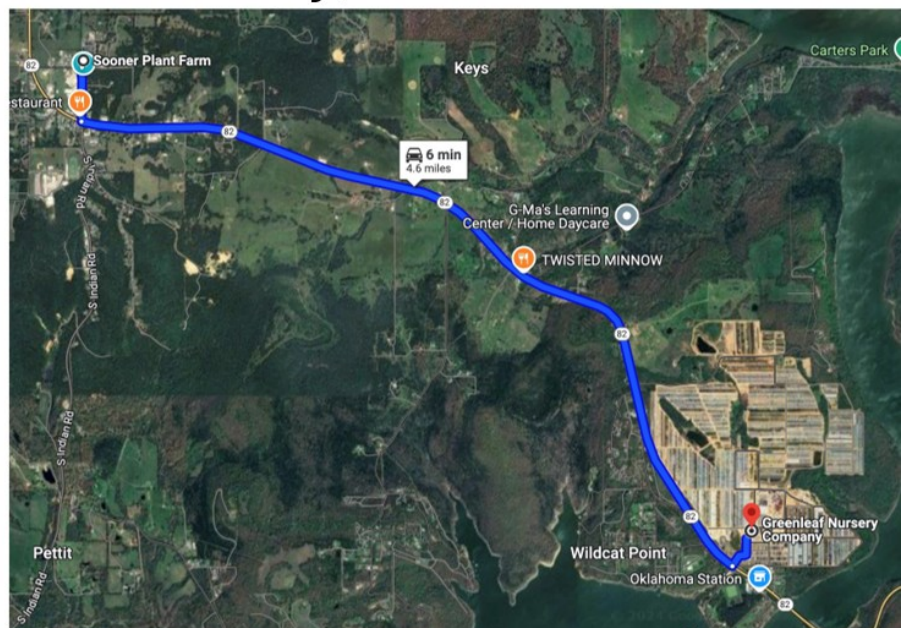
- Park by the school
- Walk down to the Sooner Plant Farm entrance
- 2 indoor bathrooms are available in the main office. 1 outdoor portable toilet.
- Private space for medical needs (First aid and nursing mothers) is available in the main office.
- Tours: walking (1 hour total)
- Load buses: 11:30 a.m.
- Depart: 11:45 a.m. (earlier if we're ready)



3rd Stop: Greenleaf Nursery, Park Hill

Drive time: 10 minutes

Arrive: Noon



Greenleaf Nursery, Park Hill

- Enter at the employee entrance (first entrance, not main entrance)
- Park in the open lot
- Portable toilets available
- Lunch in the pavilion (BBQ)
 - Half will tour first
- Private space for medical needs (First aid and nursing mothers) is available in the Human Resource offices (first building at our entrance).
- Tours: guided tours on the buses (1.5 hour total, including lunch)
- Load buses: 2:30 p.m.
- Depart: 2:45 p.m. (earlier if we're ready)

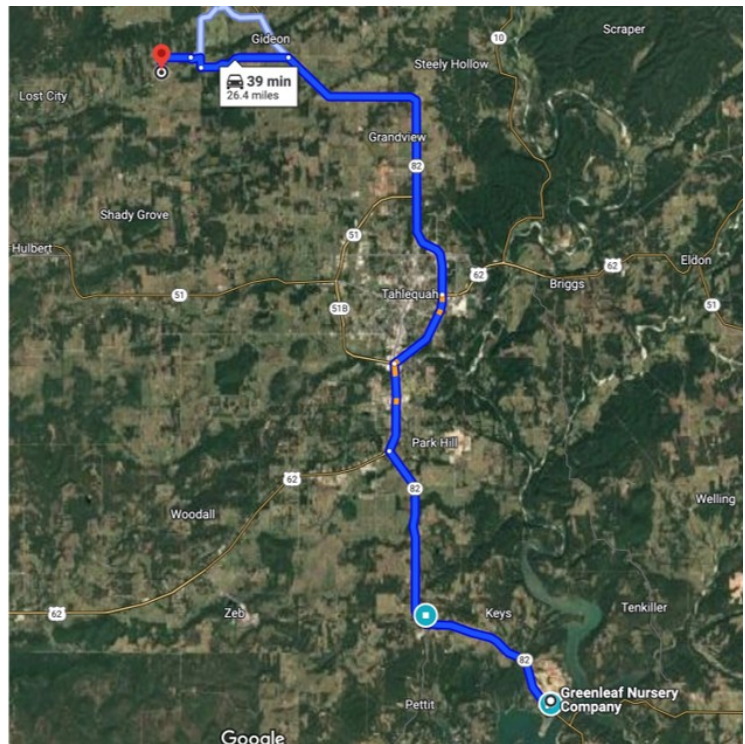


Main Entrance (do not go this way with the buses)

4th Stop: Sugartree Nursery

Drive time: 45 minutes

Arrive: 3:30 p.m.



- Park by the main office—pull all the way down the entrance road to the open area by delivery trucks
- Portable toilets available, and indoor toilets
- Private space for medical needs (First aid and nursing mothers) is available in main office or old dairy building.
- Give Scott Maxwell (owner) one of the portable microphones for the tour.
- Tours: walking (45 min total)
- Load buses: 4:15 p.m.
- Depart: 4:30 p.m. (earlier if we're ready)
- Pass around the bus driver tip collection bag



Arrive: 5:45 p.m.



Tulsa Botanic Garden

- Drop off at the visitors center
- Take all belongings—might not ride the same bus back
- Toilets and Private space for medical needs (First aid and nursing mothers) is available in visitors center and The Grange.
- Head to the Great Lawn for Welcome, Orientation, and Cash Bar
- Tours: walking (1 hour total)
- Dinner is in The Grange (Italian)
- Buses pick up at The Grange—first come, first serve
- Load buses: 7:00 to 7:30 p.m.
- Last Bus Departs: 7:45 p.m.
- 15-minute drive to the hotel

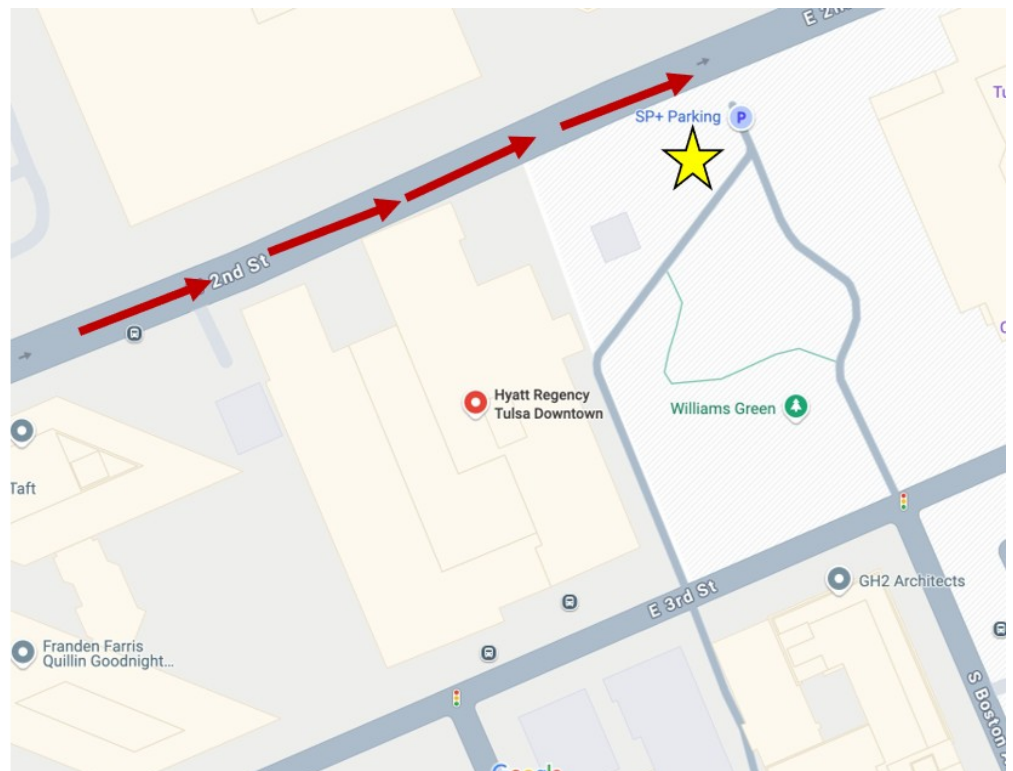


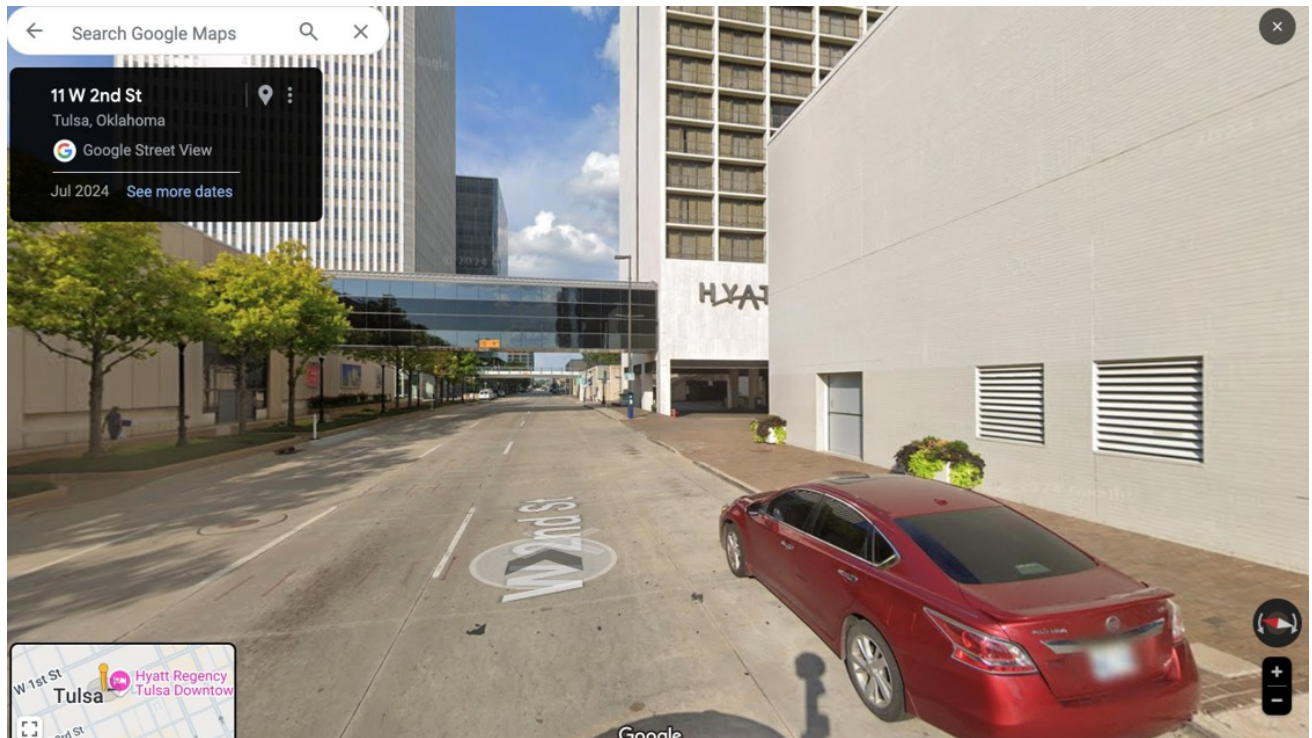
Tuesday Tours

Roger is the lead bus driver for Village Travel

Sunday Hotel Departure

- Parking is in the garage adjacent the hotel
 - \$21/day
 - IPPS can reimburse
- Meet upstairs in the hotel lobby at 7:15 a.m. to pick up coolers (with ice) and other items for the bus
- Buses will line up on 2nd Street
- People will mill around and start loading at 7:30 a.m.
 - 50-ish people per bus (they hold 56 people)
- Depart at 7:45 a.m.
- Cheryl will drive the chase vehicle with extra water
 - 2013 Toyota Rav4, silver

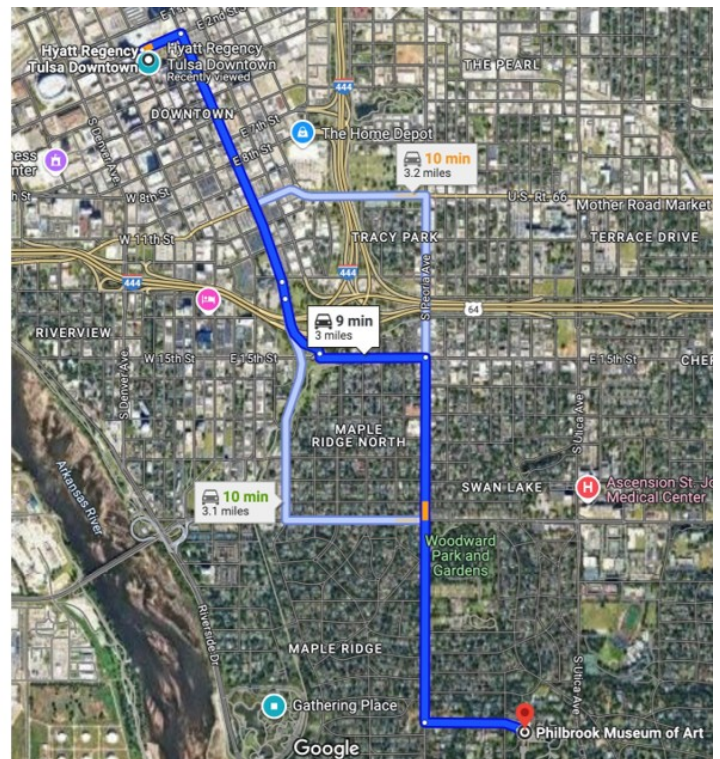




1st Stop: Philbrook Museum of Art

Drive time: 15 minutes

Arrive: 8:00 a.m.



Philbrook Museum of Art

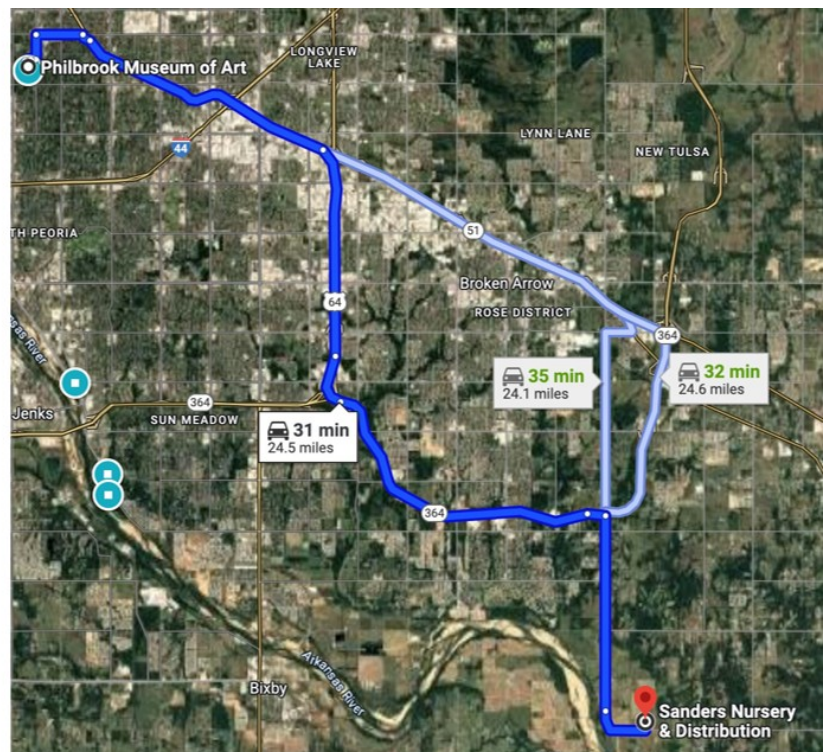
- Drop off at the main entrance, use the circle drive to loop back around to Rockford Rd. to park along the street in front of the museum.
- Indoor toilets available
- Private space for medical needs (First aid and nursing mothers) is available in the main building.
- Tours: walking (1 hour total)
 - Group Welcome
 - Group Photo
 - Visit section heads
- Load buses: 9:00 a.m.
- Depart: 9:15 a.m. (earlier if we're ready)



2nd Stop: Sanders Nursery and Distribution

Drive time: 40 minutes

Arrive: 9:55 a.m.



Sanders Nursery and Distribution Center

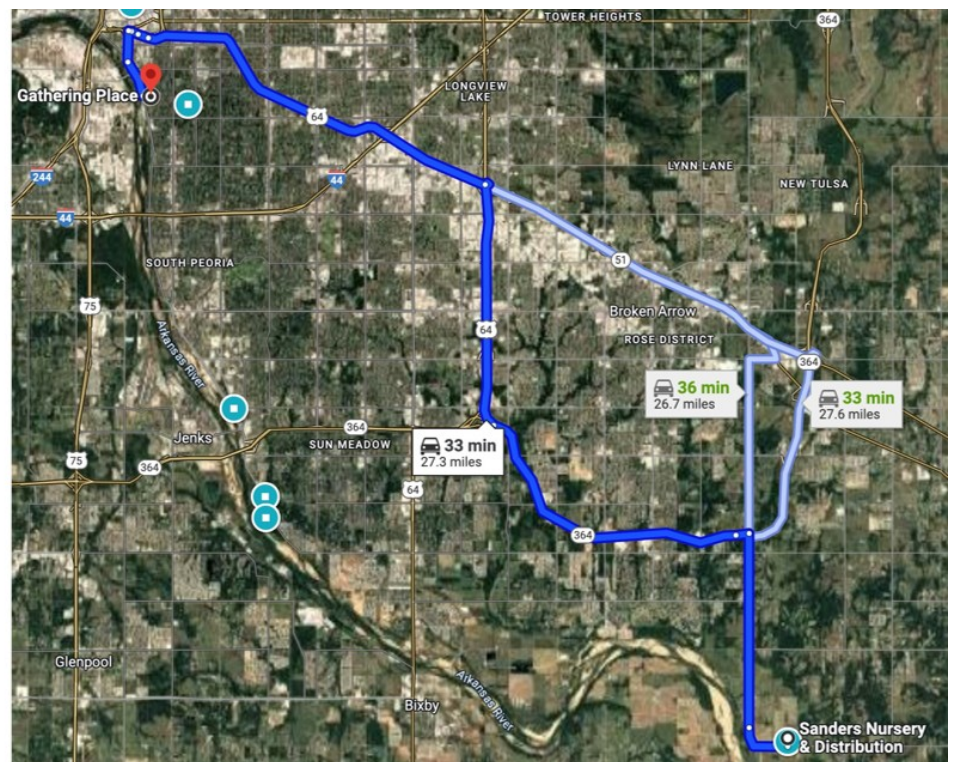
- Plenty of gravel parking
- Indoor toilets available
- Private space for medical needs (First aid and nursing mothers) is available in garden center offices.
- Tours: walking (1 hour total)
- Load buses: 11:00 a.m.
- Depart: 11:15 a.m. (earlier if we're ready)



3rd Stop: Gathering Place

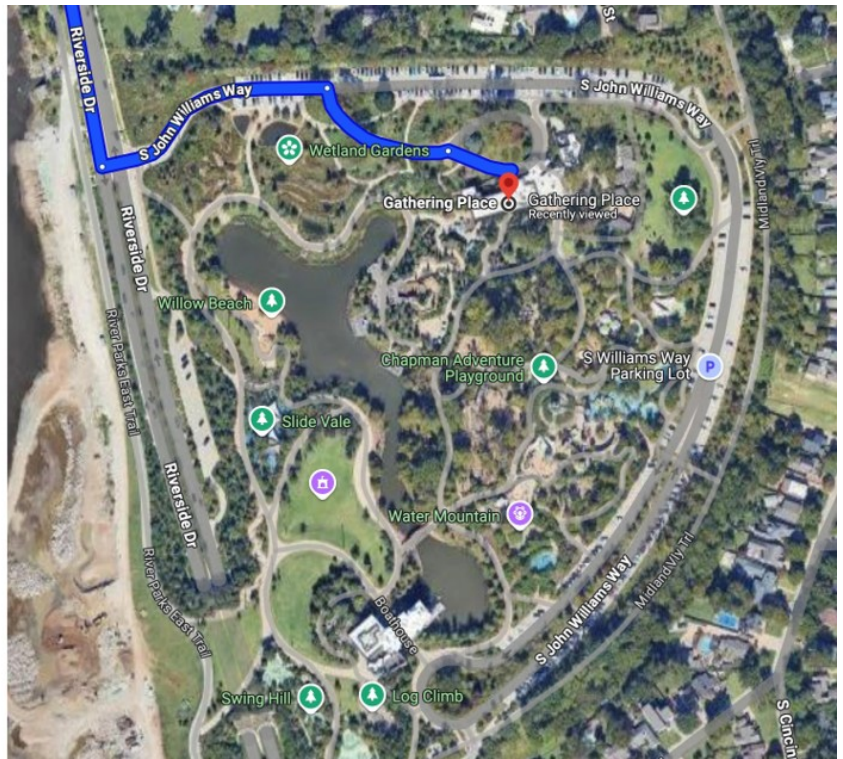
Drive time: 45 minutes

Arrive: Noon



Gathering Place

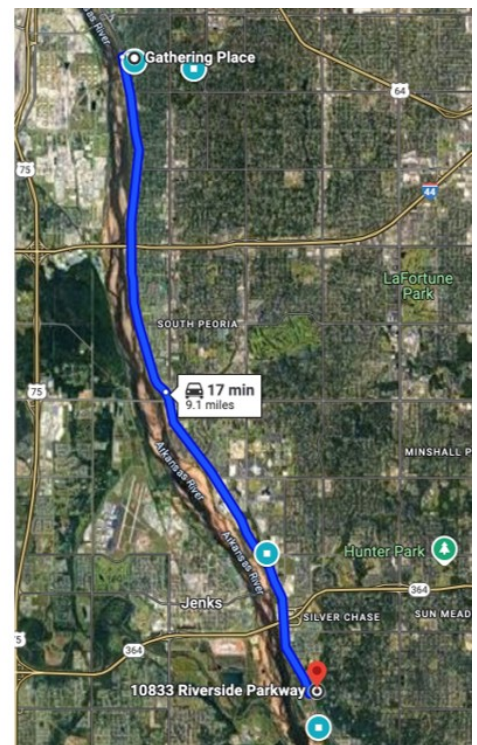
- Drop off at the main building
 - Park where staff direct
 - Indoor toilets available
 - Private space for medical needs (First aid and nursing mothers) is available in guest services.
 - Lunch and Welcome: Patio
 - Club sandwiches
 - Tours: walking (2 hours total)
-
- Load buses: 2:00 p.m.
 - Depart: 2:15 p.m.



4th Stop: Southwood Production Facility

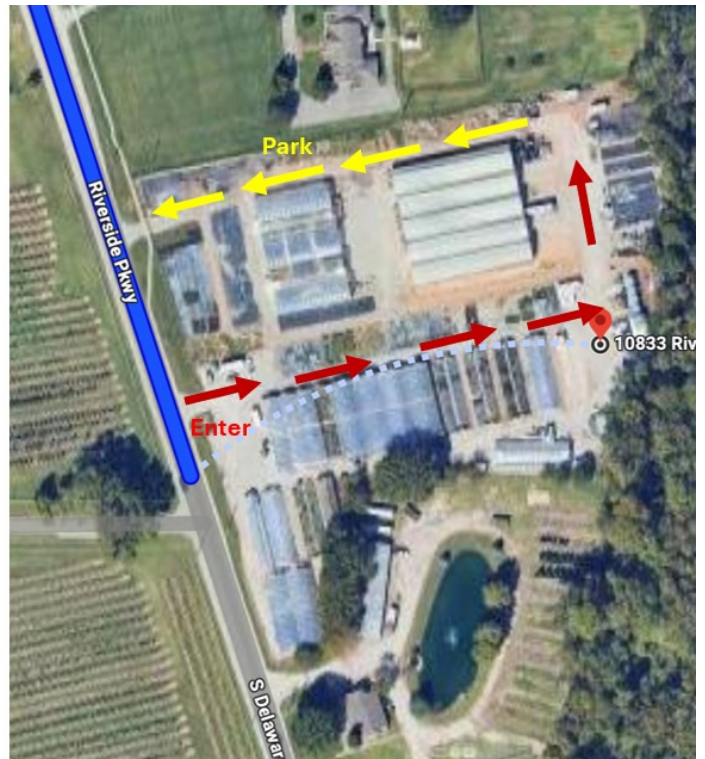
Drive time: 20 minutes

Arrive: 2:25 p.m.



Southwood Production Facility

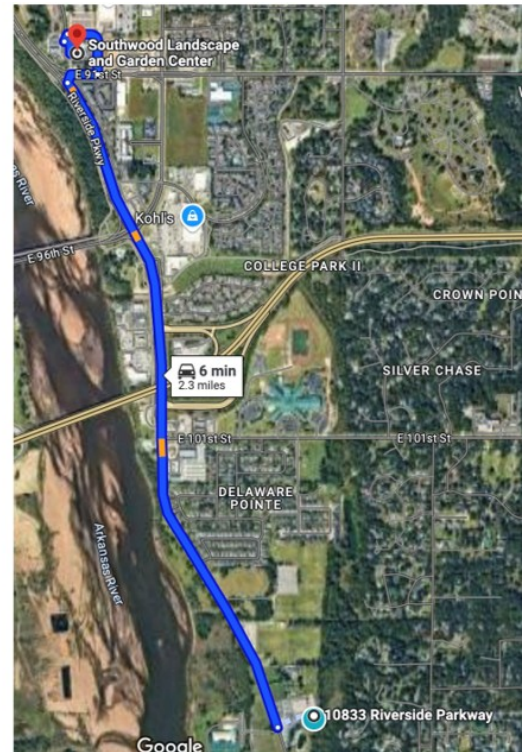
- Enter at the main entrance
- Park on the North side of the facility
- Toilets available in the greenhouse
- Private space for medical needs (First aid and nursing mothers) is available in the lunch room and office.
- Tours: walking (45 min total)
- Load buses: 3:10 p.m.
- Depart: 3:20 p.m. (earlier if we're ready)



Last Stop: Southwood Garden Center

Drive time: 10 minutes

Arrive: 3:30 p.m.



Southwood Garden Center

- Drop off in the culdesac
- Park at Oral Roberts University
- indoor toilets available
- Happy Hour: beer, wine, non-alcoholic drinks)
- Private space for medical needs (First aid and nursing mothers) is available in garden center.
- Tours: walking (1.5 hour total)
- Load buses: 5:00 p.m.
- Depart: 5:10 p.m. (earlier if we're ready)
 - 20 minute drive to hotel
 - Dinner on your own, take a student
 - 8:00 pm ice cream social and QUESTION BOX
 - Pass around the bus driver tip collection bag



We Did It! 🎉

Thank You, Thank You, Thank You!!! ★★★★★

IPPS-SR Tulsa Tour Descriptions (example)

IPPS-SR Tulsa Tour Descriptions

October 26-30, 2024

☒ Description approved

☒ Logos received

Greenleaf Nursery (Park Hill and Fort Gibson) ☒ ☒

Founded in 1945, Greenleaf Nursery is one of North America's largest wholesale nursery growers, with four locations (Oklahoma, Texas, and North Carolina). Greenleaf produces over 8,000 cultivars of plants, including broadleaf evergreen and deciduous shrubs, 70+ cultivars of ornamental grasses, shade, and ornamental trees, as well as a color program featuring annuals, perennials, and tropical plants. Between all locations, their nurseries are nearly self-sufficient in propagation. Their primary markets in the U.S. and Canada are retailers, wholesale distribution centers, and landscapers. The Fort Gibson location produces bare-root deciduous trees and shrubs for high-quality liners destined for larger container sizes. The Park Hill location produces container-grown plants on a beautiful site adjacent to Lake Tenkiller, making water management a crucial nursery component.

<https://www.greenleafnursery.com/>

Sooner Plant Farm (Park Hill) ☒ ☒

Founded in 1999 by Brian and Marsha Chojnacki, Sooner Plant Farm specializes in mail-order plants (direct to consumer). The nursery produces over 4,700 cultivars of popular landscape plants as well as hard-to-find and rare cultivars in quarts (perennials), 1-gal, 5-gal (5 to 6-foot trees), and 7-gal (shrubs). Pioneers in e-commerce, Sooner Plant Farm's online sales website was launched in 2004 and proved to be such a strong market that the nursery began focusing exclusively on online sales in 2007. Partnering with FedEx Ground, they perfected their shipping methods and are now a top-ranked internet nursery retailer. <https://www.soonerplantfarm.com/>

Sugartree Nursery (Hulbert) ☒ (use photo—no logo)

Sugartree was founded in 1994 by Daryl and Deborah Bailey in Hulbert, OK, producing container-grown trees for local field growers. Purchased in 2015 by Scott and Bethany Maxwell; production was expanded, and container-grown shrubs, grasses, and perennials are now produced for regional rewholesalers and select retailers. The 40-acre facility contains 350,000 sq ft of covered overwintering houses with 15,000 sq ft of propagation space. No supplemental heating is used in the nursery. All shipping is handled by Sugartree. The crop mix of landscape plants currently consists of 676 varieties (238 shrubs, 86 grasses, 350 perennials).

Tulsa Botanic Garden (Tulsa) ☒ ☒

Tulsa Botanic Garden is an all-season oasis blooming in the rolling hills just 8 miles northwest of downtown Tulsa. A 2012 master plan envisions 60 acres of developed gardens and facilities contrasting with the remaining 110 acres of natural beauty. The A.R. and Marylouise Tandy Floral Terraces opened in 2015 and features themed terraces on a natural hillside with a central water feature surrounded by seasonal display beds and beautiful art deco design elements. The Children's Discovery Garden is a wonderland for kids of all ages with the iconic Spring Giant, carnivorous plants, Sensory Walk, Hummingbird Walk, Tree Fort and Round Pond.

The Lakeside Promenade gracefully encompasses a seven-acre lake, and the Cross Timbers Trail provides a 1-mile hike through the native prairie and forest. In July 2023, The Bumgarner Family Foundation Lotus Pool and Stanford Family Liberty Garden opened. The Jim and Cherry Bost Arboretum will open in October 2024. <https://www.tulsabotanic.org/>

Philbrook Museum of Art (Tulsa) ☒ ☒

The Philbrook Museum of Art is a premier destination for cultural engagement and garden delight. Opening in 1939, it features a historic home, a world-class art museum, and 25 acres of gardens. The Philbrook Collection features more than 16,000 objects focusing on American, Native American, and European art. On-site growing facilities include a small greenhouse for propagation and overwintering tropical and stock plants. <https://philbrook.org/>

Sanders Nursery and Distribution (Broken Arrow) ☒ ☒

Sanders Nursery and Distribution is one of Oklahoma's largest and most respected nurseries, building upon the traditions of superior quality, fair pricing, and great service. The business sells retail and wholesale plants by offering extensive plant selections locally. Many products are produced on-site, including field-grown trees and container-grown annuals and perennials in greenhouses. Ever-changing to meet needs and opportunities, the nursery has recently added new specialty crop production areas (vegetables and cut flowers), demonstration gardens, and agritourism features. <https://www.sandersnurseryok.com/>

Gathering Place (Tulsa) ☒ ☒

Gathering Place, an award-winning 66.5-acre park along Tulsa's riverfront, opened in 2018. Recently named USA Today's Best City Park of 2024 and recognized as a top 100 unexpected travel destination by National Geographic, Gathering Place is a free park for all. From weekly educational programs and high-production events to boat rides on the pond and access to world-class playgrounds, sports courts, a skate park, and a BMX pump track, visitors can experience the magic of Gathering Place at no cost. The park boasts an impressive natural landscape, featuring 1.2 million plants of 400 species, more than 6,000 trees, and 16 acres of prairies. All of Oklahoma's ecological regions are represented in various gardens throughout the park, including prairies, wetlands, and forests. <https://www.gatheringplace.org/>

Southwood Landscape and Garden Center, Growing Facility (Tulsa) ☒ ☒

Southwood opened its doors in the spring of 1982 as a small landscape design-build firm and grew into a full-scale garden retail, landscape services, and plant production business. The garden center encompasses 5 acres and includes a 25,000-square-foot, state-of-the-art greenhouse. The nearby greenhouse production facility grows many of the garden center's products, including pansies, roses, mums, and summer annuals. It continues to be a family-run operation, headed by native Tulsans Margaret Schulte and Brenda Baird, daughters of founders Joe and Ginny Schulte. <https://southwoodgardencenter.com/>

Bus 1—Redbud

2024 *Oklahoma Proven* Tree of the Year



Bus 2—Filbert

2024 *Oklahoma Proven* Shrub of the Year



Bus 3—Ironwood

2024 *Oklahoma Proven* Perennial of the Year



Bus 4—Pawpaw

2024 *Oklahoma Proven* Collector's Choice



ADDENDUM N - Plant Auction Info, Checklist, Timeline & Plant Sheet Form



Southern Region
of North America

Auction Committee

Purpose

The purpose of the auction in conjunction with the annual meeting is to generate revenue for educational needs of the society in a fun yet organized fashion, while moving new/rare plants into the trade. Special, non-plant items are also bid on. Revenue is used for educational purposes, including the Southern Region Endowment Fund managed by HRI at the discretion of the Executive Committee during the fiscal year of the auction. There is both a live auction and a silent auction (that closes prior to the live auction).

History

The first auction was held in the Maryland meeting in 1991 and has continued since. It follows the Annual Banquet, evening of Tuesday night. The Auction Committee was later established in 1996.

Procedure

An Auction Chair, Co-chair, Local Coordinator and/or Committee solicits items for the auction.

Selection of the Committee & Chairperson

The Auction Committee is selected by Local Site Chairman.

Responsibility

Committee members are responsible for the intake of donated plants, maintaining and displaying plants in an organized manner and selecting 12-15 plants for the live auction. Committee members are to monitor the silent action room during the hours it is open and help those with winning bids collect their plants and non-plant items after the auction. The Auction Committee is also responsible for protecting the carpet and tables used in the auction room.

Personnel Required for the Live Auction:

Auctioneer:	A qualified and competent Auctioneer is needed.
Bid Spotter:	Located with Auctioneer, show items and assist with spotting bids.
Floor Bid Spotters:	2 to 4 people to be sure no bids are missed.
Runner:	3 or 4 people carrying items to buyers.
Plant Promoters:	When available – a recognized expert to humorously describe plants to the audience during the auction.
Salesclerks - Auction Checkout:	Secretary Treasurer along with people selected by the Secretary Treasurer, including Vivian Munday Interns are responsible for tabulating silent auction bids and collecting payments.
Auction Chairman:	Coordinates the total Auction in conjunction with the Local

Site Chair, Auction Vice-Chair, and the Secretary/Treasurer

Auction Vice Chairman:

Sees that all physical arrangements are in place for the auction. Arranges to get all auction materials properly displayed and tagged. This person will become next year's Auction Chair.

Physical Requirements of Live Auction Room

- e. Generally held in the same room as the Annual Banquet.
- f. Reliable Sound System - 2 microphones preferred.
- g. Riser to put auctioneer above audience level. A small platform accommodating 4 to 6 people is desirable.
- h. Attendee name tags are to be numbered, and this number is to be used as the bidder number.

Silent Auction

- f. To speed-up and reduce the number of items in the Live Auction. Both plants and non-plant items are bid on at the Silent Auction. The Silent Auction closes prior to the live auction.
- b. Each item will have an I.D. number on its description sheet. There is also a master list of items, item numbers and donors.
- c. Three-part carbonless forms are currently the best format to be used for bidding.

Collection

Collection for all purchases should be made by the end of the Auction. If at all possible, collect before leaving the banquet dinner site.

Auction

The Plant Auction is a fundraiser for SR educational programs and the SR/HRI Education Endowment. The Auction Chair needs to be organized and available starting the Sunday evening before the conference through Thursday morning. Plants (and non-plant items) begin coming in on Sunday evening. The auction rooms should be set up with adequate tables (ordered from the hotel), covered with plastic as necessary, plastic covering the carpet as necessary. SR will provide 3-part carbonless bid sheets for bidding and a plant description sheet to be completed by donors. Auction Chair and committee are responsible for placing plants in an organized manner for viewing, labeling with plant description sheets, monitoring bid sheets for replacement when full, determine plants for silent auction #1 and #2, and Live auction. An auctioneer is also needed. We hope for an auctioneer who will trade auctioneering for dinner at banquet and/or payment of no more than \$250. It is helpful if a master list of donors and plants is made as plants come in.

SAMPLE OF AUCTION COMMITTEE OUTLINE / INFORMATION - BILL BARR CREATED YEARS AGO, USE AS NEEDED. COMMUNICATION WITH AUCTION COMMITTEE

AUCTION COMMITTEE MEMBERS

Times that auction plants will be accepted (Annual Conference running Sunday – Thursday).

- Sunday Time, Date.
- Monday Time, Date.

Jobs

- Receive the plants.
- Determine which plants go into the live auction and which plants go into the silent auction.
- Assign a bid card to each plant.
- Help fill out important information about the item - that creates interest in the item. For plants we want to know the name, hardiness zone, description, etc.
- Help with the live auction.
- Bring plants to the front.
- Hold them up so the audience can see them.

Other

- We have enough people on the committee (plus student help) that not everyone has to help all the time. We want to spread it out, so no one is over-worked.
- Let me know if I've forgotten to cover something.
- See you this coming weekend.
- Thanks for "Seeking and Sharing"!!

ASKING FOR DONATIONS – sample note (edit times, locations, etc.)

In keeping with our IPPS Southern Region tradition, we will hold our plant auction again this year. The auction is an important fund raiser and helps support our Southern Region programs. In addition, the auction is a great way to seek and share plants, seeds, books, and other things those fellow members are interested in obtaining. Your generous donations will help ensure that the Texas auction will be a success. Please bring your donation items to the *Park West Ballroom West*. The hours listed in the IPPS brochure are Sunday 8- 10 pm and Monday noon - 9 pm. Auction committee volunteers will be available to assist in unloading. ***They will have item bid sheets for you to fill out regarding the name, description, USDA hardiness zone, and any cultural information.*** Because many people will be flying - we encourage small plants, seeds, books, etc., however we will appreciate any item that is donated, including large plants.

Thanks for Seeking and Sharing!

INFORMATION FROM THE LOCAL SITE COMMITTEE TO THE AUCTION CHAIR

(sample note)

Thanks for volunteering to be the auction chair. I wanted to connect you with **Mike Jones**, copied in the email, who will be providing the auctioneer for the event. I've told him that the event will be from 7:00-9:00 at the Omni Dallas Hotel at Park West, **1590 LBJ Fwy, Dallas, TX 75234**, and will include a banquet followed by a plant auction. We expect there to be around 160 people and will probably auction of 2-3 dozen items - that should go from \$40-400 each. I've let him know that there will be *spotters* to help out, and we will have folks that will take care of collecting payment. Also, there will be "*Plant Gurus*" that will describe and hype the plants. We agreed to a \$200 fee and will provide a banquet meal for the auctioneer and guest. Mike will send us an Auction Agreement for us to review. I think I covered it, but if there is anything else, you can let us know. ***[In recent years, Kevin Gantt and Richard May of the SR have been the volunteer auctioneers].***

[About 12-15 items maximum for the Live Auction]

Tracking Auction donations

- Item number Donor (person or company) _____
 - Item Description _____
 - Sample request for Plants from Auction Chair (Sec/Tres will send it out):
-



IPPS Plant Auction Call for Plants [sample]

The time is fast approaching for the IPPS Southern Region North America meeting in (CITY, STATE) (DATE). The plant auction is always a popular part of the annual meeting, and we need plants to make it a successful event. Attendees look forward to seeing new varieties and being able to bid on uncommon and unusual specimens. The auctions will take place on *Monday*.

Now is the time to think about some great plants that you have to contribute to the plant auction. There are two ways to help us with the auction.

1. You can email me a list of plants you plan to bring. Include common and scientific names and some information about the plant that would help us sell it for a premium price!
2. **You can copy the attached information sheet** and fill out one for every plant you donate and bring the information sheet with you to *Auburn*. (I would still appreciate an email letting me know what you plan to bring.)

It is a big help to have as much information and as much done prior to the auction so please let me know what you are bringing.

Bring your plants to the *XXXX Room* of the *xxx Hotel (Host Hotel)* *Sunday 12pm – 7pm., Monday 6:30am - 7:30am, 3pm-5pm, 7pm-9pm.* I look forward to hearing from you and seeing some great plants in Auburn.

John Olive [contact info].