

# NEWSLETTER OF THE AMERICAN MALACOLOGICAL SOCIETY

OFFICE OF THE SECRETARY

DEPARTMENT OF MALACOLOGY, ACADEMY OF NATURAL SCIENCES

1900 BENJAMIN FRANKLIN PARKWAY, PHILADELPHIA PA 19103-1195, USA



VOLUME 35, NO 2. AUTUMN 2004

<http://erato.acnatsci.org/ams>

ISSN 1041-5300

## *From the editor*

The 70<sup>th</sup> annual meeting of the AMS took place on Sanibel Island in Florida from July 31 to August 4, 2004. There was a full program of events, talks and field trips, and the usual socializing among members. The Sanibel-Captiva Shell Club provided extensive assistance, together with the staff of the Bailey-Matthews Shell Museum. The Lee County Visitor and Convention Bureau also helped make this a most memorable meeting. The weather cooperated, largely, and many of the sessions were held with the windows open to a view of the beach and Gulf. Reports of the various meetings and committees are reproduced in this issue.

The Society's new system for distributing the Newsletter and Members' Directory is now up and running. Robot mailing direct from the membership database circumvents server spam filters that regularly block bulk e-mails. Both publications are primarily distributed electronically, but paper copies can still be obtained from the secretary.

News was recently received of the death of Dr. Ingrith Deyrup-Olsen, a long-time member of the society. An obituary has been published on line at [http://seattlepi.nwsource.com/local/183702\\_deyrupolsenobit27.html](http://seattlepi.nwsource.com/local/183702_deyrupolsenobit27.html)

## NEW ADDRESS

Please note that treasurer Sue Cook has a new e-mail address:

[scook@coreocean.org](mailto:scook@coreocean.org)

All enquiries regarding membership and dues payment should be sent to Sue. Updates to your personal details, such as address changes, should be sent to the secretary

[callomon@acnatsci.org](mailto:callomon@acnatsci.org)

## MINUTES OF THE AMS COUNCIL MEETING 31 JULY 2004

PRESENT: **Jose Leal**, President; **Dianna Padilla**, Vice President and chair of auditing committee; **Paul Callomon**, Secretary; **Roland Anderson**, President-elect and chair of student awards committee; **Robert Cowie**, chair of conservation committee; **Robert Bullock**, Past President (11+ years); **Rüdiger Bieler**, Past President (4-10 years); **Susan Cook**, Treasurer; **Janice Voltzow**, Editor, AMB and chair, publications committee; **Diarmaid O'Foighil**, chair of nominating committee; **Robert Dillon**, Past President and chair of resolutions & constitution & bylaws committees; **Àngel Valdés**, Managing editor, AMB and councilor at large; **Timothy Pearce**, councilor at large; **Amy Wethington**, student representative and councilor at large.

ABSENT: Ellen Strong, Alan Kohn

**Opening remarks** were delivered by the President. The Lee County Visitors' Bureau and the Sanibel-Captiva Shell Club were acknowledged for their financial contributions to the meeting.

The **Secretary's** report was presented (see below). There was discussion of the role of the newsletter and its content, comparing it in particular with that of the web site. The need for regular pro-active communication with the membership via a regular newsletter was emphasized. The changing role of the secretary was also discussed. The Society is not consulted on matters of malacology in the way it was in the past, and the influence of the Internet was cited as one probable cause. It was suggested that the membership be directly polled on a number of issues relating to the Society's role.

Motion: *to approve the Secretary's report*  
Passed unanimously

The **Treasurer's** report was presented (see appendix). The Society is financially in good health, with its assets growing. This is in part due to the financial success of the 2003 meeting, as well as to a surge in income from membership dues. The endowment

committee's suggested adjustments were discussed (see endowment committee report).

Motion: *to approve the Treasurer's report*  
Passed unanimously

The report of the **Bulletin Editor** was presented (see below). The current position of the Bulletin's publishing schedule was discussed. Difficulties with the printing company in 2003-4 resulted in the adoption of a replacement that is proving more satisfactory. Volume 19 is now in press, and volume 20 is in preparation. A full set of invoices have been issued for institutional and library subscriptions, resulting in increased income. The number of failed mailings has sharply declined in comparison with that for volumes 16 and 17.

Options for publishing individual papers online were discussed, including papers from past issues. A previous proposal to merge the AMB with one or more other malacological journals was discussed, with the conclusion that this is not advisable at present. The usefulness of the Bulletin as a promotional tool for the Society was emphasized, and it was suggested that the Society encourage authors to contribute papers and at the same time become members. Various strategies were proposed to deliver more issues per year. The Bulletin remains in arrears, but steps are being taken to eliminate the backlog and return to schedule by 2005. There was further discussion of the proposal to canvass members with specific questions concerning the Society.

Motion: *that the AMB Editor and the Treasurer be charged with compiling a strategic plan for the Bulletin, to be presented at their joint convenience but before the 2005 meeting.*  
Passed unanimously

Motion: *to approve the report of the Editor*  
Passed unanimously

The **President-elect** delivered a presentation about the 2005 meeting. This will be held at the Asilomar Conference Center in Monterey, California from June 26 to 30. Accommodation options will include full board and lodging within the center itself. The meeting will be held jointly with the Western Society of Malacologists. Proposed symposia will deal with linking paleontological and neontological questions, the conservation and biology of *Partula* and parasites. Strategies were discussed for reducing the cost of the meeting for students.

Motion: *to approve the President-elect's report*  
Passed unanimously

The **Vice President** delivered a preliminary report about the 2006 meeting in Seattle, which will also be

a joint meeting with the WSM. The meeting will be held at the University of Washington from July 29 to August 3. Projected symposium topics include cephalopod behavior, chitons and nudibranchs.

Motion: *to approve the Vice President's report*  
Passed unanimously

THERE FOLLOWED THE REPORTS OF THE COMMITTEES.

The **nominating committee's** report was presented by Diarmaid O'Foighil. The slate of candidates (see below) was briefly discussed.

Motion: *to approve the nominating committee's report and candidates*  
Passed unanimously

No report was presented by the **auditing and budget committee**, but its rôle was discussed. The committee conducts oversight of the Society's financial operations, and is also responsible for its budget. Its usefulness in providing the Treasurer and each incoming President with financial information and overviews of various matters was emphasized.

Motion: *that further discussion of the role of the auditing committee be deferred till later in this meeting*  
Passed unanimously

The **endowment committee's** report was presented on behalf of its chair (see below), with brief discussion.

Motion: *that both recommendations for adjusting the disposition of the endowment be approved*  
Passed unanimously

Motion: *to approve the endowment committee's report*  
Passed unanimously

The **publication committee's** report was presented (see below). The new on-line publication '2,400 years of Malacology' was presented. There was extensive discussion of the forthcoming special publication 'Mollusks: a guide for study, collection and preservation'. Clarification of certain points in the draft proposal presented by Charles Sturm for funding was requested, and was obtained during a one-hour recess for lunch.

Motion: *that council approve the expenditure of up to \$800 for prepress work on 'Mollusks: a guide for study, collection and preservation'.*  
Passed with one dissent

The report of the **membership committee** was presented on behalf of its chair (E. Strong; see below). There was further discussion of the proposal to poll the membership, and in particular the usefulness of

such a poll in assessing the average member profile. Changes in the makeup of the membership were discussed, and in particular the increasing ratio of students among new members. Methods to attract new members were proposed, and the role of the committee was reexamined. The new membership leaflet was presented, and methods were discussed for its dissemination.

Motion: *to approve the membership committee's report*

Passed unanimously

The report of the **student awards committee** was presented (see below). There was discussion of the criteria governing eligibility for the 'best paper' award, with particular emphasis on papers presented after a student graduates. The problem of ineligibility of papers nominally co-authored with supervisors was also discussed. Both issues were discussed in response to a steep recent decline in the number of eligible papers and presentations.

Motion: *that papers may continue to be considered eligible for the Constance Boone (best paper) award if their authors graduated up to six months before submission, effective from the 2005 contest*

Passed unanimously

The report of the conservation committee was presented (see below). Robert Cowie's term as chair has ended, and his contributions were acknowledged.

Motion: *to approve the conservation committee's report*

Passed unanimously

The report of the systematics and collections committee was presented (see below). There was discussion of the Society's involvement with other organizations, including the ICZN.

Motion: *to table the issue of financial support to the ICZN pending the presentation of further details*

Passed unanimously

Motion: *to approve the systematics and collections committee report*

Passed unanimously

The report of the **resolutions committee** was presented (see below). There was general approbation of the nominations of James McLean and Alan Kohn for honorary life membership.

Motion: *to approve both proposed resolutions*

Passed unanimously

Motion: *that the Secretary be charged with compiling a list of all former life members*

Passed unanimously

There had been no action by the **constitution and bylaws committee** since the 2003 meeting, and no report was thus presented.

Before new business, there was further discussion of the role of the **auditing and budget committee**. The committee reported that income matched expenditure in the period since the last report, at \$26, 500.

Motion: *to approve the committee's report*

Passed unanimously

## NEW BUSINESS

1. There was discussion of an enquiry received by Roland Anderson from the education and outreach program director at the American Institute of Biological Sciences concerning the Society's role in K-12 education. Dr Anderson was requested to present details of the Society's current student awards plan.
2. The post of Webmaster was discussed. Daniel Graf has announced that he will not continue to maintain and develop the Society's web site after this meeting. Points discussed included where responsibility should lie for the editorial content of the site; whether the post of webmaster should be expanded, and if so whether that person should be a council member; and whether the editorial and technical elements of the current webmaster's role could be separated. The webmaster is currently appointed by the Secretary, and responsibility for seeking a replacement for Dan Graf was passed to Paul Callomon and Dianna Padilla.
3. The post of president was examined, based on a discussion document issued before the meeting by the Secretary. The advantages and demerits of the current system of annual presidency were discussed, as was the creation of a multi-year presidency simultaneous with the transfer of responsibility for organizing the annual meeting away from the president. The roles of the president in managing the society and representing it to other organizations were analyzed, with particular reference to fundraising and strategic planning.

Motion: *to adjourn the meeting*

Passed unanimously

Submitted July 31, 2004

Paul Callomon, Secretary



**SECRETARY'S REPORT 2003-2004**

- The membership database has been maintained and updated. A number of members have left; three have specifically cited the increase in membership dues as their reason.
- A new directory (version 2004.3) is now in preparation and will be published after the meeting.
- Summary of database management August 2003 – June 2004:
  - 166 records were removed representing people who had not paid since 1999
  - 11 records were removed representing people who had died or who are untraceable using their current data, despite having paid at least one year's dues between 2000 and 2003
- It has been asked whether the Society has ever considered an 'retired member dues rate' for older members who are retired.
- The newsletter is being distributed electronically to the majority of members who have not requested it by mail. No new requests for postal delivery have been received since 2003. Efforts are made to deliver the newsletter to current members whose e-mail addresses are out of date or otherwise inaccessible. One problem with the original setup was that because the newsletter was being mailed simultaneously to about 500 addresses, some spam filters were blocking it when they saw that many recipients in the 'to', 'cc' or 'bcc' fields. This can be fixed by setting up individual direct e-mailing from within File-Maker, and this is being worked on.
- Membership: as of June 25, 2004 there are 343 members who are paid up to 2003. Of these, 76 (22%) are students. 24 new members joined in 2004, of whom 17 (71%) are students.
- AMS Archive: There has been one official request for information from the AMS archives. In addition, the Secretary has made use of them in his own research, including a paper in press. There has been no new archiving work since the 2003 meeting.



**AMERICAN MALACOLOGICAL BULLETIN  
2004 Annual Report**

**Editorial Board:** Janice Voltzow (Editor-in-Chief), Ángel Valdés (Managing Editor), José Leal (*Ex Offi-*

*cio*), Rob Cowie, Carole Hickman, Alan Kohn, Timothy Pearce

With the approval of the Board, we redesigned the cover and sought quotes from new composers/printers. We selected 2B Communications, Inc., and Stuart F. Cooper Printers. Unfortunately, their service was not as promised and technical problems delayed publication of Volume 18 (originally scheduled for fall 2003) until May 2004. Because of this, and on a suggestion from Dianna Padilla, we sought and accepted a quote from Sheridan Press. We began using them for production of Vol. 19, which is now in press. We are very happy with them so far and look forward to enhancing the electronic movement of manuscripts, proofs, and reprints. We are still trying to accelerate our output so that we can return the *Bulletin* to its original publication schedule.

*Volume 18 (1/2)  
Published 7 May 2004*

8 contributed papers  
Symposium: New Frontiers in Functional Morphology of Molluscs (8 papers)  
Announcement of 2004 meeting  
Index to Volume 18  
In memoriam  
AMS membership application form  
Information for contributors  
178 pp.

*Volume 19 (1/2)  
In press*

4 contributed papers  
Symposium: New Frontiers in Functional Morphology of Molluscs (1 paper)  
Symposium and related papers: The Biology and Conservation of Freshwater Molluscs (12 papers)  
Financial reports for 2002 and 2003  
Recognition of reviewers for 2002 and 2003

*Volume 20 (1/2)  
Projected for publication winter 2004/2005*

Symposium: Non-marine Molluscan Exotics (9 papers)  
Additional contributed papers  
Announcement of 2005 meeting

**Status of manuscripts**

27 received since last report (3 rejected, 1 withdrawn)  
Current status of manuscripts: 8 in review, 12 accepted pending revision, 14 with managing editor for volume 20

Treasurer Susan Cook sent a complete set of invoices for 2004, a landmark event!

Many fewer claims have arrived for 17(1/2), we are still receiving some for 16(1/2). We continue to appreciate the generous help of Leslie Skibinski of Delaware Museum of Natural History.

**Moving ahead**

Electronic reprints for authors  
Sale of individual papers on line  
This does not seem to be the right time or circumstances to consider merging with another molluscan journal

*Respectfully submitted,  
Janice Voltzow*



**2004 AMS NOMINATING COMMITTEE REPORT**

Committee Members: A. Bogan, G. Coan, R. Dillon & D. Ó Foighil  
The nominating committee unanimously recommended the following nominees for open positions on AMS Council:

Vice-President: Paula Mikkelsen  
Councilors-at-Large: Tom Watters & Frank ("Andy") Anderson  
Past-President 4-10: Bob Prezant  
Past-President 11+: Carole Hickman

These nominees were approved by the AMS Council, and by the AMS membership at the 2004 Sanibel business meeting. We greatly appreciate their willingness to serve the society.

*Submitted by Diarmaid Ó Foighil  
Chair, AMS Nominating Committee*



**REPORT OF THE AMS ENDOWMENT COMMITTEE**

The Committee held its annual meeting electronically during the week of May 17, 2004.

The value of AMS endowments as of this date was \$112,376. One year ago, total endowment was \$105,347, so it has increased 6.3% during the past year. At the present time the allocation of the endowment is 53% in stock funds and 47% in bond funds. Of the total, \$14,625 comprises the Life Membership Endowment; the remainder comprises the symposium and student research grant endowment.

The Committee makes the following two recommendations to the Council:

1) Allocation. In keeping with traditional practice, the Committee unanimously recommends that the ratio of stock and bond funds be restored to 1:1, and that the Treasurer thus be instructed to transfer \$3,000

from the stock fund (Vanguard Total Stock Market Index Fund) to the bond fund (Vanguard Total Bond Market Index Fund). This policy of past Endowment Committees has served the Society well, as it has grown the Endowment over the years.

2) Expenditure. In keeping with its traditional practice, the Committee unanimously recommends the expenditure of interest in excess of 3% gained to support symposia. That is, we recommend that up to \$3,300 from endowment income be allotted for symposium support.

*Respectfully submitted,  
Alan J. Kohn, Chairman  
George M. Davis  
Carole S. Hickman*



**AMS PUBLICATIONS COMMITTEE  
2004 ANNUAL REPORT**

*American Malacological Bulletin*  
See report above

**AMS web site** <http://erato.acnatsci.org/ams/>  
Page curator and designer Daniel L. Graf

**AMS News** electronic newsletter:  
<http://erato.acnatsci.org/ams/publications/news.html>

New editor: Paul Callomon  
Vol. 35 No. 1 published Spring 2004.

**2,400 YEARS OF MALACOLOGY**

*Eugene V. Coan, Alan R. Kabat and Richard E. Petit*  
Published on the Web at:

[http://erato.acnatsci.org/ams/publications/2400\\_malacology.html](http://erato.acnatsci.org/ams/publications/2400_malacology.html)

This paper provides a comprehensive catalog of biographical and bibliographical publications for over 5,000 malacologists, conchologists, paleontologists, and others with an interest in mollusks, from Aristotle to the present. For each person, the birth/death years and nationality are given (when known), followed by bibliographic citations to the literature about that person and his/her collections and publications. Appendices provide citations to (1) publications on oceanographic expeditions that resulted in the collection and description of mollusks; (2) histories of malacological institutions and organizations; and (3) histories and dates of publication of malacological journals and journals that are frequently cited in malacological publications, such as those of the Zoological Society of London.

SPECIAL PUBLICATION  
MOLLUSKS: A GUIDE FOR STUDY, COLLECTION, AND  
PRESERVATION

*Edited by Charles F. Sturm*

The following proposal is from Charlie for uPublish.com, an on-demand publisher. The initial start-up costs will be approximately \$600. The book will have 30 or 31 chapters and I anticipate will run about 350 or so pages, with the page size being 6"x9" or possibly a bit larger. For books sold through the printers' website we get 40% of the cover price as profit. For books sold through Amazon.com BarnesandNoble.com, we get 20%. The approximate cost of the book will be around \$35-40. The first three books sold in a quarter, we receive no profit on. We retain the rights to the book, we can have it removed from their website with 3 months notice. At this time we can publish it any way we want or allow it to go out-of-print. All illustrations, charts, photos must be B&W. Cover will be in color. All marketing is up to us. I suggest initial marketing be done through the Newsletter, Bulletins, Mollusca-L, Conch-L, Unio list. Later we can consider an add or two in journals/magazines such as American Conchologist, Of Sea and Shore, La Conchiglia, "National Society of Biology Teachers", etc.

*Respectfully submitted,*  
*Janice Voltzow*  
*Chair*



STUDENT AWARDS COMMITTEE

Roland Anderson, Chair  
Janet Voight, Paula Mikkelsen

The Student Awards Committee awarded the following student grants for 2004, from a field of 12 applicants:

1. **Julian Finn** \$900 for his proposal "Argonauts: taxonomy, biology, and a revision of the family Argonautidae (Mollusca: Cephalopoda)."
2. **Auschka Faucci** \$800 for her proposal "The origin of Hawaiian vermetids."
3. **Rebecca Rundell** \$800 for her proposal "Determinants of diversity in the Palau diplommatinid land snails."

Both winners and non-winners were notified.

*Submitted*  
*R. Anderson*



AMS CONSERVATION COMMITTEE  
Annual Report 2004

Rob Cowie (Chair), Kevin Cummings, Terry Frest, Chuck Lydeard, Barry Roth

General

Rob Cowie has tendered his resignation as chair of the Conservation Committee, after 10 years as a committee member and the last 9 years as chair. He is willing to continue as a committee member. The AMS continues as a member of the Endangered Species Coalition (ESC), supporting the strengthening of the Endangered Species Act, which of course is currently under considerable pressure. Rob Cowie currently acts as the AMS contact for the ESC, but this should change as Rob has tendered his resignation as chair – the new chair should take over. A notice was received recently announcing an increase in the ESC dues, which the appropriate person/committee/council should probably discuss. The Conservation Committee welcomes input from all members of the society regarding activities that they might wish the Committee to play a part in.

Specific Activities

The Committee, with Chuck Lydeard taking the lead, along with a number of other authors, some of whom are AMS members, recently published the following paper:

Lydeard, C., Cowie, R.H., Ponder, W.F., Bogan, A.E., Bouchet, P., Clark, S., Cummings, K.S., Frest, T.J., Gargominy, O., Herbert, D.G., Hershler, R., Perez, K., Roth, B., Seddon, M., Strong, E.E. & Thompson, F.G. 2004. The global decline of non-marine mollusks. *BioScience* 54(4): 321-330.

Other than this effort, the Committee, as a committee, has had a relatively inactive year. However, individual committee members have continued their personal efforts in support of mollusk conservation, with some notable examples being as follows.

**Barry Roth** worked on the taxonomy of the Federally Endangered California landsnail *Helminthoglypta walkeriana*. Newly discovered inland populations of *Helminthoglypta* seemed to indicate that the species had a much wider range than known at the time it was declared endangered; these findings could have placed its protected status in doubt. With colleague Jeff Tupen, Roth demonstrated that the inland populations were a distinct species, *H. morroensis* (Hemphill, 1911), and that the extant range of *H. walkeriana* is approximately what was known at the time it received endangered status. Roth also continued his documentation and description of diversity among land mollusks of the Pacific states.

**Kevin Cummings** continues to be heavily involved with the Freshwater Mollusk Conservation Society. He is also active in trying to have the black carp listed by the USFWS as an injurious species of wildlife under the Lacey Act. A USFWS workshop on Asian carp species was held in Columbia, Missouri, in May, but thus far the USFWS has failed to act on the proposal to list the black carp as an injurious species. The black carp is a voracious predator of mollusks, but is favored by fish farmers as a control for snail infestations in catfish production ponds. The first black carp reported taken in the wild was found in Illinois in early 2003. It was probably a sterile individual. However, this has demonstrated that black carp can escape and do indeed pose a serious threat to native and endangered mollusks. Another specimen was collected in Louisiana in April 2004. All members of the AMS should be aware of this situation and do all they can to support the listing of black carp as an injurious species and to prevent its wider use and likely escape into the wild.

**Terry Frest** continues his work on mollusk conservation in western North America. He has prepared analyses of several land and freshwater taxa for the COSEWIC project (Canada), aided two conservation groups in preparing listing petitions for a number of western US terrestrial and freshwater forms, surveyed parts of Idaho for listed freshwater forms for USFWS, and initiated a two-year study of grazing effects on Oregon springsnails sponsored by WWF. He continues to record and publish on newly discovered land and freshwater mollusk diversity hotspots in western North America.

**Chuck Lydeard** hosted a Freshwater Mollusk Conservation Society workshop on freshwater gastropods 15-18 March 2004 at the University of Alabama, Tuscaloosa. Information on the workshop can be found at:

<http://ellipse.inhs.uiuc.edu/FMCS/Meetings/GastropodWorkshop.html>

Rob Cowie, Chuck Lydeard and Barry Roth continue as members of the IUCN Mollusc Specialist Group; Rob Cowie edits its newsletter, "Tentacle", all issues of which are now available on-line at <http://www2.hawaii.edu/~cowie/> – note that this address has changed since last year's annual report – this new address should be more permanent.

Robert Cowie  
27 July 2004



## REPORT OF THE AMS SYSTEMATICS COMMITTEE 2004

Submitted by Gary Rosenberg, 30 July 2004

### 1) *NSF proposal for linking mollusk collections*

At last year's AMS meeting, the Systematics Committee held an open meeting to discuss strategies for networking and computerizing mollusk collections. Researchers at 20 North American institutions with large malacological collections have now formed a loose consortium to seek funding for Mollis (Molluscan Information System)

<<http://clade.acnatsci.org/rosenberg/mollis/>>. AMS member Robert Guralnick and myself are currently leading this effort.

Statistics on the holdings of the major collections were compiled and are online at the above website. The initial goal was to submit a grant proposal to the NSF BDI program for the July 2004 deadline. This program has funded networks and online tool development for mammals, birds and herptiles. In discussion with program officers, however, it became apparent that this program would no longer fund infrastructure, but was concentrating on software development. This means that a broader variety of programs and agencies must be approached for funding for Mollis.

### 2) *Natural Science Collections Alliance*

I attended the Natural Science Collections Alliance (NSCA) meeting in Washington, DC, May 26-27.

The theme of this year's meeting was "A Summit on Collections". A number of speakers focused on the necessity of seeking large scale funding for networking and computerizing natural history collections, through concerted lobbying efforts in Washington. A "Dinosaurs to DNA" presskit was announced which presents examples of the research value of collections <<http://www.nscalliance.org/>>. NSCA is launching a national public relations campaign on August 24th 2004, with each institution invited to host behind-the-scenes tours for local media on that date.

### 3) *Bar Code of Life*

The Sloan Foundation has recently provided 2.5 years of funding for a Barcode of Life Secretariat based at the National Museum of Natural History. The Barcode is defined as "a short DNA sequence, from a uniform locality on the genome, used for identifying species." I attended a planning meeting for the Barcode of Life in Cold Spring Harbor, NY, September 10-12, 2003 and the inaugural meeting of the Consortium for the Barcode of Life at NMNH, May 24-25, 2004. AMS member Chris Meyer was also in attendance at the latter meeting and gave a presentation on reliability of barcoding in various

scenarios, using his data on cowries. Consortium members will cooperate in seeking funding to obtain short DNA sequences for as many species as possible. Museum collections are a logical place to start large scale sequencing efforts, since they contain authoritatively identified samples of hundreds of thousands of species. The consortium recognizes the necessity of integrating data for DNA sequences with information from morphology, behavior and ecology in order to arrive at reliability delimitations of species.

#### 4) *International Commission on Zoological Nomenclature*

The International Trust for Zoological Nomenclature is embarking on a fund raising campaign to secure a \$5 million dollar endowment to allow the Secretariat of the International Commission on Zoological Nomenclature (ICZN) to operate in perpetuity. In return, the *International Code of Zoological Nomenclature*, the *Bulletin of Zoological Nomenclature*, and other information from the ICZN would be made available for free. The AMS should consider a one-time gift to, or yearly support for, the ICZN.



#### MINUTES OF THE AMS BUSINESS MEETING 3<sup>RD</sup> AUGUST 2004

The Business Meeting was held in the Sanibel Room, commencing at 15:20.

The President's introductory remarks and acknowledgements were followed by the presentation of summaries of the reports presented at the council meeting:

**Secretary's report:** P. Callomon

**Treasurer's report:** D. Padilla *pro* S. Cook

**President's report:** J. Leal

**Publications committee report:** J. Voltzow

**Endowment committee report:** A. Kohn

**Student grants committee report:** R. Anderson

*The granting of the \$500 Constance Boone award to Elizabeth Davis was announced.*

**Conservation committee report:** R. Cowie

**Resolutions committee report:** R. Dillon

*Daniel Graf's service as web page editor was formally acknowledged.*

*Honorary life memberships were awarded to James McLean and Alan Kohn.*

*Diarmaid O'Foighil was formally acknowledged for his presidency in the previous year.*

**Nominating committee report:** D. O'Foighil

*A motion was proposed to elect the slate of candidates, and was unanimously passed.*

**Systematics committee report:** G. Rosenberg

Presentations were given announcing the 2005 meeting (D. Padilla) and the 2006 meeting (R. An-

derson). A presentation was given by Helena Fortunato, inviting AMS members to the CLAMA-COCLAM meeting of Latin American Malacological Associations to be held in Panama at the STRI from 3-8 July, 2005

Donna Turgeon spoke about developments in the Names of Mollusks project, and invited members' cooperation with the production of a new edition.

Diarmaid O'Foighil formally thanked Jose Leal on behalf of the Society, and presented him with a keepsake for organizing the meeting.

From the floor, Gerhard Steiner proposed that the Society study the idea of introducing student travel grants to permit more students to attend AMS meeting.

*A motion was proposed to adjourn the meeting, and unanimously passed.*

P. Callomon, secretary. August 25, 2004.

#### A MESSAGE FROM OUTGOING PRESIDENT JOSE LEAL

SANIBEL, AUGUST 31: Taking a rest from my hoop-jumping, post-hurricane activities, I am glad to formally report that the AMS 2004 meeting was financially a great success.

The auction netted \$3,592 toward the Student Endowment Fund. This is very likely a record for an AMS auction. It goes without saying that the auction owes its success to the large number of donations we received and the enthusiastic help from auctioneers Chris Garvie, Paul Scott, and Paul Callomon. In addition, I am happy to inform you that the meeting itself raised a whopping \$14,926.74 for the society. This amount (check the balance sheet at <http://www.shellmuseum.org/AMS/expense.html> does not include the set-up amount of \$2,000.

This is it, my friends. In a few days Dianna Padilla will officially take over as our leader. I am thrilled and honored to have served my term as president of AMS, an entity that informally steered me through the initial years of my career in the US, and that has afforded me so many collaborations, opportunities, and friendships. Thanks for being part of it!

**APPENDIX 1**

**AMERICAN MALACOLOGICAL SOCIETY TREASURER’S REPORT**

**CALENDAR YEAR 2003**

**Submitted July 25, 2004**

**Background**

Bank account records have been maintained in Quicken since 1993. At year end (December 31, 2003), funds available to the Treasurer were as follows:

**Operating Funds**

Non-profit checking account, First Union Bank/now Wachovia National Bank, Arlington, VA Account #2000005761711	\$51,515.78
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**Endowment Funds**

Life Membership Endowment	
Vanguard Total Stock Portfolio #85/9888588127	\$14,814.07
Symposium and Student Research Grant Endowments	
Vanguard Total Stock Portfolio #85/9888590542	\$45,419.94
Vanguard Bond Index Fund #84/98885881217	\$53,711.85
<b>TOTAL INVESTED ASSETS</b>	<b>\$113,945.86</b>

<b>TOTAL ASSETS</b>	<b>\$165,461.64</b>
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Total assets grew in 2003 by \$31,072.46 from \$134,389.18 to \$165,461.64.

**OPERATING FUND ACTIVITY**

**2003 and 2004 cash flow**

Appendix 1 is an overview of both income and expenditures based on cash flow reports for the Quicken checking account for 2003. In 2003, income exceeded expenditure by \$16,038.67. A detailed transaction record from Quicken has been provided to the Audit Committee for review.

Appendix 2 is a similar report for the first 6 months of 2004. Although expenditures in the first half of 2004 have exceeded income by \$11,705.44, counterbalancing income between \$10,000 to \$12,000 is expected from dues, AMB-related income and the annual fund-raising auction.

In past Treasurer’s reports, a separate and unduly complex analysis of the year’s income and expenditures has been provided with cash flow examined in Cost Center subcategories for the Bulletin, Newsletter, Meeting and General Operations. At the 2003 Council meeting, the Treasurer was authorized to consult with an accountant to replace this system with a system that follows accepted accounting principles for non-profits. Although this has not yet been accomplished because of a change in employment and other personal issues, all accounts are in order, dues notices and AMB subscription invoices through volume 19 have been issued, all bills have been paid and the check book balances.

In lieu of formal subaccount reporting, the following table shows how income and expenses for the Bulletin, Annual meeting and General operations categories compare from 2002 to 2003 and for the first half of 2004.

Category	2002	2003	2004 as of June 30
<b>Dues Income</b> (funds from multiple dues years)	\$8680.00	\$23,688.00	\$8455.00
<b>AMB Income:</b> Subscriptions, page charges, etc.	\$2353.00	\$4999.16	\$9605.24
<b>AMB Expense</b>	\$3628.28 (no volume published in 2002)	\$15055.32 (volume 17 published)	\$17925.44 (vol. 18 published)
<b>Student Grant Expense</b>	\$2385.00	\$1700	\$2500
<b>Student Research Fund Income:</b> Auction & other Donations	\$2756.00	Donations =\$1060 Auction =\$1584.75 Total = . \$2644.75	\$247.5 to date
<b>Annual Meeting net profit or loss</b>	Net loss \$4564	Net profit \$11528.12	TBD
<b>Symposium Fund Income</b>	\$20 in donations	\$55	\$57.50 to date
<b>Symposium Advance expense</b>	\$3445.72	\$3567.00	\$3567(Dividends) \$3854 (meeting surplus)
<b>Office expenses</b>	\$2133.60	\$3999.76	\$1223.84
<b>Officer Travel Expense</b>	\$2477.81	\$1055.05	TBD

Dues income was substantially higher in 2003 than in 2002 in part because of members catching up on overdue payments from previous years as well as members paying 'in advance' for 2004-2005 to take advantage of a reduced rate (or package deal). Income associated with the Bulletin is higher because the Treasury has invoiced institutional subscribers through volume 19.

In 2003, the Annual Meeting was highly successful both scientifically and financially. After final accounting for meeting and symposium costs, funds returned to the AMS Treasury totaled \$11,528.12. By an electronic poll of the executive committee, this surplus will be used to increase the funds available for future symposia for 2004, 2005 and 2006. The 2004 support was \$3854 for a total of \$7421.00. At the start of the year, \$3567 was provided as an advance based on endowment income from 2002. The Society still lacks a clear policy on transfers to and from endowment into the operating fund and no transfers were done in 2003. The accountant that we consult will be asked to provide advice on how to handle this situation as well as on record-keeping procedures and software.

#### INVESTMENT ACCOUNTS

Fund valuations as of year end are provided on page 1. Total invested assets at year end were \$113,945.86 as compared to \$98,877.07 at the end of 2002. Thus, the endowment as a whole gained \$15,068.79 in value in 2003. This is an increase of approximately 15%.

**Symposium and Student Research Grant Endowments**

At the instruction of the Endowment Committee in June 2003, this portion of the portfolio was rebalanced by transferring funds from the Bond Index Fund into the Total Stock Portfolio account #85/9888590542. In addition, to simplify and further diversify investments, the Vanguard 500 Stock Index fund (formerly part of this endowment component) was closed and its contents transferred to Total Stock Portfolio account #85/9888590542. Dividend income for 2003 for these two funds totaled \$3024.98. The asset allocation as of March 31, 2004 was 54% in bonds and 46% in stocks.

**Symposium and Student Research Grant Endowment Portfolio**

<b>Dates</b>	<b>Total Stock Market Index</b>	<b>500 Index</b>	<b>Total Bond Market Index</b>	<b>Total Symposium &amp; Student Endowment</b>
Initial	\$21,222.41	-	\$14,150.00	\$35,372.41
3/31/94	\$20,821.93	-	\$12,663.48	\$33,485.41
3/31/95	\$29,275.15	-	\$15,055.09	\$44,330.24
3/31/96	\$30,773.68	-		\$45,309.12
3/31/97	\$35,379.12	-		\$50,219.12
3/31/98	\$53,553.34	-		\$70,930.34
3/31/99	\$15,390.91	\$15,471.03	\$44,880.33	\$75,742.27
3/31/00	\$24,487.59	\$23,421.96	\$45,814.91	\$93,724.46
3/31/01	\$18,501.15	\$18,353.83	\$51,442.95	\$88,297.93
3/31/02	\$18,957.94	\$18,370.69	\$54,063.47	\$91,392.10
3/31/03	\$14,373.37	\$13,814.26	\$59,250.17	\$87,437.80
3/31/04	\$46,593.46	\$0	\$55,169.96	\$101,763.42

**Life Membership Endowment**

These funds reside in a separate Vanguard fund and have been allowed to accumulate without transferring annual dues to operating funds. Dividend income for 2003 was \$349.45.

<b>Date</b>	<b>Total Stock Market Index Fund</b>
Initial	\$4,950.00
3/31/94	\$5,016.74
3/31/95	\$6,800.83
3/31/96	\$7,828.58
3/31/97	\$9,022.86
3/31/98	\$13,301.64
3/31/99	\$15,010.95
3/31/00	\$18,609.81
3/31/01	\$14,060.29
3/31/02	\$14,407.42
3/31/03	\$10,923.32
3/31/04	\$15,196.82

**TABLE 1. CHECKING ACCOUNT CASH FLOW  
JANUARY 1, 2003 TO DECEMBER 31, 2003**

**INCOME**

## Dues

2000 Dues	40
2001 Dues	175
2002 Dues	2,227.00
2003 Dues	13,644.66
2004 Dues	4,464.64
2005 dues	3,136.70

**Total Dues** 23,688.00

## Membership Donations

Student Research Grant Endowment	1,060.00
Symposium Endowment	55

**Total Donations** 1,115.00

## American Malacological Bulletin income

AMB back issues	332
AMB Duplicate copies	35
American Fisheries Society	218.7
Bulletin Page Charges	1,400.00
Bulletin Reprints	868
Domestic Subscriptions	354
Foreign Subscriptions	1,116.00
Postage For Foreign J. Mailing	675.46

**AMB related Income** 4,999.16

## Annual Meeting

AMS 2003 Annual meeting & Symposium Profit	11,527.81
AMS2003 T-shirt Profit	31
AMS 2003 annual meeting auction	1,584.75

**Ann Arbor Meeting associated Income** 13,143.56

## Misc. Income

Insurance Refund-Income	9
Non-profit organization fee Refund	30.03

**Misc. Income** 39.03

**TOTAL INCOME**

42,984.75

**EXPENDITURES****American Malacological Bulletin, Volume 17***Production costs*

Bulletin Design & Typesetting	3,088.50
Bulletin Printing	7,426.00
Bulletin--Reprint Printing	767.9
Bulletin subscriber database expenses	130

**Subtotal production**

11,412.40

*Mailing expenses*

Bulletin Mailing Envelopes	337.89
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Bulletin Mailing Services	171.88	
Bulletin Postage - Domestic	707.92	
Bulletin Postage - Overseas	1,036.95	
Bulletin Reprint Postage	287.54	
Bulletin Postage - correspondence	99.76	
Subtotal Mailing and Postage		<b>2,641.94</b>
<i>Other expenses</i>		
Managing Editor--Travel	1,000.98	
Subtotal other expenses		<b>1,000.98</b>
<b>Total Bulletin expenses</b>		<b>15,055.32</b>
<b>Annual Meeting</b>		
AMS 2003 Meeting	2,000.00	
AMS 2993 Symposium Expenses	3,567.00	
Student Paper Award	500	
Symposium Speaker Travel	124	
<b>Total Annual Meeting costs</b>		<b>6,191.00</b>
<b>Student Research Grant Awards</b>	1,700.00	<b>1,700.00</b>
<b>Society Operations</b>		
<i>Bank account adjustments</i>		
Bank Charge	55	
Bad check adjustments and fees	838	
Subtotal		893
<i>Non-profit fees</i>		
California Filing Fee	30	
Charitable Organization Reg.	25	
Subtotal		55
<i>Credit card service related charges</i>		
credit card refund	10	
Credit Card Service	500.03	
Subtotal		510.03
<i>Office expenses</i>		
Dues and Subscriptions	100	
Insurance, Bus	509	
Post Office Box Rent	295	
Postage and Delivery	453.89	
Printing and Reproduction	22.32	
Secretary--Office Expenses	42.14	
Treasurer--Office Supplies	64.33	
Subtotal		1486.68
<i>Officer travel expenses</i>		
Secretary--Travel	319	
Bulletin Editor Travel	736.05	
Subtotal officer travel		1055.05
<b>Subtotal Operating Costs</b>		<b>3999.76</b>
<b>TOTAL OUTFLOWS</b>		<b>26,946.08</b>
<b>Net Income greater than expenditure</b>		<b>16,038.67</b>

**TABLE 2. CHECKING ACCOUNT CASH FLOW  
JAN 1, 2004 TO JUNE 30, 2004****INCOME**

## Dues

2000 Dues	0
2001 Dues	40
2002 Dues	380
2003 Dues	853
2004 Dues	5,902.00
2005 dues	894
06 Dues	386

**Total Dues to Date** **8455**

## Membership Donations

Student Research Grant Endowment	247.5
Symposium Endowment	57.5

**Total Donations** **305**

## American Malacological Bulletin Income

AMB back issues	58
AMB Royalties	29.94
Bulletin Page Charges	2,134.50
Bulletin Reprints	894.8
Domestic Subscriptions	2,991.00
Foreign Subscriptions	1,329.00
Subscriptions AMB	1,968.00
Postage For Foreign J. Mailing	200

**AMB related Income** **9605.24**

**TOTAL INCOME** **18365.24**

**EXPENDITURES TO DATE**

## AMB, Volume 18

Bulletin Design & Typesetting	4,135.50
Bulletin Postage	49.69
Bulletin Printing and Mailing	11,720.15
Bulletin--Reprint Printing	2,020.10

Subtotal Bulletin expenses, volume 18 **17,925.44**

## Annual Meeting &amp; Symposium advances

AMS 2004 Symposium expenses	8421.00	<b>8,421.00</b>
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## Society Operations

Credit Card Service	188.43
Dues and Subscriptions	200
Insurance, Bus	509
Post Office Box Rent	102
Postage and Delivery	121.68
Tax, Business	25

Treasurer--Office Supplies	77.73		
Subtotal society operations		<b>1223.84</b>	
<b>Student Research Grant Awards</b>	2500	<b>2500</b>	
<b>TOTAL OUTFLOWS</b>			<b>30,070.28</b>
<b>Net deficit to date</b>			<b>-11,705.04</b>
<b>Expected counterbalancing income</b>			
Additional dues and subscription income	4000		
Auction and individual donations for student grants goal of \$2500	2500		
Meeting expenses offset by registration fees	6000		
	12500		