

Society for Integrative and Comparative Biology  
Executive Committee Meeting  
January 8, 2000  
Atlanta, Georgia

Present:

Martin Feder, President  
Kimberly Smith, Treasurer  
Alan Kohn, Past President  
Mark Martindale, Member At Large  
Timothy Bradley, DCPB Chair  
John Pilger, Education Foundation Chair  
Steve Nowicki, DAB Chair  
Scott Gilbert, DDCB Chair  
Sally Woodin, DIZ Chair  
Kimberly Hammond, Member At Large Elect  
Richard Burian, DICI Chair  
Daphne Fautin, DEE Chair  
Andrew Biewener, DVM Chair  
David Norris, DCE Chair  
Penny Hopkins, Secretary Elect  
John Pearse, Program Officer  
Ron Dimock, Treasurer Elect  
Rudy Raff, DEDB Chair  
Stacia Moffett, DNB Chair  
Thomas Wolcott, Secretary  
Paula Mabee, DSEB Chair

Staff:

Susan Heckman, Account Manager

Guest:

Bret Burk, Burk & Associates

- I. The meeting was called to order by President, Martin Feder.
- II. Review of first meeting
  - A. Increase GIA \$3000
  - B. Decrease the abstract fee from \$25 to \$0
  - C. Science Writer Prize - no motion.
  - D. Comp. Reg. for officers, two per division, 24 total. New expense not to effect the current executive committee members.

**MOTION: Officers and three divisional officers will receive complimentary registration at the meeting.**

**Approved**

**MOTION: All in favor of symposium speakers that are members of the society to receive complimentary registration for the annual meeting to begin in 2001.**

**Approved**

- E. \$25,000 for 2001 to support scientific programming and to increase the attendance at the meeting.

Discussion

- Would like for this committee's members to be added to the Executive Committee.
- Feder - As President, this would need to be added to the Constitution and he would veto the idea.
- Division Program Officers will have to be included in the proposal.
- Looking for Integrative and Comparative Biologists to be on this committee.
- Appointee's will be approved by the Executive Committee.
- Bradley - If this idea is passed, the society will be putting as much money into this program as it does for the divisions. The divisions already receive low funds.
- Burian - Divisions feel their roles are lost.
- Moffett - Felt comfortable about the idea because it isn't a long term commitment.
- Fautin - Finding more volunteers to start this new committee will be difficult.
- Nowicki - Was interested in supporting the idea and suggested that the Executive Committee review it next year.
- Gilbert - Agreed with Nowicki's statement but questioned if they could really assess the program after one year in operation.
- Woodin - How many new symposium would be developed from this committee?
- Feder - No commitment - should be a process of where only the best survive.

**MOTION: To support the proposal with the support of the Program Advisory Co.**  
**By: Stacia Moffett**  
**Second: John Pearse**  
**Approved**

**MOTION: Temporary suspension of the division DICI to reform it's mission.**  
**By: Richard Burian**  
**Second: Scott Gilbert**  
**Approved**

F.

1. Bids for web site services

	Birenheide	AIBS	UW	Allen
To take over the two current sites & membership and to make it better	\$15,000	\$23,641		
Functions on Strategic Plan	\$6,000	\$4,488		
Electronic AZ	\$9,000		\$3,000	\$15-17K/Yr.

AIBS - positive for being an established company  
 negative - not biologist  
 Birenheide - positive - he is a biologist  
 negative - this will be the first time in site development

**MOTION: To give Birenheide a try for both Internet sites.**  
**By: Thomas Wolcott**  
**Second: Daphne Fautin**  
**Approved**

2. Electronic American Zoologist

- Would begin with the most recent volume.
- AZ would be put on the web for members.
- Allen Press bid is high.

- Why do this at all? 1). BioOne will be available only to libraries and it would be nice to make the journal available on line to members wishing not to receive hard copies.
- Electronic memberships could then be made available to members
- Not enough information is available to proceed.
- Discussion was then tabled.

### III. Issues from section VII. - part of first Executive Committee meeting agenda.

- A. Motion of confidence in electrification of SICB. Many divisions reported that it has gone well. Some have expressed difficulty in getting access to electronic information. Printed copies of the abstract guidelines, advanced registration packet and membership renewal forms will still mailed to all members.
- B. Motion of confidence re change to topical sessions at annual meeting. By large, most people liked the topical sessions. The Program Officer and Division Program Officers were thanked for their help.
- C. Discontinuation of abstract volume American Zoologist. Most of the members that answered the survey felt that the abstract volume should remain in the printed form. Some would like to receive the abstract volume prior to the meeting. If this option is made available, then the date of abstract submission must be pushed back. Members also expressed that they would be willing to pay extra for receiving the volume prior to the meeting.
- D. Incorporation of botanical and microbial. If these groups were included, it would increase the size of the annual meeting. Some member questioned the complexity.
- E. American Zoologist name change. Each year the American Zoologist gets smaller and smaller but the Integrative Biology journal gets bigger and bigger. If the AZ journals does changes its name will libraries subscribe?

#### Discussion:

- Feder - Many journals have two titles and many journals have changed names.
- Pilger - The society depends on the journal for revenue. Would the name change increase or decrease the amount of members.
- Smith – How can we increase revenue with the decline of the journal. This can be done by increasing membership, have a break even meeting and invest money.
- Dimock - AMS changed the name of their journal. They kept the same sequence as the old journal and it has been very successful.

The Publication Committee will be asked to explore this.

### IV. Installation of new members and resolution of gratitude to retiring members.

Outgoing: Tom Wolcott, Secretary  
 Mark Martindale, Member-At-Large  
 Robert Dores, DCE Chair  
 Timothy Bradley, DCPB Chair  
 Paula Mabee, DSEB Chair

Incoming: Marvalee Wake, President Elect  
 Penny Hopkins, Secretary  
 Ron Dimock, Treasurer Elect  
 Kim Hammond, Member-At-Large  
 Dave Norris, DCE  
 Steve Have, DCPB

- The outgoing members were thanked. A new President-Elect needs to be elected. New officers were welcomed to the committee.
- The new Executive Director, Bret Burk, from Burk & Associates was introduced.
- Smith Bucklin was thanked for a job well done.
- The meeting has been running smoothly and the posters were a huge success!
- President, Martin Feder met with the vendors for breakfast. The vendors would like for the posters to run longer.
- Distribution of the meeting rooms worked well this year.

- Division socials were poorly attended. The socials will be discontinued but if a division asks for one the society will pay for it. Some divisions set up their socials off site and found them to be very well attended.
- Very few division chairs responded to the Treasurer Kimberly Smith's request for funding.

V. New Business

- A. Should students be allowed to pay the year before the meeting and not be a member the year the abstract was submitted?

Discussion:

First time students who submit an abstract should promise to join the society and when they register for the meeting, pay their dues.

They should be required to pay dues for the next year.

What about Grants - In - Aid ?

**MOTION: Payment of a first time student who submits an abstract must pay the student registration rate plus dues for proceeding year at the time of abstract submission.**

By: Ron Dimock

Seconded by: Andrew Biewener

Approved

**MOTION: First time students who submit a Grants-In-Aid application, will be able to pay dues for the following year instead of the year the application was submitted.**

Motion declined.

- B. West coast Executive Committee members - SICB will pick up the extra night if you came in on January 3, 2000. Please contact Martin Feder.

VI. Meeting Adjourned.

# SICB Membership Report for 1999

## Renewal Report (Date Report was pulled and the number of members that needed to be invoiced)

	Date Sent	# of invoices
Second Renewal Mailing	12/11/97	962
	2/6/99	765
Third Renewal Mailing	2/5/98	499
	3/15/99	609

Number of Vouchers awarded from May 15- June 14 = 4  
 Number of Vouchers awarded from June 15 - July 21 = 4  
 Number of Vouchers awarded from July 21 - August 16 = 6  
 Number of Vouchers awarded from August 16 - Sept. 15 = 6  
 Number of Vouchers awarded from Sept. 16 - October 15 = 1  
 Number of Vouchers awarded from October 16 to present = 2  
 Number of Vouchers to date = 23

## Membership Report

Member Type	April		May		June		July	
	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed
MEG Emeritus Journal	61	17	66	12	66	12	67	11
MEY Emeritus- No Journal	11	5	12	4	12	4	12	4
MFH Family - Spouse Journal	36	8	39	5	39	5	39	5
MFM Full Member, Journal	988	201	1038	151	1064	125	1079	110
MFPJ Fmly Postdoctoral	4	2	4	2	4	2	4	2
MSF Graduate Student Fml	4	0	4	0	4	0	4	0
MSP Single Postdoctoral	92	47	101	38	104	35	107	32
MSS Graduate Student	378	169	384	163	390	157	394	153
MST Student-In-Training	41	37	41	37	42	36	43	35
<b>Total</b>	<b>1615</b>	<b>486</b>	<b>1689</b>	<b>412</b>	<b>1725</b>	<b>376</b>	<b>1749</b>	<b>352</b>

## New 1999 Members

Member Type	April	May	June	July
	1999	1999	1999	1999
MFM Full Members	28	9	5	10
FMNJ Full Member No Journal				
MFH Full Family Membership				2
MWW Full Family - No Journal				
MEG Emeritus - Journal				
MEY Emeritus - No Journal				
MEP Emeritus(1984) -No Journal				
MEPJ Emeritus (1984) Journal				
MSP Postdoctoral member	9	1	1	1
MFPJ Postdoctoral - Journal				
MFP Postdoctoral - No Journal				
MSS Graduate Student Member	54	5	8	8
MSF Graduate Family - Journal				
MSFS Graduate Family - No J				
MST Student-In-Training	17			2
MLF Life Member	49			
MHH Honorary Member	22			
Emeritus no dues no journal	121			
Emeritus no due journal	4			
<b>Total</b>	<b>304</b>	<b>15</b>	<b>14</b>	<b>23</b>
<b>Cumulative total</b>	<b>304</b>	<b>319</b>	<b>333</b>	<b>356</b>
<b>GRAND TOTAL</b>	<b>1919</b>	<b>2008</b>	<b>2058</b>	<b>2105</b>

## SICB Membership Report for 1999

<b>August</b>		<b>Sept.</b>		<b>Oct.</b>		<b>Nov.</b>		<b>Dec.</b>	
Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed
67	11	68	10	68	10	70	8	70	8
12	4	12	4	12	4	13	3	13	3
39	5	40	4	40	4	41	3	41	3
1081	108	1084	105	1086	103	1092	97	1092	97
4	2	4	2	4	2	4	2	4	2
4	0	4	0	4	0	4	0	4	0
107	32	109	30	109	30	113	26	113	26
396	151	404	143	406	141	408	139	408	139
44	34	44	34	47	31	48	30	48	30
<b>1754</b>	<b>347</b>	<b>1769</b>	<b>332</b>	<b>1776</b>	<b>325</b>	<b>1793</b>	<b>308</b>	<b>1793</b>	<b>308</b>

<b>August</b>	<b>Sept.</b>	<b>Oct.</b>	<b>Nov.</b>	<b>Dec.</b>
1999	1999	1999	1999	1999
13	10	3	17	
1			2	
			1	
			2	
4	5		4	
			1	
30	36	8	46	
	1			
6	1		7	
54	53	11	80	0
410	463	474	554	554
<b>2164</b>	<b>2232</b>	<b>2250</b>	<b>2347</b>	<b>2347</b>

DIVISION	Number of Members
DNB Division of Neurobiology	220
DAB Division of Animal Behavior	217
DCE Division of Comparative Endocrinology	365
DCPB Division of Comparative Physiology & Biochemistry	720
DDCB Division of Developmental Cell Biology	284
DEE Division of Ecology & Evolution	486
DICI Division of Integrative & Comparative Issues	141
DIZ Division of Invertebrate Zoology	497
DSEB Division of Systematic & Evolutionary Biology	267
DVM Division of Vertebrate Morphology	423
DEDB Division of Evolutionary Developmental Biology	127

**GROUP SUMMARY**

**SICB 2000 ANNUAL MTG**  
 ATLANTA, GEORGIA  
 JANUARY 4-8, 2000

TO:

**REGISTRATION**

Brochure Mail Date: September, 1999  
 Mail Date for '99 Meeting: September 18, 1998  
 Earlybird Cutoff: December 3, 1999  
 Registration Cutoff: December 20, 1999  
 Last Pre-Meeting Report: December 22, 1999

CC:

INCOME REG CATEGORIES	27-Oct	3-Nov	10-Nov		17-Nov		24-Nov		01-Dec		08-Dec		Final	Reg Fee	Income to Date
	10 wks	9 wks	8 wks out		7 wks out		6 wks out		5 wks out		4 wks out				
	2000	2000	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999	99		
Full Member Early	60	74	80	58	107	82	143	108		147		262	265	\$195.00	\$27,885.00
Full Member Late												1	54	\$250.00	\$0.00
Postdoctoral Early	11	16	20	23	24	28	28	33		46		70	73	\$150.00	\$4,200.00
Emeritus Early	3	3	3		4		5							\$150.00	\$750.00
Postdoctoral Late													7	\$175.00	\$0.00
Emeritus Late														\$175.00	\$0.00
Student/Teacher Early	32	45	49	43	82	55	121	84		133		257	278	\$70.00	\$8,470.00
Student/Teacher Late												1	52	\$100.00	\$0.00
Spouse/Guest Early	6	5	5	7	6	9	9	12		14		24	23	\$60.00	\$540.00
Spouse/Guest Late													6	\$75.00	\$0.00
One Day Early Fee	1	1	2		2		2			1		2	1	\$150.00	\$300.00
One Day Late Fee													7	\$175.00	\$0.00
Non-Member Early				1	5	1	9	2		8		11	11	\$320.00	\$2,880.00
Non-Member Late												1	2	\$350.00	\$0.00
Non-Member Postdoctoral	1	4	3	1	7	1	8	1		1		4	4	\$205.00	\$1,640.00
Non-Member Student	1	4	5	3	15	11	25	11		24		46	57	\$130.00	\$3,250.00
Sub-Total	115	152	167	136	252	187	350	251	0	374	0	679	840		\$49,915.00
<b>COMP REG CATEGORIES</b>															
Staff													7	COMP	
Complimentary				1		1		3		2		4	5	COMP	
Exhibitor				1		1		2		3		21	47	COMP	
Exhibit Hall Only													8	COMP	
Symposium Speaker				23		30	41	37		48		61	5	COMP	
Student Support												4	92	COMP	
Complimentary Guest				6		6		6		6		5	22	COMP	
Press					1		2			1		4	11	COMP	
TOTAL REGISTRANTS	115	152	167	167	253	225	393	299	0	434	0	778	1037		
<b>REGISTRATION INCOME</b>															\$49,915.00
<b>SESSIONS/EVENTS</b>															
	2000	2000	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999			
SRC Breakfast/Students	3	2	2	2	2	3	3	4		8		9	9	\$13.00	\$39.00
SRC Breakfast/Others	2	2	3	4	3	5	5	6		6		12	13	\$16.00	\$80.00
AMS Luncheon	3	3	3	10	3	10	4	13		18		30	29	\$33.00	\$132.00
SESSION INCOME															\$251.00
TOTAL INCOME															\$50,166.00
<b>CANCELLATION/NO SHOW</b>															
	2000	2000	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999			
Cancellations							1					2	7	####	\$35.00
No-Shows													11		
<b>AIR-LINE PICK-UP</b>															
American Airlines															
DELTA		1		40	7	54	7	60		74		74	115		
*based on current forecast for Atlanta															



SICB EXHIBIT AND SPONSORSHIP REPORT - 2000 ANNUAL MEETING  
January 4-8, 2000 - Atlanta Hilton & Towers Hotel  
(as of 10/12/99)

2000 Budgeted Income	\$21,000	1999 Budgeted Income	\$21,000	1998 Budgeted Income	\$21,000	1
2000 Income to Date	\$16,575	1999 Final		1998 Final Income		
Income	\$11,925					
Amount to Achieve Budget	\$4,425	Exceeded budget by		\$ 725		
Booths Available	30	Booths Available	30	Booths Available	40	B
Booths Sold	28	Booths Sold	30	Booths Sold	24	B

SPONSORSHIPS:

2000 Budget	\$750	1999 Budget:	\$750
2000 Actual	\$	1999 Actual:	\$1,000 (One (1) Gold Sponsor @ \$1,000 from ADInstruments,

COMPANY	EXHIBITING REPRESENTATIVE	'99 EXHIBITOR	AMOUNT DUE
Benjamin/Cummings an imprint of Addison Wesley Longman 1301 Sansome Street, San Francisco, CA 94111 One Jacob Way, Reading MA 01867 Contact: Gail Goodell <a href="mailto:gail.goodell@awl.com">gail.goodell@awl.com</a> Phone: 781-944-3700 (2833) Fax: 781-944-8964	Elizabeth Fogarty, Editor Erin Mulligan, Executive Editor	Yes	\$0.00
Prentice Hall 1 Lake Street Upper Saddle River, NJ 07458 Phone: 781-944-3700 ext. 2833 Fax: 781-944-8964 Contact: Gail Goodell <a href="mailto:gail.goodell@awl.com">gail.goodell@awl.com</a>	TBD	Yes	\$0.00
McGraw – Hill Two Penn Plaza, 20 <sup>th</sup> Floor New York, NY 10121-2298 Phone: 212-904-2892 Fax: 212-904-2280 Contact: Mary Jo Donnelly <a href="mailto:mary_donnelly@mcgraw-hill.com">mary_donnelly@mcgraw-hill.com</a>	Donna Nemmers, Marketing Manager Marge Kemp, Sr. Sponsoring Editor	Yes	\$0.00
ADInstruments 1949 Landings Drive Mounatin View, CA 94043 Phone: 888-965-6040 Fax: 650-965-9293 Contact: Lola Zybura <a href="mailto:lola@adinstruments.com">lola@adinstruments.com</a>	Graham Milliken, President Allison Hegarty, Applications Specialist	Yes	\$0.00
University of California Press 2120 Berkeley Way Berkeley, CA 94720 Phone: 510-643-8915 Fax: 510-643.7127	Doris Kretschmer, Acquisitions Editor	Yes	\$0.00

Contact: Erich Van Rijn <a href="mailto:erich.vanrijn@ucpress.ucop.edu">erich.vanrijn@ucpress.ucop.edu</a>			
Cambridge University Press 40 West 20 <sup>th</sup> Street New York, NY 10011-4211 Phone: 212-924-3900 (325) Fax: 212-691-3239 Contact: James Murphy <a href="mailto:jmurphy@cup.org">jmurphy@cup.org</a>	Alan Crowden, Editor Tracey Sanderson, Editor	Yes	\$0.00
Oxford University Press 198 Madison Avenue New York, NY 10016 Phone: 212-726-6063 Fax: 212-726-6441 Contact: Mary Hopkins <a href="mailto:meh@oup-usa.org">meh@oup-usa.org</a>	Kirk Jensen, Editor, Life Sciences	Yes	\$0.00
University of Chicago Press 5801 Ellis Avenue Chicago, IL 60637 Phone: 773-702-7700 Fax: 773-702-9756 Contact: Tracy Kneblak	Christie Henry, Editor	Yes	\$0.00
Academic Press 525 B Street, Suite 1900 San Diego, CA 92101-4495 Phone: 619-699-6745 Fax: 619-699-6580 Contact: Patricia Howard <a href="mailto:phoward@acad.com">phoward@acad.com</a>	Chuck Crumly, Acquisitions Editor Robert Harington, Acquisitions Editor	Yes	\$0.00
Academia Book Exhibits 3512 Willow Green Court Oakton, VA 22124 Phone: 703-716-5537 Fax: 703-620-3676 Contact: Bruce Davis <a href="mailto:acadbkexbs@aol.com">acadbkexbs@aol.com</a>	Bruce Davis, Exhibits Manager	Yes	\$0.00
National Science Foundation 4201 Wilson Blvd. Room 685 Arlington, VA 22230 Phone: 703-306-1421 Fax: 703-306-0349 Contact: Dr. Zoe Eppley <a href="mailto:zeppley@nsf.gov">zeppley@nsf.gov</a>	TBD	Yes	waived
John Wiley & Sons, Inc. 605 Third Avenue New York, NY 10158 Phone: 212-850-6000 Fax: 212-850-6088 Contact: Diane Imus <a href="mailto:dimus@wiley.com">dimus@wiley.com</a>	TBD	Yes	\$0.00
Redlake Imaging Corp. 18450 Technology Dr, Suite A Morgan Hill, CA 95037 Phone: 408-779-6464 Fax: 408-778-6256 Contact: Suzanna Jones <a href="mailto:sjones@redlake.com">sjones@redlake.com</a>	Dave Schrag, Sales David Wiese, Sales	Yes	\$0.00
Harvard University Press 79 Garden St. Cambridge, MA 02138 Phone: 617-495-2650 Fax: 617-496-2550 Contact: Vanessa Vinarub	Michael Fisher	Yes	\$0.00

<a href="mailto:vanessa_vinarub@harvard.edu">vanessa_vinarub@harvard.edu</a>			
AEI Technologies 300 William Pitt Way Pittsburgh, PA 15238 Phone: 412-826-3280 Fax: 412-826-3281 Contact: Henry Ginsberg <a href="mailto:aeitechnoll@aol.com">aeitechnoll@aol.com</a>	Henry Ginsberg, VP Marketing & Sales Joe Veltre, General Manager	Yes	\$0.00
The Biological Bulletin/Marine Biological Laboratory Marine Biological Laboratory 7 Marine Biological Laboratory Street Woods Hole, MA 02543 Phone: 508-289-7194 Fax: 508-289-7922 Contact: Pamela Clapp Hinkle <a href="mailto:pclapp@mbl.edu">pclapp@mbl.edu</a>	Pamela Clapp Hinkle, Managing Editor Carol Schachinger, Editorial Associate	Yes	\$0.00
Sonometrics Corporation 135-4056 Meadowbrook Drive London, ON Canada N6L 1E4 Phone: 519-652-6464 Fax: 519-652-6426 Contact: Martin Hess <a href="mailto:sales@sonometrics.com">sales@sonometrics.com</a>	TBA	Yes	\$0.00
Sable Systems 2887 Green Valley Pkwy. DMB 299 Henderson, NV 89014 Phone: 702-268-4445 Fax: 702-269-4446 Contact: Monika Ritter <a href="mailto:mail@sablesys.com">mail@sablesys.com</a>	John Lighton, V.P. For Development Barbara Joos, Customer Support	Yes	\$0.00
CB Science/iWorx One Washington St. Dover, NH 03820 Phone: 800-234-1757 Fax: 603-742-2455 Contact: Bill Mitchell <a href="mailto:billm@iwprk.com">billm@iwprk.com</a>	Bill Mitchell, Director Cliff Bredenberg, Vice President Sales	Yes	\$0.00
COMPANY	EXHIBITING REPRESENTATIVE	'99 EXHIBITOR	AMOUNT DUE
Hearts & Flowers Butterfly Farm P.O. Box 1069 Subury, OH 43074 Phone: 614-847-0863 Contact: Kathy Wildman <a href="mailto:kattwild@hotmail.com">kattwild@hotmail.com</a>	Kathy Wildman	Yes	\$0.00
H. Stevan Logsdon/Wildlife Artist P.O. Box 4070 Silver City, NM 88062 Phone: 505-388-4263 Contact: H. Stevan Logsdon <a href="mailto:logsdon_johnson@zianet.com">logsdon_johnson@zianet.com</a>	H. Stevan Logsdon	Yes	\$50.00
Harbor Branch Oceanographic Institution 5600 U.S.1 North Ft. Pierce, FL 34946 Phone: 561-465-2400 ext. 502 Fax: 561-465-5743 Contact: Dr. Sue Cook <a href="mailto:scook@hboi.edu">scook@hboi.edu</a>	Dr. Susan Cook, Director, Education Division Graduate student TBD	Yes	\$0.00
Qubit Systems Inc.	Dr. Stephen Hunt, Vice	Yes	\$0.00

134 Albert St. Kingston, Ontario Canada K7L 3V2 Phone: 613-549-3199 Fax: 613-549-3198 Contact: Dr. Stephen Hunt <a href="mailto:hunt@biology.queensu.com">hunt@biology.queensu.com</a>	President		
Paul Gritis Books P. O. Box 4298 Bethlehem, PA 18018 Phone: 610-954-0466 Fax: 610-954-0466 Contact: Paul Gritis <a href="mailto:pgritis@yahoo.com">pgritis@yahoo.com</a>	Paul Gritis, Owner	No	\$0.00
Johns Hopkins University Press 2715 N. Charles St. Baltimore, MA 21218 Phone: 410-516-6935 Fax: 410-516-6998 Contact: Harriette Wimms <a href="mailto:hwimms@mail.press.jhu.edu">hwimms@mail.press.jhu.edu</a>	Jack Holmes	Yes	\$900.00
Blackwell Science 350 Main Street Malden, MA 02148 Phone: 781-388-8250 Fax: 781-388-8255 Contact: Michelle Ambrose <a href="mailto:mambr@blacksci.com">mambr@blacksci.com</a>	TBD	Yes	\$0.00
Peak Performance Technologies 7388 S. Revere Parkway Suite 603 Englewood, CO 80112 Phone: 303-799-8686 Fax: 303-799-8690 Contact: Maria Chi-Ham <a href="mailto:info@peakperform.com">info@peakperform.com</a>	Denise Gravelle, Technical Account Representative	Yes	\$0.00
American Microscopical Society P.O. Box 1897 Lawrence, KS 66044 Phone: 423-439-4376 Fax: 423-439-5958 Contact: Diane Nelson <a href="mailto:nelsond@etsu.edu">nelsond@etsu.edu</a>	Dr. Diane Nelson, Exhibit Coordinator Dr. Vicki Pearse, Editor, Invertebrate Biology	Yes	\$225.00

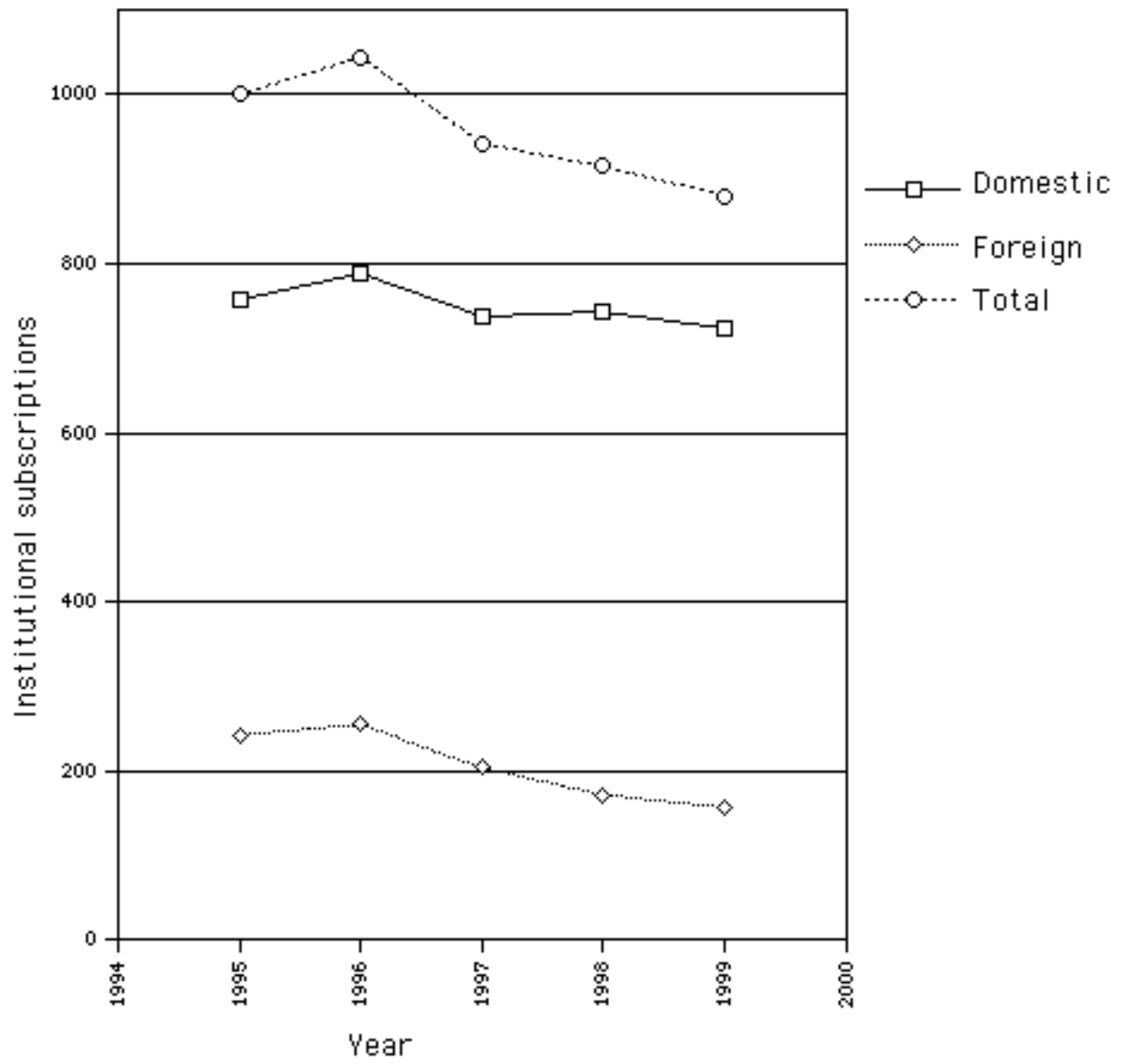
## American Zoologist Renewal Report

Year	1996		1997		1998		1999		2000	
	Date Sent	# of invoices	Date Sent	# of invoices	Date Sent	# of invoices	Date Sent	# of invoices	Date Sent	# of invoices
First Renewal Mailing					9/29/97	953	9/27/98	970	10/8/99	883
Second Renewal Mailing	3/25/96	144	12/19/96	193	2/3/98	100	3/19/99	114		
Third Renewal Mailing	6/5/96	114	4/10/97	104	4/13/98	83	4/26/99	108		

### Membership Report

Member Type	April		May		June		July		August	
	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed
SUSIN Ins. Sub. International	104	42	106	40	107	39	107	39	107	39
SUSUS Ins. Sub. United State	715	59	720	54	722	52	727	47	727	47
SUIIN Ind. Sub. International	2	2	2	2	2	2	2	2	2	2
SUIUS Ind. Sub. USA	2	1	2	1	2	1	1	1	1	1
SUSCM Ins. Sub. Canada/Mex	39	4	39	4	39	4	40	3	40	3
<b>Total</b>	<b>862</b>	<b>108</b>	<b>869</b>	<b>101</b>	<b>872</b>	<b>98</b>	<b>877</b>	<b>92</b>	<b>877</b>	<b>92</b>

Member Type	Sept.		Oct.		Nov.		Dec.	
	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed	Renewed	Non-Renewed
SUSIN Ins. Sub. International	107	39	109	37	110	36	110	36
SUSUS Ins. Sub. United State	727	47	728	46	728	46	728	46
SUIIN Ind. Sub. International	2	2	2	2	2	2	2	2
SUIUS Ind. Sub. USA	1	1	1	1	1	1	1	1
SUSCM Ins. Sub. Canada/Mex	40	3	40	3	40	3	40	3
<b>Total</b>	<b>877</b>	<b>92</b>	<b>880</b>	<b>89</b>	<b>881</b>	<b>88</b>	<b>881</b>	<b>88</b>



SICB 2000 Budget  
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SICB		1999	1999-Sept.	2000	2001
BUDGET		Approved	Current	Preliminary	Budget
		BUDGET	Projection	Budget	
	<i>REVENUE</i>				
110	ADMINISTRATIVE	\$211,573	\$211,971	\$204,802	
111	ANNUAL MEETING 2000	\$0	\$0	\$165,205	
112	ENDOWMENT	\$20,302	\$20,302	\$20,352	
113	ANNUAL MEETING 1999	\$196,965	\$178,994	\$0	
114	JOURNAL REVENUE	\$495,330	\$458,647	\$480,131	
115	GRANTS REVENUE	\$342	\$342	\$0	
117	NEWSLETTER	\$0	\$350	\$1,000	
123	MERCHANDISE	\$450	\$2,080	\$450	
150	PUBLICATIONS	\$445	\$445	\$445	
	S/T OPERATING REVENUE	\$925,407	\$873,131	\$872,385	
	ENDOWMENT CONTRIBUTIONS	\$0	\$12,419	\$0	
	<b>TOTAL REVENUE</b>	<b>\$925,407</b>	<b>\$885,550</b>	<b>\$872,385</b>	
	<i>EXPENSE</i>				
110	ADMINISTRATIVE	\$226,829	\$219,627	\$205,656	
111	ANNUAL MEETING 2000	\$0	\$0	\$308,942	
112	ENDOWMENT	\$9,504	\$8,528	\$11,971	
113	ANNUAL MEETING 1999	\$314,965	\$295,299	\$0	
114	JOURNAL	\$149,046	\$136,455	\$137,507	
115	GRANTS	\$4,469	\$4,469	\$50	
116	SICB MEMBERSHIPS	\$1,950	\$2,045	\$2,045	
117	NEWSLETTER	\$12,000	\$15,700	\$13,125	
118	DIVISIONAL BUDGETS	\$26,538	\$5,376	\$21,000	
123	MERCHANDISE	\$227	\$50	\$50	
126	MEMB. ACTIVITY	\$47,201	\$55,823	\$61,417	
127	MARKETING PROGRAM	\$25,300	\$23,000	\$24,500	
134	ANN. MTG. FUTURES	\$6,200	\$7,150	\$9,872	
141	CONTINGENCY FUND	\$10,000	\$10,000	\$10,000	
150	PUBLICATIONS (IB)	\$76,000	\$0	\$0	
	<b>TOTAL EXPENSE</b>	<b>\$910,229</b>	<b>\$783,522</b>	<b>\$806,135</b>	
	OPERATING PROFIT/LOSS	\$15,178	\$89,609	\$66,250	
	PROFIT/LOSS ALL SOURCES	\$15,178	\$102,028	\$66,250	
	1999 GOING IN UNRESTRICTED FUND BALANCE	\$474,166	\$474,166		
	1999 OPERATING PROFIT/(LOSS)	\$15,178	\$89,609		
	1999 GOING OUT UNRESTRICTED FUND BALANCE	\$489,344	\$563,775		
	2000 GOING IN UNRESTRICTED FUND BALANCE			\$563,775	
	2000 OPERATING PROFIT/(LOSS)			\$66,250	
	2000 GOING OUT UNRESTRICTED FUND BALANCE			\$630,025	
	GOING OUT UFB AS% OPERATING EXPENSE	54%	72%	78%	

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SICB		1999	1999-Sept.	2000	2001
BUDGET		Approved	Current	Preliminary	Budget
		BUDGET	Projection	Budget	
	<i>REVENUE</i>				
110	ADMINISTRATIVE REVENUE				
3080	DUES	\$168,602	\$169,000	\$171,973	
3100	MEMBERSHIP VOUCHERS	\$0	\$0	\$0	
3300	CBP SUBSCRIPTIONS	\$1,827	\$1,827	\$0	
3560	GCE SUBSCRIPTIONS	\$9,000	\$9,000	\$0	
3570	INTEREST-UNRESTRICTED FUND BALANCE	\$28,614	\$28,614	\$29,699	
3590	MEMBERSHIP DIRECTORY SALES	\$300	\$300	\$0	
3600	MAILING LISTS	\$3,130	\$3,130	\$3,130	
3620	CAREER BROCHURES	\$100	\$100	\$0	
3740	MISCELLANEOUS	\$0	\$0	\$0	
4500	AMS MEMBERSHIP DUES	\$0	\$0	\$0	
110	ADMINISTRATIVE SUBTOTAL	\$211,573	\$211,971	\$204,802	
	ANNUAL MEETING REVENUE	113-DENVER	113-DENVER	111-ATLANTA	113-CHICAGO
3420	REG NON-MBR POSTDOCTORAL	\$2,050	\$855	\$820	\$820
3430	REG NON-MBR STUDENT	\$8,580	\$7,410	\$7,410	\$7,930
3440	REGISTRATION POST DOC/EMERITUS EAR	\$13,500	\$10,950	\$10,950	\$11,700
3450	EXHIBITORS	\$11,900	\$21,575	\$21,575	\$21,575
3460	REGISTRATION FULL MEMBER EARLY	\$69,740	\$58,220	\$51,675	\$55,380
3470	REGISTRATION STUDENT/H.S. TEACH EAR	\$21,420	\$20,540	\$19,460	\$20,790
3480	REGISTRATION FULL MEM. ON-SITE	\$12,500	\$13,500	\$13,500	\$14,500
3490	REGISTRATION GUEST EARLY	\$1,260	\$1,380	\$1,380	\$1,500
3500	CO-SPONSORING MAILINGS	\$0	\$0	\$0	\$0
3510	FUNCTIONS SICB	\$900	\$0	\$0	\$0
3520	EVENTS/TOURS	\$0	\$0	\$0	\$0
3530	PROGRAM ADVERTISING	\$4,000	\$4,159	\$3,500	\$4,060
3550	ABSTRACTS	\$26,055	\$24,290	\$19,890	\$21,060
3560	ABSTRACT VOUCHER	\$0	\$0	\$0	\$0
3570	REGISTRATION POST DOC/EMER ON-SITE	\$2,100	\$1,225	\$1,225	\$1,225
3580	REGISTRATION STUDENT/H.S. ON-SITE	\$4,000	\$5,200	\$5,200	\$5,600
3590	REGISTRATION GUEST ON-SITE	\$450	\$450	\$450	\$450
3600	FUNCTIONS CO-SPONSORED	\$0	\$0	\$0	\$0
3610	REGISTRATION NON-MEMBER	\$4,160	\$4,605	\$3,520	\$3,840
3620	REGISTRATION NON-MEMBER ON-SITE	\$0	\$0	\$700	\$700
3640	REGISTRATION ONE-DAY EARLY	\$1,650	\$150	\$150	\$150
3650	REGISTRATION ONE-DAY ON-SITE	\$700	\$1,225	\$1,225	\$1,225
3700	REGISTRATION VOUCHER	\$0	\$0	\$0	\$0
3740	MISCELLANEOUS	\$0	\$0	\$0	\$0
4060	SOCIETY CONTRIBUTIONS	\$750	\$250	\$750	\$750
4080	SPONSORSHIP	\$750	\$1,000	\$750	\$750
4100	STUDENT SUPPORT	\$0	\$0	\$0	\$0
4400	REGISTRATION SYMPOSIA PARTICIPANTS	\$9,600	\$0	\$0	\$0
4200	AMS FOOD FUNCTION	\$450	\$780	\$750	\$750
4210	SRC FOOD FUNCTION	\$450	\$325	\$325	\$325
4220	R. JONES DINNER	\$0	\$905	\$0	\$0
	ANNUAL MEETING SUBTOTAL	\$196,965	\$178,994	\$165,205	\$175,080



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		SICB BUDGET	1999 Approved BUDGET	1999-Sept. Current Projection	2000 Premilinary Budget	2001 Budget
112		ENDOWMENT REVENUE				
	3250	MEMBER CONTRIBUTIONS	\$0	\$0	\$0	
	4550	MEMBER CONTRIBUTIONS INTEREST	\$0	\$0	\$0	
	4000	GRANTS-IN-AID MEMBER CONTRIBUTIONS	\$0	\$100	\$0	
	6000	GRANTS-IN-AID PROJECTED INTEREST	\$5,700	\$5,700	\$4,938	
	4100	L. H. HYMAN SCHOLARSHIP CONTRIBUTIONS	\$0	\$140	\$0	
	4150	L. H. HYMAN SCHOLARSHIP INTEREST	\$874	\$874	\$728	
	4200	JOHN MOORE LECTURESHIP FUND	\$0	\$110	\$0	
	4500	JOHN MOORE LECTURESHIP INTEREST	\$152	\$152	\$152	
	4300	G. A. BARTHOLOMEW AWARD	\$0	\$10,230	\$0	
	4510	G. A. BARTHOLOMEW INTEREST	\$1,558	\$1,558	\$2,211	
	4400	D. D. DAVIS FUND	\$0	\$0	\$0	
	4520	D. D. DAVIS INTEREST	\$304	\$304	\$253	
	4050	A.M. WENNER FUND	\$0	\$0	\$0	
	4530	A.M. WENNER INTEREST	\$456	\$456	\$370	
	4410	CHARLOTTE MANGUM STUDENT SUPPORT FUND	\$0	\$1,839	\$0	
	4540	CHARLOTTE MANGUM STUDENT SUPPORT INTEREST	\$11,258	\$11,258	\$11,700	
112		<b>ENDOWMENT CONTRIB. SUBTOTAL</b>	<b>\$20,302</b>	<b>\$32,721</b>	<b>\$20,352</b>	
114		JOURNAL REVENUE				
	3200	ADVERTISING	\$8,000	\$4,500	\$5,385	
	3210	BACK ISSUES	\$2,320	\$2,320	\$1,820	
	3220	ARTICLE REPRINTS	\$1,085	\$2,349	\$1,500	
	3240	PAGE CHARGES	\$14,500	\$500	\$14,500	
	3250	ROYALTIES	\$2,300	\$3,478	\$3,000	
	4270	SUBSCRIPTIONS	\$467,125	\$445,500	\$453,926	
114		<b>JOURNAL SUBTOTAL</b>	<b>\$495,330</b>	<b>\$458,647</b>	<b>\$480,131</b>	
115		GRANTS REVENUE				
	3490	NSF	\$342	\$342	\$0	
	3530	NIH	\$0	\$0	\$0	
	3540	OTHER	\$0	\$0	\$0	
	3740	MISCELLANEOUS	\$0	\$0	\$0	
115		<b>GRANTS SUBTOTAL</b>	<b>\$342</b>	<b>\$342</b>	<b>\$0</b>	
117		NEWSLETTER REVENUE				
	3200	NEWSLETTER ADVERTISING	\$0	\$350	\$1,000	
		<b>NEWSLETTER SUBTOTAL</b>	<b>\$0</b>	<b>\$350</b>	<b>\$1,000</b>	
123		MERCHANDISE REVENUE				
	3500	VIDEO SALES	\$250	\$250	\$250	
	4320	MERCHANDISE SALES	\$200	\$1,830	\$200	
	4340	MERCHANDISE VOUCHER	\$0	\$0	\$0	
123		<b>MERCHANDISE SUBTOTAL</b>	<b>\$450</b>	<b>\$2,080</b>	<b>\$450</b>	
150		PUBLICATIONS REVENUE				
	3250	ROYALTIES - <i>MOLECULAR ZOOLOGY</i>	\$445	\$445	\$445	
		<b>PUBLICATIONS SUBTOTAL</b>	<b>\$445</b>	<b>\$445</b>	<b>\$445</b>	

SICB 2000 Budget  
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		SICB	1999	1999-Sept.	2000	2001
		BUDGET	Approved	Current	Preliminary	Budget
			BUDGET	Projection	Budget	
		<i>EXPENSE</i>				
110		ADMINISTRATIVE EXPENSE				
	5020	ACCOUNTING FEE	\$21,900	\$21,900	\$22,338	
	5030	AUDIT	\$3,450	\$3,450	\$3,600	
	5050	MARKETING MANAGER	\$3,000	\$3,000	\$3,000	
	5080	HANDBOOK PRODUCTION	\$0	\$0	\$0	
	5090	STORAGE	\$1,600	\$1,600	\$1,600	
	5340	BANK FEES	\$2,700	\$2,700	\$2,700	
	5350	CREDIT CARD SERVICE CHARGES	\$2,000	\$5,000	\$7,000	
	5660	DUES/SUBSCRIPTIONS	\$0	\$0	\$0	
	5670	CERTIFICATES/AWARDS	\$500	\$46	\$50	
	5770	COMPUTER/SOFTWARE	\$10,000	\$8,000	\$5,000	
	6830	LEGAL	\$0	\$0	\$0	
	6100	INSURANCE	\$5,350	\$5,350	\$5,510	
	6290	ELECTRONIC COMMUNICATIONS	\$13,000	\$13,000	\$13,250	
	6890	MEMBER LIST RESALE	\$700	\$700	\$700	
	6950	MAILROOM	\$750	\$750	\$750	
	7000	MANAGEMENT FEE	\$64,800	\$64,800	\$55,000	
	7100	MARCOM MANAGEMENT FEE	\$0	\$0	\$0	
	7120	PRESIDENT TRAVEL	\$0	\$0	\$0	
	7130	PRESIDENT-ELECT TRAVEL	\$725	\$725	\$725	
	7140	TREASURER TRAVEL	\$725	\$725	\$725	
	7150	TREASURER ELECT TRAVEL	\$0	\$0	\$725	
	7160	CAREER BROCHURES PRINTING	\$0	\$0	\$0	
	7170	CAREER BROCHURES POSTAGE	\$416	\$0	\$0	
	7180	CAREER BROCHURES STAFF TIME	\$0	\$0	\$0	
	7190	<i>CBP</i> SUBSCRIPTIONS	\$1,827	\$1,827	\$0	
	7260	<i>GCE</i> SUBSCRIPTIONS	\$6,500	\$6,500	\$0	
	7350	MISCELLANEOUS	\$0	\$0	\$0	
	7700	PHOTOCOPIES	\$2,750	\$2,750	\$2,750	
	7760	POSTAGE	\$3,000	\$3,000	\$3,000	
	7900	AMS DUES REIMBURSEMENTS	\$0	\$0	\$0	
	8000	800 NUMBER	\$1,200	\$1,200	\$1,200	
	8030	STAFF TIME	\$57,556	\$55,972	\$66,653	
	8980	PRINTING/STATIONERY	\$5,880	\$5,880	\$5,880	
	9070	SUPPLIES	\$3,500	\$1,000	\$1,000	
	9250	TELEPHONE/FAX	\$4,000	\$2,500	\$2,500	
	9000	STRATEGIC PLANNING MEETING	\$9,000	\$7,252	\$0	
110		<b>ADMINISTRATIVE SUBTOTAL</b>	<b>\$226,829</b>	<b>\$219,627</b>	<b>\$205,656</b>	

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		SICB	1999	1999-Sept.	2000	2001
		BUDGET	Approved	Current	Preliminary	Budget
			BUDGET	Projection	Budget	
111		ANNUAL MEETING EXPENSE				
			113-DENVER	113-DENVER	111-ATLANTA	113-CHICAGO
	5030	ADMINISTRATIVE SUPPORT	\$17,820	\$8,331	\$0	\$0
	5050	MARKETING MANAGER	\$8,400	\$8,624	\$9,000	\$9,360
	5600	CONVENTION MANAGER	\$44,880	\$52,848	\$46,720	\$48,008
	5620	CONVENTION SUPERVISOR	\$500	\$0	\$500	\$475
	5670	CONVENTION SUPPORT	\$15,400	\$16,044	\$19,250	\$20,900
	5680	CONVENTION MAILROOM	\$2,200	\$1,413	\$3,000	\$3,000
	5690	CREDIT CARD SERVICE CHARGES	\$2,683	\$0	\$0	\$0
	5750	ABSTRACT PROCESSING	\$29,000	\$28,802	\$28,000	\$29,500
	6000	CO-SPONSORING MAILINGS	\$0	\$594	\$0	\$0
	6020	LOGO	\$700	\$0	\$0	\$0
	6030	STAFF TRAVEL-AIR	\$2,450	\$1,580	\$1,750	\$300
	6040	STAFF TRAVEL-OTHER	\$2,400	\$2,999	\$2,850	\$3,100
	6050	EXHIBITS	\$6,100	\$2,621	\$1,290	\$5,950
	6060	EVENTS/TOURS	\$0	\$0	\$0	\$0
	6070	POSTER BOARDS	\$1,300	\$1,245	\$2,275	\$4,875
	6090	PROGRAM OFFICER EXPENSE	\$0	\$0	\$0	\$0
	6120	BADGES/RIBBONS/STOCK	\$700	\$790	\$250	\$250
	6130	STUDENT SUPPORT	\$16,850	\$12,422	\$29,325	\$34,025
	6140	PROGRAM PRINT & PREP	\$20,500	\$21,402	\$20,000	\$20,500
	6210	AUDIO/VISUAL	\$15,500	\$12,384	\$20,500	\$30,000
	6240	FUNCTIONS SICB	\$42,675	\$44,950	\$52,500	\$56,000
	6250	FUNCTIONS CO-SPONSORED	\$0	\$0	\$0	\$0
	6260	SHIPPING	\$1,200	\$1,834	\$1,925	\$300
	6270	UPLOAD PROGRAM TO WWW	\$0	\$0	\$0	\$0
	6280	END OF MEETING PARTY	\$0	\$0	\$0	\$0
	6470	SECURITY	\$2,325	\$1,426	\$1,400	\$2,250
	6480	SOCIETY SYMPOSIUM CONTINGENCY	\$5,200	\$3,303	\$10,000	\$10,000
	6530	GRATUITIES	\$700	\$0	\$600	\$600
	7000	CTD MANAGEMENT FEE	\$13,200	\$13,200	\$0	\$0
	7700	PHOTOCOPIES	\$4,600	\$2,793	\$1,800	\$1,800
	7760	POSTAGE	\$11,200	\$10,305	\$13,200	\$13,200
	7890	PRINTING GENERAL	\$11,400	\$9,594	\$11,900	\$12,300
	7900	PROGRAM OFFICER SUPPORT	\$3,500	\$4,331	\$0	\$3,500
	8050	CANCELLATION INSURANCE	\$1,052	\$1,052	\$1,125	\$1,125
	8070	SITE VISIT	\$400	\$731	\$285	\$5
	8100	SPONSORSHIPS	\$50	\$0	\$0	\$0
	8330	REGISTRATION PROCESSING	\$20,910	\$20,217	\$21,092	\$22,982
	8340	REGISTRATION EQUIPMENT	\$700	\$130	\$500	\$1,250
	8800	SIGNAGE	\$150	\$132	\$150	\$150
	9060	SUPPLIES	\$475	\$140	\$160	\$180
	9100	SURVEY	\$0	\$0	\$0	\$0
	9250	TELEPHONE/FAX	\$4,000	\$4,841	\$5,000	\$5,200
	9400	CANCELLATIONS/REFUNDS	\$120	\$2,052	\$120	\$0
	9500	PRIOR YEAR	\$0	\$0	\$0	\$0
	9300	TEMPORARIES	\$925	\$805	\$1,000	\$1,200
	9310	AMS FOOD FUNCTIONS	\$450	\$780	\$750	\$750
	9320	SRC FOOD FUNCTIONS	\$450	\$325	\$325	\$325
	9390	TRAVEL	\$1,900	\$259	\$400	\$0
111		ANNUAL MEETING SUBTOTAL	\$314,965	\$295,299	\$308,942	\$343,360

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SICB		1999	1999-Sept.	2000	2001
BUDGET		Approved	Current	Preliminary	Budget
		BUDGET	Projection	Budget	
112	ENDOWMENT EXPENSE				
6000	GRANTS-IN-AID OF RESEARCH	\$6,000	\$6,000	\$9,000	
6100	GRANTS-IN-AID OF RESEARCH STAFF TIME	\$160	\$160	\$0	
6200	JOHN MOORE LECTURESHIP FUND	\$152	\$0	\$122	
6300	L. H. HYMAN SCHOLARSHIP	\$874	\$730	\$582	
6400	G. A. BARTHOLOMEW AWARD	\$1,558	\$1,638	\$1,769	
6500	D. D. DAVIS FUND	\$304	\$0	\$202	
6600	A.M. WENNER AWARD	\$456	\$0	\$296	
112	ENDOWMENT SUBTOTAL	\$9,504	\$8,528	\$11,971	
114	JOURNAL EXPENSE				
5050	ADMINISTRATIVE SUPPORT	\$2,266	\$0	\$0	
6000	EDITORIAL EQUIPMENT	\$1,380	\$1,380	\$488	
6030	EDITORIAL SUPPLIES/POSTAGE	\$1,000	\$1,000	\$1,000	
6060	EDITORIAL TELEPHONE	\$200	\$200	\$200	
6100	BACK ISSUE STORAGE	\$2,500	\$2,500	\$3,442	
6110	BACK ISSUE POSTAGE	\$1,000	\$1,000	\$1,000	
6120	BACK ISSUE ORDER PROCESSING	\$1,000	\$1,000	\$1,000	
6200	AMERICAN ZOOLOGIST MARKETING	\$1,000	\$1,000	\$1,000	
6210	ADVERTISING COMMISSION	\$1,500	\$1,500	\$1,077	
6300	ARTICLE REPRINTS	\$0	\$0	\$0	
6500	ASSISTANT EDITORS	\$34,200	\$32,775	\$34,200	
6950	MAILROOM	\$1,000	\$1,000	\$1,000	
7400	STATIONERY	\$1,000	\$1,000	\$1,000	
7760	POSTAGE	\$1,000	\$1,500	\$1,500	
7700	PRINTING- ADMIN.	\$0	\$600	\$600	
7890	JOURNAL PRINTING	\$100,000	\$90,000	\$90,000	
9390	Travel	\$0	\$0	\$0	
114	JOURNAL SUBTOTAL	\$149,046	\$136,455	\$137,507	
115	GRANTS EXPENSE				
6010	NSF	\$0	\$0	\$0	
6060	NIH	\$0	\$0	\$0	
6950	MAILROOM	\$0	\$0	\$0	
7350	MISCELLANEOUS	\$0	\$0	\$0	
7360	OTHER	\$0	\$0	\$0	
7760	POSTAGE	\$50	\$50	\$50	
8940	STAFF TIME	\$4,419	\$4,419	\$0	
115	GRANTS SUBTOTAL	\$4,469	\$4,469	\$50	

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		SICB BUDGET	1999 Approved BUDGET	1999-Sept. Current Projection	2000 Premilinary Budget	2001 Budget
116		SICB MEMBERSHIPS EXPENSE				
	5660	NABR DUES	\$500	\$500	\$500	
	7150	AIBS DUES	\$300	\$300	\$300	
	7160	ASC DUES	\$100	\$100	\$100	
	7200	CSSP DUES	\$500	\$595	\$595	
	7500	AAZN CONTRIBUTION	\$300	\$300	\$300	
	8000	CELS DUES	\$250	\$250	\$250	
116		<b>SICB MEMBERSHIPS SUBTOTAL</b>	<b>\$1,950</b>	<b>\$2,045</b>	<b>\$2,045</b>	
117		NEWSLETTER EXPENSE				
	6950	MAILROOM	\$0	\$0	\$125	
	7760	POSTAGE	\$0	\$1,700	\$500	
	7890	PRINTING	\$1,000	\$3,000	\$1,000	
	8940	STAFF TIME	\$11,000	\$11,000	\$11,500	
	8950	DESIGN LAYOUT	\$0	\$0	\$0	
117		<b>NEWSLETTER SUBTOTAL</b>	<b>\$12,000</b>	<b>\$15,700</b>	<b>\$13,125</b>	
118		DIVISIONAL BUDGETS EXPENSE				
	5100	ANIMAL BEHAVIOR	\$2,110	\$200	\$2,000	
	5400	COMPARATIVE ENDOCRINOLOGY	\$3,455	\$3,026	\$3,000	
	5420	COMPARATIVE PHYS. & BIOCHEMISTRY	\$2,513	\$0	\$2,000	
	5430	DEVELOPMENTAL & CELL BIOLOGY	\$2,218	\$193	\$2,000	
	5440	ECOLOGY & EVOLUTION	\$3,640	\$149	\$2,000	
	5450	INTEGRATIVE & COMPARATIVE ISSUES	\$0	\$0	\$2,000	
	5460	INVERTEBRATE ZOOLOGY	\$2,490	\$714	\$2,000	
	5470	NEUROBIOLOGY	\$2,063	\$150	\$2,000	
	5480	VERTEBRATE MORPHOLOGY	\$2,049	\$844	\$2,000	
	5540	SYSTEMATIC & EVOLUTIONARY BIOLOGY	\$6,000	\$100	\$2,000	
118		<b>DIVISIONAL BUDGETS SUBTOTAL</b>	<b>\$26,538</b>	<b>\$5,376</b>	<b>\$21,000</b>	
123		MERCHANDISE				
	7500	MERCHANDISE	\$0	\$0	\$0	
	7760	VIDEO POSTAGE	\$0	\$50	\$50	
	7900	VIDEO PRODUCTION	\$0	\$0	\$0	
	8080	VIDEO PROMOTION	\$0	\$0	\$0	
	9030	STAFF TIME	\$227	\$0	\$0	
123		<b>MERCHANDISE SUBTOTAL</b>	<b>\$227</b>	<b>\$50</b>	<b>\$50</b>	

SICB 2000 Budget  
2nd Draft

		SICB	1999	1999-Sept.	2000	2001
		BUDGET	Approved	Current	Preliminary	Budget
			BUDGET	Projection	Budget	
126		MEMBERSHIP ACTIVITY EXPENSE				
	6280	BROADCAST FAXING	\$60	\$60	\$0	
	6950	MAILROOM	\$1,500	\$1,500	\$1,500	
	7300	MEMBERSHIP DIRECTORY	\$0	\$0	\$0	
	7760	POSTAGE	\$1,500	\$1,500	\$1,500	
	7890	PRINTING	\$1,087	\$1,087	\$1,087	
	9030	STAFF TIME	\$43,054	\$51,676	\$57,330	
	9080	TELEMARKETING STAFF	\$0	\$0	\$0	
	9250	TELEMARKETING TELEPHONE	\$0	\$0	\$0	
126		MEMBERSHIP ACTIVITY SUBTOTAL	\$47,201	\$55,823	\$61,417	
127		MARKETING PROGRAM				
	5040	MEDIA RELATIONS	\$4,500	\$4,500	\$4,500	
	5050	ADVERTISING	\$5,000	\$5,000	\$5,000	
	5070	MARKETING MANAGER	\$13,500	\$13,500	\$13,500	
	XXXX	SCIENCE WRITER'S AWARD	\$2,300	\$0	\$1,500	\$1,500
127		MARKETING SUBTOTAL	\$25,300	\$23,000	\$24,500	
134		ANN. MTG. FUTURES EXPENSE				
	5600	CONVENTION MANAGER	\$3,500	\$3,500	\$3,740	
	5620	CONVENTION SUPERVISOR	\$0	\$0	\$0	
	5670	CONVENTION SUPPORT	\$1,200	\$700	\$1,672	
	7700	PHOTOCOPIES	\$50	\$100	\$110	
	7760	POSTAGE	\$50	\$50	\$50	
	9250	TELEPHONE	\$50	\$300	\$300	
	9390	SITE VISIT	\$600	\$0	\$600	
	9400	SYMPOSIA PLANNING (STAFF TIME)	\$750	\$2,500	\$3,400	
134		ANN. MTG. FUTURES SUBTOTAL	\$6,200	\$7,150	\$9,872	\$0
141		CONTINGENCY FUND EXPENSE				
	5590	CONTINGENCY FUND	\$10,000	\$10,000	\$10,000	
141		CONTINGENCY FUND SUBTOTAL	\$10,000	\$10,000	\$10,000	
150		PUBLICATIONS				
	5600	"INTEGRATIVE BIOLOGY" Subscription/Postage	\$76,000	\$0	\$0	
	5700	LEGAL	\$0	\$0	\$0	
	6950	MAILROOM	\$0	\$0	\$0	
	7700	PHOTOCOPIES	\$0	\$0	\$0	
	7760	POSTAGE	\$0	\$0	\$0	
	7890	PRINTING	\$0	\$0	\$0	
	9030	STAFF TIME	\$0	\$0	\$0	
150		PUBLICATIONS SUBTOTAL	\$76,000	\$0	\$0	

**SOCIETY FOR INTEGRATIVE AND COMPARATIVE BIOLOGY**  
**2000 ANNUAL BUDGET**  
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**INCOME**

**110 ADMINISTRATIVE INCOME**

**3080 Dues -**

Based on membership counts as of October 1999. (No Growth or Attrition).  
2101 membership invoices were sent and 1816 have renewed.

Full Members	1091	@\$106	\$115,652
Full Member - Family	40	@167	\$6680
Postdoctoral	116	@79	\$9,164
Postdoctoral Family	4	@129	\$516
Emeritus without Journal	12	@66	\$792
Emeritus with Journal	68	@77	\$5,236
Graduate Student Members	435	@36	\$15,660
Graduate Student Family	4	@59	\$236
Student in Training	46	@36	\$1,656
<b>Total</b>	<b>1,816</b>		<b>\$155,792</b>

New Members based on membership counts as of September 1999.

Full Members	75	@\$106	\$7,950
Full Member - Family	3	@167	\$501
Postdoctoral	21	@79	\$1,659
Postdoctoral Family		@129	\$
Emeritus without Journal		@66	\$
Emeritus with Journal		@77	\$
Graduate Student Members	141	@36	\$5,076
Graduate Student Family	1	@59	\$59
Student in Training	26	@36	\$936
<b>Total</b>	<b>267</b>		<b>16,181</b>
<b>Grand total</b>	<b>2083</b>		
	<u>207*</u>		
	<b>2290</b>		<b>\$171,973</b>

\*This budget does not include the following SICB membership categories with no fee: Emeritus before 1994 (140); Honorary Members (27); Life Members who are paid in full (46).

(1999 Dues Budget = \$168,602)

**SOCIETY FOR INTEGRATIVE AND COMPARATIVE BIOLOGY**  
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- 3100 Membership Voucher**  
This line item is used to track vouchers applied to membership dues.
- 3300 CBP Subscriptions**  
1999 handling. CBP subscriptions handling will be discontinued for FY 2000 and beyond. Note that in FY and earlier, this revenue was offset by transfer of funds to CPB plus staff time for handling.
- 3560 GCE Subscriptions**  
1999 handling. GCE subscription handling will be discontinued for FY 2000 and beyond. Note that in FY and earlier, this revenue was offset by transfer of funds to GCE plus staff time for handling.
- 3570 Interest**  
Assumes an interest rate of 4.5% applied to the unrestricted fund balance.
- 3590 Membership Directory Sales**  
This line item assumes minimal sales of the membership directory for 2000.
- 3600 Mailing Lists**  
Assumes a \$210 fee that includes the cost of labels, shipping and handling.
- 3620 Career Brochures**  
This line item is used to track revenue of the Career Brochure. Assumes no sales as a reprint is not anticipated.
- 3740 Miscellaneous**  
This line item is used to track any unanticipated income.
- 4500 AMS Membership Dues**  
FY handling. AMS Membership dues handling will be discontinued for FY2000 and beyond. Note that in 1999 and earlier, this revenue was offset by transfer of funds to AMS plus staff time for handling.

**111 ATLANTA ANNUAL MEETING INCOME**

Attendance assumptions are based on Denver meeting actual attendance (per SICB Treasurer).

- 3420 Reg. Non-Member Postdoctoral**  
Assumes 4 registrations @ \$205 = \$820.
- 3430 Reg. Non-Member Student**  
Assumes 57 students @ \$130 = \$7,410.
- 3440 Registration Post Doc/Emeritus Early**  
Assumes 73 post doc early reg. at \$150 = \$10,950.



**SOCIETY FOR INTEGRATIVE AND COMPARATIVE BIOLOGY**  
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- 3450 Exhibitors**  
Assumes 31 exhibitors at \$696 average rate = \$21,575.
- 3460 Registration Full Member Early**  
Assumes 265 full member early reg. at \$195 = \$51,675.
- 3470 Registration Student/H.S. Teacher Early**  
Assumes 278 student advance reg. at \$70 = \$19,460.
- 3480 Registration Full Member On-Site**  
Assumes 54 full member on-site reg. at \$250 = \$13,500.
- 3490 Registration Guest Early**  
Assumes 23 guests early reg. at \$60 = \$1,380.
- 3500 CO-Sponsored Mailings**  
This line item reflects revenue remitted to SICB from CO-Sponsoring Societies to receive the Abstract, Advanced Program and Registration Materials.
- 3510 Functions SICB**  
Assumes no income at this time; included in case of unscheduled events.
- 3520 Events/Tours**  
Assumes no expense; convention staff to instruct Tour Company to collect fees.
- 3530 Program Advertising**  
Assumes a minimum of 7 advertisements for the Final Program at a cost of \$500 each for a total of \$3,500.
- 3550 Abstracts**  
Based on 725 abstracts, less 62 non-member symposia = 663 @ \$30 each = total revenue of \$19,890.
- 3560 Abstract Voucher**  
Line item to track vouchers used by members to pay abstract fee.
- 3570 Registration Post Doc/Emeritus On-Site**  
Assumes 7 post doc on-site reg. at \$175 = \$1,225.
- 3580 Registration Student/H.S. Teacher On-Site**  
Assumes 52 student/teacher on-site reg. at \$100 = \$5,200.
- 3590 Registration Guest On-Site**  
Assumes 6 guests on-site reg. at \$75 = \$450.
- 3600 Functions Co-Sponsored**  
Assumes that income will meet expenses on a break-even basis.
- 3610 Registration Non-Member**  
Assumes 11 non-members at \$320 = \$3,520.
- 3620 Registration Non-Member Late**  
Assumes 2 late non-members at \$350 = \$700.
- 3640 Registration One-Day Early**

**SOCIETY FOR INTEGRATIVE AND COMPARATIVE BIOLOGY**  
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Assumes 1 one-day registrations at \$150 = \$150.

**3650 Registration One-Day On-Site**

Assumes 7 one-day on-site registration at \$175 = \$1,225.

**3700 Registration Voucher**

Line item used to track vouchers used towards registration fees.

**3740 Miscellaneous**

This line item is used to track unanticipated income.

**4060 Society Contributions**

Assumes a minimum of 3 participating society contributions at \$250 each = \$750.

**4080 Sponsorship**

Assumes sale of at least one sponsorship at \$750.

**4100 Student Support**

Line item to track contributions received.

**4200 AMS Food Function**

Luncheon held by AMS Officers and attendees.

**4210 SRC Food Function**

Breakfast meeting for the Society for Research on Coelenterates.

**4220 Symposia Events**

Used to track revenue for symposia events. At this time, no events are planned.

**112 ENDOWMENT FUNDS INCOME**

**3250 Unrestricted Fund Balance Contributions**

This income line item will track any *contributions* made to the Member Contributions fund.

**4550 Unrestricted Fund Balance Contributions Interest**

This income line item will track any *interest* (4.5%) made to the Member Contributions fund.

**4000 Grants-in-Aid of Research Contributions**

This income line item will track any *contributions* made to the Grants-in-Aid of Research Program.

**4050 Grants-in-Aid of Research Interest**

This line item will track the *interest* (4.5%) generated by the Grants-in-Aid of Research program.

**4100 L.H. Hyman Scholarship Contributions**

This income line item will track any *contributions* made to the L.H. Hyman Scholarship.

**4150 L.H. Hyman Scholarship Interest**

This income line item will track the annual *interest* (4.5%) on the L.H. Hyman Scholarship Fund.

**4200 John Moore Lectureship Fund Contributions**

This income line item will track any *contributions* made to the John Moore Lectureship Fund.

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- 4501 John Moore Lectureship Fund Interest**  
This income line item will track annual *interest* (4.5%) on the John Moore Lectureship Fund.
- 4300 G.A. Bartholomew Award Contributions**  
This income line item will track any *contributions* made to the G.A. Bartholomew Award.
- 4510 G.A. Bartholomew Award Interest**  
This income line will track annual *interest* (4.5%) on the G.A. Bartholomew Award.
- 4400 D.D. Davis Fund Contributions**  
This income line item will track any *contributions* made to the D.D. Davis Fund.
- 4520 D.D. Davis Fund Interest**  
This income line will track annual *interest* (4.5%) on the D.D. Davis Fund.
- 4050 A.M. Wenner Fund Contributions**  
This income line will track any *contributions* made to the A.M. Wenner Fund.
- 4530 A.M. Wenner Fund Interest**  
This income line will track annual *interest* (4.5%) on the A.M. Wenner Fund.
- 4410 Charlotte Mangum Student Support Contributions**  
This income line will track any *contributions* made to the Charlotte Mangum Student Support Fund.
- 4540 Charlotte Mangum Student Support Interest**  
This income line will track annual *interest* (6%) on the Charlotte Mangum Student Support Fund.

**114 JOURNAL INCOME**

- 3200 Advertising**  
Assumes no increase in advertising rates. Based on 1999 current projection.
- 3210 Back Issues**  
Reduced based on purging of back issue inventory.
- 3220 Article Reprints**  
The minimum number of reprints which can be ordered was reduced from 300 to 100 in 1996. It is the intent that the Business Office work with the Editor to ensure that the charges are set at 50% above the standard Allen Press cost. Based on history.
- 3240 Page Charges**  
The page charge rate is \$135. Based on history.
- 3250 Royalties**  
Assumption based on 1999 September projection
- 4270 Subscriptions**  
Based on 1999 September projection.

**115 GRANTS INCOME**

- 3490 National Science Foundation (NSF) Grants**  
This line item will track any interest (4.5%).

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**3530 National Institute of Health (NIH) Grants**  
Zero income budgeted because any grant monies received will be offset by expenses.

**3540 Other**  
This line item is used to track grants income other than NSF and NIH.

**3740 Miscellaneous**  
This income line item is to track any other special grants that may be awarded.

**117 NEWSLETTER INCOME**

**3200 Newsletter Advertising**  
Assumes four online banner advertisements at \$250 each.

**123 MERCHANDISE INCOME**

**3500 Video Sales**  
Currently three videos remaining.

**4320 Merchandise Sales**  
Assumes limited sales of coffee mugs, T- Shirts and mouse pads.

**4340 Merchandise Voucher**  
This income line will track vouchers used toward merchandise.

**150 PUBLICATIONS**

**3250 Royalties - "Molecular Zoology"**  
This line item will track any royalties received from this publication; estimate based on 1999 September projection.

**EXPENSE**

**110 ADMINISTRATIVE EXPENSE**

**5020 Accounting Fee**  
Fixed fee which covers full maintenance of all financial accounts, processing of all disbursements and receipts, and preparation of monthly balance sheets, P&L statements and preparation for annual audit. This fee also includes the services of Smith, Bucklin' s controller as needed.

**5030 Audit**  
Assumes cost of the annual audit to be performed by the independent accounting firm, Wolfe & Company, in the first quarter of 2000.

**5050 Marketing Manager**  
Staff time for consultation meetings with regard to 2000 membership marketing efforts, attendance at internal staff meetings and budget meetings.

**5080 Handbook Production**  
Assumes no production cost of the handbook as the handbook will be distributed electronically.

**5090 Storage**  
Reflects storage costs for SICB materials based on 1999 September projection.

**SOCIETY FOR INTEGRATIVE AND COMPARATIVE BIOLOGY**  
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- 5340 Bank Fees**  
Assumes fees for lock box charges, post office box charges and checks. Reflects separate lock box for each of the annual meeting, membership dues and subscriptions.
- 5350 Credit Card Service Charges**  
Assumption based on 1999 September projection and reflects the fees associated with processing membership dues, merchandise credit card payments, abstract fees and registration fees.
- 5660 Dues/Subscriptions**  
Assumes no dues or subscriptions.
- 5670 Certificates/Awards**  
Assumes purchase of certificates and frames for General and Divisional Officers whose terms conclude at the end of 1999. Projected cost is \$50. In 1999, outgoing officers are: Secretary, Thomas Wolcott; Member At Large, Mark Martindale; Education Council Chair, John Pilger; DCE Chair, Robert Dores; DCPB Chair, Timothy Bradley; DICI Chair, Richard Burian, DIZ Chair, Daphne Fautin; DSEB Chair, Paula Mabee.
- 5770 Computer/Software**  
Computer/technology related costs. Includes the following: Database Storage Fee of \$4000 (12 months x \$333) *assuming no growth in record storage* and \$1000 for additional mailboxes and staff training.
- 6000 Legal**  
Will be paid from contingency fund if necessary.
- 6100 Insurance**  
Annual expense for general liability and director & officer liability insurance for all aspects of SICB's operation.
- 6290 Electronic Communications**  
Assumes the expense to host SICB's web site on Smith Bucklin's server and provides for on-line web site enhancements. \$4,800 for hosting (includes site hosting, listserv, online forms, and discussion forums) and approximately 96 billing hours at \$85/hour for any additions, enhancements or changes plus \$250 for the new Electronic Communications Editor.
- 6890 Member List Resale**  
Assumes mailing costs associated with sale of the membership list. Based on 1999 September projection.
- 6950 Mailroom**  
Assumes time for the mailroom to print, collate, stuff, label, mail and inventory all general administrative mailings/materials. Based on 1999 September projection.
- 7000 Management Fee**  
The 2000 management fee includes the services of the account executive designated as the executive director of the organization. This fee also covers supervisory services and the assistance of senior partners at Smith, Bucklin when needed. Also included in the fee is the utilization (occupancy and rent) of offices at 401 N. Michigan Ave., Chicago, Illinois.
- 7100 MARCOM Management Fee**  
The Marketing & Communications division (MARCOM) management fee has been incorporated into MARCOM billing rates wherever MARCOM staff time appears in the budget.

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- 7120 President Travel**  
Assumes no cost. President lives in the same city as the Business Office.
- 7130 President-Elect Travel**  
Assumes one hotel night stay at \$150, meals at \$75, incidentals at \$125 and a \$375 airline ticket for the President-Elect to participate in the annual budget meeting in Chicago at the Business Office.
- 7140 Treasurer Travel**  
Assumes one hotel night stay at \$150, meals at \$75, incidentals at \$125 and a \$375 airline ticket for the Treasurer to participate in the annual budget meeting in Chicago at the Business Office.
- 7150 Treasurer-Elect Travel**  
Assumes one hotel night stay at \$150, meals at \$75, incidentals at \$125 and a \$375 airline ticket for the Treasurer-Elect to participate in the annual budget meeting in Chicago at the Business Office.
- 7160 Career Brochures Printing**  
Assumes no re-print of the career brochure in 2000.
- 7170 Career Brochures Postage**  
Cost of mailing brochure to interested members.
- 7180 Career Brochures Staff Time**  
Assumes no changes/updates of career brochure will be made in 2000.
- 7190 CBP Subscriptions**  
Subscription handling will be discontinued for FY2000 and beyond.
- 7260 GCE Subscriptions**  
Subscription handling will be discontinued for FY2000 and beyond.
- 7350 Miscellaneous**  
This line item is used to track any unanticipated expenses.
- 7700 Photocopies**  
Based on 1999 September projection.
- 7760 Postage**  
Based on 1999 September projection.
- 7900 AMS Dues Reimbursements**  
AMS Dues handling will be discontinued for FY2000 and beyond.
- 8000 800 Number**  
Line item to track the cost to maintain the SICB toll-free number as a member benefit.
- 8030 Staff Time**  
Cost of Account Manager staff time. Time includes preparing the budget, processing invoices and check requests, reporting, supporting Executive Director, updating the critical dates, managing day to day operations and attending the annual meeting.
- 8980 Printing/Stationery**  
Based on September current projection.

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- 9070 Supplies**  
Assumes costs for basic office supplies including; computer disks, master books, mailing labels, etc.
- 9250 Telephone/Fax**  
Based on September current projection.
- 9500 Prior Year**  
Any costs associated with activities from prior year.

**111 ATLANTA ANNUAL MEETING EXPENSE**

- 5030 Administrative Support**  
\$0 - Assumes the time charges for administrative support (Account Manager and Membership Coordinator) to be charged under program 110 Administrative Expense (Account Manager) and program 126 Membership Activity (Membership Coordinator).
- 5050 Marketing Manager**  
\$9,000 - Assumes the time charges of the marketing manager to implement a comprehensive marketing campaign targeted at the membership and new audiences. The marketing campaign includes costs for coordinating the production of the:
- 1) Exhibitor Prospectus – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
  - 2) Abstract/Transmittal Form and Guidelines – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
  - 3) Annual Meeting e-mail broadcasts – Create schedule of e-mails sent to the membership regarding the Annual Meeting. Write copy and receive approvals.
  - 4) Advance Program & Registration Packet – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
  - 5) Final Program/Abstract – Work closely with convention staff to collect information, create schedule, prepare copy and abstracts for typesetting, proofread, coordinate advertising, oversee design and approvals, arrange printing and mailing.
  - 6) Facilitate web site posting of 1,2,4 and 5 as instructed by SICB.
- 5600 Convention Manager**  
\$46,720 - Assumes the time charges for convention manager as lead contact for SICB program officer and program officer-elect to organize, plan and implement all details of the annual meeting and exhibits, as well as act as liaison between the participating societies for on-site activities. Includes symposia planning, oversight and support of abstract processing, registration, final program, scheduling events, budget development, maintenance and reporting and coordinating meeting activities of the convention staff, time for on-site work, and a meeting site visit. Also includes meeting wrap-up and final report.
- 5620 Convention Supervisor**  
\$500 - Assumes the time charges for the convention supervisor to counsel and oversee all meeting related items. Julie Walker provides counsel and assistance to convention staff regarding issues and relationships with hotels, suppliers, vendors, department staff, account team staff and client.
- 5670 Convention Support**  
\$19,250 - Assumes the time charges for convention support staff to provide support and assistance to convention manager to implement details of annual meeting and exhibition. Includes on-site time. Duties include:

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- Responsible for solicitation of RFPs for annual meeting such as decorator, computer rental, security, temporary personnel, audio visual vendor, on-site quick copy, etc. Compilation of findings and recommendation of vendor; prepares agreements for services.
- Maintain exhibitor data base. Update exhibitor prospectus once decorator selected and submit to MARCOM. Receive exhibit contracts, assign space and issue confirmations of booth space and payment receipt. Follow-up on any unpaid balances, create booth description for Final Program and submit names of booth personnel for badges. Prepare thank you letters after annual meeting to be mailed with list of attendees.
- Incorporate updates to the Abstract Transmittal and Guidelines and submit to MARCOM.
- Prepare and mail student support applications. Maintain data base of requests for housing and special pairings; submit list to hotel and update with any changes. Work with convention manager on best use of negotiated and earned complimentary sleeping rooms.
- Prepare audio visual reports from abstract submissions for equipment order.
- Update symposia guidelines to incorporate any Society changes, officer updates and staff changes at outside agencies and mail guidelines as requested.
- Respond to e-mail requests and questions regarding the Annual Meeting.

**5680 Convention Mailroom**

\$3,000 - Assumes the time charges to collate and mail all convention materials including advance program & registration packet, final abstract transmittal form and guidelines, exhibitor, and all other correspondence. This line item includes both the abstract mailing, final abstract mailing and shipment of all meeting supplies.

**5690 Credit Card Service Charges**

\$0 - Assumes all credit card fees for abstracts and registration will be included under 110 Administration.

**5750 Abstract Processing**

\$28,000 - Reflects convention staff time, temporary personnel, computer rental, Internet connections and all other expenses associated with processing Abstracts and compiling the Final Program.

**6000 Co-Sponsoring Mailings**

Line item reflects expenses associated with Co-Sponsored Mailings.

**6020 Logo**

Assumes no cost to this line item. Will either use the SICB logo or have a contest for the best design from a member.

**6030 Staff Travel - Air**

\$1,750 - Assumes six air tickets at approximately \$290 each. To include: executive director, account manager, account coordinator, convention manager, convention assistant and MARCOM marketing manager.

**6040 Staff Travel - Other**

\$2,850 - Assumes the cost for food and incidentals for any staff on site. Assumes staff hotel rooms will be covered by complimentary nights earned.

**6050 Exhibits**



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\$1,290 - Assumes 30 booths at \$40 each for cost of booth set-up by decorating company and \$90 for exhibit hall clean up.

**6070 Poster Boards**

\$2,275 - Assumes the rental cost of 65 poster boards at \$35 each.

**6090 Program Officer Expense**

Assumes no expense for the program officer in 2000.

**6100 Events/Tours**

Assumes convention staff will arrange for tour company to assume responsibility of collecting all tour fees.

**6120 Badges/Ribbons/Stock**

\$250 - Assumes the cost for badge holders, badge stock, category strips and replenishment of any necessary ribbons.

**6130 Student Support**

\$29,325 – Based on Denver history of 165 student support participants requiring 78 double/double sleeping rooms (double occupancy) for four nights each and 10 students at king sleeping rooms. Assumes all will choose housing subsidy.

**6140 Program Print & Prep**

\$20,000 - Assumes the cost to prepare and print the Final Program/Abstract Book for all meeting attendees. After the meeting, members not attending the meeting and subscribers to AZ will receive the Abstract Book only.

**6210 Audio/Visual**

\$20,500 – Based on negotiations to rent standard A/V equipment from a local company.

**6240 Functions SICB**

\$52,500 Assumes cost of \$3720 - Welcome Reception; \$775 - First Timers' Reception; \$21,000 - Coffee Breaks; \$11,500 - Graduate/Postdoc/Student Luncheon; \$3,200 - Graduate/Postdoc Reception; \$200 - Advisory and Co-Sponsoring Committee Luncheons; \$660 - Spouse/Guest Hospitality; \$4200 Society-wide Social; and \$7245- 2 drink tickets per attendee.

**6250 Functions Co-Sponsored**

Assumes break-even basis.

**6260 Shipping**

\$1,925 - Assumes the cost to ship all meeting materials to and from Annual Meeting.

**6270 Upload Program to WWW**

\$0 – Assumes no cost in this line item (will be handled by volunteers).

**6280 End of Meeting Party**

\$0 - Assumes no End of the Meeting Party.

**6470 Security**

\$1,400 - Assumes two guards for overnight security purposes in the exhibit hall and registration area.

**6480 Society Symposium Contingency**

\$10,000 - This figure is a starting point for actual expenditure and can be extended as circumstances dictate.

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- 6530 Gratuities**  
\$600 - Given to hotel staff *if* exemplary service.
- 7000 CTD Management Fee**  
The Convention Meeting Management Division has been incorporated into CMMD billing rates for the convention manager, convention supervisor and convention support staff.
- 7700 Photocopies**  
\$1,800 - Based on Denver history and electronic abstract scheduling.
- 7760 Postage**  
\$13,200 - Assumes the cost of postage for: 1) Abstract Transmittal Form and Guidelines (\$2,000); 2) Registration Packet (\$2,000); 3) Abstract confirmation & location post card mailing (x2) (\$500); 4) Exhibitor Prospectus (\$300); 5) Final Abstract mailing (\$8,000); and 6) all convention mailings (\$400). Distributing the Final Program on-site, instead of mailing, has decreased the postage costs.
- 7890 Printing General**  
\$11,900 - Assumes the cost of printing and web site conversion for, 1) Abstract/Transmittal Form and Guidelines (\$4,200); 2) Exhibitor Prospectus (\$2,200); 3) Registration Packet (\$3,500); 4) Registration List (\$500); and 5) Miscellaneous Annual Meeting printing expenses (\$1,500).
- 7900 Program Officer Support**  
\$0 - Budgeted for 2000
- 8000 Program Officer Speaker Expenses**  
Assumes no program officer speaker expenses.
- 8050 Cancellation Insurance**  
\$1,125 - Assumes cost of conference cancellation insurance coverage in the event of total or partial cancellation conditions beyond the control of the society or the hotel.
- 8070 Site Visit**  
\$285 - Cost for convention manager to visit to Atlanta for planning purposes.
- 8100 Sponsorships**  
Assumes \$0 in expenses.
- 8330 Registration Processing**  
\$21,092 - Assumes the cost of Flying Color's registration processing to input registration forms, process registration, produce registration & function lists and run badges and provide on-site registration supervision and support and produce final reports.
- 8340 Registration/Office Equipment**  
\$500 - Assumes use of rented computers and printers for on-site registration and office duties. Registration counters will be complimentary per negotiations.
- 8800 Signage**  
\$150 - Assumes cost for any signs made for Atlanta when we cannot use the SICB pocket signs.
- 9060 Supplies**  
\$160 - Cost of supplies used for meeting-related purposes.

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- 9100 Survey**  
\$0 - Assumes no cost to this line item.
- 9250 Telephone/Fax**  
\$5,000 - Assumes the cost of telephone and fax charges in preparation for the meeting plus necessary phones on-site for registration, office and press.
- 9300 Temporary Personnel**  
\$1,000 - Cost to hire local temporary personnel to assist with on-site registration. Assumes extensive use of Student Support participants.
- 9310 AMS Food Function**  
\$750 - Anticipates 25 people x \$30 to attend the AMS luncheon. This expense will be offset by income received as reflected under AMS Food Function.
- 9320 SRC Food Function**  
\$325 – Based on prior history. This expense will be offset by income received as reflected under SRC Food Functions.
- 9390 Travel**  
Assumes travel expense for Claudia deGruy to attend the annual meeting. SICB will cover the cost of air fair (\$400) and registration. This line item will not be included for 2001 and thereafter.

**112 ENDOWMENT FUNDS EXPENSE**

- 6000 Grants-in-Aid of Research**  
Reflects the cost of nine \$1,000 grants that will be disbursed to Grants-in-Aid (GIA) applicants. In 1999, no application printing costs were incurred because the grant form was printed on the web. Assumes “web only” for 2000.
- 6200 John Moore Lectureship Fund**  
This line item captures the expenses associated with the John Moore Lectureship Fund (20% of the annual pay out is returned to principal).
- 6300 L.H. Hyman Scholarship**  
This line item captures the expenses associated with the L.H. Hyman Scholarship. The annual award is based on the interest received from the Hyman scholarship award (20% of the annual pay out is returned to principal).
- 6400 G.A. Bartholomew Award**  
This line item captures the expenses associated with the G.A. Bartholomew Award (20% of the annual pay out is returned to principal).
- 6500 D.D. Davis Fund**  
This line item captures the expenses associated with the D.D. Davis Fund (20% of the annual pay out is returned to principal).
- 6600 A.M. Wenner Fund**  
This line item captures the expenses associated with the A.M. Wenner Fund. (20% of the annual pay out is returned to principal).

**114 JOURNAL EXPENSE**

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- 6000 Editorial Equipment**  
Depreciation expense for AZ equipment (final year).
- 6030 Editorial Supplies/Postage**  
Assumes costs for mailing journal-related correspondence in addition to misc. supplies based on 1999 September projection.
- 6060 Editorial Telephone**  
This line item tracks telephone reimbursement for journal editors. Based on 1999 September projection.
- 6100 Back Issues Storage**  
Assumes annual storage costs for all journal back issues at Allen Press. In addition, for 2000, back issues will be recycled (\$2,398), two complete sets of the journal will be archived (\$615), Volumes 38 and 39 will be stored for purchase (\$286 for approximately 2600 issues) plus the cost to store Volume 40 (\$143). These estimates were provided by Allen Press. Total cost for 2000 - \$3442.
- 6110 Back Issues Postage**  
Assumes the postage costs for mailing back issues of the American Zoologist to the membership.
- 6120 Back Issues Order Processing**  
Assumes \$1,000 in Allen Press expenses to pull back issues from inventory and mail to members. Includes all material cost to mail back issues (e.g. envelopes)
- 6200 American Zoologist (AZ) Marketing**  
Assumes annual fee for rates to be published in the Allen Press Buyer's Guide and for advertising fee in the Allen Press' Environmental Sciences Catalogue. Includes fees to display AZ at 5 trade shows through the Allen Marketing & Management Conference Display Program.
- 6210 Advertising Commission**  
This line item reflects the expense of a 20% commission paid to Allen Press on all advertisements sold in the American Zoologist (AZ). Assumes advertising commission for 5 issues of AZ, or \$1077.
- 6300 Article Reprints**  
Based on 1999 September projection.
- 6500 Assistant Editors**  
Assumes half-time cost for two assistant editors to proof and manage production of the American Zoologist - \$34,200.
- 6950 Mailroom**  
All mailroom costs associated with sending renewal notices and labels for the American Zoologist.
- 7400 Stationery/Mail sheets**  
This line item reflects the costs to print letterhead and envelopes for the editors, assistant editors and the Allen Press advertising office. Also includes printing the address mail sheets used by Allen Press to distribute the journal.
- 7760 Postage**  
Reflects all postage associated with sending renewal notices and labels for the American Zoologist.

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- 7890 Journal Printing**  
Reflects the cost of 5 issues for typesetting, proofing, editing, layout, printing, binding and mailing at Allen Press at \$18,000 each. Based on 2000 Allen Press Rates.

**115 GRANTS EXPENSE**

- 6010 National Science Foundation (NSF) Grants**  
Zero budget. Assumes all grant money will be expended.
- 6060 National Institute of Health (NIH) Grants**  
Zero budget. Assumes all grant money will be expended.
- 6950 Mailroom**  
Line item to track any mailroom costs associated with grant processing.
- 7350 Miscellaneous**  
Line item to track any unanticipated expense.
- 7360 Other Special Grants**  
Line item to track expenses associated with grants other than NSF.
- 7760 Postage**  
Assumes costs for mailing (via Federal Express) symposium grant proposals to organizers after review, as well as other correspondence. Based on 1999 September projection.

**116 SICB MEMBERSHIPS EXPENSE**

- 5660 National Association for Biomedical Research (NABR) Dues**  
Assumes cost of \$500 for the period of April 1, 2000 through March 31, 2001.
- 7150 American Institute of Biological Sciences (AIBS) Dues**  
Assumes cost for 2000 membership dues. (1999 dues)
- 7160 Association of Systematics Collections (ASC) Dues**  
Assumes cost of \$100 for 2000 membership dues. (1999 dues)
- 7200 Council of Scientific Society Presidents (CSSP) Dues**  
Assumes cost of \$500 for 2000 membership dues. (1999 dues)
- 7500 American Association of Zoological Nomenclature (AAZN) Contribution**  
Expenses associated with the annual contribution to American Association of Zoological Nomenclature. Annual contribution is at the discretion of the Treasurer per the motion by the Executive Committee in December 1995.
- 8000 Coalition for Education in the Life Sciences (CELS) Dues**  
Assumes the cost of \$250 for 2000 membership dues. (1999 dues)

**117 NEWSLETTER EXPENSE**

- 6950 Mailroom**  
Collation and mail handling expenses for approximately 250 hard copies of SICB News to be mailed to members without Internet access. Based on two mailings a year.
- 7760 Postage**

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Assumes postage expenses for approximately 250 hard copies of SICB News to be mailed to members without Internet access. Based on two mailings per year.

**7890 Printing**

Assumes costs for printing approximately 250 hard copies of the SICB News to be mailed to members without Internet access. Based on two issues per year.

**8940 Staff Time**

Marketing manager and any support staff support will work closely with division secretaries, officers, committee chairs, staff and others to: create schedule; send reminders; answer society procedural questions; obtain, organize and edit articles; obtain approvals from every article contributor; proofread; solicit, coordinate, and invoice advertising; oversee design and printing; create ballots; and arrange for notification to members. Based on two issues.

**8950 Design**

Assumes no cost for this line item.

**118 DIVISIONAL BUDGETS EXPENSE**

Budget figures were calculated at \$2,000 per division, which was approved by the Treasurer. Some divisions requested additional funds to cover annual meeting expenses.

**123 MERCHANDISE EXPENSE**

**7500 Merchandise**

Assumes merchandise will be purchased in 2000.

**7760 Video Postage**

Cost to ship videos (Note: video inventory = 4).

**7900 Video Production**

Assumes no videos will be duplicated in 2000.

**8080 Video Promotion**

Assumes no cost for signage at the Annual Meeting.

**126 MEMBERSHIP ACTIVITY EXPENSE**

**6280 Broadcast Faxing**

Assumes the cost of sending a broadcast fax renewal notice to members who have not renewed after first quarter 2000.

**6950 Mailroom**

This line item tracks membership material collating and stuffing time.

**7300 Membership Directory**

No directory will be printed in 2000.

**7760 Postage**

This line item tracks the expense of mailing membership materials.

**7890 Printing**

This line item tracks the expense of printing membership materials.

**9030 Staff Time**

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Assumes all time charges for the Membership Coordinator for membership renewal data entry, database maintenance, processing new members, creation and coordination of renewal material, coordination of ballot mailings, cash application, mailing label requests, subscription and back issue claims, invoicing and tracing, answering phones, responding to and maintaining email messages and addresses and attending the annual meeting. Supports Account Manager as needed.

**9080 Telemarketing**

Assumes no cost in this line item. All renewal notices will be through email.

**9250 Telemarketing Telephone**

Assumes no cost in this line item. Renewal notices will be through email.

**127 MARKETING PROGRAM EXPENSE**

**5040 Media Relations**

The media relations program will continue to focus on conference activities and securing pre-meeting media coverage to attract qualified levels of media as in the past to ensure comprehensive local and post-show coverage for the Society. Secondly, by working with the trade publications efforts will continue to provide SICB with a venue for educating prospective attendees about the Society. This includes printing and postage for two press mailings and media kit preparation. The media relations program also includes the coordination of the Public Affairs Committee media workshops, panel discussion and press reception at the Annual Meeting.

**5050 Advertising**

The advertising program will continue to build awareness of the Society and provide an invitation for prospective attendees to the conference. Assumes the display ad will be used in conjunction with any existing or new trade-out agreements, along with the distribution to the Public Affairs Committee.

**5070 Marketing Manager**

Assumes the time charges of the marketing manager to implement a comprehensive media relations and advertising program.

The media relations program staff time includes: obtaining, editing, formatting and mailing two press mailings and a comprehensive media kit; coordination of the Public Affairs Committee science writers travel funding, media workshops, panel discussion and press reception at the Annual Meeting; primary contact with media through phone calls, mailings, e-mail and faxes. Also includes working with the media at the Annual Meeting to set up interviews, provide needed resources and assist the press in learning more about the meeting.

The advertising program includes writing and design of the Annual Meeting advertisements; placement of ads in magazines; correspondence and placement of trade advertisements with trade publications.

In addition, the marketing manager coordinates: Public Affairs Committee e-mail alerts; conference calls, writing and setup of the Science Communicators Award and coordinates monthly conference calls and any additional projects of the Public Affairs Committee.

**5090 Science Writer Award**

The SICB Public Affairs Committee science writers' prize was created to recognize the best science reporting in the media. One prize will be awarded annually by SICB in the amount of \$1000 for the best scientific writing, reporting, etc. in any written or broadcast media. The first award will be presented at the 2001 Annual Meeting. \$1500 is budgeted for 2000 and \$1500 for 2001.

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**134 ANNUAL MEETING FUTURES EXPENSE**

- 5600 Convention Manager**  
\$3,740 - Assumes time for convention manager to negotiate and re-negotiate future meetings that are booked. This time covers the 2003 and 2004 sites. The convention manager will develop a list of potential future cities, prepare RFP, review site search report for officers, make a recommendation and, based on decision, negotiate contract(s).
- 5620 Convention Supervisor**  
\$0 - Assumes no expenses in this line item.
- 5670 Convention Support**  
\$1,672 - Assumes support for convention manager with future meeting activity, in such clerical duties as typing, photocopying, mailing, etc., for the RFPs, site search report and contract(s).
- 7700 Photocopies**  
\$120 - Based on past experience.
- 7760 Postage**  
\$50 - Based on experience.
- 9250 Telephone**  
\$300 - Based on experience.
- 9390 Site Visit**  
\$600 - Assumes one site visit for the 2002 Anaheim meeting.
- 9400 Symposia Planning**  
\$3400 - Assumes time for convention manager and support staff to work with the program officer on the preparation of symposium application, call for symposium, collection and selection process for the 2001 Chicago and 2002 Anaheim meeting.

**141 CONTINGENCY FUND EXPENSE**

- 5590 Contingency Fund**  
These monies may be authorized for use to cover organizational unbudgeted expenses per SICB policy.

**2001 SICB Budget Items**

**113 CHICAGO ANNUAL MEETING INCOME**

Attendance assumptions are based on 7% increase over Denver meeting actual attendance (per SICB Treasurer), based on a more popular location and higher local attendance.

- 3420 Reg. Non-Member Postdoctoral**  
Assumes 4 registrations @ \$205 = \$820.
- 3430 Reg. Non-Member Student**  
Assumes 61 students @ \$130 = \$7,930.



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- 3440 Registration Post Doc/Emeritus Early**  
Assumes 78 post doc early reg. at \$150 = \$11,700.
- 3450 Exhibitors**  
Assumes 31 exhibitors at \$696 average rate = \$21,575.
- 3500 Co-Sponsor Mailings**  
This line item reflects revenue remitted to SICB from Co-Sponsoring Societies to receive the Abstract and Advanced Program and Registration Materials.
- 3460 Registration Full Member Early**  
Assumes 284 full member early reg. at \$195 = \$55,380.
- 3470 Registration Student/H.S. Teacher Early**  
Assumes 297 student advance reg. at \$70 = \$20,790.
- 3480 Registration Full Member On-Site**  
Assumes 58 full member on-site reg. at \$250 = \$14,500.
- 3490 Registration Guest Early**  
Assumes 25 guests early reg. at \$60 = \$1,500.
- 3500 Co-Sponsored Mailings**  
This line item reflects revenue remitted to SICB from Co-Sponsoring Societies to receive the Abstract, Advanced Program and Registration materials.
- 3510 Functions SICB**  
Assumes no income at this time; included in case of unscheduled events.
- 3520 Events/Tours**  
Assumes no expense; convention staff to instruct Tour Company to collect fees.
- 3530 Program Advertising**  
Assumes a minimum of 7 advertisements for the Final Program at a cost of \$580 each for a total of \$4,060.
- 3550 Abstracts**  
Based on 770 abstracts, less 68 non-member symposia = 702 abstracts @ \$30 each = total revenue of \$21,060.
- 3560 Abstract Voucher**  
Line item to track the vouchers used by members to pay abstract fees.
- 3570 Registration Post Doc/Emeritus On-Site**  
Assumes 7 post doc on-site reg. at \$175 = \$1,225.
- 3580 Registration Student/H.S. Teacher On-Site**  
Assumes 56 student/teacher on-site reg. at \$100 = \$5,600.
- 3590 Registration Guest On-Site**  
Assumes 6 guests on-site reg. at \$75 = \$450.

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- 3600 Functions Co-Sponsored**  
Assumes that a break-even.
- 3610 Registration Non-Member**  
Assumes 12 non-members at \$320 = \$3,840.
- 3620 Registration Non-Member Late**  
Assumes 2 late non-members at \$350 = \$700.
- 3640 Registration One-Day Early**  
Assumes 1 one-day registrations at \$150 = \$150.
- 3650 Registration One-Day On-Site**  
Assumes 7 one-day on-site registration at \$175 = \$1,225.
- 3700 Registration Voucher**  
Line item used to track vouchers used towards registration fees.
- 3740 Miscellaneous**  
This line item is used to track unanticipated income.
- 4060 Society Contributions**  
Assumes a minimum of 3 participating society contributions at \$250 each = \$750.
- 4080 Sponsorship**  
Assumes sale of at least one sponsorship at \$750.
- 4100 Student Support**  
Line item to track contributions received.
- 4400 Registration Symposia Participants**  
Assumes waiver of registration fees for non-member symposia speakers.
- 4200 AMS Food Function**  
Luncheon held by AMS Officers and attendees.
- 4210 SRC Food Function**  
Breakfast meeting for the Society for Research on Coelenterates.
- 4220 Symposia Events**  
Used to track revenue for symposia events. At this time, no events are planned.

**113 CHICAGO ANNUAL MEETING EXPENSE**

- 5030 Administrative Support**  
\$0- Assumes the time charges for administrative support (Account Manager and Membership Coordinator) will be charged in program 110 Administrative Expense (Account Manager) and program 126 Membership Activity (Membership Coordinator).
- 5050 Marketing Manager**  
\$9360 - Assumes time charges for the Marketing Manager to implement a comprehensive marketing campaign targeted at the membership and new audiences. The marketing campaign includes costs for coordinating the production of the:

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- 1) Exhibitor Prospectus – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
- 2) Abstract/Transmittal Form and Guidelines – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
- 3) Annual Meeting e-mail broadcasts – Create schedule of e-mails sent to the membership regarding the Annual Meeting. Write copy and receive approvals.
- 4) Advance Program & Registration Packet – Create schedule, collect information and prepare copy, oversee design and approvals, proofread, arrange printing and mailing.
- 5) Final Program/Abstract – Work closely with convention staff to collect information, create schedule, prepare copy and abstracts for typesetting, proofread, coordinate advertising, oversee design and approvals, arrange printing and mailing.
- 6) Facilitate web site posting of 1,2,4 and 5 as instructed by SICB.

**5600 Convention Manager**

\$48,008 - Assumes the time charges for convention manager as lead contact for SICB program officer and program officer-elect to organize, plan and implement all details of the annual meeting and exhibits, as well as act as liaison between the participating societies for on-site activities. Includes symposia planning, oversight and support of abstract processing, registration supervision, final program, scheduling events, budget development, maintenance and reporting, and coordinating meeting activities of the convention staff, time for on-site work, and a meeting site visit. Also includes meeting wrap-up and final report.

**5620 Convention Supervisor**

\$475 - Assumes the time charges for the convention supervisor to counsel and oversee all meeting related items. Julie Walker provides counsel and assistance to convention staff regarding issues and relationships with hotels, suppliers, vendors, department staff, account team staff and client.

**5670 Convention Support**

\$20,900 - Assumes the time charges for convention support staff to provide support and assistance to convention manager to implement details of annual meeting and exhibition. Includes on-site time. Duties include:

- Responsible for solicitation of RFPs for annual meeting such as decorator, computer rental, security, temporary personnel, audio visual vendor, on-site quick copy, etc. Compilation of findings and recommendation of vendor; prepares agreements for services.
- Maintain exhibitor database. Update exhibitor prospectus once decorator selected and submit to MARCOM. Receive exhibit contracts, assign space and issue confirmations of booth space and payment receipt. Follow-up on any unpaid balances, create booth description for Final Program and submit names of booth personnel for badges. Prepare thank you letters after annual meeting to be mailed with list of attendees.
- Incorporate updates to the Abstract Transmittal and Guidelines and submit to MARCOM.
- Prepare and mail student support applications. Maintain database of requests for housing and special pairings; submit list to hotel and update with any changes. Work with convention manager on best use of negotiated and earned complimentary sleeping rooms.
- Prepare audiovisual reports from abstract submissions for equipment order.
- Update symposia guidelines to incorporate any Society changes, officer updates and staff changes at outside agencies and mail guidelines as requested.
- Respond to e-mail requests and questions regarding the Annual Meeting

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- 5680 Convention Mailroom**  
\$2,200 - Assumes the time charges to collate and mail all convention materials including advance program & registration packet, exhibitor, and all other correspondence. This line item includes the abstract mailing, final abstract mailing and shipment of all meeting supplies. The collation charges have been re-allocated from 7760 to more accurately track expenses.
- 5690 Credit Card Service Charges**  
\$0 - Assumes credit card fees for abstracts and registration to be applied to Administration.
- 5750 Abstract Processing**  
\$29,500 - Reflects convention staff time and fee paid to MSS to process Abstracts and compile the Final Program. (Note: Contract with MSS is for Atlanta only; Atlanta fees were used for Chicago budgeting purposes.)
- 6000 Co-Sponsor Mailings**  
This line item reflects all expenses associated with mailings to the CO-Sponsoring Societies.
- 6020 Logo**  
\$0 - Reflects the cost to create and produce the Annual Meeting logo. Increases will allow for more design time to create a more professional and creative logo.
- 6030 Staff Travel - Air**  
\$300 - Assumes six ground transportation at \$50 each. To include: executive director, account manager, account coordinator, convention manager, convention assistant and MARCOM manager.
- 6040 Staff Travel - Other**  
\$3,100 - Assumes the cost for food and incidentals for any staff on site. Assumes staff hotel rooms will be covered by complimentary nights earned.
- 6050 Exhibits**  
\$5,950 - Assumes 30 booths at \$115 each for cost of booth set-up by decorating company, plus \$2500 for carpeting.
- 6070 Poster Boards**  
\$4,875 - Assumes the rental cost of 65 poster boards at \$75 each.
- 6090 Program Officer Expense**  
Assumes no expense for the program officer in 2001.
- 6120 Badges/Ribbons/Stock**  
\$250 - Assumes the cost for badge holders, badge stock, category strips and replenishment of any necessary ribbons.
- 6130 Student Support**  
\$34,025 – Based on Denver history of 165 student support participants requiring 78 double/double sleeping rooms (double occupancy) for four nights each and 10 students at king sleeping rooms. Assumes all will choose housing subsidy.
- 6140 Program Print & Prep**  
\$20,500 - Assumes the cost to prepare and print the Final Program/Abstract Book for all meeting attendees. After the meeting, members not attending the meeting and subscribers to AZ will receive the Abstract Book only.
- 6210 Audio/Visual**  
\$30,000 – Based on estimated cost to rent standard A/V equipment from a local company.

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- 6240 Functions SICB**  
\$56,000 - Assumes cost of \$3972 - Welcome Reception; \$21,528 - First Timers' Reception; Coffee Breaks; \$11,700 - Graduate/Postdoc/Student Luncheon; \$3,720 Graduate/Postdoc Reception; \$200 - Advisory and Co-Sponsoring Committee Luncheons; \$690- Spouse/Guest Hospitality; \$5700 - Society-wide Social and \$7970 - 2 drink tickets per attendee.
- 6250 Functions Co-Sponsored**  
Assumes break-even basis.
- 6260 Shipping**  
\$300 - Assumes the cost to ship all meeting materials to and from Annual Meeting.
- 6270 Upload Program to WWW**  
\$0 - Assumes no cost to upload program to web site (will be handled by volunteers).
- 6280 End of Meeting Party**  
\$0 - Assumes no End of the Meeting Party.
- 6470 Security**  
\$2,250 - Assumes two guards for overnight security purposes in the exhibit hall and registration area.
- 6480 Society Symposium Contingency**  
\$10,000 - Reflects a contingency budget for symposia support that will be dispersed per SICB policy.
- 6530 Gratuities**  
\$600 – Given to hotel staff *if* exemplary service.
- 7700 Photocopies**  
\$1,800 - Based on Denver history and electronic abstract scheduling.
- 7760 Postage**  
\$13,200 - Assumes the cost of postage for: 1) Abstract Transmittal Form and Guidelines, 2) Advance Program & Registration Packet, 3) Abstract confirmation & location post card mailing (x2), 4) Exhibitor mailing, 5) Abstract Only mailing, 6) all daily convention mailings and 7) Conference Teaser.
- 7890 Printing General**  
\$12,300 - Assumes the cost of printing for, 1) Abstract/Transmittal Form and Guidelines, 2) Exhibitor Prospectus, 3) Annual Meeting Teaser, 4) Registration Packet, and 5) Registration List.
- 7900 Program Officer Support**  
\$3,500 - Funds available to support the program officer as approved by the Treasurer.
- 8000 Program Officer Speaker Expenses**  
Assumes no program officer speaker expenses.
- 8050 Cancellation Insurance**  
\$1,125 –Based on net “No Claims” premium for insurance coverage in the event of total or partial cancellation to conditions beyond the control of the society of the hotel.
- 8070 Site Visit**  
\$5 Travel cost for convention manager for inspection of Chicago Hilton and Towers for planning purposes.

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- 8100 Sponsorships**  
Assumes \$50 in expenses.
- 8330 Registration Processing**  
\$22,982 - Assumes the cost of using Flying Colors registration processing to input registration forms, process confirmations, produce registration & function lists and run badges and provide on-site registration supervision and support and produce final reports.
- 8340 Registration/Office Equipment**  
\$1,250 - Assumes use of rented printers for on-site registration and office duties plus 5 registration counters @\$150 each.
- 8800 Signage**  
\$150 - Cost for any signs made for Chicago where we cannot use the SICB pocket signs.
- 9060 Supplies**  
\$180 -Cost of supplies during the year for meeting-related materials.
- 9100 Survey**  
\$0 - Assumes no cost to this line item.
- 9250 Telephone/Fax**  
\$5,200 - Assumes the cost of telephone and fax charges in preparation for the meeting plus necessary phones on-site for registration, office and press.
- 9300 Temporary Personnel**  
\$1,100 - Cost to hire local temporary personnel to assist with on-site registration. Reflects extensive use of Student Support participants.
- 9310 AMS Food Function**  
\$750 - Anticipates 25 people x \$30 to attend the AMS luncheon. This expense will be offset by income received as reflected under AMS Food Function.
- 9320 SRC Food Function**  
\$325 - Based on prior history. This expense will be offset by income received as reflected under SRC Food Function.
- 9390 Travel**  
Assumes no travel expenses for 2001 for assistant editors.

X-Sender: rlawrenz@mail.allenpress.com  
Date: Wed, 15 Dec 1999 12:52:10 -0600  
To: m-feder@uchicago.edu  
From: Rod Lawrenz <rlawrenz@allenpress.com>  
Subject: Advertising Update on "American Zoologist"  
Cc: mchapin@allenpress.com

Dr. Feder,

At your request, following is an update on the progress in advertising sales for *American Zoologist* since taking over this account in mid-November. Upon assuming the reigns, there was only a projected ad sales revenue of \$1940 for all of 2000. However, after aggressively working this account, I am pleased to announce that the projected ad sales revenue for 2000 is now at \$4500.75. This has been achieved by contacting previous advertisers, and updating them on the benefits of advertising within this journal. To supplement this effort, promotional materials were mailed earlier this week to all contacts in our database for this journal. In addition, I have been aggressively cross-selling *American Zoologist* with clients and prospects of other journals whose editorial content is similar to this one. As a result, several clients and prospects who initially inquired about advertising in other journals were given *American Zoologist* media kits as well, thus increasing your journals exposure to potential advertisers. As a result of these efforts, I anticipate that the advertising sales revenue will continue to increase throughout 2000.

Rod Lawrenz  
Advertising Manager  
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Simulation of impact of reducing Full Member dues from 106 to 95 (10.4%), prorated to other categories. Cost is \$15,120:

Category	2000 Dues	#renewed in '99	New in '99	Revenue	-10.40%	Projection
Full Members	\$106.00	1084	75	\$122,854.00	\$95.00	\$110,105.00
Full Member - Family	\$167.00	40	3	\$7,181.00	\$150.00	\$6,450.00
Postdoctoral	\$79.00	109	21	\$10,270.00	\$71.00	\$9,230.00
Postdoctoral Family	\$129.00	4	0	\$516.00	\$116.00	\$464.00
Emeritus without Journal	\$66.00	12	0	\$792.00	\$60.00	\$720.00
Emeritus with Journal	\$77.00	68	0	\$5,236.00	\$70.00	\$4,760.00
				\$146,849.00		\$131,729.00



## **SICB Strategic Plan 7 August 1999 version**

The Society for Integrative and Comparative Biology is a robust, scientifically and educationally important, and fiscally sound scientific society. It has now fully recovered from various problems that beset it during the past decade. It has large reserves of resources, scientific, educational, human, and financial. While maintaining its existing strengths, NOW (rather than times of crisis) is the time to pursue bold initiatives that will guarantee SICB's future stature and health:

- A major statement that the financial crisis of the early 1990's has long since passed, including an ongoing program of reduction in dues and fees that rewards existing members.

- A quantum leap in the already-strong scientific program of SICB, achieved by increasing the prominence of our own best, most 'cutting edge' science at our annual meeting, in print, and electronically.

- An aggressive program of scientific growth and outreach, designed to identify and assimilate new areas of integrative and comparative biology.

- An energized, highly visible program of educational activity, including a revisitation-revision-expansion of the most distinguished educational product of SICB, 'Science as a Way of Knowing'

- A broad program of synergy with international scientific societies, programs, and initiatives in integrative and comparative biology.

These initiative will obviously require a substantial commitment of resources and effort. Their intended outcome, however, is an SICB that is large enough and strong enough to weather whatever crises the 21st Century may present, and provides substantially enhanced benefits to the scientific and educational development of its membership.

### II. Why strategic planning?

The setting of goals and priorities is a way to decide, in an environment with limited resources, which SICB activities should be carried forward and which should be set aside or not attempted. At the outset, the planners reached three conclusions about the likely future of SICB. The first, which was unanimous, was that SICB must either increase in size or at least not decrease below its present size, to remain viable in the long run. The second, with which most but not all planners agreed, was that the sum total of activities needed to undergo significant qualitative change (i.e., beyond minor fine-tuning) for SICB to remain viable in the long run. The third, with which most but not all planners agreed, was that the present cost to members for SICB activities (e.g., dues, meeting registration fees) was so high as to jeopardize the long-term viability of SICB. In light of these conclusions, the planners immediately recognized that in proposing to change, SICB could not alienate or marginalize any existing group in its membership because departure of such a group would decrease the membership below critical mass. Planning thus becomes the identification of activities that will energize (rather than alienate) the entire existing membership and attract new members. The principal strategy that the planners recommend is to institute a vigorous program of scientific and educational self-renewal and expansion, which would be the 'rising tide' lifting all the Divisional boats and attracting new ones to the SICB fleet. A second strategy is also essential: immediate and continuing reduction of the cost of belonging to SICB. These two strategies are obviously coupled; only if SICB grows by virtue of self-renewal and expansion will it be able to reduce per member costs.

The following is a preliminary account of the initiatives that the Strategic Planning Meeting of 16-18 July 1999 recommends be carried forward, and some of the rationale informing the choice of these initiatives. Each of these initiatives must be developed in detail with an accurate estimate of its likely cost before the Executive Committee and membership can give final approval or disapproval. For the present, the planners

recommend that the Executive Committee and membership scrutinize these candidate initiatives and ascertain whether in principle they are worthy of support.

III. Principles underlying strategic planning. These principles should first be affirmed by the membership and Executive Committee before considering the individual initiatives.

- Any change in SICB must not marginalize or alienate existing components of SICB, which are all essential. While it is changing, SICB needs to maintain and acknowledge its traditional strengths. Growth for growth's sake would be erroneous; rather, activities, disciplines, and members that are added to SICB need to be consistent with its core: integrative biology, comparative biology, interest in diverse species, and 'a feeling for the organism'.

- Change must not result in the 'dumbing down' of SICB activities. SICB must maintain the highest professional standards and not dilute these to attract a broad audience.

- New SICB activities and functions should be added to the existing activities and functions, and not displace existing activities and functions. In the annual meeting, for example, the program should give equal prominence to new and existing elements.

- Evaluation of the initiatives proposed here and their implementation if desired must be undertaken in full view of the entire membership. Members must have a large voice in the process if they are to take ownership of it. The Executive Committee must receive and be responsive to member feedback at every step.

- Initiatives chosen for implementation must undergo continuous scrutiny, and be rigorously challenged particularly at the time of budget renewal. SICB should make no binding multi-year commitments to any initiative, and discontinue initiatives that do not live up to their promise.

- As a rule of thumb, SICB must fund only activities that significantly impact the professional development of at least a third of the membership. SICB lacks the resources to fund both essential and discretionary activities.

- The *American Zoologist* makes an essential contribution to the revenue stream of SICB; if this asset is not protected, SICB as we know it would immediately deteriorate. Protecting its strength must have first call on SICB resources.

## V. Initiatives

The planners recommend the simultaneous implementation of 7 different initiatives. So many initiatives seemed daunting to the planners, who aggressively challenged each in an attempt to eliminate some. In the end, the planners concluded that all proposed initiatives are essential, and that eliminating any one would be irresponsible because it would jeopardize the success of the entire process.

### A. *American Zoologist*.

The *American Zoologist* is the principal financial engine of SICB and is often the principal representation of SICB to the larger scientific and educational community. To some extent, *American Zoologist* is only as good as the materials it publishes, and initiatives to increase the quality and scope of the activities that result in these materials are included elsewhere. The editorial consortium and board need to become proactive in the generation and evaluation of activities that affect the journal's content. Journal pages need to be freed to accommodate this material, and the planners propose that this be accomplished by publishing abstracts for the Annual Meeting as an electronic supplement to *American Zoologist* rather than as a hard copy issue of the journal. This change would make abstracts available to members earlier in advance of the meeting than is presently the case, preserve the ability to cite abstracts as contributions to the literature, and reduce costs (see Renaissance Initiative). Funds should be provided to accommodate the cost of producing a sixth issue each year. If the justification is sufficient, funds should be provided for renovation of the journal's format and electronification of editorial processes. Provided that journal quality (and hence interest in the journal) increases as expected, the

journal should be made available electronically in a way that does not jeopardize institutional subscriptions. The “Bio-One” consortium of AIBS, SPARC, and Allen Press may be an attractive way to realize this goal.

#### B. Renaissance Initiative

In the early 1990's, SICB simultaneously underwent two serious crises: a financial crisis that almost bankrupted SICB and membership attrition that brought its size from 4000 to 2000. These crises have now passed. Unrestricted reserves are in excess of 6 months operating costs, due to vigorous cost-cutting revenues may exceed costs by \$100,000 this year, stringent accounting and approval procedures have been implemented, and the membership size has been stable for some years. Nonetheless, many members' confidence in SICB still has not been restored, which frustrates their ability to look forward with optimism and participate fully in the initiatives that follow. For this reason, the Strategic Planning Group concluded that a priority is to take aggressive steps to put this crisis in confidence to rest once and for all. The single most important step would be to demonstrate that the financial crisis has passed, and the best way to accomplish this step would be to reduce the charges that members must pay, many of which were increased dramatically during the financial crisis. Every member of the Strategic Planning Group believed that current charges for members were either too high relative to the benefits received, or just plain too high. Clearly, reducing charges will mean forgoing the revenue that would otherwise result from the unreduced charges, but (1) restoration of member confidence is more important and (2) the current budget and funds balance will sustain this loss of revenue. Specifically, SICB business management believes that an unrestricted fund balance of \$400,000 is a sufficient reserve, the current unrestricted fund balance is approximately \$600,000, and the 1999 budget is expected to result in a \$100,000 surplus. Thus, the Strategic Planning Group recommends a “Renaissance Initiative” to demonstrate that SICB has been ‘born again’ financially:

- A significant reduction in meeting registration fees. Registration fees for student members are presently comparable to those for other biological societies, but the fee for non-student members is among the most expensive for societies that meet in hotels/convention centers. The Executive Committee has already approved a reduction of this fee from \$220 to \$195.

- A reduction in dues for full members. The current ‘early renewal’ rate, >\$100 for full members, is more expensive than for comparable societies. The Executive Committee should reduce this rate to <\$100, with a similar reduction in other non-discounted ‘early renewal’ rates.

- A reduction in abstract fees. [Note: For some SICB Divisions, abstract fees are not customary, and these tend to regard any abstract fee as too large. For other Divisions, abstract fees are neither unusual nor higher than for other societies to which their members belong.]

Obviously these reductions cannot be so large or prolonged that they jeopardize SICB. The Strategic Planning Group concluded that the Renaissance Initiative not go forward in isolation, but in combination with an initiative to strengthen *American Zoologist* (a major revenue source, see above), other initiatives designed to attract new members with exceptionally attractive scientific and educational programming, and continued cost-cutting. The only opportunity for significant cost-cutting that the Strategic Planning Group could identify is to discontinue the hard-copy publishing of abstracts as Issue 6 of the *American Zoologist*. Although abstracts are not reviewed, some members of SICB value these abstracts as a way of beginning or extending a list of publications. For this reason, abstracts should not be discontinued, but should be published electronically in a way that can still be cited by members who wish to cite them. Electronic publication of abstracts, moreover, should result in several improvements: (a) Because abstracts need not be prepared for ‘typesetting’, the abstract deadline need not be as early. (b) Abstracts (and not just the meeting program) could be made available electronically well in advance of the

meeting. (c) Text of abstracts could be searched electronically. A hard-copy version of the abstracts, produced as inexpensively as possible, should be made available at cost or for free for annual meeting registrants who require them.

For this initiative to succeed, members need to do their part, including suggesting additional ways of reducing costs, volunteering to take on tasks for which SICB would otherwise need to pay employees, advising SICB officers on which current SICB benefits are neither wanted nor needed by members, and aggressively recruiting new members.

### C. Showcasing EXISTING Science

SICB has significant and attractive scientific strengths in several areas (how to compare taxa, how to integrate investigations of diverse levels of biological organization, knowledge of diverse model systems, how to use biological diversity to elucidate biological pattern and process), and its members are at the cutting edge of diverse disciplines. A problem, however, is that many outside SICB do not recognize these strengths, and a growing number of members are looking elsewhere for cutting edge science. This is not a problem in SICB's science itself, but rather in the efficacy with which SICB showcases and communicates its science both internally and externally. In terms of the annual meeting, the specific challenges for SICB are to:

- Establish a mechanism to target senior, distinguished members for increased inclusion in the scientific program of the annual meeting. Specialty meetings and other societies are competing for these members' presentations and best science; SICB must too!

- Establish a mechanism to develop symposia of broad interest to the membership, that recruit non-members, and /or help set the future directions of integrative and comparative biology (or SICB's component Divisions). The membership has little difficulty developing excellent but specialized symposia; SICB needs to complement these with attractive non-specialized symposia.

- Invigorate the many mainly passive elements of the Annual meeting with highly interactive elements: discussion, debate, constructive criticism, etc.

Meeting these challenges must involve SICB's Divisions. SICB is an extremely diverse society, and it has rapidly exhausted those plenary speakers and symposium topics that are truly of interest to the entire Society. Further efforts in this direction are likely to produce events that are not truly Society-wide, so why bother? By contrast, it is comparatively easy to generate program events that interest entire Divisions or groups of Division; that is where emphasis should lie. For these reasons, the Strategic Planning Group recommends assigning to the Divisions the responsibility for meeting the above challenges in ways that make the most sense to each individual Division or groups thereof. With this responsibility must go the resources to implement these Divisional plans. There must also be a mechanism, however, that guards against Divisions using these resources to mount the 'same old' program.

The Strategic Planning Group's primary recommendation is for the invigoration and enhanced cooperation of several existing persons and bodies within SICB: the Program Officer, the Divisional Program Officers, the Editor(s) of *American Zoologist*, the Editorial Board of *American Zoologist*, and the Program Advisory Committee. According to the SICB Constitution and Bylaws, these persons and bodies are already supposed to be working together in providing innovative programming that showcases SICB's strengths, but their consciousness needs to be raised about the importance of this endeavor. Second, these persons and bodies need resources to bring about innovative programming. The Strategic Planning Group recommends providing such resources in a way that will necessitate cooperation among these persons and bodies. Specifically, funds should be made available to support innovative programming events. The availability of these funds should be advertised, and proposals solicited. Proposals could be for

- a) "Perspectives and Prospectus"; Chairing a session and, while chairing that session, use two 20-minute slots to deliver a lecture on progress/discoveries during the

preceding year and likely foci during the next year. No more than 1 slide on the member's own work. 30 min long, followed by 10 min discussion, OR:

b) Plenary lecture to be delivered during the lunch break or another appropriate time, OR

c) Chairing a session and, while chairing that session, using the final 20 minutes to conduct a discussion of the papers/posters presented in that session, OR

d) Speakers from outside the society. These could be either exemplars of science that is already within SICB or representatives of disciplines/approaches not currently within SICB. Divisions could prepare joint proposals with correspondingly larger budgets for 'superspeakers', OR

e) A similar program event. This could be a young investigator lecture, an innovation in science lecture, a report of another scientific meeting, or anything else. The Strategic Planning Group believes that these funds will incent the kind of programming events that will showcase SICB's strengths. The funding level and the award process, however, need to be designed so that stringent competition ensues and less-than-meritorious proposals are not supported. The proper body to award funding is the combined Program Officer, the Divisional Program Officers, the Editor(s) of *American Zoologist*, the Editorial Board of *American Zoologist*, and the Program Advisory Committee. In evaluating proposals, this group must:

a) Demand that proposed events effectively communicate SICB's strengths; those that do not should be rejected to specialty meetings or ordinary support mechanisms.

b) Demand that proposed events effectively communicate hypotheses, strong inference, and significance; those that do not should be rejected to specialty meetings or ordinary support mechanisms.

c) Demand that proposed events include effective mechanisms to stimulate scientific discussion and debate; those that are effectively passive should be rejected to specialty meetings or ordinary support mechanisms.

d) Consider factors such as impact on *American Zoologist* if the special event is published, contribution of matching funds from Divisions, whether the event is envisioned as one-time or repeated, use as a vehicle for fund-raising.

Finally, this group needs to evaluate the efficacy of these special programming events, learning from its mistakes and proliferating ideas that work well. A specific round of review and recommendation needs to follow each annual meeting.

The Strategic Planning Group believes that, if properly executed, these recommendations will materially enhance the Annual Meeting in ways that both reinforce the enthusiasm of existing members and attract new members to SICB.

#### D. Assimilating NEW Areas of Science Appropriate for SICB

For SICB to maintain existing strengths is not enough. The Strategic Planning Group concluded that SICB now needs to attract and assimilate areas of science that will be critical in the future. Again, these new areas should not represent growth for growth's sake, and need to be consistent with SICB's values. They also need to be feasible targets; taking over all of 'functional genomics' is simply not a viable option.

As with 'showcasing existing science', the Strategic Planning Group recommends a process rather than a discrete outcome. Again, the persons and bodies charged with programming (Program Officer, the Divisional Program Officers, the Editor(s) of *American Zoologist*, the Editorial Board of *American Zoologist*, and the Program Advisory Committee) or the Program Advisory Committee in particular should constitute themselves as an oversight body with the authority to allocate specified funds to member groups to carry out these groups' initiatives:

First, either all the persons and bodies charged with programming or the Program Advisory Committee should identify promising areas or disciplines for assimilation into SICB. This process should involve extensive consultation with the entire membership, and

more encourage members to bring forward ideas than exclude unworkable proposals at this stage. The incentive for proposals would be the possibility of obtaining funding for executing the proposals.

Second, for each proposal/discipline/target that is not completely unattractive, the advisory committee should appoint or encourage the formation of an "Expert Committee", a small ad hoc group of SICB members who will develop a specific plan for recruitment of a target discipline into SICB. The plan should include mechanisms to inform the SICB membership about the target discipline, and to inform the target discipline about SICB. Mechanisms could include (but would not be restricted to) plenary lectures, workshops, tutorials, 'perspective' presentations by designated integrators, research career enhancement awards, young investigator research awards, symposia co-sponsored with a specialty society in the target discipline, etc. The plan should be accompanied by a budget for its execution. Quite possibly, some target disciplines would not attract a sufficiently enthusiastic and competent Expert Committee, and these target disciplines would be dropped from the process until an appropriate Expert Committee emerges.

Third, the advisory committee would evaluate the proposals/plans/budgets of the Expert Committees. Quite possibly, some of these would not be meritorious and others could not be supported given limited resources. The Strategic Planning Group views these possibilities as beneficial, resulting in only proposals of the highest quality being carried forward.

Fourth, the chosen Expert Committees would execute their plans. The execution of these plans would be subject to periodic review, with unpromising efforts discontinued in favor of new initiatives.

In other words, it would be 'up to the marketplace' to determine which target disciplines are developed for eventual assimilation and which fall by the wayside. Stringent ongoing selection, with ample opportunity for the entire membership to express its likes and dislikes, is viewed as preferable to designation of certain disciplinary targets a priori.

#### E. Energizing the Education Council

Education of many kinds (e.g., instruction of undergraduates, training of apprentice researchers at diverse levels) is a key part of the activities of most SICB members, and SICB membership finds part of its value in the facilitation of members' educational activities. Much of SICB's visibility to prospective members comes from its education-facilitating programs; arguably the "Science as a Way of Knowing" (SAAWOK) series is the single program event for which SICB is most recognized. Accordingly, the Strategic Planning Group concluded that an expanded, increasingly visible educational presence would be just as important as an enhanced scientific presence to SICB's future. Again, the Strategic Planning Group recommends not a discrete set of programs or activities in this area, but an ongoing process that will develop and implement such programs. The SICB Constitution already provides for such a process in its authorization of the Education Council, and the Education Council has already developed an ambitious plan, which includes the following goals and objectives:

Goal 1. To increase the profile of education activities at the annual meeting of the society.

Objective A. Offer a topical program every other year at the annual meeting of the Society.

Objective B. Work with the Program Officer to schedule education programs, papers, and posters so that there is minimal conflict with science papers.

Objective C. Support and encourage opportunities for members interested in life science education to come together informally.

Objective D. Sponsor an excellence in life science teaching award.

Goal 2. To serve as a resource for information that will positively affect life science education in the United States.

Objective A. Develop the Web site for the Educational Council.

Objective B. Use the Educational Council's Web site for the presentation of teaching resources.

Objective C. Study the possibility of making teaching information available in a printed format.

Objective D. Study the value of updating the resource material from the SAAWOK Symposia.

Goal 3. To reach out to the science education community in ways that will contribute to the improvement of life science education at all levels.

Objective A. Invite high school and community college life science educators to our annual meeting to participate in workshops for the purpose of learning both fundamental and new information about specific life science topics.

Objective B. Develop and post a list of life science mentors who will answer questions posed by educators about various aspects of the life sciences.

Objective C. Develop and post a list of members who would serve as science fair mentors for elementary and middle school teachers and students.

Goal 4. To be proactive in matters relating to life science education in the United States.

Objective A. Monitor trends and issues in life science education in the United States.

Objective B. Take a stand for the society on issues related to national curriculum standards.

Goal 5. To contribute to the professional development of our graduate student and post-doctoral fellow members.

Objective A. Continue offering student/post-doc workshops at the annual meeting.

Objective B. Encourage a closer relationship between the SICB officers and the graduate students and post-doctoral fellows.

Objective C. Provide information that supports the professional development of students and post-doctoral fellows.

An accompanying Education Taskforce Report describes these goals/objectives, their rationale, and specific plans for implementation in greater detail. The Strategic Planning Group reviewed these. Goal 2, Objectives A and B, are discussed in greater detail below. Goal 4, Objective B, did not generate much enthusiasm (nor did other potential strategic initiatives associated with political action). Implementation of special sessions for high school or junior college instructors likewise garnered little enthusiasm; the group preferred that SICB facilitate instructors' access to existing SICB activities instead. The Strategic Planning Group concluded that the remaining goals and objectives deserve enthusiastic endorsement, that the Education Council should be directed to proceed with implementation, and that the necessary resources for implementation should be provided to the Education Council.

One of the signature accomplishments of SICB was SAAWOK. Even now, many years after SAAWOK's end, its materials are still widely used and known. The Strategic Planning Group has enormous enthusiasm for revisiting SAAWOK. This could occur in several ways: (1) Asking SAAWOK authors to revise their contributions, and

republishing them; (2) Expanding SAAWOK to include areas of biological science that have emerged since SAAWOK's original conclusions; (3) Re-doing SAAWOK in its entirety, appropriately revised for the 21st Century. The Strategic Planning Group believes that the Education Council should be charged with this task.

#### F. An Enhanced, Attractive, and Innovative Electronic Presence

ALL of the above initiatives rely on effective communication. Indeed, SICB's greatest challenge may be communicating the diversity and strength of member activity in science and education, both to those outside and those inside SICB. SICB's former efforts in this area were limited by the expense and ineffectiveness of printed communication distributed on paper. Advances in electronic communication enable SICB to do a much better job. The existing SICB website is a reasonable first step; the Strategic Planning Group believes that now is the time to take the remaining steps and implement a greatly expanded and more functional web presence. The Science Taskforce, the Education Taskforce, and the Public Relations Committee independently make the same recommendation.

The vision is that various client groups need to "access" SICB for various reasons (in parentheses): **biologists and other scientists** (for experimental models, approaches, techniques, equipment, teaming/collaborators, comparative data, funding, recruitment of personnel), **educators** (educational materials, educational programs, experts), **the media** (news and commentary in areas of relevance), **government and private foundations** (expertise in policy formulation, technical expertise, recruitment of personnel), **industry** (for experimental models, approaches, techniques, equipment, teaming/collaborators, comparative data, recruitment of personnel), and **SICB members** (all of the above). A well-designed website could facilitate this access and, in so doing, synergize with all of the above strategic initiatives.

The top level of the website should be an attractive page with 4 links:

- Scientific expertise
- Educational expertise
- For the Public and the Media
- For SICB members (including how to join and the Annual Meeting)

The Science link should point to a page with a searchable index of members (by experimental models, approaches, techniques, expertise, interest in teaming/collaboration, availability for employment), comparative data, and funding opportunities. The Education link should point to a page with a searchable index of members (by educational expertise, techniques, interest in teaming/collaboration, availability for employment), materials/resources, SICB programs for educators, and SICB programs for trainees. The Public/Media link should point to a page with current non-technical accounts of SICB members' activities and instructions on how to use the Science and Education pages to find out more. The SICB Member page should include much of the information that is already on the existing website. All pages should include links to other societies or groups that synergize with SICB or might do so.

An associated challenge will be to fund the creation and maintenance of these pages. The pages should accommodate a feature that will enable SICB members to maintain their individual entries (e.g., change index keywords, experimental models, expertise as their research and educational programs evolve). Also, the various SICB constituencies associated with each page should be able to modify it without resorting to an expensive site maintenance service. The notion of an "Electronics Communication Editor", an SICB member with oversight responsibility, is a good one.

#### G. An Enhanced International Presence



The former *American Society of Zoologist* has always enjoyed an international membership, but its formal interactions with integrative and comparative biologists in other countries and their professional societies have remained fairly limited. In fact, some of the SICB Divisions have been far more proactive in 'international relations' than SICB as a whole. The Strategic Planning Group believes that the increasingly internationalization of science requires that SICB vigorously pursue an international presence. It should not become "The International" Society for Integrative and Comparative Biology, but rather should work with other societies and intersociety organizations (e.g., IUBS) to achieve this presence. Specific initiatives could include:

- Formal invitation of societies from other countries to meet with SICB. This could range from no or low cost to waiver of fees and/or provision of student aid benefits.
- Co-organization and sponsorship of specific symposia or other program elements at SICB annual meetings. Again, this could range from no or low cost to provision of extensive support.
- Co-sponsorship of meetings and/or symposia outside of SICB.
- Membership in IUBS.

## VI. Remaining problems

The single most significant remaining problem is the decline in member volunteerism and the reliability of members who do volunteer. The Strategic Planning Group believes that SICB members have undergone a progressive increase in the tasks they are required to perform outside of SICB and the associated burdens in applying for extramural support, recordkeeping, committee work, etc. Hence, the discretionary time available for SICB activities is dwindling, and members who volunteer to perform SICB duties actually perform these duties maybe 50% of the time. Volunteer effort is critical because: (1) Only SICB member-volunteers (rather than professional management) is competent to perform certain critical tasks; and (2) For other tasks, SICB members who volunteer replace highly-compensated professional managers, who would otherwise constitute an unacceptable burden on SICB finances.

The second problem is how to finance the foregoing initiatives. Some are inexpensive, and their financing is not problematic. Some (e.g., electronic publishing of abstracts) actually save money rather than cost money. Other than that, SICB's financial situation as of mid-1999 is that unrestricted reserves are healthy (\$600,000) and the budget projects an annual profit of \$100,000. The Strategic Planning Group estimated that this situation is sufficient to finance all of the foregoing initiatives for 4 years (assuming that unrestricted reserves should not decrease below \$400,000, as recommended by SICB's business consultants. During that time, membership growth would need to occur if the initiatives were to continue beyond 4 years.

## VII. Implications of Strategic Planning

Adoption of a strategic plan is tantamount to setting of priorities, which then need to be stringently enforced. SICB does not have the resources to be all things to all people. A strategic plan means that SICB will focus on a small number of initiatives and not on other possible initiatives. If the plan is adopted, SICB will need to pursue vigorous pruning of non-essential activities, say 'no' to a variety of worthy causes, and forego some member benefits that would otherwise be feasible.

The Strategic Planning Group does not recommend that certain potential initiatives be supported financially or through recruitment of member-volunteers. These include the publishing of journals other than *American Zoologist*, political action on behalf of policy issues, or charitable causes.

#### VIII. Adoption of the Strategic Plan

The Strategic Plan first needs to undergo evaluation by the SICB membership and Executive Committee. As development of detailed budgets for initiatives that enjoy little support is a tremendous waste of effort, the Strategic Planning Group recommends the following process:

September 15th: Electronic publication of the Strategic Plan, with members invited to comment either directly or to their representatives on the Executive Committee by October 15th.

November 1st: Executive Committee vote on approval of Strategic Plan in principle, in whole or in part, pending development of detailed budget.

December 1st: Electronic publication of revised Strategic Plan, including detailed budgets for previously-endorsed components (if any). Members invited to comment either directly or to their representatives on the Executive Committee by the Annual Meeting.

Annual Meeting in Atlanta:

Executive Committee Meeting 1: Discussion and straw vote on revised Strategic Plan in whole or in part.

Business Meeting: Discussion and vote on member resolution to Executive Committee on revised Strategic Plan in whole or in part.

Executive Committee Meeting 2: Discussion and vote on Revised Strategic Plan, in whole or in part.

#### IX. Strategic Planning Group Membership

Christine Bennett (Marketing Manager, SICB Business Office)

Tim Bradley (Chair, Division of Comparative Physiology and Biochemistry)

Robert Dores (Chair, Division of Comparative Endocrinology)

John Edwards (Editor, *American Zoologist*)

Martin Feder (President)

Bob Full (Chair, Task Force on Science)

Daphne Fautin (Chair, Division of Invertebrate Zoology)

Susan Heckman (Account Manager, SICB Business Office)

Harvey Lillywhite (Member-at-large)

Janice Nason (Membership Coordinator, SICB Business Office)

John Pearse (Program Officer)

Kathy Packard (Chair, Task Force on Governance/Organization/Administration)

John Pilger (Chair, Task Force on Education and Chair, Education Council)

Wilma Salvatore (Convention Manager, SICB Business Office)

Kim Smith (Treasurer)

Peter Studney (Executive Director)

Marvalee Wake (President-Elect)

Mark Westneat (Representing Division of Vertebrate Morphology)

## **Information about the BioOne project and the BioOne licensing agreement**

Last Revised, 17 November 1999

Dear Colleague:

AIBS, SPARC, and the other founding organizations of the BioOne project take pleasure in presenting, for your society's consideration, the Licensing Agreement for placing your society's peer-reviewed journal(s) online in BioOne. This project, which is the result of a unique collaboration among the scientific, academic, publishing, and library communities, has the capacity to put the journals of the more than 65 AIBS member societies online in a single linked database for library subscription and subsequent revenue sharing--at no out-of-pocket expense to the societies. An FAQ sheet about BioOne and the Licensing Agreement is below. This FAQ sheet and the Licensing Agreement are online in the BioOne section of [www.aibs.org](http://www.aibs.org). For further information about BioOne please see its recently revamped website, **[www.BioOne.org](http://www.BioOne.org)**.

The Licensing Agreement is being distributed to AIBS member societies by AIBS and by Allen Press, Inc., the latter being another of the five founding BioOne organizations. At AIBS, the contact for BioOne questions is Richard O'Grady, Executive Director, 202-628-1500 x 258; [rogrady@aibs.org](mailto:rogrady@aibs.org). At Allen Press, the contact for questions is Robert Kidd, Director of Development, 914-365-3670 or 1-800-627-0326; [rkidd@allenpress.com](mailto:rkidd@allenpress.com). Richard Johnson, SPARC Enterprise Director, is also available for questions at 202-296-2296 x 157; [rick@arl.org](mailto:rick@arl.org)

The launch of BioOne is planned for 2001, with the first release of the project limited to 40,000 journal pages; additional pages will be added in subsequent years' releases. We encourage your society to include its journal(s) in the 2001 launch.

### **Frequently Asked Questions:**

#### **In a nutshell, what are the licensing terms being offered to AIBS member societies?**

The basic terms included in the Agreement are:

- Non-exclusive licensing of electronic rights to BioOne (thus leaving societies free to include their journals in other online projects in addition to BioOne).
- Good-faith payment of \$1,000 per journal from BioOne to the society when the society's journal(s) go online.
- No charge for SGML and other online preparation costs if the AIBS member society has the print version of its journal composed and printed by Allen Press. For those member societies that have their journal composed and printed elsewhere, the SGML and online preparation costs for BioOne will be paid upfront by BioOne and charged against the society's future BioOne earnings. *In neither case, therefore, do societies incur out-of-pocket costs to be a part of BioOne.*
- 50% royalties from the net revenue pool from BioOne subscriptions will be distributed to the participating societies each year, based upon a page-count of the journal material that each society has in BioOne.
- Societies wishing to make subsequent use of the BioOne SGML text of their journal for their members' use or for sale to third parties may purchase the coded files (as well as contract for society website services) at a discount.

#### **Who created BioOne and what is its leadership?**

BioOne was created in mid-1999 by five collaborating organizations: The American Institute of Biological Sciences (AIBS), SPARC (the Scholarly Publishing & Academic Resources Coalition), The University of Kansas, The Big 12

Plus Libraries Consortium, and Allen Press, Inc. SPARC was created a few years ago by the Association of Research Libraries to address the serials crisis in scholarly publishing by competing with commercial publishers through the development of new publication products more in keeping with libraries' budgetary and user resources. To administer BioOne effectively and openly for the benefit of library-subscribers and society-publishers, the five collaborating organizations have established a District of Columbia non-profit corporation, also called BioOne (currently in the process of obtaining 501(c)(3) tax status), with offices at the Association of Research Libraries, in Washington, DC. Allen Press is also acting as a contractor to BioOne for database & website development, sales & marketing, and subscription revenue management. Each of the collaborating organizations has made and will continue making substantial financial and/or in-kind contributions to the project.

### **I read about BioOne last summer in *Science and Nature*--what has happened since?**

The last few months have been spent primarily working with SPARC libraries and other members of the Association of Research Libraries (SPARC's parent organization) raising funds to finance the approx. \$1M start-up costs of BioOne. This operation is now well underway. Libraries around the country have contributed over \$250,000 so far. Combined with in-kind contributions from within the BioOne management--especially Allen Press--approximately \$500,000 has now been raised to prepare BioOne for its launch in 2001.

### **Why is BioOne necessary?**

Despite their significance in their respective fields, relatively few of the journals of AIBS member societies are currently available electronically. For those few that are, most are online at individual society "silo" Web sites, the maintenance costs of which can be as unfavorable to the society-publisher as is their lack of exposure to institutional subscribers, subscriber agents, and cross-linking to other online journals in the same subject area.

The BioOne aggregation of cross-linked related journals addresses all of these concerns. It will provide integrated, cost-effective access to a thoroughly hyperlinked information resource of interrelated journals focused on biological, ecological and environmental sciences. Through BioOne, scientific dissemination and communication are greatly enhanced in a manner that recognizes that journal aggregations are a more functional and attractive offering to institutional subscribers than are individual journals.

Through BioOne, AIBS member societies now have a realistic opportunity to make the jump to the Web, a financial and technological commitment otherwise beyond the reach of many societies. This enables them to keep their publications viable and independent of commercial control while responding to the needs of both their members and the library market. And via the broad dissemination of information possible through the Web, societies have an opportunity to expand enormously their subscriber market, readership, and influence. Through BioOne's marketing and consortium sales around the world, societies will be able to introduce their journals to heretofore untapped institutional markets as well as reintroduce their journal to institutional markets that have dropped the print subscription in the past.

### **What are the advantages of BioOne?**

**The bottom line for a society publisher is that BioOne, a SPARC-supported project, gives the library market (the society's "customer") what it is asking for.** It links the scientific and library communities to their mutual benefit: scientists and scientific societies want their published works widely read and cited in journals that bring sufficient revenue to the societies; libraries want to be able to subscribe to those journals and have them available for their readers. BioOne will be able to provide Internet access to the contents of your journals to every library and institution in the world, including those libraries that have cancelled the print subscription to your journal long ago. Access through BioOne will provide to journals whose print subscriptions have disappeared from library shelves a "second bite at the apple." Since BioOne will require all libraries to retain access to all journals in the aggregation, all journals in the collection will immediately become available to participating libraries. No library currently subscribes in print to all journals published by AIBS-related societies. Thus, BioOne will increase the exposure and reach of your journals.

In fact, our SPARC library partners in BioOne tell us that institutions are more likely to buy electronic access than they are to restart a print subscription to a journal. Electronic access may even stimulate these same libraries to renew their print subscriptions just to provide a reading or browsing copy of the journal for library patrons.

The technology behind BioOne also focuses on the long-term issues of online content provision and management from the research community perspective rather than solely from the publisher perspective. Under this model, interaction between BioOne's users and its creators is not only desirable, but necessary. Our intent is to remain a highly portable and effective resource capable of evolving as technology advances

### **What are the technical aspects of the BioOne online database?**

BioOne's Internet delivery system is based on an archival SGML database. It will offer a seamless information environment allowing cross-journal searches and inter-journal linking from references. Each article will clearly indicate the journal source so that societies will continue to maintain their identify and users can evaluate articles based on their origin.

BioOne is committed to best practices in online journals publishing and Web-based access. The service will utilize both established and new technology to provide features and functions most in demand by today's scholars, while using technology as a way to keep society journals viable and successful in an electronic age.

The journals in BioOne will be fully encoded in a standards-based SGML format (based on ISO12083) for archival and searching purposes. HTML and PDF formats will be provided for convenient common browser viewing and printing. Articles included in the database will be identified using Document Object Identifiers (DOIs) and will be reference-linked with other BioOne journals to create an internally coherent research resource. The article DOIs will potentially be made available to external abstracting and indexing services to provide easy linking to the online full-text of articles discovered as a result of searches in traditional indexing databases—a critical feature for researchers in need of broad, deep, detailed information in a timely fashion.

### **How much will it cost to participate in BioOne?**

As indicated above, there is NO expense or cost for any AIBS society to participate in BioOne. Quoting from Para. 1 of the Licensing Agreement: BioOne will incur all content conversion costs associated with converting and coding the Publications from printed form to Electronic Media form as long as Publisher (a) remains a member in good standing of the American Institute of Biological Sciences (AIBS) or is otherwise granted by AIBS, in writing, member-equivalent status for the specific purpose of including the Publications in BioOne (b) **and** also composes and prints the Publications with Allen Press, Inc.

Such AIBS members that do not compose and print the Publications with Allen Press, Inc., agree that conversion costs for the Publications will be charged against the Publisher's total revenue sharing as per Para. 2 herein at a price to be agreed to mutually in writing by Allen Press, Inc. and the Publisher at the time of execution of this Licensing Agreement, provided, however, that if the Publisher's share of revenue fails to cover the conversion costs on a cumulative basis, the Publisher will not be liable for the cost difference.

### **How will BioOne be priced for library subscribers?**

BioOne will be sold to libraries as a single aggregated database of journals. Pricing, which cannot be set until there has been a determination of which journals are included in any given year, will follow library-preferred models and is likely to be set on a price curve tied to the subscribing institution's FTE size (or in the case of library consortia, the sum of the FTEs included). Pricing of the BioOne collection will be set at a level intended to satisfy both value to the library-subscriber and revenue to the society-publisher--a balance that is intended to secure long range stability for both publisher and subscriber.

### **How will the subscription revenues from BioOne be calculated and distributed to the participating societies?**

As stated above, 50% royalties from the net revenue pool from BioOne subscriptions will be distributed to the participating societies each year, based upon a page-count of the journal material that each society has in BioOne. Please see Para. 2 of the Licensing Agreement for details. Allen Press's publishing division will manage the receipt, accounting, and disbursement of subscription revenues. The remaining 50% of the net revenue pool will be reinvested in maintaining the BioOne database's operational requirements of staff and equipment.

### **How will participation in BioOne impact my institutional print subscriptions?**

A common concern is that providing the full contents of journals to libraries will cause libraries to cancel print subscriptions to the journals. Indications from several sources are that this has not and will not happen.

First, libraries do not yet trust electronic access as a permanent archive for a journal, so they are still buying print subscriptions as a permanent archive for their collections. Second, electronic access and print serve two different functions in a library. Print is necessary for browsing and reading, and these functions cannot be replaced by electronic access to the same contents. Likewise, electronic access is critical for finding relevant research quickly and answering specific research questions. Third, as of 1999, over 5,000 scientific, technical, and medical journals are available online. Therefore a significant number of publishers of scientific information have apparently overcome the concern of scavenging print by making electronic versions available online. Finally, print subscriptions are in decline universally. Electronic sales to libraries are a possible replacement for the subscriptions lost through declining print subscriptions.

The reasoning is simple: If print subscriptions are declining anyway, what will replace them? The clear answer from the library community is electronic access.

Is there any evidence on this point? In fact, a related aggregation of about 40 journals started by Johns Hopkins University Press offers some evidence. Project MUSE provides full text electronic access to 40 humanities and social science journals only to libraries. These journals were experiencing declining print subscriptions in libraries, thus MUSE was mounted to help provide a second route for libraries to purchase the same journals.

Data from 1997 suggest that the average loss of print subscriptions was about 4 subscriptions per title. By 1997 the electronic database had been available for almost 2 years. In 1998 the average number of subscriptions lost was 12 per titles. According to a recent Project MUSE report, "We do not know, of course, whether these subscribers would have canceled the print titles anyway." While it is too early to draw hard and fast conclusions, the report indicated that the introduction of an electronic version of journals does not produce significant loss of print subscriptions. Anecdotal evidence from other journal aggregators and vendors bear out this same conclusion.

### **My society wants retain its ability to offer its journal online to its members as well as to library subscribers in the form of a single subscription product--would our participation in BioOne allow this?**

Not only would your participation in BioOne allow both of these options, it would facilitate it. Societies wishing to make subsequent use of the BioOne SGML text of their journal for their members' use or for sale to third parties may purchase the coded files (as well as contract for society website services) at a discount. Quoting from Para. 1 of the Licensing Agreement: BioOne agrees to make available to the Publisher, at a price to be agreed to mutually in writing by Allen Press, Inc. and the Publisher, the Electronic Media form of the Publications for the Publisher's own use according to the following schedule: (a) if for personal use by the individual members of the Publisher's society/organization, or if for sale by subscription to a single institution, upon the date of inclusion in the BioOne Database; or (b) if for resale to or distribution or use by any other party (including but not limited to a vendor, aggregator, or consortium), within 12 months from said date of inclusion.

### **Given that the print version of our journal is currently in, say, 18 libraries in Virginia, what happens if we go with BioOne and those libraries cancel the print subscription?**

This question is taken as an example from a real case situation for a member society. In response, it should be noted that one of BioOne's strengths is its ability to access the library consortium market that exists for electronic but not print publications. Electronic database purchases in the State of Virginia are made by a consortium called VIVA. VIVA purchases electronic access for every library in the State, including all universities, colleges, medical schools, community schools, and public libraries. Through BioOne, the electronic contents of a journal will be available to all libraries in Virginia, with the ones most likely to subscribe being the 96 academic libraries in the VIVA consortium. So, BioOne will have one customer, the State of Virginia, and the journal will be potentially available to all 96 academic libraries--a big jump in exposure from the 18 libraries that now subscribe to print only. The society would probably not lose any print subscriptions and would in addition gain paid access to the 96 electronic outlets.

### **Will library access to BioOne cause members to abandon the society?**

We recognize this as a concern and we join many others in having no definitive answer. There are, however, no good examples that this loss takes place. Not only will the print version of a journal continue to be valued over the electronic version for its portability, quality of illustrations, and suitability for archiving, but most societies provide additional services and benefits to their members that are over and above subscription to the societies' journals. We encourage all societies to continue to build additional benefits for members as a way to enhance participation for individuals in the activities of the society.

Furthermore, plans are taking shape for a second phase of development of the BioOne website in subsequent years that would incorporate such services as pre-press publication, online peer-review, and data archiving, any of which could be restricted to benefit participating societies' members and thus provide individuals with additional reasons to belong to the society--as well as societies with additional reasons to belong to the BioOne project.

### **Will BioOne archive?**

Yes. As part of the license to mount and link journals' contents in BioOne, we require perpetual archival rights for journals' volume years as they go online in the BioOne database. Libraries that subscribe to BioOne and cancel their subscription at a later date still want to have access to the volumes and issues they purchased earlier. This archival right will permit BioOne to store, archive, and deliver these contents to previous subscribers. As is the case with print subscriptions, libraries want long-term archival access to what they purchase.

### **Will BioOne link up with JSTOR?**

JSTOR, short for Journal STORAGE, is a Mellon-funded project that is providing back issues to the entire history of select journals, such as, the journals of the Ecological Society of America. BioOne has been in touch with JSTOR, and we have been discussing the possibility of linking their archival database to BioOne. These discussions are still at a preliminary stage. JSTOR has expressed interest in possibly mounting more ecology and environmental biology journals on its database. We will keep you posted as these discussions continue.

### **What does Allen Press, the for-profit collaborator in BioOne, get out of the arrangement?**

As one of the five founding organizations of BioOne, Allen Press is concerned with the long-term welfare of non-profit societies and associations in scientific and scholarly publishing, for whom they have provided printing and publishing services for over 50 years. They understand that many of the small to medium sized society journals printed by Allen Press cannot afford to do electronic Internet publishing on their own, yet the societies' survival into the 21st Century may depend on making the transition from print to electronic publishing. Allen Press sees BioOne as a way for the societies to make this transition without facing significant financial hardship. Allen Press's investment in BioOne, including its contribution-in-kind of not charging for SGML services (see above for details) is substantial. Like the other four collaborating organizations managing the BioOne non-profit corporation, Allen Press and its appointee to the BioOne Board of Directors does not receive remuneration.

Allen Press is also the primary contractor for BioOne, chosen to fabricate the SGML data and to develop the database, web delivery system, sales, marketing, and cash management. For these services, Allen Press is paid the

market rate, as are other contractors (legal, accounting, etc.). These costs are paid by BioOne directly and do not come out of the revenue sharing monies due the societies.

### **What does AIBS get from BioOne?**

AIBS's role in the BioOne project is that of facilitator to make inclusion in the database available to its member societies and that of gatekeeper to ensure that the journals included in BioOne are peer-reviewed publications from respected scientific societies active in the areas of biology consistent with AIBS's scientific mission and BioOne's market focus.

Like the other four collaborating organizations managing the BioOne non-profit corporation, AIBS and its appointee to the BioOne Board of Directors does not receive remuneration. AIBS does not receive any money from BioOne sales. AIBS will receive (1) its share of revenue sharing based upon the inclusion of its own journal, *BioScience*, in BioOne, and (2) reimbursement of its direct and indirect administrative costs in support of BioOne. These administrative costs are paid by BioOne directly and do not come out of the revenue sharing monies due the societies.

AIBS is pleased to have the opportunity to organize participation by its member societies in this significant project. AIBS aims to serve the interests of the biological research community and to strengthen member society journals by making their contents more widely distributed and read. AIBS also aims to strengthen the bottom line of journals participating in BioOne by providing new revenues to members' publishing programs.

### **My society wants to participate in BioOne--what next?**

Please have an authorized officer of the society sign the Licensing Agreement and return it to AIBS for processing. We can assure you that BioOne's PR outlets, headed by the staff at SPARC, are capable of giving your society a great deal of publicity within and beyond the library community for having signed onto BioOne--witness our placement of articles earlier this year in *Science*, *Nature*, the *Chronicle of Higher Education*, and many other outlets!

If your society currently has its journal(s) composed and printed by Allen Press, the staff of Allen Press will contact your society regarding the next steps. If Allen Press is not your composer and printer, the staff will contact you to discuss the logistics of transferring files over to Allen Press to go online.

Sincerely,

Richard T. O'Grady, Ph.D.  
Executive Director, AIBS  
Member of the Board of Directors, BioOne  
202-628-1500 x 258; rogrady@aibs.org



BioOne  
Electronic Licensing Agreement

Agreement entered into this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ by and between BioOne, a District of Columbia non-profit corporation, with offices at 21 Dupont Circle, Suite 800, Washington, DC 20036 (hereinafter referred to as "BioOne") and \_\_\_\_\_

\_\_\_\_\_,  
with offices at \_\_\_\_\_

\_\_\_\_\_  
(hereinafter referred to as "Publisher"), as the publisher of the journal(s) set forth in Schedule 1: "Included Publications" (hereinafter referred to as "the Publications").

WHEREAS, the Publisher is the owner, copyright holder, and duly authorized publisher of the Publications and wishes to distribute them electronically for searching and retrieval using local and remote terminals and computers.

WHEREAS, BioOne is a non-profit organization under the joint directorship of the American Institute of Biological Sciences, the Association of Research Libraries, the Big 12 Plus Libraries Consortium, the University of Kansas, and Allen Press, Inc., owning, fabricating, and distributing an aggregated, machine-readable, electronic database called the BioOne Database (as defined below), retrievable and searchable of data therefrom using local and remote terminals and computers.

WHEREAS, the Publisher and BioOne wish to provide for the distribution of the Publications as a component of the BioOne Database using the resources, technologies and systems developed by BioOne in connection therewith, under the terms and conditions set forth below.

NOW, THEREFORE, in consideration of the mutual agreements herein contained, BioOne and the Publisher agree as follows:

## **Definitions**

“BioOne” or “BioOne Database” will mean the aggregation of the Publications licensed under this Licensing Agreement as such will be distributed by BioOne to Subscribers and Distributors, and provided for access together with other publications.

“Database Aggregation” will mean an aggregated, machine-readable, electronic database set of retrievable and searchable of data of the Publications, together with publications of other publishers in the biological, ecological and environmental sciences.

“Database Formatting” will mean any activities necessary to manipulate and transform or convert the Publications so that they can be distributed by BioOne in Electronic Media.

“Distributor” will mean any party authorized to resell and/or redistribute the BioOne Database in accordance with the terms and conditions of a Third-party Distribution Agreement, as defined below.

“Electronic Media” will mean those distribution forms used by BioOne to deliver the Publications and other digitized information on local and remote terminals and computers.

“Licensing Agreement” will mean this written document, including all terms and conditions and any Exhibits, Schedules, or Appendices that are attached hereto.

“Publications” will mean the full text of all contents plus digitized images, electronic content codes, and the PDF page images from all issues of the Publications, provided, however, that such may exclude any paid advertisements and other content deemed by BioOne to be excluded in accordance with its criteria and standards consistently applied to all publications in the BioOne Database.

“Revenue-sharing Pool” will mean 50% of the total sum of all “Net Revenue” by which the proportionate and contingent payments to the Publisher will be calculated in accordance with Para. 2.1, and “Net Revenue” will mean gross earned revenue less returns, discounts, credits, allowances, distributors’ commissions, bad debt and sales taxes, as calculated in accordance with generally-accepted accounting principles (GAAP) consistently applied.

“Subscriber” or “Subscribers” will mean any institution, organization, library, consortium, agency or other party named in the “Subscription Agreement,” as defined below.

“Subscription Agreement” will mean a written agreement between BioOne and a third party for use of the BioOne Database subject to the terms and conditions set forth therein, as determined by BioOne, and consistent with the terms and conditions of this Licensing Agreement.

“Third-party Distribution Agreement” will mean a written agreement between BioOne and a party other than the Publisher or a Subscriber for resale and/or redistribution of the BioOne Database subject to the terms and conditions set forth therein, as determined by BioOne, and consistent with the terms and conditions of this Licensing Agreement.

## **1. License Granted**

- 1.1 Publisher grants to BioOne a nonexclusive worldwide license to use, distribute, market, and sell directly or indirectly to Subscribers or to other parties through Distributors, the Publications in Electronic Media in the BioOne Database. This grant applies to the Publications on a per-volume-year basis and is solely for the purposes of fulfilling the obligations of this Licensing Agreement herein.
- 1.2 BioOne acknowledges that all rights, title and other proprietary interests of the Publisher, including but not limited to the Publications’ copyright and trademark will be retained by the Publisher, and that the Publisher will have certain rights of acquisition and use of the Database Formatting in accordance with the terms and conditions of this Licensing Agreement. Each party understands and agrees that no ownership or proprietary rights are conveyed by this Licensing Agreement. BioOne at all times retains ownership of the Database Formatting software, hardware, and delivery systems that it develops for the BioOne Database.
- 1.3 Publisher agrees that once any issue of the Publications has been converted for inclusion in the BioOne Database under the terms of this Licensing Agreement, such will remain a part of the BioOne Database archives and as such will remain available to Subscribers and Distributors, at the option of BioOne, regardless of whether this Licensing Agreement is later terminated as per Para. 6 herein and future issues of the Publications thus cease being included in BioOne.

- 1.4 Publisher agrees to provide to BioOne, at its expense, a computerized, machine-readable file for each issue of each Publication subject to this Licensing Agreement, together with a printed copy or print-out of same, provided, however, Publisher shall be relieved of this obligation if (a) said files do not exist and are not customarily produced by the Publisher or (b) BioOne waives this requirement by written notice. Said files will be provided by online download by or physical media delivery to BioOne in the format and with the coding used for the Publications in the Publisher's ordinary course, whether created and maintained internally or by another party on behalf of the Publisher.
- 1.5 BioOne will incur all content conversion costs associated with converting and coding the Publications from printed form to Electronic Media form as long as Publisher (a) remains a member in good standing of the American Institute of Biological Sciences (AIBS) or is otherwise granted by AIBS, in writing, member-equivalent status for the specific purpose of including the Publications in BioOne (b) **and** also composes and prints the Publications with Allen Press, Inc. Such AIBS members that do not compose and print the Publications with Allen Press, Inc., agree that conversion costs for the Publications will be charged against the Publisher's total revenue sharing as per Para. 2 herein at a price to be agreed to mutually in writing by Allen Press, Inc. and the Publisher at the time of execution of this Licensing Agreement, provided, however, that if the Publisher's share of revenue fails to cover the conversion costs on a cumulative basis, the Publisher will not be liable for the cost difference.
- 1.6 BioOne agrees to make available to the Publisher, at a price to be agreed to mutually in writing by Allen Press, Inc. and the Publisher, the Electronic Media form of the Publications for the Publisher's own use according to the following schedule: (a) if for personal use by the individual members of the Publisher's society/organization, or if for sale by subscription to a single institution, upon the date of inclusion in the BioOne Database; or (b) if for resale to or distribution or use by any other party (including but not limited to a vendor, aggregator, or consortium), within 12 months from said date of inclusion.

- 1.7 Pursuant to Para. 1.6 above, the Publisher may not transfer or distribute or cause to be transferred or distributed the Electronic Media form of the Publications produced for BioOne under this Licensing Agreement to any other party without the prior written consent of BioOne, which consent shall not be withheld unreasonably.

## **2. Consideration**

- 2.1 The Publisher will receive a proportionate share of the Revenue-sharing Pool in accordance with the terms and conditions herein. Said share will constitute the Publisher's entitlement by division of the total Revenue-sharing Pool among all publishers who have licensed the content of their publications to BioOne by a licensing agreement similar in all material respects to this Licensing Agreement. Payment to the Publisher will be determined by multiplying the amount of the Revenue-sharing Pool as of December 31 in any given year by the percentage of contents represented by the Publications in the BioOne Database. Said percentage of contents will be calculated by dividing the total number of printed pages (or 4,666 characters per page, whichever is greater) represented in the BioOne Database into the number of printed pages or equivalent (cumulative total, over volume-years) in the Publications as of December 31 of the year. Accordingly, the revenue sharing payment made to Publisher will be calculated as follows:

Payment to Publisher = Revenue Sharing Pool x (Number of Pages in Publications / Total Number of Pages in BioOne), less (a) the one-time payment in connection with Para. 2.5 below; and (b) any cumulative amount in connection with Para. 1.5 above, if applicable

BioOne reserves the right to renegotiate the above revenue sharing formula with Publisher if (a) in BioOne's judgment the correspondence between a printed page in the Publications and the equivalent of 4,666 characters per page differs significantly or (b) the Publisher ceases producing a print version of any of the Publications.

- 2.2 BioOne will keep such books and records as are required in its judgment to establish the revenue sharing payments due to the Publisher hereunder. BioOne

will allow an independent certified public accountant selected by the Publisher to inspect and audit those of its records that relate to the payment due hereunder in order to verify their accuracy, at any time during regular business hours and with 60 days advance notice, such independent certified public accountant to be compensated by the Publisher.

- 2.3 Within 90 days after the close of each calendar year, BioOne will provide the Publisher with a statement based on the revenue sharing calculation. Such report shall be followed within 15 days by payment of the amount due to the Publisher.
- 2.4 BioOne will have the sole right to determine the prices at which it will make the BioOne Database available to Subscribers and Distributors.
- 2.5 BioOne will pay to the Publisher a one-time flat payment of \$1,000 (US) within 15 days of the date on which the Publisher's Publication(s) are first made accessible online to users of the BioOne Database, and the Publisher's entitlement in accordance with Para. 2.1 will be reduced by the amount of this payment.

### **3. Development of BioOne**

- 3.1 BioOne will be responsible for development and operation of the BioOne Database and electronic access thereto, including but not limited to maintaining and supporting software and converted data from the Publications, and will make available updates or new releases thereof to Subscribers and Distributors, as the data are ready for access or delivery.
- 3.2 The Publisher will not be liable to BioOne for any expenses or charges except as expressly provided for in this Licensing Agreement.
- 3.3 BioOne will maintain telephone support during normal business hours providing assistance to Subscribers for questions related to hardware, software, and business matters.
- 3.4 The Publisher will designate a representative (which it may change from time to time) of its organization to be available during normal business hours to consult

with a representative of BioOne regarding technical, content, formatting, quality control, delivery and related matters when necessary.

#### **4. Proprietary Information**

- 4.1 BioOne will use its best efforts to protect the proprietary position of the Publisher with respect to use of the Publications in the BioOne database. A notice of the Publisher's copyrights, trademarks, and credits will appear conspicuously on the BioOne Database in a location of BioOne's choosing. The Publisher will inform BioOne in writing of its requirements with regard to wording.
- 4.2 Each of the parties hereto shall hold in confidence and not disclose to others all non-public information of the other that is disclosed to it hereunder, as well as the negotiations and terms and conditions of this Licensing Agreement. Each party will follow the same procedures to ensure compliance with this paragraph as it follows to protect its own most confidential and proprietary information. This obligation of confidentiality shall not apply to information in the public domain, information already in the possession of the receiving party prior to disclosure, information disclosed to the receiving party by a third party without breach of confidentiality, or information required to be disclosed by a court of competent jurisdiction. Each party shall be entitled to injunctive relief to enforce its rights under this paragraph, it being understood and agreed that remedies at law would be inadequate.

#### **5. Warranties and Representations**

- 5.1 Publisher represents and warrants that it has full right, power and authority to enter into this Licensing Agreement and that there is nothing known to the Publisher that would prevent it from performing its obligations under the terms and conditions imposed on it by this Licensing Agreement. BioOne represents and warrants that it has full right, power and authority to enter into this Licensing Agreement and that there is nothing known to BioOne that would prevent it from performing its obligations under the terms and conditions imposed on it by this Licensing Agreement.
- 5.2 Publisher assures BioOne that it will not infringe on the copyright of others or submit in the Publications any matter that is libelous or actionable. Publisher shall

indemnify and hold harmless BioOne against any and all such liability, both to BioOne and the public, for the publication of such matter. BioOne may refuse to convert to Electronic Media material deemed to be in violation of this provision. This right of refusal shall not relieve the Publisher of liability both to BioOne and to the public for matter contained in the Publications that may be libelous or actionable.



## **6. Termination of Agreement**

- 6.1 This Licensing Agreement may be terminated by either party on written notice of termination, upon material breach hereunder by the other party or, if such other party fails to cure such default within 60 days after written notice thereof. The cure period stated in the preceding sentence will not apply where the party in breach has exhausted a cure period specifically provided herein in connection with the duty or obligation breached.
- 6.2 The Publisher may terminate this Licensing Agreement if, in its judgment, BioOne fails to perform or to observe any of the obligations and undertakings outlined herein. In the event of termination prior to the completion of the Publications' current volume year, work for such volume-year of the Publications will be completed. Revenue sharing payments to the Publisher will be prorated. The Publisher shall retain ownership of its electronic copy of the Publications already included in the BioOne database prior to termination, including, but not limited to ASCII text, data, select coding (e.g., SGML, HTML), and BioOne shall have the right to continue selling and distributing these issues of the Publication within the BioOne Database archives to Subscribers, with continued revenue-sharing with the Publisher as per Para. 2 herein of revenue derived from subscriptions to those back-issues of the Publications.
- 6.3 Upon termination of this Licensing Agreement, Publisher shall continue to deliver to BioOne publications for such period of time as shall be necessary for BioOne to satisfy all of its contractual obligations relating to the database and to the Subscriber Agreements.

## **7. Severability**

If any one or more of the provisions of this Licensing Agreement will, for any reason, be held to be unenforceable by a court or administrative agency, the remaining terms and conditions hereof will remain in full force and effect.

## **8. Force Majeure**

Neither party will be deemed in default of this Licensing Agreement to the extent that performance of its obligations or attempts to cure any breach are delayed or prevented by unforeseen circumstances or circumstances beyond its control, including without limitation, war, strikes, civil disturbances, natural disasters or acts of God (“Force Majeure”), provided that such party gives the other party written notice thereof promptly and in any event. In the event of such a Force Majeure, the time for performance or cure will be extended for a period equal to the duration of the Force Majeure plus 30 days.

**9. Notices**

All notices required hereunder will be in writing and sent by certified mail to the following addresses:

If to the Publisher,

---

---

---

Tel. (\_\_\_\_) \_\_\_\_-\_\_\_\_.

If to BioOne,  
c/o ARL-SPARC  
21 Dupont Circle, Suite 800,  
Washington, DC 20036  
Tel. 202-296-2296

**10. Entire Agreement**

This Licensing Agreement, the Schedules, Appendices or Exhibits attached thereto constitute the entire agreement between the parties pertaining to the subject matter hereof and supersedes all prior and contemporaneous agreements, negotiations and understandings, or written documents. The Licensing Agreement may be modified only by mutual approval and by an instrument in writing duly executed by both parties

**11. Governing Law**

This Licensing Agreement will be interpreted and enforced according to and consistent with the laws of the District of Columbia without giving effect to the principles of conflict of law thereof.

**12. Resolution of Controversy or Claim**

Any controversy or claim arising out of or relating to this Licensing Agreement, or the breach thereof, will be settled by arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association, and judgment upon the award rendered by the arbitrator(s) may be entered into any court having jurisdiction thereof.

We, the undersigned, fully understand and agree to all terms, statements, and mutually agreed upon modifications contained within this Licensing Agreement. Our signatures hereby represent and warrant that the respective signatures below have been and are on the date of this Licensing Agreement, duly authorized by all necessary corporate action to execute this Licensing Agreement. Mutual consent to this Licensing Agreement, when fully executed by both parties, becomes binding on all parties, their heirs, representatives, assigns, and successors in interest.

Signed,

For Publisher,

---

Signature \_\_\_\_\_ Date \_\_\_\_\_

---

Print Name \_\_\_\_\_ Title \_\_\_\_\_ Telephone Contact \_\_\_\_\_

Publisher is a member of AIBS: [ ] Yes

or has otherwise obtained eligibility to participate in BioOne: [ ] Yes, please explain:

---

For BioOne,

---

Richard O'Grady \_\_\_\_\_ Date \_\_\_\_\_

Member of the Board of Directors, BioOne

Executive Director, AIBS

**Please return signed contracts to AIBS Headquarters (attn: Executive Director) at 1444 Eye St. NW, Suite 200, Washington DC 20005 (tel 202-628-1500 x 258) for processing and forwarding to the BioOne offices.**

**Schedule 1**

**“Included Publications”**

---

Journal Title \_\_\_\_\_ ISSN \_\_\_\_\_ Frequency of Publication \_\_\_\_\_

1.

2.

LAW OFFICES

**JENNER & BLOCK**

A PARTNERSHIP INCLUDING PROFESSIONAL CORPORATIONS

ONE IBM PLAZA  
CHICAGO, ILLINOIS 60611-7602

(312) 222-9350  
(312) 627-0484 FAX

WASHINGTON OFFICE  
401 THIRTEENTH STREET, N.W.  
SUITE 1300 SOUTH  
WASHINGTON, D.C. 20005  
(202) 638-8000  
(202) 638-8085 FAX

LAKE FOREST OFFICE  
ONE WESTMINSTER PLACE  
LAKE FOREST, IL 60045  
(847) 395-9300  
(847) 395-7810 FAX

PAULA COZZI GOEDERT

December 1, 1999

Mr. Peter Studney  
Society for Integrative and Comparative Biology  
c/o Smith, Bucklin & Associates  
401 N. Michigan Avenue  
Chicago, Illinois 60611-4212

Dear Peter:

You asked me to review the proposed contract between SICB and the American Institute of Biological Sciences. I have a few comments.

The main issue I see in this document is that the revenue stream which will be payable to SICB is uncertain, and SICB would have no right to terminate the agreement if it proved unsatisfactory. Section 6.1 provides that SICB would be able to terminate the agreement only upon a "material breach" by BioOne. Since BioOne has few obligations under the agreement, a breach by BioOne warranting termination by SICB is unlikely. This means that, even if the revenue stream is unsatisfactory, SICB will be required to participate in perpetuity.

Section 2.1 defines the revenue stream as a proportion of the Revenue-sharing Pool, based on the total number of pages contributed by SICB compared to the total number of pages contributed by all participants. SICB will have no control over the size of the pool or the number of participants.

The net revenue shared in the pool is defined at the top of page 3 as gross revenues less certain deductions, including distributors' commissions. There is no ceiling on the amount that can be paid as distributors' commissions, and they could be paid to affiliates of BioOne, thus decreasing the Revenue-sharing Pool without decreasing the income to BioOne.

Mr. Peter Studney  
December 1, 1999  
Page 2

I also note that, even if SICB were able to terminate the contract at some point in the future, BioOne retains the perpetual right to include all issues included in the database prior to the termination.

The agreement places no limitation on assignment, which means that the current owners of BioOne could sell it in the future to a less reputable database manager, and SICB would remain bound by the terms of the agreement.

SICB will want to consider these issues before becoming a participant in the BioOne database.

I would be happy to discuss these issues with you or the SICB leadership at your convenience.

Sincerely,



Paula Cozzi Goedert

PCG/wg

**A PROPOSAL TO PUBLISH**  
***AMERICAN ZOOLOGIST***

**ON THE WORLD WIDE WEB FOR**  
**THE SOCIETY FOR INTEGRATIVE AND**  
**COMPARATIVE BIOLOGY**

**Prepared by:**

**Allen Press, Inc.**

**Date:**

**December 2, 1999**

**Version:**

**1.0**



Peter Studney  
Society for Integrative and Comparative Biology  
401 N. Michigan Avenue, 21st Floor  
Chicago, IL 60611

Dear Peter:

Thank you for the opportunity to send you a proposal describing the cost savings made possible for development of a full-text SGML-based journal web site for member access to the American Zoologist based upon the possible participation of The Society for Integrative and Comparative Biology in our BioOne project. BioOne is designed to provide library access to your journal because it is being funded largely by the library community. However, since BioOne and Allen Press would pay for all of the development cost and SGML coding, and part of the implementation cost, your own cost of doing web publishing for your members would be greatly reduced.

The site we would develop for American Zoologist in conjunction with BioOne will contain all of the features and functionality we have built into web sites for the Ecological Society of America, the American Fisheries Society, and other organizations. Many of the key features are listed on the highlights page at the beginning of the proposal. Participation in BioOne reduces the cost of electronic publishing substantially. The development costs of \$12,500 are eliminated entirely and the annual cost is reduced from about \$30,000 to about \$16,000-\$17,000.

I also wanted to emphasize that our proposal includes all of the features of our system, as well as later enhancements that we may add to other new sites as technology develops at no additional charge. I should mention that doing a web site for member access is not a requirement for participation in BioOne, if you feel that library access alone is sufficient.

We encourage you to consider participation in BioOne and allowing Allen Press to develop an individual web site for American Zoologist. If you have any questions after looking over the enclosed materials, please let me know.

Guy Dresser  
Allen Press

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## **1.0 INTRODUCTION**

### **1.1 Background**

The Society for Integrative and Comparative Biology (hereafter referred to as the “Society”) is seeking competitive bids to provide electronic Internet publishing services to its self-published and wholly-owned journal, *American Zoologist* (hereafter referred to as “the journal”). The journal is not currently available in any electronic form.

Proposals are being sought for the following publishing services:

- A) Preliminary specification for SGML and PDF format.
- B) Preparation of text and graphics from printer-supplied digital data for mounting on website;
- 3) Maintenance of website with full text of the journal from month to month;
- 4) Informing the Society of new developments that will improve efficiency or usability of the electronic version of the journal;
- 5) Providing usage reports to the Society;
- 6) Advising the Society on setting up online subscriptions, maintaining website security, and eventually, accepting payments by credit card over the Internet;
- 7) Archiving the journal in electronic form.

### **1.2 Objectives**

The objectives of this Web publishing project are to:

- 1) Establish ongoing Internet Web publishing for the journal.
- 2) Develop and implement a journal DTD based on ISO 12083 DTDs for serial, article, and math.
- 3) Complete a rudimentary pilot of the site to gather feedback from individuals who access the site to help design the optimum Web client interface and other components of the system.
- 4) Establish controlled access to the full-text articles, including tables, equations and figures (black and white, grayscale, and color) based on subscriber information supplied by the Society. This security will be based on a password system.
- 5) After completion of the site, the Society subscribers and non-subscribers will have controlled access to the journal on or around the date of print publication.
- 6) Provide ongoing maintenance, support, and an archive for the site for the duration of the contract period.

### **1.3 Benefits**

Benefits of this project to the Society will be:

- 1) Enhanced research opportunities for all journal subscribers; sophisticated search and retrieval across all the journal.
- 2) Potential of increased revenue for the Society through additional charges to subscribers for on-line access to the journal.
- 3) Higher profile for journal through access to titles and abstracts for non-subscribers, increasing journal marketability.
- 4) Possibility for eventual savings in traditional printing and distribution costs as market for on-line journal access evolves.

## **2.0 WORKPLAN**

### **2.1 Scope**

This on-line publishing project encompasses the following general parameters:

- 1) Publishing all of the full-text articles (including figures) of journal on the Web for up to 1000 printed pages per year for four years.
- 2) Providing SGML to HTML conversion for full text retrieval designed for display on widely used HTML Web clients and a PDF file for print download.
- 3) Designing an SGML-based search engine that searches for character strings in the full-text of all articles across all journal, and can be restricted to any or all of the following elements: journal, issue, title, author (first and/or last name), abstract, key words, article body, and references.
- 4) Providing password controlled access to the full-text articles based on the pertinent subscriber information (individuals and institutions) supplied by the Society from their member and subscriber database to Allen Press in a form that makes it possible to automate the importing of said information into the Allen Press Oracle database. The password security system within the scope of this proposal will turn access on and off based on individual journal subscriptions and the duration of such subscriptions. The system will also permit authorization by recognition of IP address ranges or domain names. The Society and Allen Press may choose to develop a more sophisticated security system beyond the scope of this agreement, and at additional cost.
- 5) Archiving of all journal data (SGML and PDF files, including all graphics) for the duration of this or any extension of this contract between Allen Press and the Society. Said data will be provided at any time at the request of the Society on the media of choice at the cost of time and materials required for transmission. The Society would be entitled to the original SGML, PDF, and graphic data making up the content of the articles. All hardware, software, and programming related to the Web publishing of these articles will remain the sole possession of Allen Press.

*Proposal to The Society for Integrative and Comparative Biology*

- 6) Supporting users and educating them about how the site functions will be provided by Allen Press in the form of on-line documentation. Questions from users related to additional information about or problems with the site will be directed by email to the Society Project Manager, prioritized and filtered to the Allen Press Project Manager via email, phone, or fax. In response to feedback from the Society, Allen Press will provide ongoing support in the following order of priority:
  - 1) Providing immediate “fixes” for errors (within 48 hours);
  - 2) Making “enhancements” for reasonable improvement of the site;
  - 3) Having bi-annual conferences involving Allen Press and the Society project operatives to assess the state of the site.

## **2.2 Approach**

In partnership with the Society, Allen Press will provide a complete solution to publishing the journal on the World Wide Web. Allen Press has adopted a modular, scalable, open architecture designed to bridge the gap between structured document information (SGML) and dynamic Internet publishing (HTML). We want a system that takes advantage of ISO SGML standards—for the long-term viability of the core documents, as well as for the searching and manipulation of highly structured data—and current standard Web protocol, including freely available and widely used Web client software. This architecture was selected because it will allow the system to exploit advances in components of the hardware and software without compromising any of the other components, thereby making the system scalable and providing the Society and Allen Press with the best return on investment.

System proposed will provide enhanced search and indexing capabilities and SGML to HTML interface for full text as well as headers.

During construction of the system, we will be using an evolutionary prototyping approach to designing and implementing the user interface and supporting processes. This phased approach to system development recognizes that the eventual users of the system are the best people to describe how they will want to use it. Accordingly, a pilot phase has been defined during which subject matter experts from the Society will actively participate in defining the structure of the system. Allen Press and the Society will jointly manage this process to ensure the site meets the access requirements of members and that these requirements are kept within the scope of this project. (See **3.1.E** for specifics about pilot feedback.)

## **2.3 System Description**

The architecture of the web site is depicted here in Figure 1. To make the description easy to follow, the components have been divided into three broad categories: front-end processing, database processing, and back-end processing. The components will be described below in terms of those categories.



### **2.3.1 Front-end Processing**

Front-end processing contains those system elements that provide the services of the site to the clients. The elements are as follows:

- 1) **Web Server**—An operating system and associated hardware that mediates multi-client access to an information system using TCP/IP for communications. The Web server will run on a Windows NT platform, a Pentium II, 500 MHz, with 524 MB of RAM, dual processor with a full RAID 5 (Redundant Array of Independent Disks) subsystem comprised of five 9 GB independent disks with four active and one on standby.
- 2) **Performance and capacity** - system will be designed to have no more than 3.0% downtime on average. There will be no greater than 3-second delay in accessing the full text SGML version, assuming the user has a minimum of T1 access and a Pentium processor with at least 500 MHz speed.

- 3) Services—The services essentially are the set of options available to the subscribers and guests for interacting with the site. They are going to be implemented using OmniMark Konstruktor .
- 4) The set of services will be determined by the user interface, which initially will include indexed element searches for character strings (full text, title, author, abstract) by year, journal, volume, and issue. The hits will be in the form of titles and authors and will be linked to abstracts, full-text HTML files, and full-text PDF files (the latter requiring the user to have Acrobat Reader locally).

### **2.3.2 Database Processing**

The database processes will be used to store and retrieve the information relevant to the operation of the web site, namely the structure and content of the journal (including graphics) and client subscription information. Possible future enhancements (beyond the scope of this proposal) would include general user and subscriber activity reports, as well as e-commerce transactions.

There are two components to this category. The first is the ODBC database (Oracle) where the information will be stored and managed. The second component is also a third party software, the “search engine” (e.g., Fulcrum). This suite would provide the front-end processing with the ability to do full-text searches of the articles and abstracts and could be used by the back-end processing to extract and load indices to the articles when they are initially accessioned.

### **2.3.3 Back-end Processing**

These software components are required to prepare the journal and subscriber information for processing. Components written using OmniMark will analyze the content of the SGML headers and/or articles, associated graphics, and PDF files and load them into the appropriate subject areas in the database. The subscriber information would be supplied by the Society and loaded using the native capabilities of the Oracle database.

## **2.4 Tasks**

- 1) Project Management
  - 1) Planning and Organizing—the Allen Press project manager will prepare a detailed plan of the work to perform to develop the fully functional web site. It will contain descriptions of the tasks, organizational structure, and roles and responsibilities.
  - 2) Controlling—a project kickoff meeting (either a face-to-face meeting or a conference call, whichever is more convenient) involving all of the project operatives will be held within two months of the acceptance of this proposal during which the project manager will describe the plan and get formal approval. The project manager will then monitor all activities against the approved plan for the duration of the project and chair regular status meetings to report on progress.

*Proposal to The Society for Integrative and Comparative Biology*

2) Design

- 1) Describe the user interface for the site—existing sites offering a similar service will be reviewed and a list of required and desirable features will be compiled for both the pilot and the final system. The features of the pilot will be selected, the pages will be mocked up, and the behavior of the elements will be described.
- 2) Define the full system functionality—all members of the Society will be invited to visit the pilot site and provide feedback on its structure. In addition, selected subject matter experts will be asked to review the feedback from their peers with Allen Press and assist in defining the final functionality of the site.

3) Construct

- 1) Pilot site construction—based upon the review of existing site, Allen Press will develop a pilot web site with limited functionality that will give members an opportunity to understand how the site will operate and to provide the project with constructive feedback. The titles, authors, abstracts, full-text HTML and/or PDF files of a limited number of articles will be included in the pilot site.
- 2) Install security component—securing access will be constructed and installed after the client design of the site is finalized. Other software components of the site to meet the user interface requirements will be constructed.
- 3) Complete importation of data into database—articles, along with associated graphics, will be imported into the Oracle database for accessibility from client interface.

4) Data Conversion

There will be basically four kinds of data conversion involved. The first will be accomplished using a combination of Penta utilities and a batch graphics converter called Alchemy; the second will be accomplished using OmniMark V.3; and the third and fourth will use the Oracle DBMS.

- 1) Equations, and figures to GIF and JPEG format for display in Web browser.
- 2) SGML files to HTML (on the fly, with possible cache of HTML files for enhanced retrieval speed) for full text.
- 3) Penta to PDF file conversion for print download.
- 4) Subscriber information to Oracle forms for security system.



### **3.0 DELIVERABLES**

#### **3.1 Pilot Web Site**

A pilot Web site giving T1 access, portions of 2-3 journal articles and associated graphics demonstrating the basic capabilities of the system. This pilot will not include any security features.

- 1) Searches across any and all journals by year, journal, and issue based on strings within title, author, or abstract elements.
- 2) A list of hits in the form of titles and authors with the options to see abstract, full-text HTML and full-text PDF.
- 3) Separate delivery of abstracts and full-text articles in HTML.
- 4) Eight HTML pages:
  - 1) opening page with links to current journal issues, general search engine, information about the journal, subscription information, and the Society home page
  - 2) simple search pages where indexed searches are initiated
  - 3) advanced search page
  - 4) current issues page with links to most current TOC of the journal
  - 5) subscriber information
  - 6) list of hits in the form of titles and authors, linked to abstracts, full-text HTML, and PDF files
  - 7) abstract pages where chosen abstracts from titles hot page appear
  - 8) on-line help page explaining how to use the site.
- 5) Feedback from the Society project personnel, subscribers and other visitors to the site during the pilot phase will be handled by the Society project Manager, filtered, prioritized, and delivered by email, phone, or fax to Allen Press. Allen Press will make every effort within a six-week period following the implementation of the pilot site to accommodate those requests for enhancements that fall within the scope of this proposal. Allen Press will provide the Society with a weekly report indicating the list of the fixes and enhancements being worked on based on the list of priorities provided to Allen Press by the Society. The Society will have the option of revising the report if and when the priorities change. Fixes or enhancements falling outside of this period and/or the scope of this proposal will be done at \$120/hour labor for any conversion, tagging, and/or programming required.

**3.2 Phase 2 Web Site**

A phase-two Web site modified and enhanced from the pilot to include features and services within the scope of the project and agreed to by the Society and Allen Press.

**3.3 Phase 3 Web Site**

A phase-three Web site demonstrating all previously agreed to features and services, plus

- 1) A security password system restricting access to the full-text articles to subscribers, both individuals and institutions. See **2.1.D** for a description of the security system within the scope of this project. Additional security features may be added at additional cost after consultation between the Society and Allen Press about specific requirements.
- 2) A firewall system for general security of the site.

**3.4 Final Web Site**

Completion of Web site and functioning security system.

**4.0 SCHEDULE (Target dates to be set at mutually convenient intervals)**

**4.1 Pilot Web Site**

Target Date 1 - See **3.1** for description of deliverable.

**4.2 Phase 2 Web Site**

Target Date 2 - See **3.2** for description of deliverable.

**4.3 Phase 3 Web Site**

Target Date 3 - See **3.3** for description of deliverable.

**4.4 Phase 4 Web Site**

Target Date 4 - See **3.4** for description of deliverable.

## **5.0 HUMAN RESOURCES**

The following is a description of the structure of the Society and Allen Press teams that are required to complete the project:

### **5.1 Society Team**

The Society will provide Allen Press with the names and contact information for the following people:

- 1) Contract Authority—Signs the initial proposal, gives final OK for completion of site before Target Date 4.
- 2) Project Manager—The contact for Allen Press project manager, coordinates the Society response to pilot and subsequent testing and quality assurance, has authority to sign off on phased deliverables, does general coordinating from the Society.
- 3) Project Coordinator—Works under the project manager at the Society as a contact for Allen Press project manager and other operatives.

### **5.2 Allen Press Team**

- 1) Contract Authority—Guy Dresser, [gdresser@allenpress.com](mailto:gdresser@allenpress.com). Guy will be the contact for any issue related to the contract, including the cost of out-of-scope changes or additional features.
- 2) Project Manager—Ted Freeman, [tfreeman@allenpress.com](mailto:tfreeman@allenpress.com). Ted will be the contact for the Society Project Manager on issues related to the system configuration, scheduled deliverables, quality control matters, the feasibility of system modifications, etc.
- 3) WebMaster—Kevin Rainbolt, [krainbolt@allenpress.com](mailto:krainbolt@allenpress.com). Kevin will be in charge of all Web related functions, including the HTML client interface, the conversion of SGML to HTML, the search engine, and the security system.

## **6.0 CONDITIONS**

### **6.1 Changes to the project scope**

These may be proposed in writing by either party. When such a proposal is made, it is the Project Manager's responsibility to assess the impact on the project (i.e., the budget and schedule). Allen Press and the Society must agree to the changes in writing following the Project Manager's assessment before they are accepted.

### **6.2 Acceptance of deliverables**

The Society will formally accept all deliverables by signing an acceptance form provided with the deliverable.

### **6.3 Performance and capacity**

Given the many Internet traffic and performance issues beyond our control, Allen Press cannot guarantee a response time to users of the proposed Web site. What we commit to is direct T1 Internet access linked to a dedicated dual-processor 400-MHz Pentium II server with 512 MB ECC DRAM running Windows NT Server 4.0. This server is equipped with an external hot-shapable level 5 RAID subsystem and an uninterruptable power supply for 24-hour fail-safe operation. Our software scripting and database licensing arrangements include unlimited transactions to allow a larger number of simultaneous users on the system. All relevant data will be backed up on a daily basis.

## SPECIAL FEATURES OF ALLEN PRESS ELECTRONIC PUBLISHING PROPOSAL

- SGML to HTML “on the fly.” Full text resides in an archival SGML database and is delivered as HTML or XML on demand. Can be browsed by standard Internet browsers such as Netscape and Microsoft Explorer.
- SGML is an internationally recognized coding structure that will not change over time, as compared to HTML or PDF which will go through different versions. Your full text data will never have to be changed or migrated to a new format.
- PDF version provided (for print download only) to look just like the journal page.
- Fully supports color and black and white illustrations, as well as display equations and tables.
- More than 4,000 special scientific characters and symbols available (not normally supported by HTML).
- T-1 Internet access for enhanced speed of searching and information delivery.
- Text is fully searchable for word string and indexed searches.
- Password controlled security system with IP address recognition for libraries provided at no additional charge.
- OmniMark programming provides enhanced functionality and searching capabilities, and is scalable to handle future issues and volumes of the journal.
- Email alert system to notify users of contents of issues as they are published.
- Links to Medline and other bibliographic databases.
- Reference links among multiple journals published by a publisher or cooperating publishers.

## OVERVIEW

This system is based on a full text SGML database of all the articles delivered as HTML on the Internet for browsing with NetScape or Microsoft Explorer. SGML is the best way to archive your scientific information for the future because it is designed to be an unchanging data coding structure that is independent of any proprietary or evolutionary platform, such as Adobe Acrobat which reads PDF, or HTML which goes through multiple versions.

At the present time, the commonly available browsers such as NetScape and Microsoft Explorer are not capable of reading SGML. Therefore, the system offered in your proposal converts SGML to HTML “on the fly,” with all special characters, math, equations, tables and graphic information present in the file and viewable. It also includes a PDF version which looks just like the journal page, but is intended primarily for use as a print download medium. This is the “Cadillac” approach to electronic publishing. It will allow enhanced searching and indexing capabilities and provide an electronic publishing platform with open architecture scalable to future volumes and years of the journal.

This proposal includes a full-blown password security system that will distinguish between subscribers based on individual journal subscriptions and the duration of such subscriptions - See Section 2.1(D).

We believe that Allen Press provides the most intelligent and complete solution for electronic publishing for your journal.

FULL-TEXT ELECTRONIC PUBLISHING PROPOSAL  
 AMERICAN ZOOLOGIST  
 (This proposal assumes that The Society for Integrative and  
 Comparative Biology enrolls the publication in the BioOne project)

FEES

1999

Programming and development leading to pilot		\$12,500.00
Omnimark programming (SGML to HTML)		
Design data model and Oracle database		
Design Web interface		
Develop security system		
Install NT server		
Provide T1 Internet access		
LESS - in-kind contribution paid by BioOne project		(\$12,500.00)

TOTAL		\$0.00
-------	--	--------

2000

Implementation		
SGML code	1000pages @	\$5.75
LESS - in kind contribution from Allen Press		(\$5,750.00)
Import	1000pages SGML/PDF/graphics into database @	\$8.50
Fixed costs		\$14,890.00
LESS - in kind contribution from BioOne		(\$7,445.00)
Maintain Oracle database		
Maintain Web server		
Maintain archive		
Maintain security system		
Provide customer support and education		

TOTAL		\$15,945.00
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2001

Implementation		
SGML code	1000pages @	\$5.75
LESS - in kind contribution from Allen Press		(\$5,750.00)
Import	1000pages SGML/PDF/graphics into database @	\$8.80
Fixed costs		\$15,340.00
LESS - in kind contribution from BioOne		(\$7,670.00)
Maintain Oracle database		
Maintain Web server		
Maintain archive		
Maintain security system		
Provide customer support and education		

TOTAL		\$16,470.00
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(cont.)

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FULL-TEXT ELECTRONIC PUBLISHING PROPOSAL  
AMERICAN ZOOLOGIST  
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2002

Implementation			
SGML code	1000pages @	\$5.75	\$5,750.00
LESS - in kind contribution from Allen Press			(\$5,750.00)
Import	1000pages SGML/PDF/graphics into database @	\$9.10	\$9,100.00
Fixed costs			\$15,800.00
LESS - in kind contribution from BioOne			(\$7,900.00)
Maintain Oracle database			
Maintain Web server			
Maintain archive			
Maintain security system			
Provide customer support and education			
TOTAL			<hr/> \$17,000.00

2003

Implementation			
SGML code	1000pages @	\$5.75	\$5,750.00
LESS - in kind contribution from Allen Press			(\$5,750.00)
Import	1000pages SGML/PDF/graphics into database @	\$9.40	\$9,400.00
Fixed costs			\$16,270.00
LESS - in kind contribution from BioOne			(\$8,135.00)
Maintain Oracle database			
Maintain Web server			
Maintain archive			
Maintain security system			
Provide customer support and education			
TOTAL			<hr/> \$17,535.00

Additional charge if number of pages exceeds 1000  
    \$5.75/page SGML  
    \$8.50/page implementation

All fees are exclusive of applicable taxes.



(cont.)

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FULL-TEXT ELECTRONIC PUBLISHING PROPOSAL  
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BASIS OF PAYMENT

Payments will be made according to the following schedule:

Development costs - NA, prepaid by BioOne

SGML coding - NA, in kind contribution by Allen Press

2000	Quarterly payments beginning January	2000	\$3,986.25
2001	Quarterly payments beginning January	2001	\$4,117.50
2002	Quarterly payments beginning January	2002	\$4,250.00
2003	Quarterly payments beginning January	2003	\$4,383.75

## SENT TO PRESIDENTS OF SELECTED AIBS MEMBER SOCIETIES

14 December 1999

Dear Colleague:

We are writing to invite your society, as a member organization of the American Institute of Biological Sciences (AIBS), to participate in a reformation of the annual meeting of the Society for Integrative and Comparative Biology (SICB). Some background is relevant:

In 1996, the American Society of Zoologists changed its name to the Society for Integrative and Comparative Biology (SICB). As this society had little representation from the plant and microbial communities, the name change represented a desired future rather than a current reality. Since then, SICB has been searching for ways to become what its name implies.

Prior to 1999, AIBS hosted each summer a large and diverse meeting of integrative and comparative biology societies, including various botanical, ecological, and microbial components. For the participating societies, this annual AIBS meeting was also their annual meeting. AIBS has now suspended this meeting format for the foreseeable future in favor of smaller AIBS annual meetings focusing on specific topics and not incorporating member-society meetings and their contributed paper sessions. The first AIBS meeting of this nature is in March 2000.

We suggest that expanding the annual meeting of SICB to include other AIBS groups may represent an opportunity both to achieve the integrative goals of SICB and to provide an appropriate venue for certain AIBS member-societies wishing to make their annual meeting part of a multi-society meeting of complementary scientific themes.

We propose that the reformation occur in three stages. We tentatively schedule these for 2001, 2002, and after 2002, with the foreknowledge that this timetable may be too ambitious and may need to be pushed back one year. In STAGE 1, individual members and officers of relevant AIBS member societies would be invited to join the 2001 SICB Annual Meeting in Chicago, IL, 3-7 January 2001. This would provide scientists and educators from AIBS member societies an opportunity to assess the suitability of the SICB meeting for their needs and to influence the course of the 2002 meeting. AIBS formally would be a "co-sponsoring organization".

In STAGE 2, interested AIBS member societies and SICB would meet together on a one-time, trial basis in Anaheim, California, 6-10 January 2002. To reflect that the participating societies would be meeting as equals, at least this once, the meeting would be re-named "Integrative and Comparative Biology 2002" (ICB2002). Participating societies would be able to have their own sessions/functions and/or join in a common, taxon-independent program structured around major themes and topics in integrative and comparative biology.

STAGE 3 would involve an assessment of the success of these meetings and a determination of whether any or all participating societies wished to meet together in the future, either regularly or occasionally, or go their own way. SICB is presently contractually obligated to meet at the times and places specified above, but would be willing to consider an alternative meeting time in Stage 3.

Several features of SICB and its meetings make this proposal plausible. First, SICB has an existing Divisional structure. Divisions are in essence small topical societies within a larger SICB. SICB is familiar with balancing the needs of these Divisions for individual functions/program and for inter-Divisional and plenary events, and presumably could do the same for participating societies. [In fact, it has already done so, and will do it again at this year's meeting, which is co-sponsored by the Animal Behavior Society, American Microscopical Society, International Society for Invertebrate Reproduction and Development, Society of Vertebrate Paleontology, and The

Crustacean Society.] Second, the SICB meeting is arranged thematically. Those submitting communications choose from a list of topics, and communications on similar topics are clustered regardless of the Division or Society of origin [except when Divisions or Societies prefer their own sessions]. It is readily possible to adjust these topics to accommodate the needs of participating societies.

We recognize that, before any of our societies can respond to this proposal, many additional details are necessary, including financial arrangements and the likely size of the resultant meetings. However, because many societies are now developing meeting plans for 2002, we wanted to provide you with a partially-developed proposal as soon as possible. If you believe that your society has sufficient interest in this proposal to be kept informed of or participate in its further development, please let us know. It is expressly understood that your expression of interest commits neither you, AIBS, nor SICB to the plan proposed above. If you are interested, please let us know how many of your members might participate in an ICB2002 meeting, additional information you'd require to reach a decision, and the date by which you feel you'd need to reach a firm decision on your society's 2002 meeting plans. If your society is not interested, it would be helpful to learn that from you too.

Thank you for taking the time to consider this proposal.

Sincerely,  
Martin Feder (for SICB) and Richard O'Grady (for AIBS)

December 17, 1999

Professor Martin Feder, President  
Society for Integrative and Comparative Biology  
Department of Organismal Biology & Anatomy  
The University of Chicago  
1027 East 57th Street  
Chicago, IL 60637 USA

Dear Martin:

I write to report on the state of the Division of Integrative and Comparative Issues (DICI), which, unhappily, is quite bad. As you know, this division was created out of the earlier division of History and Philosophy of Biology. Unfortunately, writing from my sabbatical position, I do not have the precise details of the transition available, but it is now, I believe, three years since the creation of DICI. That transition, I believe, has been a failure. Allow me a brief account of our situation.

One consequence of the transition is that SICB has lost virtually all those members who are primarily historians and/or philosophers of biology. We probably would have lost them in any event, for the price of the SICB meetings is far greater than the cost of meetings of the societies in their disciplines, and for most of them this was a secondary meeting. At the same time, the leadership of the division continued to draw heavily from the remaining few historian-philosophers of biology. When I became chair of the Division, the previous Division Chair (a historian of biology) left the Society because of multiple obligations in other directions, the high costs, and the paucity of events of direct interest to her professionally. Shortly after, I discovered that the Division's Program Chair (another historian) had left the Society for similar reasons, so I acted in his stead. Our Secretary, Joe Graves, gracefully agreed to stay on for a second term due to a lack of volunteers and the Division's failure to have conducted an election.

I had expected to be proactive as Division Chair, attempting to reinvigorate the Division by activating its intended primary membership, mainly biologists with a strong secondary interest in overarching integrative and comparative issues. Due to a series of personal circumstances and unanticipated pressing commitments, I did not manage to do any of the things I had hoped. Neither Joe Graves nor I were able to engage with the Division's business as would have been needed if we were to have any chance of drawing the membership into divisional activities. In consequence of the situation we inherited and our inactivity, we found no candidates to stand in the recent round of elections, and the Division will have no officers as of the end of the Society's current meeting.

What should the Society do in the circumstances? It could put the Division into some sort of receivership and attempt to resuscitate it. It could seek a more promising way to coordinate the very strong interest among its members in addressing integrative and comparative issues that would otherwise fall between cracks given the current divisional structure by creating some new vehicle for that purpose. Or it could decide that no special structure is required for the

purpose.

Before speaking briefly to this question, it is worth adding one more bit of background. In spite of the Division's inactivity, there remains strong interest among the Society's members in having some outlet or vehicle for addressing integrative and comparative issues outside the programs of the other divisions. The clearest evidence for this is that there still are about 200 members of the DICI in spite of the Division's relative invisibility in the affairs of the Society. At the same time, virtually all of these are secondary members of the Division; most of them do not submit papers or posters to the Division. Typically no more than five attend its business meetings.

I believe that it is not worth trying to rescue the Division as currently conceived. I know of no cadre of people within the Society that is ready and able to invest themselves in making the Division play the role that the Society and many of its members would like. If I am wrong about this, then it would be worth a try, but unless specific individuals are identified who really want to take charge, the Division is moribund. Perhaps the way SICB has restructured the program of the meetings – i.e., with topical sessions not tightly tied to the Divisional structure – will satisfy the latent interest indicated by these mixed signals from the membership by. But I DO believe that it is worth exploring other options. I am inclined to think that SICB needs, and would profit from, some sort of vehicle for highlighting integrative and/or comparative issues that are not readily captured within any particular division but that are salient to the membership and address situations (intellectual and practical) faced by biology. Perhaps what is needed, rather than a division, is some new Society tradition – e.g., establishing a keynote symposium on an integrative or comparative issue, funded by the Society, awarded competitively to the best proposal from the membership. Since many of the most important integrative issues in biology need to be raised ad hoc, when the time or the situation is right, such a mechanism offers some promise of finding the right people at the right time to push an issue forward without getting the Society committed to a Division that, apparently, will be of real, but secondary, interest to its members.

I regret not having been able to do better by the Division for SICB and its members, but I do believe that the problem is a systemic one and that it needs to be addressed as such by the Executive Committee.

Yours sincerely,

Richard M. Burian  
Chair, DICI

## PROPOSED CHANGE IN SICB BYLAWS

The Bylaws, Article XIV (Program Rules) state the following:

Section 1. Titles and abstracts of papers to be presented in person at meetings of the Society must be sent in duplicate as specified on the transmittal blank on or before a stated deadline date. The length, form, and arrangement of abstracts must conform to regulations set by the Program Officer.

Section 2. Aside from a single abstract presented to the Division of Integrative and Comparative Issues and/or a session on Innovative Teaching in Biology, a member may submit no more than one abstract at one meeting of the Society.

Section 3. Except when specifically invited or required to present a major address, except for a paper presented before the Division of Integrative and Comparative Issues and/or a session on Innovative Teaching in Biology, a member shall be entitled to no more than fifteen minutes at any one meeting for the presentation of a paper personally or through introduction of a non-member. If a member is unable to present a paper accepted on the program, a substitute should present the paper.

Section 4. A member who sponsors a paper by a student member shall not have the normal allotment of time curtailed by such sponsorship.

Section 5. A non-member of the Society may present a paper at a scientific session of the Society, if (a) a joint author with a member, or (b) introduced by a member, or (c) a member of an organization which is sponsoring a joint session with the Society or one of its Divisions, or (d) a member of an organization in another nation which has extended privileges to the Society or to any one of its Divisions. In the latter case, negotiation of such privileges may be made by either the President of the Society or by the Chairperson of a Division, the arrangement to become official upon approval of the Executive Committee.

Section 6. Members wishing to organize a symposium should have their plans approved by the Program Officer and Chairperson of a sponsoring Division of the Society, and they should comply with instructions on procedure available from the Program Officer and Executive Officer. If financial support is needed, application should be made to some granting agency, or to the appropriate Divisional Chairperson, or to the President of the Society. If royalties are expected from the publication of a symposium sponsored by the Society and supported by funds derived from the Society membership dues, disposition of these royalties must be arranged by prior negotiation between the symposium organizers and the President and Program Officer.

The proposal is that the entire article be replaced as follows:

Section 1: In advance of each meeting of the Society, the Program Officer, in consultation with the Divisional Program Officers and Program Advisory Committee, shall propose the Program Rules to the Executive Committee. The Executive Committee may accept or modify these rules. The prevailing Program Rules shall be included in each call for presentations at the succeeding meeting.

Section 2: The Program Rules shall specify: (a) the requirements and procedures for abstract transmittal; (b) the number, nature (oral, poster, and/or other), sponsorship requirement, and duration of presentations for each class of member and for non-members; (c) the exceptions to these rules, if any, for participants in special program events such as major addresses, plenary lectures, symposia, and workshops; (d) the exceptions to these rules, if any, to encourage presentations in specific areas of the meeting program; (e) the exceptions to these rules, in any, to accommodate specific needs of each Division or changes in presentation technologies; (f) the application of these rules to members of organizations that are sponsoring a joint session with the Society or one of its Divisions, or organizations in another nation that have extended privileges to the Society or to any one of its Divisions; and (g) any other matters that may affect the conduct of the meeting.

Section 3: Negotiation with other organizations for privileges for presentations at meetings of the Society may be made by either the President of the Society or by the Chairperson of a Division, the arrangement to become official upon approval of the Executive Committee.

Section 4. Members wishing to organize a symposium should have their plans approved by the Program Officer and Chairperson of a sponsoring Division of the Society, and they should comply with instructions on procedure available from the Program Officer and Executive Officer. If

financial support is needed, application should be made to some granting agency, or to the appropriate Divisional Chairperson, or to the President of the Society. If royalties are expected from the publication of a symposium sponsored by the Society and supported by funds derived from the Society membership dues, disposition of these royalties must be arranged by prior negotiation between the symposium organizers and the President and Program Officer. [This is the existing Section 6 unchanged]

The rationale for the proposed change is that it would permit the Program Officer and Executive Committee to modify the "Program Rules" (i.e., who may present what at the Annual Meeting) without asking for a change in the Bylaws every time such a change is implemented. For example, the Executive Committee has already been asked to change the number of abstracts a member may submit (FROM one TO one oral presentation and/or one poster presentation) and to enable members to sponsor the abstracts of non-members without sacrificing their own right to present a paper; if the Executive Committee agrees, this change would be implemented contingent upon your approval of the bylaws change. Arguments in favor of the bylaws change are that it would permit the program to be changed without bothering the members, and more rapidly than the time required to obtain mail ballots. Arguments in opposition are that these bylaws have served SICB well for many years, that the resulting changes could make the program worse rather than improve it, and that the program rules could be changed by the Executive Committee rather than by vote of the entire membership.

## **Report of the Electronic Communications Committee**

**25 May 1999**

### **Preamble: Charge to the Committee**

"During the past few months there's been quite a bit of comment and question about the SICB Website. In particular, there have been numerous proposals for the website's functionality to be changed or for additional materials to be added. Seldom do these proposals not involve \$\$\$, of which SICB lacks an unlimited supply. Rather than dealing with these proposals on an ad hoc basis, I'd like to have SICB have some guiding policy (which it presently lacks). I am writing mainly to inform you of some of the issues that need to be considered in developing this policy so that you can see them for yourself and realize why we've not made more rapid progress.

Before discussing this further, let me introduce the principals and principles so that we're all "on the same page":

Smith-Bucklin (SBA) is the company that SICB employs to operate the Business Office. A division of SBA, named NEOLOGY, offers website management and programming on a fee-for-service basis. In recent years, they have managed and programmed for the SICB website, and SICB's annual budget includes a line item allocating \$\$ for this purpose. SICB is not obligated to hire Neology to operate its website; this has come about more or less by default and because of its convenience to the Business Office. Neology is eager to do whatever SICB asks of it, but (1) they will bill SICB for additional activities and (2) they have many other clients, so immediate attention to SICB's needs may be extra costly and not always possible. Constitutionally speaking, directing Neology to do anything beyond that provided in our annual operating budget is an "unbudgeted expense" requiring approval of the President and/or Treasurer and/or Executive Committee. Thus, SICB members cannot unilaterally make changes to the website, and the Business Office has been directed to refer to me all such requests that might constitute an unbudgeted expense. If you do want something posted on the website, the correct route is to email it to the Business Office at sicb@sba.com. They will either hold it until the next time routine site maintenance is done or forward it to me to begin the unbudgeted expense approval process. Thus, don't send things directly to Neology; they are not authorized to deal with it without prior Business Office approval. Also, if anything is not to your liking, blame it on me rather than on Neology. IMHO, HTML and website management are simple to do but sometimes time-consuming. On this basis, it is entirely possible for members to create and manage SICB web pages, either on their own hosts or on SICB's. This costs SICB little or nothing, and we can readily include links to such pages on other hosts. While we're on the subject of costs, costs come from member dues. Members are unhappy about the present dues rate, and increasing dues probably has a negative impact on the size of the membership.

Having said that, here are the options that SICB as a whole has open to it:

- (1) We can greatly increase the \$\$s allotted to Neology for web activities, both as unbudgeted expense and as a line item in the budget. The Treasurer at this point will appropriately raise the question of where these \$\$ will come from.
- (2) We can turn to another cheaper website provider. We've had occasional indications of interest from SICB members who would be willing to operate the site, either gratis or for a lesser fee, but these have uniformly not panned out. This is not to say that it couldn't work out.
- (3) We can ask SICB members or committees to manage/revise/program particular pages.



(4) We can ask SICB members or committees and Neology jointly to manage/revise/program particular pages.

(5) We can maintain the status quo.

Deciding among these alternatives requires information on costs, financial resources, member willingness to volunteer, member reliability, and member expertise. I'd say that the largest judgement call to make concerns member reliability. Our members have many other functions they need to perform and deadlines that they need to meet. If members are willing to be responsible about performing duties they agree to do, then we have more options. If members become irresponsible whenever a grant is due or they need to prepare to teach a new course, etc., it may be more prudent to contract with Neology to perform website functions. If so, financial considerations may dictate that we limit the size/scope/functionality/innovativeness of the website."

## **Section A. Background**

Whether we want it or not, most communication in the future will be via electronic means. Thus as a scientific society it makes good sense to identify a coordinated pathway that our electronic communications will follow rather than to haphazardly have those pathways develop in a random fashion. As cash flow and budgetary matters have always been problem areas for the society, it also makes sense to adopt electronic means of communication as a way of saving money.

We have broken the roles of electronic communication into three areas: the website, the listservers, and e-mail. We list below the functionalities that we believe each aspect should supply to both members and non-members.

**The website is our gateway to the world. It should indicate our purpose, our history, and aid both members and non-members in accessing information about the society and its goals.**

*For members the website should provide the following functions:*

accurate listing of society member benefits

announcement of society meetings (past, present and future)

registration for society meetings

information on how to organize, propose and publish society or divisional symposia

submission of abstracts for annual meetings

access to abstracts and schedules for annual meetings

access to the *American Zoologist*, both current and past issues

access to present and past newsletters and other society documents

access to divisional homepages

ability to pay dues via the internet

access to phone numbers, e-mail and regular address information, divisional affiliations, etc of society members

list of listservers maintained by the society with information as to contents, how to subscribe and unsubscribe, how to check archives, etc.

a) up to date job postings (via listserv--see section below)

b) up to date funding opportunities (via listserv--see section below)

c) up to date "member alerts," (important legislation), including a link to a page describing how to contact your congressman/senator, and letter format for doing so (part of this function can be accomplished via the website and part via a listserv)

education page to help with the teaching of biology and subdisciplines associated with the society; members could post successful lab exercises, etc. (could be organized by division)

ability to purchase society goods (mouse pads, coffee cups, videos, etc.)

For non-members

To show the world who we are and what we do

Contacts for further information about the society

Positions the society has taken on a number of matters (biodiversity, role of lab animals, etc.)

Ability to join the society and subscribe to its publications

Ability of the general public to buy items that might be useful in the teaching or understanding of biology (e.g., society sponsored videos, publications about biology as a career, etc)

Listing of the contents of the current issue of the *American Zoologist*

Ability to search past issues of the *American Zoologist* for articles of interest (titles and abstracts provided for visitors, full contents for members)

Links to homepages of closely related societies and links to "biology" portal pages (e.g., UC Berkeley Paleomuseum, Harvard's biology page)

For members of the press/science writers: listing of members organized by research interest (since our membership list would be only open to current members, there would have to be some sort of provisional registration for this to take place)

## **Listservers**

Listservers and e-mail functions are closely related. Essentially the main difference is that one subscribes to a listserv but for e-mail, one passively receives the e-mailed items. We believe that there should be one society-wide listserv for general matters pertaining to society. Upon joining the society, one would be automatically subscribed to that listserv. Each person then would have the option of unsubscribing if so desired. The society would use this listserv very sparingly. Possible uses would be: society wide notifications on important pieces of pending legislation before national and state bodies, announcements of coming meetings and deadlines associated with same (with links to additional details on homepage), and special notices (links to reports of importance to the whole society, etc).

There should also be divisional and committee listservers (e.g., a listserv dealing with the teaching of college level biology/zoology courses, a listserv for the teaching of invertebrate zoology, etc.). Because notices of jobs and positions are essentially dynamic, there should be a listserv for same rather than posting the job notices on the website. Thus individuals interested in reading such information could subscribe or unsubscribe as needed.

## **E-mail**

E-mail should be used for communication between members. Thus we suggest that members be able to search the membership database for e-mail and physical address data. The business office would use e-mail for reminders associated with continued membership in society (with links to additional details on homepage), change of address matters, confirmation of registration information, etc.

## **Section B. Committee Proposal**

1. Wherever and whenever possible, the society should use electronic means of communication. There are a number of reasons for this, but the main two are immediacy and cost. With this caveat, we should not disenfranchise those members who lack access or who are philosophically opposed to such means. They should have the option of receiving paper copies of all documents sent electronically.

2. We propose that the society add a new officer and a new committee to its roster. We call this position "Editor of Electronic Communications". The position would involve the following duties: over-all design and maintenance of the society webpage and organization and coordination for society-based listservers. This position would be equivalent to that of editor of the *American Zoologist*. The Electronic Communications editor would be advised by a separate and distinct Electronic Communications Committee (essentially the same body that is making this proposal plus some other members as indicated below). The individual would sit on the Editorial Committee for the *American Zoologist* and the editor of the *American Zoologist* would be a member of the ECC. The EC Editor would not necessarily be the webmaster, but would be responsible (along with the ECC) for hiring the webmaster. The first duties of the EC Editor and ECC would be to analyze the suitability and costs of the 'neology' group as maintainer and webmasters of our present website. They would thus be responsible for decisions related to the actual location of the webserver and the society and divisional/committee listservers. We see all the duties of this person very closely aligned with the way the editor of the *American Zoologist* works. The AZ Editor has professional assistants for editing submitted manuscripts, a professional firm for publishing those submissions, other agents for distributing the published journal to members of the society and to the subscription list, contacts to see that contents of the journal are extracted and placed in various databases, etc. The position of EC Editor would be filled in the same manner that the position of Editor of the *American Zoologist* is filled. The EC Editor would have a line item budget (we assume at this time the amount of money provided SBA for regular and incidental expenses) and would allocate those funds as needed for design and maintenance tasks. The only access to the website for changes would come through the EC Editor as advise by his/her committee, but that individual would see to it that individuals associated with specific aspects, e.g., dues, updates for the *American Zoologist*, registration information for meetings, could make those changes.

Each of the divisions can or would appoint one member to the ECC. This could be an existing officer, e.g., secretary or chair, or a new officer. This person would have the duties of maintaining the divisional homepage (if the division desired to do this--not every division may want to have a homepage). These homepages though, would fall within the design constraints imposed by the EC Editor and the ECC. Another member of the ECC would be the program officer. The EC Editor would be a member of the SICB Executive Council.

3. Whether the society decides to adopt proposal number two, we recommend the following items be acted upon in the intervening time. We suggest that the present informal electronic communications committee be designated to work with the "neology" group to refine and rework components of the web. These changes might include: investigating the use of Adobe Acrobat to produce "pdf" files for the next newsletter, increasing the options for submission of abstracts for the next meeting, working with the editor and editorial board of the *American Zoologist* to get more of that journal online, and simplification and reworking of the present website to increase its utility value. We also suggest that for the purposes of maintaining our historical records, that all officers and all committees be urged to send a copy of relevant e-mails to the Archivist. To do this, the society needs to immediately construct a mailbox, preferably archives@sicb.org and for the President or Archivist to send a message asking all individuals and committees to add that mail location to all mail and distribution lists. The Archivist should have access to that mailbox to retain or discard received e-mails. We should probably contact the Smithsonian Institution for more suggestions on this matter.

### **Section C. Outcomes of this proposal.**

We feel that there should be one individual in the society with the responsibility for all matters pertaining to electronic communications. Putting those duties on the shoulders of one individual and an advisory committee will bring unity to society endeavors in electronic communications. There will still be costs associated with maintenance of the membership databases by SBA and on-line payments (dues, registration fees, etc.), but at the same time there should be some savings and those savings could be put towards decreasing the registration costs for annual meetings. Utilization of electronic means of communication about the annual meeting (listing of talks, abstracts, etc) might encourage more members to attend or to know what went on if unable to attend. . If the SICB President and advisors feel that our proposal has merit, we will need to change our by-laws (this would involve describing the duties of the editor and the associated committee) and propose a tentative budget for the coming year. We are willing to provide details on both matters.

As to the two items listed in proposal 3, we feel it is important to make some decisions concerning the website and electronic communications in the immediate future and not wait until an editor of Electronic Communications is appointed. We don't feel that we should be making so momentous a decision as to relocate the website at this time. The appointed editor will have to analyze all aspects of this matter before proposing such a change.

The society does have an archivist. In the past officers and committees have sent materials to that person (or actually to the archives location). Now that we are in an electronic age, we need to adopt new methods to record our past. By having all officers and committees send e-mail to the archive mailbox, we will at least be saving some of the kinds of information that future historians and sociologists of science might find useful in their analyses as to how scientific societies function.

### **Postscript:**

This report was accepted by the Executive Committee and, in response, a society-wide email called for applications/nominations for the post of Electronic Communications Editor. The President thought that implementation of the other recommendations should await the appointment of an Electronic Communications Editor. Essentially no responses to the ad were received. In the meantime, several members of the Electronic Communications Committee (Alistair Cullum, Wes Grueber, and Ruediger Birenheide) spontaneously created an Atlanta meetings website, gratis. If SICB changes management, there will obviously need to be some provision for a website. The President has been in communication with the aforementioned members, the American Zoologist editorial consortium, and AIBS regarding provision of web services. The following request for proposals has been constructed:

SICB would be interested in receiving 3 bids. You would be welcome to bid on one, some, or all of these.

#1

Scope of bid: The entire content of <http://www.sicb.org/> AND <http://daphne.bio.uci.edu/> hosted on a reliable server and maintained as necessary.

INCLUDING:

"Business Office Feedback" automail directing member complaints to Business

Office

ADDITIONAL FEATURES WANTED:

page design more modern/sexy than <http://www.sicb.org/> and more like

<http://daphne.bio.uci.edu/>

searchable/editable online membership directory a la

<http://12.17.12.70/fasebdir/SearchMemb.asp?TSK=> except with active

links to member webpages

member survey page that tabulates/reports results

form that receives student applications to grants-in-aid program and letters of reference for applicants

ITEMS TO BE EXCLUDED FROM BID:

the secure form for membership application/renewal with credit card payment

the secure form for abstract submission with credit card payment

the secure form for meeting registration with credit card payment Questions:

1. What would your policy be on adding/revising materials? Would authorized clients be able to write and post their own html and modify existing pages? Would the webmaster need to do this? If so, would it be the client's job to prepare html, the webmaster's, or both?

2. What would your standards be for site reliability, site maintenance, and responsiveness to client needs? What personnel would be working on the site? How would their activities be coordinated? How would you assure reliable service during illness, vacation, etc.?

3. Please describe your current level of expertise and training you have received.

4. Please describe the server on which the site would be maintained, its capacity for speed and reliability, and its provisions for security.

5. Please describe your capabilities for inserting banner ads, which would be an additional source of revenue for SICB.

#2

Scope of bid: The incremental/added cost of establishing the following in addition to #1

A home page with links to 4 major areas of Society activity:

a. Membership: the material in bid #1

b. For researchers and trainees

c. For educators

d. For the media and public

The "For researchers and trainees" page would link to a site much like [http://daphne.bio.uci.edu/schedule/SearchTerms.php3?myschedule= VISITORS](http://daphne.bio.uci.edu/schedule/SearchTerms.php3?myschedule=VISITORS) to the site would be able to search on research interest, research organisms, research expertise, specialized/unusual research equipment, offers to collaborate, collaborations wanted, and latest research findings. The search would return contact information for members who match the criteria. MEMBERS ONLY would be able to submit information in each of the preceding categories into the searchable database. Submission should be automated and password-protected. There would also be links to both SICB's and others' materials related to research and training. It should be possible for authorized users to submit link titles and URLs on an automated, password-protected basis.

Similarly, the "For educators" page would link to a site much like [http://daphne.bio.uci.edu/schedule/SearchTerms.php3?myschedule= VISITORS](http://daphne.bio.uci.edu/schedule/SearchTerms.php3?myschedule=VISITORS) to the site would be able to search on appropriate educational topics and keywords. The search would return contact information for members who match the criteria. MEMBERS ONLY would be able to submit

information in each of the preceding categories into the searchable database. Submission should be automated and password-protected. There would also be links to both SICB's and others educational materials. It should be possible for authorized users to submit link titles and URLs on an automated, password-protected basis.

The "For the media and public" page would consist primarily of stories/press releases written for non-scientists on the activities of SICB members. It should be possible for authorized users to submit link titles and URLs on an automated, password-protected basis.

#3

Scope of bid: Full-text and graphics online version of American Zoologist, fully searchable, with individual papers downloadable as PDFs. See, for example, <http://www.journals.uchicago.edu/PBZ/journal/index.html>

Question: How would you obtain and format the electronic text to achieve such a site?

# Memo

To: SICB Executive Committee  
From: Electronic Communications Committee  
Date: 12/17/99  
Re: Report to the Executive Committee

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We need your input. This past year we worked on how the society should organize and control its electronic communications. We came up with a number of suggestions, that we presented to Martin Feder and to some of you this past summer in the form of our final report. One of our main recommendations was for the society to have one person in charge of electronic communications (web site, listerservers, etc). We proceed to develop that concept and put out "an-all-points" bulletin asking for a volunteer. Unfortunately, no one volunteered. Some of our other suggestions, particularly those relating to the web site have transpired. There was an on-going experiment with submitting materials for the January meeting through a web server at Irvine. A couple of members have also developed alternative web pages for the society, which the members of the committee have examined and analyzed. At this point, though, we have not done much else, as all of our plans were tied up in having one person spearhead issues dealing with electronic communications.

Some ideas:

1. Should we continue to pursue the concept of one person to head up this vital area or should we forget the idea and instead recommend the establishment of a permanent "Electronic Communications Committee" which would do most of the duties we envisioned for the single person.
2. Should we forget about the whole idea? Has the playing field so changed, that we as a group are no longer necessary and a czar of electronic communications is superfluous.
3. Should some of the things we envisioned for the czar(editor of Electronic Communications) be folded into the work of the editor of the *American Zoologist*? Many of the items we proposed, having recent and past issues of the journal on the web site, are really matters for the editor and his editorial board. Should the job description for the editor and the editorial board be expanded to include the other issues our group dealt with.
4. Have the relationships and costs for managing the web site changed since we first undertook our work last year? If they have, how can SICB best formalize a new and better relationship between the web programmers and the things the society wants to do with the web site?

## REPORT OF THE PROGRAM ADVISORY COMMITTEE

### I. Abstracts

Obtain software that allows editing of abstracts by authors (access to be denied after a given deadline) e.g., that used by FASEB, ESA, or Benthic Ecology (Dean Pentcheff (pentcheff@pascal.acm.org)). Software should also be able to treat special characters. Ideally, software would automatically generate and send to the author via email a copy of the final abstract as it would appear in the journal. John Pearse with aid from members proficient in the technology.

### II. Program for Annual meeting on SICB web site.

Purpose is to allow members to search the program using keywords for presentations of interest and generate a list that includes the relevant information including date, time, and location. John Pearse with aid as above.

III. Standing request to provide division Chairs and Program Officers with division email list annually as soon as is reasonable after the annual meeting. Wilma Salvatore or other SBA.

### IV. Symposia

A. Modify symposium organization. John Pearse.

1. Central organization by society Program Officer.
2. Delegation of post review (American Zoologist or divisional recommendations) negotiation with symposium organizer to primary divisional Program Officer.

B. Symposium funding. Billie Swalla and John Pearse.

1. Contact NSF to find out how they wish to receive proposals to fund multiple symposia considering the divisional nature of SICB and the Program structure of NSF.
2. If appropriate, write "boiler plate" NSF proposal to fund multiple symposia. Proposal to be available on the SICB web site.
3. Convey information to divisional Program Officers for dissemination to membership. Modify symposium application to reflect requirement to provide a summary or whatever else is needed for NSF.

C. Request that the Executive Committee waive non-member symposium participant abstract and registration fees.

### V. Keynote Address

- A. Pay expenses of keynote speaker or at least provide honorarium
- B. Broadcast email at registration time to advertise keynote address
- C. Begin welcoming party immediately after keynote address
- D. Hold welcoming party in close proximity to keynote address

### VI. General suggestions for the Annual meeting



- A. Reinstate mass mailing to Biology Departments to advertise annual meeting. Wilma Salvatore or other SBA.
- B. Rope off exhibits in a fashion that allows them to close without closing off access to the posters. Wilma Salvatore or other SBA.
- C. Provide an evaluation form for the annual meeting on the SICB web site. Esther Leise with feedback from PAC.
- D. Obtain meeting evaluation form for the annual meeting from Esther Leise and install it on the web site. Collect and collate responses. SBA
- E. Session co-chairs should be notified of their specific duties.

## Public Affairs Committee Annual Report

The Public Affairs Committee is completing another successful year of communicating the activities and mission of SICB to the public. Our committee has scheduled several media related events for the upcoming SICB meeting in Atlanta:

*Media Workshop.* Each year the Public Affairs Committee organizes a session dedicated to helping researchers communicate their findings to the media and general public. The committee tries to take advantage of local resources, and as Atlanta is the home of Turner Broadcasting, we have arranged for a member of CNN to address interested SICB members. On Friday January 7 at 3:00 p.m., the committee will host Natalie Pawelski, a writer, producer, and host of the CNN show “Earth Matters”, CNN’s weekly news magazine of environmental issues.

*Panel Discussion.* Together with the SICB Education committee, we will also jointly sponsor this year’s topic: The University in the 21<sup>st</sup> Century. Participating panelists currently include William Chace, President of Emory University, Mary Clutter, Associate Director of Biological Sciences at the National Science Foundation, Carolyn Raffensperger of the Science and Environmental Health Network, and Jane Maienschein representing American Women in Science.

*Media Reception.* Our committee will also be hosting a reception on the opening night of the meeting to provide information to attending media representatives and to allow symposium organizers to present the contents of their symposia first hand.

*Advertising the Annual Meeting.* The Public Affairs committee will be advertising the SICB meeting this fall in the pages of several journals including *Science*, *Invertebrate Biology*, *BioScience*, *Behavioral Ecology & Sociobiology*, *Brain, Behavior & Evolution* and *Biological Bulletin*.

In anticipation of the annual meeting in 2001, members of the Public Affairs committee are in the process of working with a selection committee, chaired by Hans Laufer, to choose a recipient the first annual Science Communicator’s Prize. The award winner will receive a cash prize of \$1,000 and a plaque from the society at the 2001 meeting awards banquet in honor of their contribution to communicating science to the public.

Finally, our committee has continued to post “alerts” to the SICB membership throughout this year informing them of upcoming legislation and other events of importance to the SICB membership.

# SICB PUBLICATION POLICY – STATEMENT OF PRINCIPLES

Prepared by the SICB Publications Committee: Warren Burggren (Chair), Fred Harrison, Howard Lasker, Karen Martin. March, 1999

## INTRODUCTION

The Society for Integrative and Comparative Biology (SICB) has a long history of cooperative ventures with publishers, primarily in the arena of scientific journals. In the past, relationships between publishers and SICB have been generated on an *ad hoc* basis, usually springing from informal negotiations with Society Divisions, and then being ratified by the Society Executive Committee. While this approach generally has been effective, it has not been consistent. Different journals have received different and not necessarily equivalent treatment, and the SICB has received varying degrees of benefit. Additionally, as the publishing industry grows more complex and volatile, agreements made primarily on the strength of “handshake agreements” are less likely to prevail as publishing houses experience turnover.

Consequently, it is in the best interests of SICB to have a Publication Policy that is consistent, fair, protects the interests of SICB even as it promotes science and its communication, and is flexible to provide for future creative ventures in a rapidly changing industry. The following principles are intended as “guidelines” rather than “rules” describing how SICB can interact with publishers as opportunities present themselves.

## PRINCIPLES

Past practice, and contemplated future activities, suggest that there are two categories of interaction with publishers. The first category, “Association”, consists of informal, non-binding relationships in which publishers are provided access, through various mechanisms, to the Society membership. The second category consists of a more formal “Sponsorship” with a publisher. Each type of relationship has its own guiding principles.

### I. “Association”

**A. Definitions.** Supported by years of successful past practice, it continues to be in SICB's best interest to enter into arrangements with publishers in which Society members have the opportunity to subscribe to journals at discounted rates compared to non-Society members, herein termed “Association”. Such discounts constitute a major advantage of Society membership, and can be used as a membership

recruiting tool. Moreover, Association constitutes a substantial, if intangible, financial contribution to the Society by publishers without involving complex contractual arrangements involving direct forms of payment to the Society.

**B. SICB's Responsibilities.** In return for receiving a specified subscription discounts for SICB members, SICB will do one of:

- furnish 1 set of mailing labels for one-time use for each year in which the arrangement is in place, and/or
- include notice of discounted subscriptions in society publications and on the Society's website as appropriate.

**B. Negotiations of Terms.** Recommendations and proposals for Association with SICB and the attendant provision of access to Society membership should come from interested publishers and/or SICB divisions. The SICB executive committee will appoint an *ad hoc* evaluation committee consisting of:

- one member of the Publications Committee (to ensure that the current SICB Publications Policy is considered in the evaluation of the proposal)
- the cognizant division Chair or his/her representative (to ensure that discipline-specific issues are considered)
- one member appointed by the SICB President (to represent the interests of the SICB regarding the nature of the commitment)

This ad hoc committee will, in turn, make a recommendation as to the suitability of the Association to the SICB Executive Committee. The magnitude of the journal discount or other recommended benefit of the Association should then result from a direct negotiation between the Executive Committee and the Publisher. The results of the negotiations will be defined in a Memo of Understanding signed by the Society and the Publisher.

**C. Right of Termination.** The Society reserves the right to terminate an "Association" at any time.

## **II. "Sponsorship"**

**A. Definitions.** "Sponsorship" comprises a formal relationship in which SICB and/or one of its Divisions lends its name and reputation to a journal. This level of interaction consequently is more involved than the Association described in Section I.

above, since it renders SICB professionally (and perhaps legally) accountable for the actions of that journal.

**B. SICB's Responsibilities.** Recommendations for Sponsorship of newly proposed or established journals should come from interested publishers and/or SICB divisions to the Publications Committee. The Publications Committee, in turn, will make a recommendation to the Executive Committee. The details of the Sponsorship should then result from a direct negotiation between the Executive Committee and the Publisher. The results of the negotiations will be defined in a Memo of Understanding or other contractual instrument signed by the Society and the Publisher.

SICB should enter (or continue) such relationships only when it shares responsibility and control of editorial content with the journal publisher. There are several mechanisms by which SICB can exert editorial control, not each of which is necessary or appropriate in every case of Sponsorship:

- recommendation or appointment of Editorial Board Members and Associate Editors
- recommendation or appointment of journal Editor

As a consequence of Sponsorship, SICB and/or the cognizant SICB division will be responsive to the request of an editor/publisher for advice on editorial staff and journal content. Editors/publishers should regularly seek this advice. Normally, editorial matters will be the purview of the editorial staff, while the business aspects of journal operations will be purview of the publisher. It is not the intent of SICB to be involved with the month-to-month activities of the journal and its normal publishing activities. However, the relationship between the publisher, editorial staff, and SICB should be based on full and open consultation, equal authority (unless otherwise specified), shared responsibility, and collegiality. All agreements of Sponsorship should clearly indicate specific measures to achieve these ends.

While "Sponsorship" of a journal by SICB may in certain instances be accompanied by financial obligations and/or rewards, it is not the primary intent of SICB to financially support private publishing activities nor enter into revenue generating contractual arrangements with publishers. However, it is SICB's expectation that Sponsorship of a journal will result in subscription discounts to SICB members, as described in Section 1, above.

Sponsorship of newly proposed journals, as opposed to existing journals seeking sponsorship, may require additional consideration above and beyond that indicated above, since SICB will be a charter sponsor. Among the issues to be considered are the role of SICB in providing the initial suggestions for editorial content, establishing the editorial board, journal title, and perhaps even identifying a publisher. Such considerations are unique to each newly proposed journal and

beyond the scope of this Publication Policy, but may require additional involvement of the Publications Committee and/or SICB executive Committee.

**C. Negotiations of Terms.** Recommendations and proposals for Sponsorship with SICB and the attendant provision of access to Society membership should come from interested publishers and/or SICB divisions. The SICB executive committee will appoint an *ad hoc* evaluation committee consisting of:

- one member of the Publications Committee (to ensure that the current SICB Publications Policy is considered in the evaluation of the proposal)
- the cognizant division Chair or his/her representative (to ensure that discipline-specific issues are considered)
- one member appointed by the SICB President (to represent the interests of the SICB regarding the nature of the commitment)

This *ad hoc* committee will, in turn, make a recommendation as to the suitability of the Sponsorship to the SICB Executive Committee. The magnitude of the journal discount or other recommended benefit of the Sponsorship should then result from a direct negotiation between the Executive Committee and the Publisher. The results of the negotiations will be defined in a Memo of Understanding signed by the Society and the Publisher.

**D. Publisher's Responsibilities.** Shared accountability, responsibility, and control will in every instance require effective communication between the editorial staff and SICB. Consequently, it is crucial that the Editor and or his/her representative attend annual SICB meetings to report on the past, present and future activities of the journal, and to seek feedback from the SICB membership on the journal's activities. These reports will take the form of formal presentations at Division and/or Society Business Meetings, as well as informal discussion with the Publications Committee. It is also the responsibility of the Editor, Editorial Board and/or Publisher to contact SICB's Publishing Committee at any time during the year in which substantial changes in editorial policy, journal content, or other changes to the journal are planned. Communication of such changes is to be made well in advance of the actual implementation of these changes, to provide SICB opportunity to assess the impact of these changes on its Sponsorship. Finally, it is expected that the journal editor and a majority of the academic associate editors (if any) will be members of SICB (although prior SICB membership is not necessary).

**E. Right of Termination.** SICB may, upon giving six months notice in writing to the publisher, withdraw its Sponsorship should it determine a lack of sufficient shared accountability, responsibility and control as outlined above, at which time the publisher will remove all indication of Sponsorship with SICB from its publication.

# SICB Annual Report

## Student Support Committee (SSC)

**David Borst, Chair (DCE), Elizabeth Brainard (DVM), Timothy O'Connor (DCPB), Kimberly Smith (DEE), Julian Smith (DIZ), Peter Smallwood (DAB).**

The SSC has had two responsibilities during the past year. The first involves the **Grants-in-Aid of Research program**, which provides small research grants to graduate students. While the grants program is a relatively feature of the SICB, it has made approximately 40 awards since its inception. Our second activity is to oversee the **Student Travel Awards program**. The SSC thanks the SICB staff for their help in supporting these activities. The activities of the SCC are supported in part by the generous bequest of Charlotte Magnum.

**Grants-in-Aid of Research:** During 1998, 51 applications were submitted for research grants. The SSC reviewed these at the Denver meeting and made 11 awards (totaling \$7500) to students from 8 different divisions of the Society. We were impressed with the high quality of all of the applications, and would have felt comfortable funding many more. A list of the recipients follows this report..

In the coming year, the budget for this program has been increased substantially (to \$12,000). A notice was sent to SICB members in October encouraging all graduate student members to apply. The deadline for applications has been moved forward this year to November 15, 1999. This year, application instructions and forms have been available from the following website (**Error! Bookmark not defined.**) The completed grant proposals and letters of reference are being submitted electronically to the chair of the committee (**Error! Bookmark not defined.**).

**Student travel awards:** For the Denver meeting, every student who applied (165 students) received some level of support for their attendance, either as for reduced registration expenses or for hotel accommodations. The total value of this support was \$17,000.

## Recipients of GIA support in 1999

Name	Institution	Division	Title
<b>Valerie Simon</b>	Duke University	DAB	<i>An analysis of the signaling behavior of an Anolis lizard under the risk of predation.</i>
<b>Michael Vickery</b>	University of Alabama, Birmingham	<u>DDCB</u>	<i>Investigating regeneration using an echinoderm model system.</i>
<b>Loretta Mayer</b>	North Arizona University	DCE	<i>The effects of the endocrine disrupting compound octylphenol on gonadal expression of steroidogenic factor-1 in developing Xenopus laevis tadpoles.</i>
<b>Keith Sockman</b>	Washington State University	DCE	<i>A mechanism for family planning: how incubation behavior in birds may create the sibling social environment.</i>
<b>Marilyn Banta</b>	University of Nevada	DCPB	<i>Evolutionary consequences of thyroxine manipulation in a desert-adapted rodent, Merriam's kangaroo rats (Dipodomys merriami).</i>
<b>Andrew Crawford</b>	University of Chicago	DEE	<i>Comparative population genetic analysis of the evolution of a shared color pattern polymorphism.</i>
<b>Tamara McGovern</b>	Florida State University	DEE	<i>Gender-specific clonal reproduction in the brittle star Ophiactis savignyi.</i>
<b>Erika Iyengar</b>	Cornell University	DIZ	<i>The ecology and evolution of a novel feeding mechanism in a marine snail (Trichotropis cancellata)</i>
<b>Sheila Patek</b>	Duke University	DIZ	<i>From structure to acoustic signal: sound production in the Caribbean spiny lobster Panulirus argus.</i>
<b>Michael Alfaro</b>	University of Chicago	DSZ	<i>Striking in thamnophiine snakes: postcranial function during prey capture</i>
<b>Lisa Rosenberger</b>	University of Chicago	DVM	<i>Pectoral fin locomotion in batoid fishes: undulation vs. oscillation.</i>