

# Pi Alpha Xi, National Horticulture Honor Society Operations Manual



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This manual was compiled as a resource for all members. Input was obtained from officers, past and present, chapter advisors, and ASHS Headquarters staff. At any time, if this manual is in conflict with the PAX Constitution and By-laws, those documents take precedence.

It was compiled to help ensure the future of Pi Alpha Xi in order to continue the celebration of excellence in horticulture in the spirit as intended by our founders in 1923.

First edition, 2012; revised 2014; revised 2016; revised 2019 © PAX National, Alexandria, VA

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# THE MISSION OF PI ALPHA XI

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*To recognize high scholarship*

*To foster good relationships among its members*

*To promote or to facilitate the exchange of ideas among  
members of the professions*

*To establish cordial relations among students, educators, and  
industry members*

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## MOTTO

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*Always to Excel*



## STRUCTURE OF PI ALPHA XI

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### Executive Committee

1. President
2. Vice President
3. National Secretary-Treasurer

### Board of Directors:

1. Past President (2 yrs. term)
2. Immediate Past President (2 yr. term)
3. President (2 yr. term)
4. Vice President (2 yr. term)
5. National Secretary-Treasurer (2 yr. term)
6. Executive Secretary (non-voting, ex-officio)

### Standing Committees:

1. Fellows Selection
2. Membership Services
3. Nominations
4. Photography Contest
5. Rules
6. Student Activities

### Ad Hoc Committees:

1. Website Committee

### Chapters and Chapter Advisors

1. Chapter Advisor and/or Co-advisors
2. Chapter President
3. Chapter Vice President
4. Chapter Secretary-Treasurer (some chapters have separate positions for Chapter Secretary and Chapter Treasurer)

## DUTIES OF THE PRESIDENT

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The President provides leadership for the organization and serves as ambassador of the Society, fielding questions from members, chapters, those wishing to be members, those wishing to establish chapters, the public, industry, other societies, and others. The President helps to connect persons to the officer or committee with the responsibility related to the inquiry. The President ensures that the business of the Society is being addressed and completed.

Answers to many questions can be found within the Constitution and By-laws; it is good to become familiar with them. Study the Constitution and By-laws, in order to be able to conduct the business of the Society and guide other officers, committee chairs, and chapters. This operations manual, the Constitution and By-laws, and the website provide a wealth of information to help with smooth operation of the Society and its chapters.

### WITHIN THE FIRST MONTH IN OFFICE

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The Board of Directors assumes office at the close of the annual PAX business meeting held in conjunction with the American Society for Horticultural Science (ASHS) annual conference.

Furnish digital signature (jpg or tif formats) to the Executive Secretary or make arrangements to personally sign membership certificates (realize that obtaining original signatures will slow the processing time).

While attending the annual ASHS conference, try to work on composition of committees. At the most, this should be done within the first month of taking office,

- select chairs and members to serve on the standing committees (Fellows Selection, Membership Services, Nominations, Photography Contest, Rules, and Student Activities) and any ad hoc committees
- if current committee chairs and members are not being reappointed, send a thank you note for their service
- appoint a Board of Directors member to each of the committees

Each committee has a minimum of three (3) members.<sup>1,2</sup>

Send lists of officers, committee chairs and committee members with full contact information to the Vice President, National Secretary-Treasurer and Executive Secretary (an ASHS staff member, see page 14)

- List of current officers, with full contact information, from President (changes every 2 years): name, US Postal Service mailing address, telephone number, and email address

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<sup>1</sup> By-laws, Section I:Nominations and Election of Officers and Composition of Standing Committees, (b) Composition of and Appointment to Standing Committees

<sup>2</sup> See the Constitution and sections beginning on page 18, for guidelines of the duties of each committee.



- List of current committee members, with institution affiliations and contact information for the chairs (updated by incoming President usually once every 2 years): name, US Postal Service mailing address, telephone number, and email address

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## YEAR-ROUND

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Communicate with committee chairs to assure society business is being accomplished.

Communicate with the Board of Directors to address society business. Email, telephone, video call, or conference calls may be used depending upon the circumstance.

Interpret and resolve policies and issues of the Society. Consult the Constitution, By-laws, and Operations Manual. If not included in one of these documents, it will be up to the President, and when necessary, in consultation with the Executive Committee, on how best to answer questions, resolve policy issues, or handle the business of the Society.

- Regardless of what the operations manual may indicate, when it is in conflict with the Constitution and By-laws, they are the final word.

Serve as liaison and ambassador of the Society.

Promote re-activation of existing chapters and establishment of new chapters.

Coordinate with Board of Directors to install new chapters. The President typically officiates at the installation of new chapters; however, a member of the Board of Directors nearest the chapter to be installed can officiate.

If a standing committee chair vacates his/her position, in consultation with the Board of Directors and the remaining committee members, names a new chair, per By-laws Section III: Filing Vacancies (b) Standing Committee Chairs.

## MONTH-BY-MONTH ACTIVITY

Month	Activity
September	<p>Review with the Board of Directors the annual financial statement and determine at what level chapter and initiate dues are set. Notify the Executive Secretary and chapter advisors of the dues rates, regardless of whether or not there is a rate change.</p> <p>If the National Intercollegiate Floral Crop Quality Evaluation and Design Competition is scheduled, communicate with National Secretary-Treasurer to ensure American Floral Endowment grant has been secured for the Competition.</p>
October	<p>Write “Letter from the President” for fall issue of the <i>Lotus Leaflet</i>. Once the completed issue of <i>Lotus Leaflet</i> is received, in electronic format, from the Vice President distribute <i>Lotus Leaflet</i> to chapter advisors, Board of Directors, committee chairs, and the Executive Secretary.</p>
November	
December	
January	<p>Contact the Annual Photography Contest committee chair and review the rules of the Photography Contest with the committee chair.</p> <p>The President submits the Annual Photography Contest Rules to</p> <ol style="list-style-type: none"> <li>1. ASHS for publishing in ASHS newsletter (no charge) and for uploading to PAX website;             <ol style="list-style-type: none"> <li>a. At this time also request a booth, table and projector for the PAX Photography Contest exhibition at the annual ASHS conference</li> </ol> </li> <li>2. the Vice President for inclusion in the winter issue of the <i>Lotus Leaflet</i></li> </ol> <p>Contact ASHS (sdemar@ashs.org) to schedule PAX luncheon</p> <ul style="list-style-type: none"> <li>• allow enough time for the annual business meeting</li> <li>• schedule when no delegate (sponsored lunch) is available to participants</li> </ul> <p>Write “Letter from the President” for the winter <i>Lotus Leaflet</i>. Once the completed issue of <i>Lotus Leaflet</i> is received, in electronic format, from the Vice President distribute <i>Lotus Leaflet</i> to chapter advisors, Board of Directors, committee chairs, and the Executive Secretary.</p> <p>The President contacts the chair of the Fellows Selection Committee to initiate the process of identifying and securing documentation for Fellow nominee(s). Do not inform nominee of his/her nomination.</p>
February	
March	<p>Sign National Intercollegiate Floral Crop Quality Evaluation and Design Competition certificates or supply digital signature, if the National Intercollegiate Floral Crop Quality Evaluation and Design Competition is scheduled.</p>

Month	Activity
April	If possible, attend National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled.
May	
June	<p>Contact the chair of the Nominations Committee to initiate the nomination process in time to present the slate of officers at the annual business meeting held in conjunction with the annual ASHS conference (note if the conference is held in the fall, initiate the process at least 30 days prior to the annual business meeting)<sup>3</sup>.</p> <p>Write “Letter from the President” for the spring/summer <i>Lotus Leaflet</i> Once the completed issue of <i>Lotus Leaflet</i> is received, in electronic format, from the Vice President distribute <i>Lotus Leaflet</i> to chapter advisors, Board of Directors, committee chairs, and the Executive Secretary.</p>
June or Month Prior to Annual ASHS Conference	<p>Request list of PAX luncheon registrants from appropriate staff member at ASHS (<a href="mailto:ashs@ashs.org">ashs@ashs.org</a> or contact ASHS conference planner, ASHS Executive Director, or Executive Secretary)</p> <p>Working with the National Secretary-Treasurer establish the annual business meeting agenda so the agenda along with the minutes of the previous annual business meeting and the financial statement can be distributed to the membership approximately 30 days prior to the meeting.</p> <ul style="list-style-type: none"> <li>• Provide a head-count to the National Secretary-Treasurer in order to bring an appropriate number of copies of the agenda, minutes and financial statement to have on hand at the annual business meeting</li> </ul>
July or Month of Annual ASHS Conference	<p>Conduct annual business meeting of the Society.</p> <p>Conduct orientation meeting for the new Board of Directors during annual ASHS conference, in the alternate year when officers change.</p> <ul style="list-style-type: none"> <li>• This meeting is <b>not</b> held in a conference room booked by ASHS.</li> <li>• Announce a day and time, preferably over a meal, when everyone gets together to have a transition between the old and new board. A Dutch-treat breakfast or lunch may be the best time as it would not conflict with any sessions or evening social time.</li> </ul>
August or Month after Annual ASHS Conference	Arrange for an audit of the PAX National financial statement.

<sup>3</sup> By-Laws, Section I: Nominations and Election of Officers, and Composition of Standing Committees, (a) Nominations and Election of Officers



## DUTIES OF THE VICE PRESIDENT

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### GENERAL DUTIES

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With the assistance of ASHS, provides oversight for the Pi Alpha Xi website.

Produce the *Lotus Leaflet* (three times a year) with input from the President, National Secretary-Treasurer, Executive Secretary, committee chairs, and chapter advisors who supply information for inclusion in each issue.

Help the National Secretary-Treasurer and host institution write the American Floral Endowment grant that funds the National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled

Take on any other assignments from the President, as mutually agreed upon.

### PRODUCTION OF THE LOTUS LEAFLET

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The Vice President is responsible for the production of the *Lotus Leaflet*. Three issues are produced each year: Fall (October), Winter (January), and Spring/Summer (June).

Contact information of all officers is included in each issue

### CONTENTS BY ISSUE

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#### FALL ISSUE - OCTOBER

Letter from the President

Reports from the annual business meeting held at the ASHS annual conference

- Minutes of the meeting and financial statement
- Announce results of the annual Photography Contest, to include the winning images
- In the alternate years when there is an election, provide a list of the new officers along with full contact information.

Chapter dues, reminder - fee plus remittance address: ASHS Headquarters, attn.: PAX Chapter Dues, 1018 Duke St., Alexandria, VA 22314; January 30 payment deadline

List of chapters and chapter advisors (receive list from the National Secretary-Treasurer)

Solicited/unsolicited articles from chapters (articles may be edited for style and to fit available space)

Information from chapters regarding deceased members

Any newly initiated members not included in previous issues (chapters listed in Greek alphabetical order, members listed alphabetically within the chapter list)

### **WINTER ISSUE - JANUARY**

Letter from the President

Announce complete details and contacts for National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled

Chapter dues reminder - fee plus remittance address: ASHS Headquarters, attn.: PAX Chapter Dues, 1018 Duke St., Alexandria, VA 22314; January 30 payment deadline

Call for submission of entries into the annual photography contest; information received from the President.

Solicited/unsolicited articles from chapters (articles may be edited for style and to fit available space)

Information from chapters regarding deceased members

Any newly initiated members not included in previous issues (chapters listed in Greek alphabetical order, members listed alphabetically within the chapter list)

### **SPRING/SUMMER ISSUE - JUNE**

Letter from the President

Chapter past-dues notice - fee plus remittance address: ASHS Headquarters, attn.: PAX Chapter Dues, 1018 Duke St., Alexandria, VA 22314

Report from the coaches meeting held in conjunction with and announce the winners of the National Intercollegiate Floral Crop Quality Evaluation and Design Competition; include photos, if made available

Call for submission of entries into the annual Photography Contest; information received from the President.

Solicited/unsolicited articles from chapters (articles may be edited for style and to fit available space)

Information from chapters regarding deceased members

Any newly initiated members not included in previous issues (chapters listed in Greek alphabetical order, members listed alphabetically within the chapter list)

## DISTRIBUTION

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Once the pdf file of the *Lotus Leaflet* is produced, it is sent to the President for distribution to the chapter advisors and PAX list serve

The Vice President sends the pdf file to the Executive Secretary at ASHS for posting to the PAX website and to the National Secretary-Treasurer for printing and delivery to the PAX National Archives at Cornell University.





## DUTIES OF THE NATIONAL SECRETARY-TREASURER

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The National Secretary-Treasurer is an elected officer position filled by a PAX member.

Maintains regular communication with the appointed Executive Secretary at ASHS Headquarters

- Within the first month of assuming duties, furnish digital signature to the Executive Secretary or make arrangements to personally sign membership certificates (realize that obtaining original signatures will slow the processing time).
- National Secretary-Treasurer compiles the list of chapter advisors, officers, and contact information; updates the email distribution list, and sends the list of chapter advisors and the email distribution list to all officers, the Executive Secretary, all committee chairs, and all advisors.
- National Secretary-Treasurer will send reminder notice to those chapters in arrears, with copy to President and Executive Secretary, indicating payment due date and that payment is sent to the Executive Secretary at ASHS Headquarters.
- Upon receipt of the initiate lists, records new member names and numbers in the “black books”
- If the National Intercollegiate Floral Crop Quality Evaluation and Design Competition will be held, sends announcement information received from the host institution to the Executive Secretary for posting to the PAX website.
- Receives the annual financial statement from the Executive Secretary at least 10 business days prior to the annual ASHS conference
- Presents the annual financial statement at the annual business meeting.

Serves as the clearinghouse for PAX inquiries

In mid- to late-August, send reminder to Chapter Advisors to submit the chapter and officer contact information. Compile the list of chapter advisors and emails; send to all Board of Directors, all chapter advisors, committee chairs, and Executive Secretary.

Communicates with the Chair of the Rules Committee regarding any proposed amendments to the Constitution and By-Laws and maintains an updated version of the Constitution and By-Laws

Provides the most current version of the Constitution and By-Laws to all active chapters and the Executive Secretary; the Executive Secretary sees that the most current version is posted to the national website

Conducts electronic voting

Write, with the help of the Vice President and host institution, the American Floral Endowment grant that funds National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled

Notice of the annual business meeting is sent 30 days prior to chapter advisors and announced in the ASHS newsletter<sup>4</sup>

Working with the President, prepares the agendas and minutes for the annual business meeting; and then, distributes, 30 days before the business meeting, electronic copies the agendas, minutes, and financial statement to the

- chapters,
- PAX list serve
- Vice President for publication in the *Lotus Leaflet*, and
- Executive Secretary for posting to the PAX website

Based on the number of registrants for the PAX luncheon (head count received from the President), make an appropriate number of copies of the previous year's annual business meeting minutes and the current financial statement to distribute at the luncheon

Send hard copies of the *Lotus Leaflet*, revised versions of Constitution and By-laws, revised editions of the operations manual, and annual business meeting minutes to the PAX archive (enclosing a cover letter indicating the materials are for the Pi Alpha Xi National archive; ask for a confirmation receipt via email and provide your email address):

Elaine Engst  
Attn: Director and University Archivist  
Kroch Library, Division of Rare and Manuscript Collections  
2B Kroch Library  
Cornell University  
(607)255-3530, [ee11@cornell.edu](mailto:ee11@cornell.edu) and copy [rareref@cornell.edu](mailto:rareref@cornell.edu)  
<http://www.library.cornell.edu/node/221>

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<sup>4</sup> Constitution Article VIII: Annual Business Meeting, Section I: Scheduling the Annual Business Meeting

## DUTIES OF THE EXECUTIVE SECRETARY

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Overview of the responsibilities of the Board/ASHS-appointed Executive Secretary

Maintain the National PAX website. Updates occur approximately 6 times per year and include

- posting each new issue of the *Lotus Leaflet*,
- posting the minutes of the annual business meeting, and
- other materials as required by the Board of Directors and, through the board, reports from standing committee chairs
- list of officers and standing committees

Creating and maintaining a PAX listserv

Receiving and filling orders of the Flower Judging Manual, depositing funds, reprinting when necessary

Referring inquiries to the National Secretary-Treasurer

Providing oversight of financial matters to include

- checking account and other investment accounts
- appropriate audits
- accounts receivable and accounts payable
- creating and presenting an annual financial statement for the annual business meeting

Providing member services to include

- receiving and depositing fees and lists of new initiates for each chapter
- purchasing pins and certificates
- inscribing certificates and mailing to appropriate chapters
- maintaining the national database
- sending lists of new initiates by chapter to the Vice President for publication in the *Lotus Leaflet*

Creating and sending annual dues notices to chapters, collecting and depositing dues

Assisting the Board of Directors with other matters upon mutual agreement

## CHECKING ACCOUNT

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ASHS maintains a checking account solely for Pi Alpha Xi. All credits and disbursements will go through this account.

List of credits:

- Chapter dues (\$50 each chapter; annually, billable in January; reviewed annually by the Board of Directors)
- Chapter reactivation fees [\$60 or current delinquent chapter dues equal to 3 years (2 years past and current year); reviewed annually by the Board of Directors]

- Initiate dues (\$35 per initiate; reviewed annually by the Board of Directors)
- American Floral Endowment grant for National Intercollegiate Floral Crop Quality Evaluation and Design Competition
- Fees for Flower Judging Manuals
- Entry fees for Annual Photography Contest (held at the annual ASHS conference)

List of disbursements:

- New chapter installation (PAX National pays for the travel expense of the national officer located closest to the chapter being installed; the new chapter pays for housing & meals)
- Certificate for PAX National Fellow Award (to President or Immediate Past President)
- Reimbursement to host institution for National Intercollegiate Floral Crop Quality Evaluation and Design Competition certificates and plaques, upon presentation of an expense report to the National Secretary-Treasurer (see page 27 for details). Funds come from the proceeds of the American Floral Endowment grant.
- Reimbursement to individual universities for attending competition; National Secretary-Treasurer supplies list with amounts (see page 27 for details). Funds come from the proceeds of the American Floral Endowment grant.
- Disbursements associated with the Photography Contest
  - Cash awards for winners of Photography Contest, list provided by Photography Contest Committee Chair through the President
  - Maintain an inventory of ribbons (Best-in-Show, First, Second and Third Place) for presentation by the President at the annual ASHS conference
- Miscellaneous postage and office supplies for National Secretary-Treasurer of Pi Alpha Xi
- Administrative fee for Executive Secretary (\$35 per new initiate)
- Payment for printing new certificates and obtaining new pins
- Expense associated with sending pins and certificates to each chapter
- Matching scholarship (available to each active chapter)
- Expense of Executive Secretary lunch or equivalent at annual Pi Alpha Xi meeting (held in conjunction with ASHS), if in attendance
- Other disbursements as indicated by the Executive Committee

Should the checking account maintain a high balance from year-to-year, the Executive Secretary informs the President who, after consulting with the Executive Committee, determines if investment in CD or other vehicle is appropriate.

***If there are budget concerns or irregularities, contact all members of the Board of Directors when the problem arises – don't wait.***

## CHAPTER DUES

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1. The Executive Secretary will send a dues notice to the chapter advisor of each active chapters in early January.
2. As dues come in the Executive Secretary will deposit them and indicates paid on the chapter list.
3. By March 1<sup>st</sup> the Executive Secretary will send a list of all active chapters (dues paid) to all Board Members.
4. National Secretary-Treasurer will send reminder notice to those chapters in arrears, with copy to President and Executive Secretary, indicating payment due date and that payment is sent to the Executive Secretary at ASHS Headquarters.
5. On July 1, Executive Secretary will send final list of all active (dues paid) chapters and those in arrears of dues payment (indicating number of years in arrears) to members of Board of Directors.

## RECEIPT OF MONIES FOR INITIATES

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Each active chapter has the option of one or two initiations (election of new members) each year. Most chapters will report in the March-April and the October-November timeframe. The vast majority will submit in the spring.

Process:

1. The chapter will send in a typed list of names and a check for initiation fees (currently \$35 per initiate; for ease in processing, please submit one check for all initiates to the Executive Secretary and to minimize any “insufficient funds” charges to the PAX National account.
2. Upon receipt, the Executive Secretary will
  - a. look up that chapter in the membership database,
  - b. enter each initiate into the database along with the initiation date by assigning the next member number in sequence for that chapter and

- c. enter the number next to each initiate's name on the typed list received by the chapter
3. The Executive Secretary will then print each certificate with each name and unique number and add the electronic signatures of the President and National Secretary-Treasurer to the appropriate lines on the certificate (see Figure 1, page 18).
4. The electronic list by chapter of initiates, their numbers and initiation date is sent to the Vice President for listing in the *Lotus Leaflet* and to the National Secretary-Treasurer.
5. Certificates and one (1) pin for each initiate are mailed to the chapter advisor via first class mail.
6. Deposit checks to the Pi Alpha Xi account.
7. Anticipated turnaround-time is 7 business days from receipt of list of initiates & check(s).
8. When the supply of membership certificates or pins drops to 300, consult with the President to determine where to place the order. If ASHS prefers to use a local vendor for certificates, samples (or good photos) with pricing should be shared with the President to approve the order. Pins should be high quality and ordered through an experienced, reputable vendor.

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### TYPICAL ANNUAL INVENTORY

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- Blank certificates and pins  $\approx$  225
- Flower judging manuals  $\approx$  10; print as needed. Executive Secretary maintains an electronic copy.

Orders for Flower Judging Manual National Intercollegiate Floral Crop Quality Evaluation and Design Competition

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### FLOWER JUDGING MANUAL

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Cost of the Flower Judging Manual is currently \$18 (including postage).

- If this does not cover printing and mailing costs, provide cost information to the National Secretary-Treasurer so the Board can set new price. This should be reviewed on an annual basis.

All orders are prepaid and shipped via First Class Mail (express or other shipping requires extra charge).

Record and deposit all checks into the Pi Alpha Xi checking account.

An electronic copy of the Flower Judging Manual is maintained with the Executive Secretary.


FIGURE 1 SAMPLE PAX CERTIFICATE

This is to certify that

Initiate's name → *Jean Pedersen*

has been elected a member of

*Alpha Gamma*




in recognition of scholarship  
and achievement in Horticulture

Initiated at

Specific chapter → *University of Nebraska - Lincoln*

Initiation date → *April 19, 2008*



Electronic signatures

*Alpha Gamma*

Initiate's unique number → *No. 269*

*Ben M. H.*  
LOCAL PRESIDENT

*Allen T. Separdis*  
NAT'L. PRESIDENT

*Michael E. Constan*  
NAT'L. SECRETARY

## PI ALPHA XI MATCHING SCHOLARSHIP PROGRAM

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Chapters may receive up to a maximum of \$100 annually from Pi Alpha Xi National as a match to chapter funds

Process:

- A letter of request is sent to the Executive Secretary for matching funds (up to \$100) for a scholarship for undergraduate **and/or** graduate student member of an active Pi Alpha Xi chapter.
- Accompanying the request, the chapter must provide an award letter or a copy of a check or invoice made out to that student(s) to verify the match.
- There is a maximum of \$100 per chapter per year (chapters may award multiple scholarships; however, the total match is a maximum of \$100).
- Once the match is verified, the Executive Secretary mails a check back to the chapter advisor (or student, depending upon request).

## WEBSITE MAINTENANCE

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Only officers may request website postings.

Routine updates to the Pi Alpha Xi website include:

- Three (3) times a year (Fall, Winter, Spring/Summer) the *Lotus Leaflet* is published by the Vice President and submitted by the Vice President to the Executive Secretary for posting to the website.
- Announcements for the Annual Photography Contest submissions procedure (post in January from the President) and the National Intercollegiate Floral Crop Quality Evaluation and Design Competition (post in December with Jan-Feb update from National Secretary-Treasurer)
- List of current officers, with full contact information, from the President (changes every 2 years, unless there are vacancies): name, US Postal Service mailing address, telephone number, and email address
- List of current committee members, with institution affiliations and contact information for the chairs (updated by incoming President, usually once every 2 years): name, US Postal Service mailing address, telephone number, and email address
- Update the list of PAX Fellows, with their mini-biographies, after recipients are announced at the annual business meeting held in conjunction with the annual ASHS conference.



## ADDITIONAL DATABASE RESPONSIBILITIES

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When members of Pi Alpha Xi pass away or change their name due to marriage or divorce, the database is updated. Deceased members are not deleted; just indicate as such.

**Database access:** only the Executive Secretary has full “read/write” access to the database (FileMaker Pro or other appropriate database software as determined by ASHS Headquarters). All current officers of Pi Alpha Xi (President, Vice President, and National Secretary-Treasurer) may request changes. All Pi Alpha Xi members have “read only” access to the web-delivered content of the membership database.

## THE ANNUAL PI ALPHA XI MEETING HELD IN CONJUNCTION WITH ASHS

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Prepare a simple financial statement following the format on the next page. Use a fiscal year of July 1- June 30.

- Send an electronic copy of the report to the National Secretary-Treasurer at least 30 days prior to the annual ASHS conference so s/he can distribute to the members 30 days prior to the annual business meeting
- Provide any necessary explanatory notes

Additionally provide the current checking account balance and the total cash assets of PAX (mini balance sheet)

- Send both to all Board members before the annual meeting

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**FINANCIAL STATEMENT**

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<b>Beginning Balance<sup>5</sup></b>		<b>\$\$\$</b>	
Income			
Chapter dues (# of chapters)		\$\$\$	
New initiate dues (# of initiates)		\$\$\$	
Chapter reactivation fees (# of chapters)		\$\$\$	
Fees for Floral Judging Manual (# of manuals)		\$\$\$	
American Floral Endowment Grant		\$\$\$	
Other			
		\$\$\$	
		\$\$\$	
	Total of other income		
		\$\$\$	
<b>Total Income</b>			<b>\$\$\$</b>
Expenses			
Fellow Award		\$\$\$	
New Chapter installation, officer travel reimbursement		\$\$\$	
Intercollegiate Floral Competition			
Certificates and plaques		\$\$\$	
University teams reimbursement (list each institution)			
		\$\$\$	
		\$\$\$	
	Total Intercollegiate Floral Competition		
		\$\$\$	
Printing/postage flower judging manual		\$\$\$	
Photography contest			
Ribbons, printing, etc.		\$\$\$	
Cash prizes (list each individual)			
		\$\$\$	
		\$\$\$	
	Total photography contest		
		\$\$\$	
Misc. office expenses (PAX National)		\$\$\$	
Administrative fee to ASHS		\$\$\$	
Initiation expenses			
Certificates		\$\$\$	
Pins		\$\$\$	
Postage		\$\$\$	
Total initiation expenses		\$\$\$	
PAX Scholarship \$100 match (list each school)			
		\$\$\$	
		\$\$\$	
	Total scholarship match		
		\$\$\$	
PAX Annual Luncheon		\$\$\$	
Other expenses (list)			
		\$\$\$	
		\$\$\$	
	Total other expenses		
		\$\$\$	
<b>Total Expenses</b>			<b>\$\$\$</b>
<b>Ending Balance (Income less Expense)</b>			<b>\$\$\$</b>

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<sup>5</sup> Note: Keep all categories even if there is a zero dollar (\$00) entry; insert table rows where needed to expand lists.

## EXECUTIVE SECRETARY CALENDAR OF EVENTS FOR PI ALPHA XI

Month	Activity
January	Check inventory and order certificates and pins, if necessary Send out annual dues notice to all chapters
February	Update website <ul style="list-style-type: none"> <li>• Announce photography contest for the next annual ASHS conference</li> <li>• Announce date and location of the National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled</li> <li>• Post <i>Lotus Leaflet</i>, Winter Issue</li> <li>• Post information for annual Pi Alpha Xi meeting and luncheon at annual ASHS conference</li> </ul>
March	March 1: send list of active chapters (dues paid) to Board of Directors Expect approximately 100 to 150 initiate certificate requests for printing and mailing in March/April Expect scholarship match request
April	Expect approximately 100 to 150 initiate certificate requests for printing and mailing in March/April 1 <sup>st</sup> week of April = National Intercollegiate Floral Crop Quality Evaluation and Design Competition held, if scheduled
May	
June	Update website <ul style="list-style-type: none"> <li>• Post <i>Lotus Leaflet</i>, Spring/Summer issue</li> </ul> Prepare financial statement for Board of Directors by July 1
July	Work with President, Vice President, and National Secretary-Treasurer on preparation of budget
August	
September	
October	Update website <ul style="list-style-type: none"> <li>• Post <i>Lotus Leaflet</i>, Fall issue</li> <li>• PAX fellow(s)</li> </ul> Expect approximately 50 to 100 initiate certificate requests for printing and mailing in October/November
November	Expect approximately 50 to 100 initiate certificate requests for printing and mailing in October/November
December	Update website <ul style="list-style-type: none"> <li>• Announce date and location of the National Intercollegiate Floral Crop Quality Evaluation and Design Competition</li> </ul>



## COMMITTEES

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### RULES COMMITTEE

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The Rules Committee reviews and suggests changes or additions to the Constitution and By-Laws to the membership.

Any member or chapter may propose amendments to the Constitution and By-Laws by submitting them to the Rules Committee chair with a copy to the National Secretary-Treasurer.

The Rules Committee reviews the operations manual to ensure that the operations manual does not conflict with the Constitution and By-laws, and when revisions are made to the Constitution and By-laws, the operations manual is revised to reflect any changes.

The Rules Committee will also have officers review revisions to the operations manual to ensure that the manual reflects current operations, especially if the administrative assistance provided by ASHS changes.

The Vice President serves as an ex officio member. <sup>6</sup>

The Rules Committee chair compiles the suggested revisions and sends to the committee for discussion and consideration.

When committee agrees on all revisions, the chair sends to the National Secretary-Treasurer with a cover letter listing the various changes with an explanation (if more than simple, editorial changes).

The National Secretary-Treasurer distributes to the Board of Directors and chapters for voting, copying the Rules Committee Chair.

Upon completion of voting, the Rules Committee Chair will revise the Constitution and By-laws based on those amendments receiving a two-thirds (2/3) majority vote<sup>7</sup> and send the National Secretary-Treasurer a final Word and pdf version. The pdf version will be distributed to all officers, chapters, and Executive Secretary (for posting to the web).

### MEMBERSHIP SERVICES COMMITTEE

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The Membership Services Committee coordinates the development of the Recruitment Brochure, Flower Judging Manual, and other services or materials provided by the Honor Society.

If the Membership Services Committee develops a new program, service or material, a full budget must accompany the proposal so the Board of Directors can make an informed decision on whether or not the program, service or material will be instituted by PAX.

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<sup>6</sup> This is by tradition. It is not specified in the Constitution and By-laws.

<sup>7</sup> Constitution, Article IX: Amendments and By-Laws, Section X: Amendments

The Executive Secretary will assist with the printing and distribution of these materials and any future services or materials provided by the Honor Society.

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### NOMINATIONS COMMITTEE

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The Nominations Committee develops a slate of candidates for National Offices and presents the slate at the annual business meeting.

At least 30 days before the annual business meeting, and preferably earlier<sup>8</sup>, the President will contact the chair of the Nominations Committee to initiate the nomination process in time to present the slate of officers at the annual business meeting held in conjunction with the annual ASHS conference (note if the conference is held in the fall, initiate the process two months prior to the annual business meeting).

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### STUDENT ACTIVITIES COMMITTEE

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The Student Activities Committee proposes, develops, and oversees activities of the Honor Society to engage undergraduate and graduate students at national and international events.

Depending upon the scope of any proposal by the Student Activities Committee, it is within the purview of the Board of Directors to appoint an *ad hoc* committee to provide the oversight and coordination of any specific program, activity or service proposed by the Student Activities Committee.

Currently, the Student Activities Committee provides guidance to the host institution for the planning and implementation of the National Intercollegiate Floral Crop Quality Evaluation and Design Competition.

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### FELLOWS SELECTION COMMITTEE

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The Fellows Selection Committee solicits nominations for Fellows of the Society and is responsible for assembling support documentation for selection. The immediate past President chairs the committee with 2 to 3 individuals who have been previously selected as fellows as members of the committee.

Criteria: The Fellows Award is given to Pi Alpha Xi members who have achieved marked service or excellence in the field of Horticulture and/or distinguished themselves with meritorious serve to Pi Alpha Xi.<sup>9</sup>

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<sup>8</sup> By-laws, Section I: Nominations and Election of Officers and Composition of Standing Committees, (a) Nominations and Election of Officers specifies “at least thirty days before the Annual Business Meeting”

<sup>9</sup> By-Laws, Section XI: Fellows Award, (a) Criteria

Procedures:

1. In January, the President contacts the chair of the Fellows Selection Committee to initiate the process of identifying and securing documentation for Fellow nominee(s). Do not inform nominee of his/her nomination.
2. Nominations are by three active members and merits and qualifications shall be documented in writing. Documentation includes
  - a. a letter of nomination that addresses the criteria for selection and is co-signed by three (3) active members and
  - b. a brief biographical sketch which will be used in the *Lotus Leaflet*, on the PAX website, and in the ASHS newsletter
3. Former officers of the Honor Society must be out of office for at least five (5) years to be eligible for nomination.
4. Nominees must be living at the time of selection.
5. No more than five (5) Fellows are selected per year.
6. Fellows are given an appropriate certificate signed by the Chair of the Fellows Selection Committee, the President, and the National Secretary-Treasurer.

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### ANNUAL PHOTOGRAPHY CONTEST COMMITTEE

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The Annual Photography Contest Committee proposes revisions to the contest as needed, selects the Challenge Category theme, solicits submissions, arranges for judges, compiles results, and announces the award recipients in the *Lotus Leaflet* and in the ASHS newsletter.

Prior to January, the Chair contacts the members of the committee to select the Challenge Category theme and review all contest rules.

In January, the President contacts the Annual Photography Contest committee chair to review the rules of the Photography Contest with the committee chair.

In February, the President sends the contest rules information to ASHS for publication in the ASHS newsletter. At the same time, the President also requests a booth, table and projector for the Annual Photography Contest exhibition at the annual ASHS conference. The information should appear twice in the newsletter approximately three (3) and one (1) months prior to the deadline for submission of photographs.

Chair makes arrangements with ASHS for collection of entry fees and photographs through ASHS Marketplace. Contact the ASHS Executive Director, not the Executive Secretary.

Approximately two months before the contest held at the annual ASHS conference, the chair

1. secures judges for Photography Contest and
2. requests the Executive Secretary to supply ribbons for Contest: Best in Show, and first, second and third place ribbons for each of the categories
3. asks the National Secretary-Treasurer to distribute announcements to chapters

4. asks Executive Secretary to distribute to announcement to ASHS membership via email

At the annual ASHS conference, the chair set-ups the Photography Contest display, arranges for the judging, tabulates the scores, determines the winners, and announces the winners at the annual business luncheon.

Dismantle Photography Contest at conclusion of ASHS Conference.

After the annual business meeting, the chair

- sends the list of winners and the value of each award to the Executive Secretary to cut and mail award checks
- prepares announcement of the winners and sends the photographs to ASHS Headquarters for publishing in the ASHS Newsletter and to the Vice President for inclusion in the fall issue of the *Lotus Leaflet*

## NATIONAL INTERCOLLEGIATE FLORAL CROP QUALITY EVALUATION AND DESIGN COMPETITION HOST INSTITUTION

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Assist the National Secretary-Treasurer write, with the help of the Vice President, the American Floral Endowment grant that funds the National Intercollegiate Floral Crop Quality Evaluation and Design Competition, if scheduled

Provide contest information to the National Secretary-Treasurer for distribution to the chapters

- Date and location of the competition
- Host hotel and competition venue
- Registration fee and deadline for registering
- Special events/tours

The host institution

- sets the registration fee that helps to defray the expenses not covered by the AFE grant
- arranges for the availability of appropriate material for the required number of classes of cut flowers and potted plants
- organizes local tour(s) to sites of horticultural and regional historical/cultural interest, held in conjunction with the competition
- arranges for the printing and purchase of all certificates and plaques associated with National Intercollegiate Floral Crop Quality Evaluation and Design Competition
- arranges for a final awards banquet where the presentation to winners is made
- compiles the list of winners and submits to the Vice President for inclusion in the Spring/Summer issue of the *Lotus Leaflet*

Submits an expense report to the National Secretary-Treasurer for reimbursement for approved expenses associated with hosting the competition (i.e., certificates, plaques) and compiles the list of



participating institutions (minus the host institution), their respective proportion for reimbursement (based on distance from host institution), and submits it to the National Secretary-Treasurer who will authorize the release of funds from the AFE grant to help defray travel expenses.

## CHAPTER ADVISORS

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At the beginning of each academic year, and no later than October 1, the Chapter Advisor is responsible for reporting to the National Secretary-Treasurer, the names and email addresses of each chapter officer and Chapter Advisor and the US Postal Service mailing address for the Chapter so any hard copy correspondence, certificates, and pins may be sent to the correct address.

- If at any time during the year, there is a change in the Chapter Advisor; either the outgoing or new Chapter Advisor must notify the National Secretary-Treasurer of such change.

Chapters are encouraged

- to notify the Executive Secretary of deceased members, if at all possible
- to submit articles, sharing news of chapter activities and members, to the Vice President for inclusion in the *Lotus Leaflet* (articles may be edited for style and to fit available space)

The Chapter Advisor is responsible for overseeing the activities of each chapter. The level of activity is determined by the members of the chapter:

- Some chapters are subsidiaries of a departmental club
- Some chapters only initiate members once a year or once a semester; that is determined by the chapter
- Some chapters are extremely active and function as a student organization holding regular meetings, hosting speakers, sponsoring special events (i.e., horticultural field trips, prepare a team for the National Intercollegiate Floral Crop Quality Evaluation and Design Competition) and holding fund-raising events

To remain listed as an active chapter and to continue to have voting privileges in Pi Alpha Xi National affairs, each chapter must pay its annual dues.

- The Executive Secretary affiliated with the ASHS Headquarters sends dues notices to chapters in January
  - remittance address: ASHS Headquarters, attn.: PAX Chapter Dues, 1018 Duke St., Alexandria, VA 22314
  - January 30 payment deadline
- If not paid by March 1, the Executive Secretary sends a list of delinquent chapters to the National Secretary-Treasurer
- The National Secretary-Treasurer sends a second reminder to remit dues to the Executive Secretary at ASHS Headquarters

- If dues remain unpaid by July 1, the Chapter will be considered inactive and ineligible to vote at the annual business meeting held at the annual ASHS conference, and remain ineligible to vote until dues in arrears are fully paid.
- To reactivate a chapter, the chapter must pay the reactivation fees [\$60 or current delinquent chapter dues equal to 3 years (2 years past and current year)]

The Chapter Advisor submits the list of initiates and initiation fees to the Executive Secretary (see page 16 for more information):

- Anticipated turnaround-time is 7 days from receipt of list of initiates & check.
  - For processing, it is highly recommended that each chapter submits one check for the total dues for the number of initiates (\$35 per initiate) to minimize any “insufficient funds” charges to the PAX National account.
- If the chapter provides ample lead time (allows time for processing and mail delivery) and the date of the initiation ceremony, certificates and pins may be available prior to the initiation

Each active chapter is eligible to participate in the PAX Matching Scholarship Program. See Pi Alpha Xi Matching Scholarship Program on page 19 for detailed information.

Chapters are encouraged to personalize their initiation ceremonies. Some suggestions from active chapters include:

- Have each new initiate sign a membership roster (including their PAX number) for the chapter historical records. Give them each a dried lotus pod on a stick (obtained from wholesale florist) with a piece of blue and green ribbon (PAX colors) tied onto the base of the pod. In addition initiates are presented a live 4.5" foliage plant to take home and challenged to see how many years they can keep it alive. A dinner follows the initiation ceremony. (Alpha Zeta - Wisconsin – River Falls)
- The initiation ceremony includes a nice dinner; business attire. Invitations are issued and the chapter covers the cost of dining for old and new members. A gift of a plant to the new initiates plus pin and certificate are presented. During the induction ceremony, each officer took a section of the presentation. (Kappa – Virginia Tech)
- The induction ceremony is held as part of an overall Horticulture program awards ceremony where we give out Horticulture Club awards, student worker awards, etc. The induction ceremony guidelines are followed but the students/clubs decide on the venue and the food. This helps expose the general horticulture community to the honor society hopefully inspiring some of the younger students. (Alpha Xi – Texas State – San Marcos)
- Generally, two initiations are held yearly. The Fall initiation is more formal and held at a restaurant. In the spring, a less formal initiation is held with a pot-luck dinner. A guest speaker is invited for each initiation. Initiates are presented with PAX color decorations and boutonnieres. Officers and various faculty members split up the ceremony. (Upsilon – Cal Poly)

Chapters are encouraged to be engaged in activities throughout the year to keep the membership active and engaged and to increase campus awareness of Pi Alpha Xi. Some activities chapters participate in include:

- Because of an active Horticulture student organization there may be tremendous overlap in membership. The PAX chapter may consider cohosting activities such as plant sales, invited speakers, sponsored scholarships. (Alpha Zeta - Wisconsin – River Falls)
- The chapter buys the graduation cords for the graduating members of PAX every semester. (Alpha Zeta - Wisconsin – River Falls)& (Kappa – Virginia Tech)
- Themed fundraisers, such as a "Hokie Bulb Sale" (a maroon and orange tulip blend - 8000-10,000 bulbs) sold at the Homecoming football game each year, can raise PAX awareness on campus. Funds raised help fund chapter expenses and sponsored scholarships. Community service projects, regular meetings during the semester, and maintaining a "PAX" display/color bed located on campus also help increase PAX awareness. (Kappa – Virginia Tech)
- Floral designs for campus events have been used as a fundraiser, as well as annual plant sales. We also sell timed crops and floral designs almost weekly to the campus community through an emailed announcement (Bobcat Bloom specials). Student workers and community service workers help with deliveries. (Alpha Xi – Texas State – San Marcos)
- Monthly meetings to plan field trips or bowling or some sort of social thing helps keep members active. Sponsorship of the Community Flower Show each spring as a service to encourage local residents to garden and enjoy flowers and plants helps increase awareness of PAX as does coordinating social activities with other clubs in the department whenever possible. (Upsilon – Cal Poly)

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## ESTABLISHING A CHAPTER

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According to the Constitution and By-Laws of Pi Alpha Xi, "any four-year university or college offering baccalaureate instruction in horticulture is eligible to establish a chapter."

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### PROCEDURES FOR ESTABLISHING A CHAPTER

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The faculty member desiring to establish a chapter of Pi Alpha Xi at his/her university submits the following information electronically (PDF format preferred) to the National Secretary-Treasurer.

- a petition stating "We, the undersigned, petition that a chapter of Pi Alpha Xi-The Honor Society for Horticulture be established at \_\_\_\_\_ (university's name)." The petition should have at least ten signatures from faculty (tenure and non-tenure track), staff, and students affiliated with the horticulture program.

- a letter from the nominating horticulture faculty (tenure and non-tenure track) and staff member(s) supporting this petition (co-signers of PAX members is appropriate)
- a letter from the department head/chair or school director supporting this petition and outlining goals of the department/school, including a description of the teaching, outreach, and research programs in the department/school.
- a letter from the Office of the Dean supporting this petition.
- catalogue copy for the horticulture major or academic major(s) under which horticulture is included. For online catalogues, please create an electronic file (PDF format preferred) of the catalogue copy and highlight the portions of the curriculum that directly relate to horticulture.
- a history about the department/ school, including any reorganizations that combined different disciplines into a plant sciences department/ school. If the department/ school has recently undergone a USDA or institutional review, much of this information should be found in that review documentation.
- a listing of faculty (tenure and non-tenure track), staff, their positions, and specializations should be included. If this is found on a website, please provide the URL in the nominating letter and provide a pdf file of the faculty list with positions and specializations. Indicate which faculty (tenure and non-tenure track) and staff are already PAX members.
- the five most recent years of enrolment and graduation data for graduate and undergraduate programs.

Upon receipt of the petition for a new chapter, the National Secretary-Treasurer will distribute the petition to the Board of Directors, composed of the three current national officers (President, Vice President, and National Secretary-Treasurer) along with the immediate past two presidents. Upon receipt of a majority affirmative vote from the Board of Directors the petition is submitted to the active chapters (those that are current on their chapter dues by January 31 in any given academic year). Upon affirmative vote by two-thirds of the active Pi Alpha Xi chapters, the President notifies the new chapter of its acceptance.

- Should the institution not receive a majority vote by the Board of Directors or active chapters, the institution will receive feedback as to the reason for the negative vote and the option to resubmit a petition.

Upon approval to establish a new chapter, the President of Pi Alpha Xi National will proclaim a new chapter at the university. One of the current officers will work with the institution to confirm an installation date. As stated in the Constitution and By-Laws of Pi Alpha Xi, "Such petitioning group covers the expense of the National President or other officer to attend the chapter installation and, at the time of installation, deposits with the Executive Secretary the regular initiation fee for each of the members. The chapter is exempt from further payment of dues for the remainder of the academic year, except for members initiated after the installation of the chapter." It is also customary that one of the national officers attends and performs the Pi Alpha Xi Installation Ceremony.

New chapters are named using the Greek alphabet. Naming convention dictates the chapters be named Alpha through Omega with a single letter designation. Beginning with the 25<sup>th</sup> chapter, double letter designations are used starting with Alpha Beta and running through the remaining

letters in the Greek alphabet. After Alpha Omega is used, the next chapter would be designated Beta Alpha, Beta Gamma (skipping Beta Beta), and continuing in a similar manner.

Alpha  
Beta  
Gamma  
Delta  
Epsilon  
Zeta  
Eta  
Theta  
Iota  
Kappa  
Lambda  
Mu  
Nu  
Xi  
Omicron  
Pi  
Rho  
Sigma  
Tau  
Upsilon  
Phi  
Chi  
Psi  
Omega

Procedures for establishing a chapter revised October 2015

New Chapter Guidelines Review Committee: Immediate Past President Mary Albrecht (University of Tennessee), chair; Doug Needham (Longwood Gardens; past president and chapter advisor), Dennis Ray (University of Arizona, no established chapter), Ryan Contreras (Oregon State University, chapter established in 2011), Stephanie Burnett (University of Maine, chapter approved in 2015), and Tina Cade (Texas State University, chapter established in 2005). The committee represented land-grant and non-land-grant universities, and non-university members. The charge to the committee was to review the procedure posted on our website for clarity for the way horticulture programs are structured today and to facilitate electronic submission.



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This document was compiled using Microsoft Office Word 2010. The text font is Cambria, 11 point, using the Formal built-in style set.

Built-in headings were used and the Table of Contents is generated through Heading 2.

The index is created using the Index feature under the References ribbon by marking appropriate text.

To reveal all marks, select “Show Paragraphs marks and other hidden formatting symbols” in the Paragraph block are on the Home ribbon.

When revisions are made, to update page numbers in the Table of Contents, Index and cross-references given in the body of the text, use Ctrl A (Select All), right click, and select Update Field in the menu. In the pop-up window, select Update pages only or Update entire table. Update entire table will revise the Table of Contents and the Index.

The Word file is maintained by the Rules Committee Chair and the Executive Secretary. A secure pdf file is made available to the membership on the PAX website and sent annually to each National officer, National committee chair, and chapter advisor.



## NOTES

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