

## FOR INFORMATION ONLY

### Report to the AIS from the AIS Foundation -- September 12, 2019

#### Grants & Scholarships

Below is the status of Foundation Grants at this time:

1. **Dr. Carol Wilson Grant:** Funds for Year 3 (\$1,065) have been paid to Dr. Wilson for her approved Grant for Systematic Studies of subgenera *Xiphium* and *Hermodactyloides* and Related Taxa Utilizing Next-Generation Sequencing and Morphology.
2. **Dr. Carol Wilson Grant:** The Foundation approved funds for a second grant to Dr. Wilson. The project is the Systematic and Biogeographic Studies on Iris section *Oncocyclus*, a Morphologically Diverse Lineage of Bearded Species from Mountain, Semi-Desert, and Steppe Communities. The Grant will cover 3 years for a total cost of \$9,082.60. Again, this project involves extensive use of DNA sequencing. Year 2 funds have been sent.
3. **Dr. Thomas Givnish – University of Wisconsin-Madison:** The Foundation approved in September 2018 a grant from the University of Wisconsin entitled “Drivers of Species Diversification and Floral Mimicry in *Geissorhiza* (Iridaceae): Phylogeny, Biogeography, and Vulnerability in the Cape Floristic Region”. The Cape Floristic Region (CFR) is in southwest South Africa and supports roughly 900 species of irids and 9,000 flowering plants overall. The results from this project should reveal the relationships of species within *Geissorhiza* and among genera of the iris subfamily *Crocoideae*. Total cost of this grant is \$21,990. Funds were paid for this grant on November 15, 2018.
4. **Dr. Enkhtuya Luvsanbaldan – Mongolian Academy of Science:** The Foundation in March 2019 approved a proposal for \$14,000 to fund a joint Russian-Mongolian expedition to the far east region of Russia to further study the irises of that little explored region. This was put together with the cooperation of Dr. James Waddick and includes one US member, Sean Zera, who is currently the seed exchange manager with SIGNA. The team planned to visit the locus classicus *Iris maakii* and study to determine the validity of it as a true species. It also wants to determine the distribution of *I. laevigata* in the Russia Far East.

Funds were sent by bank wire and Western Union to the Team members, and the expedition took place between May 31 and June 17, 2019. On July 26, 2019 the Foundation received 3 written reports from Dr. Luvsanbaldan. These included a day by day journal of the trip with the iris species collected each day. Several of the nights were spent camping in the countryside. Species collected included *I. ensata*, *I. uniflora*, *I. mandhurica*, *I. sanguinea*, *I. ventricosa*, *I. oxypetala*, *I. laevigata*, *I. setosa*, and *I. maakii*. They also collected over 100 samples of other living plants from various populations such as allium, euphorbia, primula and paeonia among others. The group took over 800-1000 plant pictures.

Dr. Luvsanbalden and his expedition colleagues plan to publish an article for SIGNA on their findings.

**Foundation Operations**

**Donations:** Through September 9, 2019, the Foundation received \$463,176 in donations this year. Of this, \$456,000 was the second installment from the Gerald Richardson Estate. All donations for AIS funds have been sent to AIS which also included another \$750 for the 100<sup>th</sup> Anniversary. The Foundation retained \$1,175 of donations for its own funds.

**Foundation and DuBose Trust Investments:** The bulk of Foundation monies and all of the DuBose Trust funds are now invested in Mutual Funds with Global Wealth Management of La Canada, CA. Below is the growth and income for these funds since their purchase in January, 2017:

	<b>Cost Basis</b>	<b>Market Value</b>	<b>Market Value</b>
		<b>Aug 30, 2019</b>	<b>July 31, 2019</b>
<b>AIS Foundation</b>	\$392,682	\$445,845	
<b>Sidney DuBose Trust</b>	\$408,753		\$473,006

Interest and dividend income to date totals \$5,216 for the Foundation and \$5,920 for the DuBose Trust.

The Foundation continues to fund the operations for the Iris Encyclopedia (the WIKI) and the DuBose Hager AIS Memorial Library in Mollala, Oregon.

Respectfully submitted,  
 Jill Bonino,  
 Secretary/Treasurer