

## Suggested Revisions – Pleurothallid Award Criteria Review

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Following the Williamsburg, Virginia, AOS Members Meeting in October 2000, Judging Committee Chair James Rassmann asked me to chair a task force to review the judging criteria and point scales for pleurothallids as published in the *Handbook* under 7.1.8 and 7.2.9. The task force consisted of myself, Diana Dunn, Ann and Phil Jesup, Woji Klikunas, Alan Koch and Ron McHatton.

After careful review of the pertinent sections of the *Handbook* and an analysis of the previous five years of awards to pleurothallids, the task force discussed many aspects of judging this diverse group of orchids. A number of suggestions were made and refined regarding the Pleurothallid criteria, but also a great deal of our discussions centered on the “botanical awards,” the CHM and CBR, since these are far and away the most common awards granted to this group. The task force agreed to offer suggestions for the fine-tuning and clarification of these two awards, as well as specific suggestions to modify 7.1.8 and 7.2.9.

Final suggestions from the task force were submitted to the JC chair and the JC Working Task Force on January 30, 2001. The JC took no action on this proposal at that time, and I felt it was time to suggest these changes to the judging community as a whole. I know the JC will be discussing this issue in more detail, but I felt that the task force’s recommendation ought to be public. Following are the complete recommendations.

### **Changes suggested under 5.5.2.1 (Judging — Procedure):**

Add to 5.5.2.1(5) to read: Taxonomic verification of all previously unawarded species is required, no matter what award is granted. Taxonomic verification need not be presented prior to an award being granted. Awards will be held in a provisional status until identifications is are complete.

*Rationale: see note 2 under 6.2.8 below.*

Delete 5.5.2.1(12).

*Rationale: see note 4 under 6.2.8 below.*

### **Changes suggested under 6.2.8 (CHM):**

Awarded to a cultivar of a ~~well-grown and well-flowered~~ species or natural hybrid with outstanding aesthetic appeal that contributes to the horticultural aspects of orchidology. The entire plant must be exhibited and not just the inflorescence, and the plant and flowers displayed should be in good condition and have sufficient flowers to judge the horticultural merit of the plant<sup>1</sup>. This certificate may be awarded more than once if a plant has characteristics significantly ~~different and~~ desirable and different from other similarly awarded cultivars. The distinctive features of the new cultivar must be clearly described, measurements recorded and the country of origin should be noted, if known.

The award should not be granted to a cultivar which has previously received a Certificate of Botanical Merit (an award that has been discontinued). A score of at least 80 points on the point scale in Section 7.3.2 is required. This award is granted provisionally and filed with the judging center chair pending the exhibitor supplying full taxonomic verification by a taxonomist acceptable to the AOS as published annually in the *Awards Quarterly* under the heading “AOS Taxonomic Authorities. Taxonomic verification need not be presented prior to an award being granted.”<sup>2</sup> If such verification is not received within one year the judging center chair must disallow the award unless there is satisfactory evidence that the question of verification is being actively pursued by a taxonomist. Taxonomic verifications should acknowledge the name under which the species has been previously known if that differs from the botanically correct name.<sup>3</sup> ~~A species or natural hybrid shall not receive, at the same judging, a CBR and a CHM.~~<sup>4</sup>

*Rationale:*

<sup>1</sup> *“Well-grown and well-flowered” are subjective terms. This requirement almost approaches those for cultural awards. We believe that the proper intent is to insure that the plant is well established and has sufficient flowers displayed to assess the appeal.*

<sup>2</sup> *We feel there needs to be a clarification that pre-identification of unfamiliar species is not required. There was discussion by one member as to whether this should be softened somewhat so that judges would not be required to judge a plant under a name that was felt to clearly be in error, perhaps with wording such as “However, judges may opt not to award any plant where questions of correct identification arise.” Other members of the task force felt that this softening might lead to the situation where exhibitors were required to provide pre-identification, nullifying the suggested change. In addition, it was felt that the last sentence in 5.5.3.1(1) indicates that unfamiliar taxa should be judged without requiring pre-identification.*

<sup>3</sup> *This will help to clarify any taxonomic confusion due to name changes. This is a modification of wording from the CBR as noted below under 6.2.9 in note 4.*

<sup>4</sup> *What this says at present is that the two awards are redundant and therefore should be mutually exclusive, whereas in reality a plant that is well-grown enough to exhibit its horticultural potential could easily qualify for both awards simultaneously without any redundancy. These are different awards, one for aesthetic appeal in a horticultural sense, and one for rarity, novelty, and educational value. To say that a candidate for one cannot be a candidate for the other is setting up an either/or situation, saying that a plant which qualifies for a CBR has to be horticulturally undesirable, or that one qualifying for a CHM automatically must not be rare, and/or have no educational value, or novelty. We can readily think of a number of candidates which, when first presented to judges, would easily have qualified for both. We further do not see a conflict in awarding these two awards to the same plant at the same judging because at that point they do not require any prior knowledge which would be necessary to make a comparison between one clone and others of the same species. (Please note that the task force was not unanimous on this recommendation.)*

### **Changes suggested under 6.2.9 (CBR):**

Awarded to a cultivar of a species or natural hybrid deemed especially<sup>1</sup> worthy of recognition for rarity, novelty, and educational value. The entire plant must be exhibited and not just the inflorescence. The plant need have no special horticultural desirability. The CBR is not a lesser award than the CHM, but is granted for different reasons.<sup>1</sup> No award of any kind may have previously been made to the species as a taxon, but it is not intended that the CBR be given solely for this reason<sup>2</sup>. A taxon can be granted a second CBR to correct a clear taxonomic mistake in the record, and the description of such an award should clearly state the reason for the second award.<sup>3</sup> No point scale is used, but the award shall be granted only by the affirmative vote of at least two-thirds of the judging team assigned. Full description, measurements, and country of origin, if known, must be supplied on the summary sheet since the plant, by definition of the award, has not been previously described in AOS records. This award is granted provisionally and filed with the judging center chair pending the exhibitor supplying full taxonomic verification by a taxonomist acceptable to the AOS as published annually in the *Awards Quarterly* under the heading “AOS Taxonomic Authorities. Taxonomic verification need not be presented prior to an award being granted.<sup>4</sup> If such verification is not received within one year the judging center chair must disallow the award unless there is satisfactory evidence that the question of verification is being actively pursued by a taxonomist. Taxonomic verifications should acknowledge the ~~species~~ name under which ~~it is commonly cultivated~~ the species has been previously known if that differs from the botanically correct name<sup>5</sup>. ~~A species or natural hybrid shall not receive, at the same judging, a CBR and a CHM.~~<sup>6</sup>

#### *Rationale:*

<sup>1</sup> *Further clarifies the difference between the CHM and this award.*

<sup>2</sup> *Clarifies that the CBR is not intended to be given to every new species that comes before judges, but is to be used for the stated purposes.*

<sup>3</sup> *Allows a CBR to be granted a second time to clarify taxonomic mistakes in the record.*

<sup>4</sup> *See note 2 under 6.2.8 above.*

<sup>5</sup> *See note 3 under 6.2.8 above.*

<sup>6</sup> *See note 4 under 6.2.8 above.*

### **Changes suggested under 7.1.8 (Pleurothallid Criteria):**

**Final changes to read:** The members of the Pleurothallidinae are extremely diverse, so general criteria for all species and hybrids cannot be given. Many plants considered for flower quality awards will be species or hybrids of *Masdevallia*, *Dracula*, or similar genera, and the point scale in 7.2.9 can be easily applied. Many quality plants are encountered in other genera. Some may be best judged using the General Point Scale in 7.2.1.

The form of the flowers is highly diverse. What is important in judging quality is the overall aesthetic appearance of the flowers and their presentation. The prominent parts of the flower are often the sepals, including sepaline tubes and sepaline caudae (or tails). Petals and labella are often small. It is generally desirable that the edges of the sepals should not reflex or twist. Caudae may be elongated, short, or absent; and may extend outward, reflex, or be crossed. The overall aesthetic appearance of the caudae should contribute to the general form of the flower.

Color is as varied as form in pleurothallids. The color of the flower should be clear. Suffusion of one color over another should be regular and harmonious. Stripes, spots, or blotches, if present, should be distinct. Hairs, if present, should enhance the overall appearance of the flower.

Other characteristics are variable as well. Size of the flower should be in proportion to the aesthetic appeal of the plant. The size of the flower in most hybrids should be equal to or greater than the geometric mean of the size of the parents. Flower scapes should be long enough to display the flowers well, and should contribute to the overall presentation of the plant. Generally, pleurothallids are floriferous and this should be considered when determining the floriferousness of any plant. Substance and texture should be complimentary to the other aspects of the flower. Substance is variable, and may be hard to determine on small flowers. Texture of the flowers varies considerably, from glossy to matte.

For award descriptions, it is critical that the vertical, as well as horizontal, spread be recorded, as vertical dimensions are critical in judging size in many species and hybrids. For tubular flowers, sepaline tube length is useful information. For flowers with sepaline tails, the orientation and length of the caudae should also be recorded.

These criteria, and the point scale in 7.2.9, may apply to other groups of orchids, including some in the *Bulbophyllum* and *Cirrhopetalum* complex.

**Changes by line:** The members of the Pleurothallidinae are extremely diverse, so general criteria for all species and hybrids cannot be given. Many plants considered for flower quality awards will be species or hybrids of *Masdevallia*, *Dracula*, or similar genera, and the point scale in 7.2.9 can be easily applied. Many quality plants are encountered in other genera. Some may be best judged using the General Point Scale in 7.2.1. ~~Some plants, especially members of the section *Coccineae* of the genus *Masdevallia*, have flowers of striking colors and relatively flat form. Often the sepals are relatively broad in this group, and the desired form is toward fullness and, in some taxa, roundness. In other pleurothallids, the sepals may be very narrow, twisted or otherwise unusual. In addition, the form may be cup-shaped, bowl-shaped or even tubular.~~

The form of the flowers is highly diverse. What is important in judging quality is the overall aesthetic appearance of the flowers and their presentation. The prominent parts of the flower are often the sepals, including sepaline tubes and sepaline caudae (or tails). Petals and labella are often small. Ideally, it is generally desirable that the edges of the

sepals should not reflex nor should the sepals be asymmetrically twisted, particularly in hybrids. Caudae (sepaline tails) may be short or elongated, short or absent, depending on type, and may extend outward, reflex or be crossed. ~~What is important is~~ The overall aesthetic appearance of the caudae should contribute to the general form of the flower. Caudae and sepals may reflex; however, the generally desired trait is for no (or minimal) reflexing. The prominent parts of the flower are generally the sepals and the sepaline tube. ~~Petals and labella are usually quite insignificant.~~

Colors ~~are~~ is as varied as form in pleurothallids. ~~Some species have brilliant colors while others are quite drab.~~ The color of the flower should be clear. Suffusion of one color over another should be regular and harmonious, ~~not muddy or blotched.~~ Stripes, spots or blotches, if present, should be distinct. ~~These should never detract from the overall attractiveness of the flower.~~ Hairs, if present, should enhance the overall appearance of the flower.

Other characteristics are variable as well. Size of the flower should be in proportion to the aesthetic appeal of the plant. The size of the flower in most hybrids should be equal to or greater than the geometric mean of the size of the parents. Flowers scapes should be long enough to display the flowers well, and should contribute to the overall presentation of the plant. ~~Normally,~~ Generally, pleurothallids are floriferous and this should be considered when determining the floriferousness of any plant. Substance and texture should be complimentary to the other aspects of the flower. Substance is variable, and may be hard to determine on small flowers. Texture of the flowers varies considerably, from glossy to matte, ~~depending on the ancestral species.~~

For award descriptions, it is critical that the vertical, as well as horizontal, spread be recorded, as vertical dimensions are critical in judging size in many species and hybrids. For tubular flowers, ~~floral depth (and/or sepaline tube length) can be~~ is useful information. For flowers with sepaline tails, the orientation and length of the caudae should also be recorded. ~~In hybrids, the inflorescence may be erect or not, depending on the ancestral species; although, at all times the scape should be long enough and strong enough to display the flowers well.~~

These criteria, and the point scale in 7.2.9, may apply to other groups of orchids, including some in the *Bulbophyllum* and *Cirrhopetalum* complex.

### **Changes suggested under 7.2.9 (Pleurothallid Point Scale):**

#### **Other recommendations:**

This task force further recommends that:

1. A generalized drawing of a pleurothallid flower (probably a *Masdevallia*, *Dracula* or *Pleurothallis*) be added to the figure “Floral Parts of Selected Orchid Genera” on page 58 of the eleventh edition.

2. A substantial section on the intent, and effective and thoughtful use, of the General Point Scale (7.2.1) should be included in the next edition.
3. Discussion was held on whether the scoring requirement for the CHM should be eliminated. We suggest further consideration of this issue, and whether the CHM should be awarded in the same manner as the CBR.