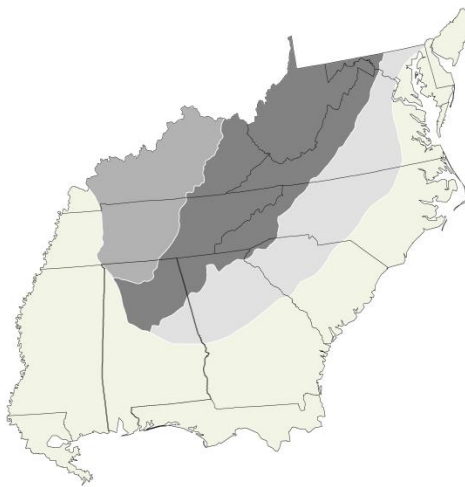


Flora of Georgia

Working Draft of 17 May 2017



by

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360. SPHENOCLEACEAE (Chickenspike Family) [in SOLANALES]	788
361. HYDROLEACEAE (Hydrolea Family) [in SOLANALES]	788
366. OLEACEAE (Olive Family) [in LAMIALES]	789
367. TETRACHONDRAEAE (Tetrachondra Family) [in LAMIALES]	794
370. PLANTAGINACEAE (Plantain Family) [in LAMIALES]	795
371. SCROPHULARIACEAE (Figwort Family) [in LAMIALES]	807
373. LINDERNIACEAE (False-pimpernel Family) [in LAMIALES]	809
375. MARTYNIACEAE (Martynia Family) [in LAMIALES]	810
376. PEDALIACEAE (Sesame Family) [in LAMIALES]	810
377. ACANTHACEAE (Acanthus Family) [in LAMIALES]	810
378. BIGNONIACEAE (Bignonia Family) [in LAMIALES]	815
379. LENTIBULARIACEAE (Bladderwort Family) [in LAMIALES]	816
382. VERBENACEAE (Verbena Family) [in LAMIALES]	820
383. LAMIACEAE (Mint Family) [in LAMIALES]	824
384. MAZACEAE (Mazus Family) [in LAMIALES]	849
385. PHRYMACEAE (Lopseed Family) [in LAMIALES]	849
386. PAULOWNIACEAE (Paulownia Family) [in LAMIALES]	850
387. OROBANCHACEAE (Broomrape Family) [in LAMIALES]	851
392. AQUIFOLIACEAE (Holly Family) [in AQUIFOLIALES]	859
394. CAMPANULACEAE (Bellflower Family) [in ASTERALES]	862
400. MENYANTHACEAE (Buckbean Family) [in ASTERALES]	868
403. ASTERACEAE (Aster Family) [in ASTERALES]	869
408. ADOXACEAE (Moschatel Family) [in DIPSACALES]	972
409. CAPRIFOLIACEAE (Honeysuckle Family) [in DIPSACALES]	975
413. PITTOSPORACEAE (Pittosporum Family) [in APIALES]	979
414. ARALIACEAE (Ginseng Family) [in APIALES]	980
416. APIACEAE (Carrot Family) [in APIALES]	983

The Flora

In the nineteenth and early twentieth centuries, the botanical exploration of an area and writing a flora to summarize that information was seen as a basic societal need leading to the discovery of economically valuable information. Financial support for the research and writing of floras has waned in recent decades, though, as they have been increasingly regarded as “old science” and resources have shifted to areas of plant science seen as more “cutting edge”. Even in taxonomic research, the advent of molecular techniques has largely supplanted detailed taxonomic research (at generic levels and below) and the writing of floras, and the great majority of papers in plant systematics now address phylogenetic relationships within a particular group of plants, and mostly at higher taxonomic levels. Traditional

monographic taxonomy, with descriptions of taxa, keys to facilitate their identification, distribution maps, and assessments of habitat and relative abundance or rarity, has become increasingly rare.

Yet, paradoxically, the societal uses and needs for the translation of taxonomic information to a useable form, such as floras, have never been greater. Globalization of human societies and economies has meant that plants are regularly introduced far away from their regions of nativity, and many become established and can be either benign or cause economic and conservation damages. Increasing human utilization of land resources has fueled a biodiversity crisis, with many species now considered imperiled. In the United States and elsewhere, this has resulted in considerable governmental and nongovernmental activity focused on biodiversity inventory and conservation, “recovery” of endangered and threatened species, ecological studies and ecological restoration, and assessment and suppression of invasive exotics. All these activities require an accurate and sophisticated understanding of the flora of an area. These activities also generate new information about the taxonomy, distribution, and conservation status of components of a region’s flora which then needs to be incorporated into new iterations.

In the southeastern United States, the publication thirty-seven years ago of the Manual of the Vascular Flora of the Carolinas, by A.E. Radford, H.E. Ahles, and C.R. Bell (Radford, Ahles, & Bell 1968), was a landmark. In the decades since its publication, it has served as the primary reference for the identification of plants in the Carolinas, and throughout the southeastern United States (since most other states were not covered by comparable, recent references). The effort to research and write the Manual of the Vascular Flora of the Carolinas took about 11 years, and resulted in a series of publications, the Guide to Vascular Flora of the Carolinas (Radford, Ahles, & Bell 1964), the Atlas of the Vascular Flora of the Carolinas (Radford, Ahles, & Bell 1965), and finally the Manual itself (1968). Once published, the existence of “the Manual” helped generate an interest in and further studies of the flora of the region; since then, many additional species have been documented as part of the region's flora, additional alien species have become naturalized, new species have been described, monographs have given new taxonomic insights into groups, nomenclature accepted in 1968 has been found to be invalid, new and more reliable keys have been developed, and systematic treatments have changed and advanced. Increasingly, identification of the flora of our area (and other states of the Southeast and Mid-Atlantic) by academic researchers, agency personnel, and the interested public is hampered by the lack of an up-to-date flora. Without such a flora, identification must involve reference to herbaria and thousands of monographs, papers, and other floras – resources not readily available to many people who need them. The absence in the region of a single-source modern standard for the systematic treatment, nomenclature, and identification of the flora compromises scientific studies, ecological research, and agency inventory, management, and monitoring of ecosystem and species biodiversity.

At the present time, the Flora includes treatment of all species in the flora area of Delaware, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Alabama, Mississippi, Tennessee, Kentucky, the District of Columbia, and Maryland, and portions of the additional states of Florida (northern Florida, including the Panhandle and northeastern Florida, south to and including Levy, Marion, Putnam, and Flagler counties, at the northern border of the FL peninsula), New Jersey (southern New Jersey, south of and including Monmouth and Burlington counties), and Louisiana (the Florida Parishes, east of and including West Feliciana, East Baton Rouge, Ascension, St. James, St. John the Baptist, St. Charles, Jefferson, and Plaquemines parishes) (see Figure 1.A.). Approximately 7000 taxa are keyed and treated, making the Flora a comprehensive resource for understanding the flora of all of the Southeastern United States east of the Mississippi River and south of the Ohio River and Mason-Dixon Line, excluding peninsular Florida.

Sources of information.

This new flora is based on all resources available: herbarium specimens, published literature, grey literature, Natural Heritage databases and rare species lists, and personal communication with a regional network of botanists and taxonomic experts. Herbarium specimens have been consulted at major institutions in the region.

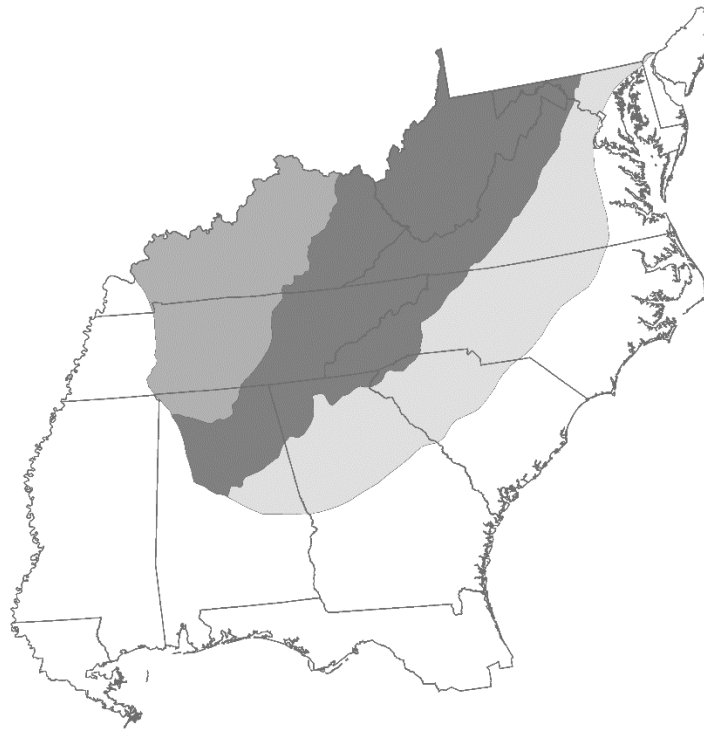


Figure 1.A. Map of the area covered by the Flora.

Criteria for inclusion of taxa.

One of the first challenges that the author of a flora encounters is to decide the criteria for the inclusion of taxa. The general rule in most floras can be simply summarized as “all native taxa and naturalized alien taxa,” but within this simplistic phrase hide many complicated issues, and floras often differ widely in the actual criteria and judgments that they apply (Pyšek et al. 2004; Palmer, Wade, & Neal 1995). In particular, coverage of alien species is very uneven in floras, and the frequent exclusion of many alien species from floras hampers ecological studies, conservation efforts, and efforts to minimize the ecological and economic impacts of invasive aliens.

The following categories of taxa are included and treated fully as “primary” species:

1. Native taxa documented from the Flora (Georgia, South Carolina, North Carolina, Virginia, West Virginia, Delaware, and northern Florida, Alabama, Mississippi, Tennessee, Kentucky, Maryland,

District of Columbia, Maryland, eastern Louisiana, and southern New Jersey), whether extant or presumed extinct. Some authors, such as Isely (1990), have “excluded” taxa from a flora if they believed them to be extinct or extirpated. This philosophy seems poorly considered: these taxa may prove not to be extinct or extirpated and their inclusion in the Flora will facilitate possible rediscovery, even if never found again specimens of them in the herbarium need to be identified or confirmed, and their former existence in the region should be documented.

2. Alien taxa introduced by whatever means and demonstrably established and reproducing (sexually or vegetatively) as a component of the flora. Parallel to #1 above, established alien taxa which have been presumably eradicated (such as *Striga asiatica* in the Carolinas) are included, as their eradication may not have been effective, they may be reintroduced, specimens need to be identifiable using the Flora, and their former existence should be documented.
3. Alien taxa substantially cultivated in the Flora area as crops, such as *Triticum aestivale*, *Zea mays*, *Vitis vinifera*, and *Pinus clausa*. Such species are variably represented in herbaria, and are often included in floras only if one or more herbarium specimens indicate that the species is persisting, or has been collected around a dump or in the edge of a field “out of cultivation.” This seems an arbitrary criterion to apply to species which are among the most commonly seen and economically most important in a region, and may cover many thousands of acres or square miles in the region covered by the flora.

Additional categories of taxa are included and treated as “secondary” species:

1. Native taxa with uncertain documentation, this varying from literature reports not definitely verifiable with specimens (some of these old and some new), to sight reports regarded as probably correct. Taxa in this category are included as secondarily-treated taxa, and their imperfect documentation is described.

Species which have been reported from the Flora area but which are excluded for one reason or another are also listed and the reason for their exclusion mentioned or discussed.

Taxonomic philosophy. Taxonomic treatments generally follow recent monographic and revisionary work, but an effort has been made to provide a certain rough consistency of “splitting” vs. “lumping” across different taxonomic groups. As is generally true in recent treatments, generic and family concepts are often narrower than those used in the Radford, Ahles, and Bell (1968) Manual, based on new evidence, including (but not limited to) cladistic methods applied to morphologic and molecular data. Ironically, these results have often resulted in a validation of earlier, narrower generic (and familial) concepts espoused by J.K. Small, P.A. Rydberg, and others (see Weakley 2005 for extensive discussion). Varieties are less frequently recognized than by Fernald (1950), though a considerable number of species and infraspecific taxa “lumped” by Radford, Ahles, and Bell (1968) are recognized (generally following more recent monographic or revisionary work). Some taxa not formally recognized are discussed and characters for their recognition provided in the text, to draw attention to putative taxa that may warrant recognition after further evaluation.

Format and features.

Detailed keys. Keys have been subjected to rigorous testing in the field and herbarium by hundreds of users. To the degree feasible, keys are structured to emphasize characters that are readily observable and available for long parts of the year, such as vegetative characters; this is not feasible for all groups,

of course. Multiple characters are provided. Terminology strives to avoid abstruse technical terms which do not significantly add meaning (for some genera, an introduction to morphological characters and terms used is provided as “Identification notes” preceding the key). Geographic distributions and habitats are sometimes included in the keys as pragmatic, useful, secondary “characters,” but are placed in brackets to indicate that they are not “true” characters. The keys include all species from the primary and secondary flora areas (North Carolina, South Carolina, Virginia, Georgia, Alabama, Mississippi, Tennessee, Kentucky, West Virginia, Maryland, Delaware, the District of Columbia, and parts of Florida, Louisiana, and New Jersey). In some cases, several alternate keys are provided. The primary emphasis of the keys is pragmatism – effective and efficient identification. For this reason, a key to a genus sometimes includes closely similar taxa not in the genus that may be mistaken for it. Another example is that the “family key” to ferns and fern allies is actually a key to genera, allowing an emphasis in the key on readily observable characteristics, rather than the technical characters often needed to distinguish fern families. Keys are based on herbarium specimens, though reference is made when characters based on live or fresh plants may differ from those of pressed and dried specimens. Some keys have been adapted from literature cited; where the adaptation is particularly close, credit is given to the source by specific citation.

Habitat. Information is provided about the habitat of the taxon. This information is largely from the field experience of the author, supplemented by information from other botanists, from herbarium labels, and from the literature. For species with wide ecological amplitudes, the habitat may be described simply and broadly (“a wide variety of upland forests”), while the habitat of more localized, specialized, or rare taxa may be described in considerable detail (“moist outcrops of calcareous to semi-calcareous metamorphic rocks, such as mylonite or marble, near waterfalls in humid escarpment gorges with high rainfall, at low elevations”).

Native status. The native or alien status is stated. Also, an asterisk prior to the species’ name indicates that it is considered alien throughout the primary flora area. Some past floras, including Radford, Ahles, and Bell (1968), were haphazard in their inclusion of this information, which is a very important attribute of each recognized taxon. If there is a question, it is mentioned or discussed. For aliens, an opinion is given as to whether the taxon is naturalized, persistent, waif, etc. in the primary flora area.

Flowering/fruiting dates. Flowering and fruiting dates are provided for the primary flora area. These are derived from herbarium specimens viewed by the author (collected from within the Flora area), from field observations by the author (within the Flora area), and from literature cited.

Distribution of species. A statement of the rangewide distribution of each taxon treated is provided. This is based on published distribution maps and distribution statements in other floras, amended and improved by additional herbarium specimens and published records (such as the “Noteworthy Collections” section in the journal *Castanea*). The distribution within the primary area is provided by state and physiographic province.

These distribution statements are being replaced by a map. The map shows distribution within the Flora area symbolically, with each state × physiographic province area, except that on the maps, the very small areas of the DC Piedmont, the DC Coastal Plain, and the DE Piedmont are not shown separately from the MD Piedmont, the MD Coastal Plain, and the MD Piedmont, respectively. The native/alien status of the taxon is shown by squares for native occurrence and triangles for alien occurrence. Note that some species have distributions including both alien and native distributions, so *Dionaëa muscipula* for instance is native in the Coastal Plain of NC and SC, but alien in the Coastal Plain of FL. The

abundance in that state \times physiographic province area is shown by the symbol, an open symbol is rare, a symbol with a dot is uncommon, and a filled symbol is common.

In the lower right corner is a space designated for distributional information. If the species is endemic to the Flora Area, you will see "EN." If the species is alien, you will see the region of the world to which it is native. If the species is native but not endemic, you will see a compass rose. Eight arrows depict the native distribution of the taxon outside of the Flora area. Arrows can be long (common at least somewhere in that region), or short (only uncommon or rare in that region).

The regions to which the eight arrows point are:

N arrow -- ne. North America (PA and n. NJ north to the Canadian maritime provinces, west through QC to se. ON and e. and s. OH);

NW arrow -- nw. North America (w. OH, MI, w. ON, and NU west to AK, BC, and OR, north of and including n. MO, NE, WY, ID, and OR);

W arrow -- w. United States (the western "Southeast" of trans-Mississippi LA, AR, s. MO, OK, and e. TX), west to sw. United States;

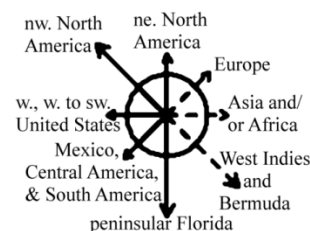
SW arrow -- Mexico, Central America, and South America;

S arrow -- peninsular FL;

SE arrow (dashed to indicate overseas) -- West Indies (including Bahamas) and Bermuda;

E arrow (dashed to indicate overseas) -- Asia and/or Africa;

NE arrow (dashed to indicate overseas) -- Europe.



	Native	Maybe Exotic	Exotic
Waif	n/a	*	*
Rare	□	◊	△
Uncommon	◻	◈	◼
Common	■	◆	▲
Endemic	● EN	n/a	n/a

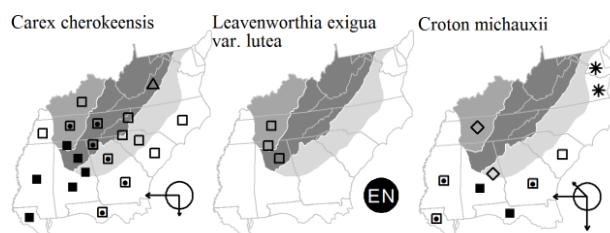


Figure 1.B: Distribution map key and sample distribution maps

Literature. Nearly all genera have citations to recent, pertinent systematic literature, as well as more limited citations to literature on ecology and population biology. The intent is to provide the user with access into more detailed literature, and to document the literature basis of the treatment followed in the Flora. About 2100 references have been consulted and are cited.

Synonymy. Cited synonymy is provided to regional floras, monographs, revisions, and other significant floristic and monographic treatments, at the end of the account and enclosed in brackets: []. This allows comparison of the treatment in the Flora to other treatments, and convenient access to the other treatments. Synonymy is (or is in the process of being) provided comprehensively for the following floras: Gentry et al. (2013) as Ar, Gleason and Cronquist (1991) as C; Fernald (1950) as F; Wunderlin & Hansen (2015) as FI; Flora of North America (1993b, 1997, 2000, 2002a, 2002b, 2003a, 2004b, 2005, 2006a, 2006b, 2006c, 2007a, 2009, 2010) as FNA; Flora of China (1993 et seq.) as FoC; Gleason (1952) as G; Godfrey and Wooten (1979, 1981) as GW; Mohlenbrock (2014) as II; Kartesz (1999) as K or K1; Kartesz

(2010) as K2; Kartesz (2015) as K3; Jones (2005) as Ky; Brown & Brown (1984) as Md; the Flora Mesoamericana (1995 et seq.) as Meso; Yatskievych (1999, 2006, 2013) as Mo; Radford, Ahles, and Bell (1968) as RAB; Small (1933, 1938), as S; Vascular Flora of the Southeastern States (Cronquist 1980, Isely 1990) as SE; Tennessee Flora Committee (2015) as Tn; Weakley, Ludwig, & Townsend (2012) as Va; Wofford (1989) as W; Wunderlin & Hansen (2011) as WH3; Acevedo-Rodríguez & Strong (2012) (Catalogue of Seed Plants of the West Indies) as WI; and Strausbaugh & Core (1978) as WV. All names known to me to be attributed to the **Flora** area in the other floras cited above, significant monographs and revisions, and important regional publications are accounted for, from Small (1933) and forward in time, with the exception that the process has not yet been completed for several floras (notably FoC, Il, Ky, and Tn). Prior to the name cited, a symbol is inserted to convey the conceptual relationship of the two names – in other words, the relationship of the name and associated taxonomic concept being applied in the Flora to the name and associated taxonomic concept in the other references, regardless of the nomenclatural relationship of the two names. “=” means that the two concepts are believed to be identical. If the taxonomic concept is identical and the name is also the same, the name is omitted. “<” means that the name in use in the flora is finer than (a split relative to, and wholly included within) the name as used in the reference(s) listed. “>” means that the name and associated taxonomic concept in use in the Flora is broader than (a lump relative to, and wholly including) the name as used in the reference(s) listed. “><” means that there is a complex and cross-cutting relationship between the name and associated taxonomic concept used in the Flora and the name and associated taxonomic concept used in the reference(s) listed. “?” means that the relationship between the taxonomic concepts is not understood by me at this time (often this means that there are complications outside the flora area, and often outside of North America, that make the concept relationship difficult to determine).

Comments and discussion. Miscellaneous comments and discussion are provided for many species and genera, including discussion of biogeography, more details on distribution of rare species, additional notes on identification not included in the keys, information of particular interest on species biology and ecology, habitat, uses, discovery in the flora area or a state, etc. These “idiosyncratic comments” add to the general usefulness and interest of what is intended to be a rigorous, practical, and interesting flora.

Acknowledgments

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Hal Massie, Kathy Gould Mathews, Jim Matthews, David McAdoo, Bill McAvoy, Bob McCartney, Kathleen McCoy, Carol Ann McCormick, Patrick McMillan, Jordan Metzgar, Julie Moore, Mike Moore†, Larry Morset†, Bill Moye, Nora Murdock, Zack Murrell, Lytton Musselman, Robert Naczi, Fred Nation, Gil Nelson, John Nelson, Guy Nesom, Claire Newell, Carl Nordman, Cary Norquist, Hugh Nourse, Shawn Oakley, Doug Ogle, Jeff Ott, James Padgett, Tom Patrick, Karen Patterson, Steve Paull, Chris Payne, Cary Paynter, Linda Pearsall, Sam Pearsall, Bob Peet, Mark Peifer, Jeff Pippen, Dan Pittillo, Bert Pittman, Derick Poindexter, Jackie Poole, Richard Porcher, Milo Pyne, Al Radford†, Tom Rawinski, Doug Rayner, Jerry Reece, Chris Reid, Mark Rose, Carl Rothfels, Mary Russo, Mike Schafale, Steve Seiberling, John Semple, Joey Shaw, Jason Singhurst, Alan B. Smith, Alan R. Smith, Inge Smith, Peter Smith, Anita Solomon, Bruce Sorrie, Dan Spaulding, Brent Steury, Don Stone†, Bill Stringer, Dale Suiter, Dave Taylor, John Thieret†, Michael C. Thompson, Johnny Townsend, Erin Tripp, Mike Turner, Julie Tuttle, Leonard Uttal†, Nancy Van Alstine, Brian van Eerden, Herb Wagner†, Andy Walker, Dan Ward, Jim Ward, Donna Ware, Richard Ware, Stewart Ware, Allison Weakley, Kristie Wendelberger, Tom Wentworth, Peter White, Brenda Wichmann, Tom Wieboldt, Bob Wilbur, Theo Witsell, Gene Wofford, Donna Wright, Robert Wright, Steve Young, the Flora of Virginia Project, participants in the Carolina Vegetation Survey annual “pulses”, NatureServe (Durham Office), the Southern Resource Office of The Nature Conservancy, the North Carolina Natural Heritage Program (Division of Parks and Recreation), the Virginia Division of Natural Heritage, the Conservation Trust for North Carolina, and many herbaria, especially NCU, NCSC, DUKE, UGA, USCH, CLEMS, VDB at BRIT, FSU, US, BRIT, WILLI, BOON, WCUH, HUH, MO, and UNCC herbaria. I ask the forgiveness of anyone omitted inadvertently.

KEYS TO FAMILIES (AND, IN SOME CASES, GENERA)

KEY TO GENERA AND FAMILIES

General advice on keying. The keys in this *Flora* are artificial and unabashedly pragmatic. One can get to the sub-keys (Key A, Key B, Key A7, etc.) by proceeding through the general key, or by jumping directly to the sub-key based on its “description”. In order to accommodate both access methods, some taxa are keyed in 2 or more sub-keys, but would logically be found only in one sub-key if one proceeded accurately through the general key. For instance, floating aquatic pteridophytes are keyed in both Key A2 and Key C1, though a logical procession through the general Key would key them into Key C1 and not allow them to appear in Key A2; they are keyed as well in Key A2, so that if it is apparent or determinable to the user that they are vascular cryptogams, they can be found via that key as well.

Identification keys are a time-honored and useful way to arrive at a tentative decision about the identity of a plant in the field, on an herbarium sheet, or in an image. A key is essentially a decision tree, where you are presented with a series of dichotomous (“choose A or B”) choices that arrive eventually at an “answer”. “Keying” takes some practice, though, and we here provide some advice and information to help you use the keys in the *Flora of Virginia*. The keys in this book are indented keys, which take more space but provide easier visual understanding of the structure of the key and make it easier to backtrack, when that is needed, or to look ahead, which is often helpful, particularly for those who are more experienced with the plants of Virginia. Each choice in the decision tree (key) is represented as a couplet with 2 leads. Each couplet in a key has a unique (and sequential) number, which reduces errors in following the key, particularly in longer subkeys, in which the two leads to be compared may be some distance apart and even on different pages. Some characters require some magnification; a high-quality 10× hand lens is adequate for use of the Key to Genera and Families and for use in nearly all the subsequent keys to genera and species in the families (greater magnification and a dissecting scope are helpful or necessary in some families and genera with small, technical features).

It is important to **read both leads of a couplet** and to make a choice based on the **preponderance of the evidence**. In most couplets, 2 or more characters are used, and the character states of each of those characters are contrasted. Sometimes the contrast for a particular character may be an incomplete one, such as “petals 4 or 5” vs. “petals 5 or 10” – if your plant has 4 or 10 petals, the choice based on that character is clear, but if your plant has 5 petals, this character provides no useful information for you and you will need to rely on other characters used in the same lead. This illustrates the problem of just reading the first lead and making a snap decision (“oh, it has 5 petals, so I will choose the first lead”). Many couplets use one or more characters that may not be available on your specimen, or at least not readily determinable, such as the number of petals on a plant in fruiting stage, or the fruit type on a plant in flowering stage (though see “Sleuthing Characters” below for some advice on determining character states that may not be readily apparent). Occasionally, you may run into a couplet which represents a “dead end” for you, in that the plant you are keying does not have the feature(s) you are asked to judge (e.g., the petal number of a plant not in

flowering stage). A “dead end” does not mean that you cannot arrive at an “answer”, though it does make it somewhat more difficult. In this situation, as well as in any situation in which the choice between the two leads of a couplet is somewhat or completely ambiguous, it is a good idea to record or remember the location or identity of the ambiguous couplet (“Key N1, couplet 11”), take one lead and see what answer results, then take the other lead and see what answer results. Occasionally, the answer will be the same (some species and genera are keyed in multiple places), but often this will lead you to two contrasting potentially correct answers which must then be compared (see below for advice about testing the “answer” arrived at in a key). Often, you will get an indication that one way is the wrong way because you will be confronted with couplets that do not make sense relative to the plant you have in hand.

The Key to the Genera and Families has been structured in a somewhat novel way, emphasizing vegetative characters (those not involving flowers and fruits). Many professional and amateur users of floras nowadays need or want to name plants throughout the growing season, and not only during the somewhat short periods of time when flowers or fruits may be present on the plant. For this reason, more readily observable features of the growth form of the plant, the arrangement of the leaves, whether it is woody or herbaceous, a vine or not, and other characters that are readily observable over a long period are used as much as possible in the keys, and those vegetative characters are especially used in the early portions of the keys, so that based strictly on more observable and less “technical” characteristics, you can key down to an answer or at least to a relatively small subset of the species in the Flora. In other words, we have tried to minimize the use of difficult choices, ambiguities, and technicalities at all, but when they have proven necessary, we have “pushed them” as far down into the latter parts of keys as possible, so that if a true “dead end” is reached in the key, an identification can possibly be made based on comparison of the relatively few possibilities remaining.

Confirming identifications. Identification keys are a tool, but not an infallible one, and it is therefore critical to confirm your identifications. It is easy to make the dangerous assumption that “it keys to it, so it must be it”. You may have made a simple error (such as jumping down a line in the key), or an error of interpretation in deciding between the two leads. The key may be imperfect, having failed to accommodate an unusual species or genus, or unusual conditions (character states) in a species or genus (e.g., abnormally large leaves, leaves whorled by developmental anomaly in a typically opposite-leaved species, etc.). Or, you may have found a native or alien species not known before from Virginia and therefore not provided for in the key! For these reasons, it is important that you compare your “answer” from keying to the description and drawings in the Flora of Virginia, to written technical descriptions and drawings in other floras (increasingly available online, such as the Flora of North America), to specimens in area herbaria, and to photographic images available in other books and online.

Leaf arrangement. The arrangement of leaves (**alternate**, **whorled**, or **opposite**) and their **disposition** (**basal** or **cauline**) is used frequently in the keys. Alternate leaves are attached at the stem 1 per node, opposite leaves 2 per node, and whorled leaves 3 or more per node. Note, however, that alternate leaves are sometimes closely clustered (with very short internodes) and mistakable as whorled or opposite. Note also that some plants (*Hypericum*, *Eupatorium*, many Lamiaceae, many others) have a strong tendency to have axillary shoots in the axils of primary leaves; these are often referred to as **axillary fascicles**. These can superficially make it appear that there are many leaves at a node. Axillary fascicles tend to have smaller leaves (at least for a time) than the primary leaves and to have short and compressed internodes; these should not be interpreted as whorled if the primary leaves are not whorled. Also, many herbs with opposite leaves have occasional developmental “errors” that result in the leaves being in whorls of 3; these cannot be reliably accommodated under “leaves whorled” choices in the key, so if a plant with whorled leaves does not key well under “leaves whorled”, it should also be sought under “leaves opposite”.

Leaf duration. The longevity of leaves is used in the keys for woody plants. **Evergreen** plants are those that retain full leaf cover through the winter, while **deciduous** plants lose their leaves at the end of the growing season (for some species, sometimes well before autumn). Some plants are also described as **tardily deciduous** or **semi-evergreen**, meaning that they drop leaves gradually into the winter, so that they are sparsely bedecked with leaves or even bare by the time of initiation of new growth in the spring. Unless you are in a position to observe the plant repeatedly through the seasons, leaf duration must be interpreted, and this can be difficult, especially on herbarium specimens. In general, evergreen leaves tend to be darker green (at least on the upper surface), often shinier, and usually thicker in texture and stiffer than deciduous leaves, but there are exceptions to all these tendencies. It can be helpful to see if the specimen or living plant has two obviously different ages of leaves present: older, tougher, more ragged and insect-eaten leaves of last year as well as younger leaves of the year. On many woody plants, it is easy to determine what is new (this year’s) growth from older growth, and the younger vs. older leaves may be spatially separated on shoots of the season vs. on older wood. Note, though, that some “evergreen” shrubs or trees essentially replace all their leaves at leaf-out in the spring, all of last year’s leaves being sloughed as the current year’s leaves are emerging.

Growth form or habit. The basic growth form or habit of the plant is used extensively in the keys. **Woody** plants have substantial secondary or diameter growth of wood, which makes their stems (in general) thicker, stronger, stiffer, and tougher; they also have “perennating structures” (normally buds) borne above ground on their woody stems. **Woody plants** are further subdivided into **trees**, **shrubs**, **rosette shrubs**, **subshrubs**, **rosette subshrubs**, and **lianas**. **Trees** are generally more than 5 meters tall at maturity and usually have single stems which are not interconnected by subterranean rhizomes (forming clonal patches). However, some tree species are characteristically multi-trunked or tend to produce a multi-trunked growth form as a result of stump-sprouting following logging, and stressful ecological conditions (such as shallow soil over rock or maritime exposure) can produce trees shorter than 5 meters. **Shrubs** are generally less than 5 meters tall and are often multi-stemmed from the base or near it (though some shrubs are characteristically single stemmed); quite a few are also clonal and produce many above-ground stems from a series of interconnected underground rhizomes). Some species grow as both trees and shrubs or have an ambiguous form; these are generally keyed as both trees and shrubs. Note that trees have seedlings or saplings that are shorter than 5 meters tall and may be multi-stemmed in growth form, especially in burned habitats; these are not keyed as shrubs and can generally be recognized as tree seedlings or saplings by the presence in the habitat of adult trees of the same species and by their lack of sexual reproduction (flowers, fruits, cones, etc.) because of their juvenile condition. **Subshrubs** are somewhat to strongly woody, but short in stature (often < 2 dm tall); while they have woody growth, they are often mistaken for herbs. **Rosette shrubs** and **rosette subshrubs** have basal leaves (see **Leaf location**, below) from an above-ground but short woody stock. **Lianas** are woody vines: in essence shrubs with specialized structures for climbing, including a) adventitious roots, b) twining growth of main stems, or c) simple or branched tendrils that either twine themselves or have

adhesive “holdfast” tips. Some plants are keyed both as lianas and as shrubs. **Herbaceous plants** lack substantial secondary growth of wood and are either annual or have perennating organs (such as buds) on subterranean rhizomes, crowns, caudices, or corms. Herbaceous plants are further subdivided into **herbs** and **herbaceous vines**. **Herbs** are erect, sprawling, or trailing, but lack specialized adaptations for climbing (twining, tendrils, etc.); whereas **herbaceous vines** have these specialized adaptations. The interpretation of “woodiness”, between shrub and herb (and liana and herbaceous vine), can be difficult, especially with herbarium specimens. Some herbaceous plants can become suffrutescent: tough, fibrous, or thick in ways that mimic or approach woodiness. The presence of vegetative buds (not flower buds) in the axils of leaves on the aerial stems clearly indicates a woody plant. Some plants which are ambiguously woody and likely to be mistaken one way or the other are keyed both ways.

Leaf disposition. The disposition of the leaves, whether basal or cauline, is used as a distinction to separate some of the major subkeys (in the woody plants separating Keys A7, B1, and E from the others, and in the herbaceous plants separating Key N from Keys O, P, Q, R, and S), as well as in a few other places. **Basal leaves** arise from underground buds (on rhizomes, crowns, caudices, or corms) or from the very base (ground level) of an aerial stem. **Stem leaves** (cauline leaves) are those which arise from above-ground (aerial) stems of the plant. Many plants, however, have **basally disposed** leaves, where the largest leaves are basal (and usually persistent through the growing season as a “basal rosette”), but smaller stem leaves extend up the above-ground stem. This can be ambiguous, though, and the persistence of basal leaves can be affected by season and conditions. While many taxa are keyed both in Key N and in one or more of Keys O, P, Q, R, and S), if this choice seems at all ambiguous and keying one way does not work well, the other choice should be tried.

Leaf type. Leaves are described as either **simple** or **compound**. Simple leaves are not divided into separate leaflets; the leaf tissue is continuous with all other leaf tissue of the leaf. By contrast, compound leaves are separated into 2 or more separate leaflets, connected only by various stalks (petiolules, rachises, rachillas) that lack leaf tissue. Simple leaves may be **unlobed**, **pinnately lobed**, or **palmately lobed**, and the lobes may be variously shallow or cut nearly to the midvein or base of the leaf. Perhaps the easiest way to determine whether leaf lobing is pinnate or palmate is to look at the major veins in the leaf. Pinnately lobed leaves have lobes arrayed in a line along either side of the midvein, and the lobes are associated with the major secondary veins of the (pinnately veined) leaf. The lobes of palmately lobed leaves are associated with the 3 or more palmate veins that arise together from the base of the leaf blade (note that the lobes of palmately lobed leaves are sometimes themselves sublobed, and that these sublobes are often pinnately arrayed: the leaf is still considered palmately lobed). **Compound leaves** are further classified by the number of leaflets, whether the leaflets are arrayed in a pinnate or palmate manner, and whether there is a single order of division or 2 or more orders of division. **Palmately compound** leaves have all leaflets attached at a single point, at the end of the petiole. Palmately compound leaves in our flora have from 3 to ca. 21 leaflets and are never further compound beyond the single order of division (in other words, the leaflets are not themselves compound). **Pinnately compound** leaves have leaflets attached to one or more axes (rachises, rachillas) that extend beyond the end of the petiole, and many taxa have 2 or more orders of division. Bifoliate (**2-foliate**) leaves are very rare in our flora. Trifoliate leaves (**3-foliate**, and sometimes called “ternate”) are very common in our flora and can be either **palmately 3-foliate** or (especially in the Fabaceae) **pinnately 3-foliate**. Pinnately compound leaves have a short rachis extending past the end of the petiole (and the point of attachment of the 2 lateral leaflets via their petiolules), with the terminal leaflet attached at the end of this rachis via its petiolule; the joint between the rachis and the terminal petiolule is usually obvious because of a change in diameter, color, vestiture, and/or texture. The distinction between palmately 3-foliate and pinnately 3-foliate leaves is not used in the [Key to Genera and Families](#) but is important in the some other keys, especially the key to genera of the Fabaceae. Pinnately compound leaves with 4 or more leaflets are very common in our flora, especially in some families. **Even-pinnately compound** leaves (the less common situation) have an even number of leaflets, often paired along the rachis or rachillas, and lack a terminal leaflet at the tip of the rachis or rachilla and extending along its axis; these taxa are concentrated in the Fabaceae and a few other smaller families. **Odd-pinnately compound** leaves have a terminal leaflet and therefore usually an odd number of leaflets. Odd-pinnately compound leaves with 2 or more orders of division are typically described in the keys as **complexly compound**. Other floras variously describe leaves of this sort as 2-pinnate, 3-pinnate, decompound, biternate, or other terms, but these have largely been avoided in the keys in this work because the “compoundness” is often complex, mixed between pinnate and ternate, and therefore difficult to describe accurately with such terminology. For instance, many members of the Apiaceae have complexly compound leaves, which are initially 3-forked (ternate), each of these forks may then be 3-forked again (though with the lateral forks supporting fewer or smaller leaflets than the terminal one), and these 3-order divisions are then often pinnately compound. Note that **deeply lobed leaves** can sometimes be easily mistaken for **compound leaves**. Compound leaves have no leaf tissue connecting the individual leaflets, whereas lobed leaves have at least a narrow flange of leaf tissue along the rachis or rachilla that connects the leaf tissue of one lobe with the leaf tissue of the next. In some taxa, this is difficult to interpret, and these have generally been keyed both ways.

Lobes and teeth. The presence, absence, number, and shape of **lobes** or **teeth** along the margin of the leaf are very useful vegetative characters. The term “tooth” or “teeth” is here used in a broad sense to include any of the small marginal projections covered under the terms dentate, denticulate, serrate, serrulate, crenate, crenulate, spinose, spinulose, doubly serrate (biserrate), or erose. In other words, teeth can be rounded, pointed, or spine-tipped, and of various shapes and sizes. The term “tooth” or “teeth” does not include undulations out of the main plane of the leaf, hairs, or epidermal projections in the plane of the leaf margin, described by terms such as ciliate, ciliolate, or scabrous-margined. Teeth are often regular in size and position but in some species are irregular in form, shape, and even presence (these species are keyed in several places). The term “lobe” or “lobes” is also used in a broad sense to mean a larger feature of the leaf margin. Relative to teeth, lobes are typically both actually larger and relatively larger in relation to the size of the leaf, and also more widely spaced, often with a sinus (the depression between 2 lobes) extending $1/10^{\text{th}}$ to $9/10^{\text{th}}$ of the way from the outer leaf outline to the midrib. Lobes are typically spaced 1 cm or more apart, though the term is also applied to more closely spaced features with relatively deep sinuses (at least $3/10^{\text{th}}$ of the way to the midrib), especially in pteridophytes and in flowering plants with small leaves. Teeth are truly marginal, typically meeting 2 or 3 of the following 3 conditions: spaced < 1 cm apart, the sinuses between them usually extending $< 1/10^{\text{th}}$ of the way to the midrib, and the tooth itself (measured on its shorter side if it not equilateral) < 4 mm long. Occasionally we have also used the number of “**points**” as a character in the keys. This is the total number of lobe points and tooth points along one side of the leaf (base to apex on one side of the midvein). Note that some leaves are unlobed except for the presence of 2 basal lobes (one on either side, often described as cordate, sagittate, auriculate, or

hastate depending on the shape, size, and orientation of the lobes); this situation is not keyed in the “lobed” sections of the key (as noted in the pertinent couplets).

Learning families. Learning plant families, especially those that are particularly important in the Southeastern United States flora or that are especially distinctive, is an extremely useful aid in identifying plants. While “learning” a family often starts with understanding its distinctive characteristics, often including some rather technical characteristics, with experience it becomes a more “gestalt” sense that, for instance, “that plant just looks like Asteraceae”, even if the features that would allow it to be keyed are not present. Knowing plant families often allows one to bypass the Key to Genera and Families entirely or facilitates decisions at particular couplets in it. A few of the families that are particularly useful to learn are Apiaceae, Asteraceae, Brassicaceae, Cyperaceae, Euphorbiaceae, Fabaceae, Juncaceae, Lamiaceae, Poaceae, Ranunculaceae, Rosaceae, and Rubiaceae.

Sleuthing characters. Some characters used in the key may seem initially impossible to find on your plant or specimen, but may actually be findable or deducible. Old fruits can sometimes be found on woody species, or on the ground under the tree or shrub. Old flower stalks (from the previous year) are sometimes present in perennial herbs, allowing the size of the plant and the type of inflorescence to be assessed. The calyx is often persistent after the petals have fallen, and calyx merosity (number in the whorl) and symmetry is usually the same as the merosity and symmetry of the corolla (though not always). Various fruit characters can sometimes be deduced from the flowers, and various flower characters can be deduced from the fruits. When capsules are immature (sometimes even in the stage of an ovary while in flower), dehiscence can often be deduced by the presence of visible lines on the fruit (sutures, visible at 10×). The number of carpels and locules can usually be determined from either the ovary or the immature or mature fruit, by making a careful x-section. Stamens are sometimes present as shriveled remnants on fruits, allowing the number of stamens to be determined. Hair types (e.g., simple vs. stellate) may seem impossible if the leaf appears superficially glabrous, but hairs often remain to the end of the season on even apparently glabrous leaves in protected places, especially on the lower surface in the main vein axils. The bulbous or papillose bases of some hairs remain after the rest of the hair has worn off. Hairs with bulbous or papillate bases. Deducing the presence of stipules is often possible by looking for scars (usually linear) that extend beyond the leaf scar proper.

Winter identification. Note that no attempt has been made to make the key work consistently for plants in winter condition. Woody plants with evergreen foliage will generally be “keyable” in Keys B, D, E, F, G, H, I, and J, but deciduous species will not; there are various winter twig and bud keys available in print and online for the winter identification of trees and shrubs. Herbaceous plants with winter rosettes or otherwise green winter foliage will generally be found in Key N, but an impractical number of ambiguous or “dead end” leads will be encountered.

Botanical terminology. While the use of specialized terminology and jargon has been reduced, some of these terms are useful and unavoidable, and provide a precise meaning without a lengthy explanation. Terms can be found in the glossary, and there are print and online resources that provide definitions and often illustrations as well. Particularly recommended at the time of writing is Harris and Harris (2001), Plant Identification Terminology: an Illustrated Glossary.

Characteristics of major groups of vascular plants. At various points in the key, a kind of shorthand is used in key leads to indicate the main evolutionary group involved: Lycophytes, Pteridophytes, Gymnosperms, Basal Angiosperms, Eudicots, and Monocots. This shorthand is not placed in every couplet in which it could be, but is used where it is likely to be helpful to the user. While the readily visible characteristics of these groups have many exceptions, the following table} will aid in their recognition (note that this table is pragmatically based only on the characteristics of those taxa in our flora).