

# SYSTEMATICS AND IDENTIFICATION OF SOUTHERN APPALACHIAN PHANEROGAMS: AN INDEXED BIBLIOGRAPHY

RESEARCH/RESOURCES MANAGEMENT REPORT No. 53

U.S. DEPARTMENT OF THE INTERIOR  
NATIONAL PARK SERVICE  
SOUTHEAST REGION

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OF  
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Research/Resources Management Report No. 53

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October 1981

U.S. Department of the Interior  
National Park Service  
Southeast Region

This work was supported by the Great Smoky Mountains Natural History  
Association

Wofford, B. Gene and Peter S. White. 1981. Systematics and Identification of Southern Appalachian Phanerogams: An Indexed Bibliography. U.S. Department of the Interior, National Park Service, NPS-SER Research/Resources Management Report No. 53. 69 pp.

## TABLE OF CONTENTS

|                                                                                                                                                        | Page |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| INTRODUCTION . . . . .                                                                                                                                 | 1    |
| GEOGRAPHIC SCOPE . . . . .                                                                                                                             | 2    |
| SUBJECT MATTER . . . . .                                                                                                                               | 2    |
| TABLE 1 - An index to treatments in the generic flora of<br>the Southeast (Carroll Wood, Jr., editor) that<br>are cited in this bibliography . . . . . | 4    |
| METHODS . . . . .                                                                                                                                      | 6    |
| THE BIBLIOGRAPHY: SUMMARY AND GUIDE . . . . .                                                                                                          | 6    |
| REFERENCES CITED . . . . .                                                                                                                             | 8    |
| BIBLIOGRAPHY OF THE SYSTEMATICS AND IDENTIFICATION<br>OF SOUTHERN APPALACHIAN PHANEROGAMS . . . . .                                                    | 9    |

#### ACKNOWLEDGEMENTS

We would like to thank the Great Smoky Mountains Natural History Association for their kind support in this project. The need for a series of bibliographies on the biota of the Great Smoky Mountains National Park and vicinity was first articulated by a committee made up of representatives of Great Smoky Mountains National Park offices of Interpretation, Resource Management, and Uplands Field Research Laboratory. The project has been supervised by Peter S. White.

## INTRODUCTION

This bibliography was developed to provide researchers and naturalists with an up-to-date list of the literature on Southern Appalachian phanerogams. An earlier report in this series (Evans et al. 1981) treated the pteridophytes. With the present report we have extended the coverage to all vascular plants. Reports on vegetation patterns (DeYoung et al. 1981) and soils (Springer and White 1981) are now in preparation; the long range goal of this series of bibliographies is to assemble the literature on the biota, ecology, and environmental setting of Great Smoky Mountains National Park and vicinity. The recognition of Great Smoky Mountains National Park as an International Biosphere Reserve has stimulated the establishment of this series. In addition, the Southern Appalachians have been a popular study area for many biologists--these bibliographies are intended to aid the researcher in organizing and evaluating this accumulating body of work.

Our specific goals in the current report were (1) to provide access to monographic literature that floristic manuals are unable, by their very nature, to contain; (2) to provide a list of recently published material not yet incorporated into floristic manuals; and (3) to provide access to keys, other identification aids, and taxonomic opinions that are usually overlooked by the general field botanist.

The Southern Appalachian flora is among the most diverse of temperate floras; no general work is currently available for the entire region. State floras include those of West Virginia (Strausbaugh and Core 1952-1964) (for this and the following citations, see the bibliography under "Floristics") and the Carolinas (Radford et al. 1968). State checklists include those for Georgia (Duncan and Katesz 1981) and Tennessee (Sharp et al. 1956, 1960).

County atlases have been published for Virginia (Harvill et al. 1977, 1981) and North and South Carolina (Radford et al. 1965). A county atlas is in progress for Tennessee (Wofford 1980; Wofford and Evans 1978, 1979). Small (1933) covered the entire Southeast, but that work is much out of date. An all-Southeast flora is now being published by the University of North Carolina Press; only volume I is available to date (see Cronquist 1980 under "Asteraceae"). Despite these larger floristic efforts, the field botanist or ecologist often needs access to monographic treatments. This is particularly true for certain problem genera (e.g., Amelanchier, Carex, Heuchera, Prenanthes, Rubus, Viola). In addition, rare plants are often little known by the field botanist (since they are rare) or are superficially treated in floristic manuals (since their descriptions are often based on a few collections). The field botanist often benefits from direct access to recent, in-depth, systematic treatments. We have kept the needs of the field botanist in mind in compiling this bibliography.

#### GEOGRAPHIC SCOPE

Our geographic focus is Great Smoky Mountains National Park, located in North Carolina and Tennessee. We began with a checklist of genera currently known from the Smokies; additions were made if the genus in question was deemed significant in the upland, mountainous portion of the Southern Appalachians. Literature from outside the Southern Appalachians or treatments of broad geographic scope were included if judged essential to an understanding of taxa in this region.

#### SUBJECT MATTER

Our subject matter included monographic, systematic, nomenclatural, and taxonomic literature. Our emphasis was on literature that provided aids to identification. Ecological treatments were, for the most part, excluded. We included several categories of general works: floristic manuals, rare and

endangered plant lists, woody plant identification guides, wildflower guides, aquatic plant manuals, and edible, medicinal, and poisonous plant manuals. Local checklists were included when they had direct relevance to the Smokies and immediate area. State checklists and county atlases for the Southern Appalachians were also included. We have not provided, however, a complete compilation of floristic checklists available for local areas in the entire Southern Appalachian region.

In general, we have listed the several most recent publications for each taxon. We did not compile all historic literature available, nor original citations of all Latin binomials in our flora. Much of this historic literature can, however, be accessed through the literature we cite. Again, our aim was to provide access to current taxonomic opinion, not to provide an all-inclusive survey of past opinion or nomenclature. Even so, we have included many older, classic works (e.g., Trelease 1924 under "Quercus").

No bibliography, such as this one, can ever be absolutely complete. However, the literature cited here will lead the interested researcher onward. We draw the reader's attention to several additional bibliographic aids. Sargent (1977) provides a bibliography of work done at Highlands Biological Station (this is also annually updated in the Station's Annual Announcement). Hardin and McDonald (1975) have provided a bibliography of literature on the plants of North Carolina. The Bulletin of the Torrey Botanical Club includes in each issue a Guide to American Botanical Literature. "The Generic Flora of the Southeast" is an ongoing series edited by Carroll Wood and published in the Journal of the Arnold Arboretum. We have listed 67 papers from Wood's Generic Flora series (see Table 1).

Table 1. An index to treatments in the generic flora of the Southeast  
(Carroll Wood, Jr., editor) that are cited in this bibliography.

| Citation               | Families treated                               |
|------------------------|------------------------------------------------|
| Adams and Wood 1976    | Hypericaceae                                   |
| Bogle 1969             | Portulacaceae                                  |
| Bogle 1970             | Aizoaceae, Mulloginaceae                       |
| Bogle 1974             | Nyctaginaceae                                  |
| Brizicky 1961          | Passifloraceae                                 |
| Brizicky 1961          | Violaceae                                      |
| Brizicky 1962          | Anacardiaceae                                  |
| Brizicky 1962          | Rutaceae                                       |
| Brizicky 1963          | Aceraceae                                      |
| Brizicky 1964          | Aquifoliaceae, Celastraceae, Hippocastanaceae  |
| Brizicky 1964          | Cistaceae                                      |
| Brizicky 1964          | Rhamnaceae                                     |
| Brizicky 1965          | Tilaceae                                       |
| Channell and Wood 1959 | Plumbaginaceae                                 |
| Channell and Wood 1959 | Primulaceae                                    |
| Elias 1970             | Ulmaceae                                       |
| Elias 1971             | Fagaceae                                       |
| Elias 1971             | Myricaceae                                     |
| Elias 1972             | Juglandaceae                                   |
| Elias 1974             | Fabaceae                                       |
| Ernst 1962             | Fumariaceae, Pappaveraceae                     |
| Ernst 1963             | Capparaceae                                    |
| Ernst 1963             | Hamamelidaceae, Platanaceae                    |
| Ernst 1964             | Berberidaceae, Lardizabalaceae, Menispermaceae |
| Eyde 1966              | Nyssaceae                                      |
| Ferguson 1965          | Dipsacaceae, Valerianaceae                     |
| Ferguson 1966          | Caprifoliaceae                                 |
| Ferguson 1966          | Cornaceae                                      |
| Graham 1964            | Lythraceae                                     |
| Graham 1966            | Araliaceae                                     |
| Graham and Wood 1965   | Polygonaceae                                   |
| Graham and Wood 1975   | Podastemonaceae                                |
| Haynes 1977            | Najadaceae                                     |
| Haynes 1978            | Potamogetonaceae                               |

Table 1. Continued.

| Citation               | Families treated                         |
|------------------------|------------------------------------------|
| Long 1970              | Acanthaceae                              |
| Miller 1970            | Cannabaceae                              |
| Miller 1971            | Polygalaceae                             |
| Miller 1971            | Urticaceae                               |
| Nevling 1962           | Thymelaceae                              |
| Robertson 1971         | Linaceae                                 |
| Robertson 1972         | Geraniaceae                              |
| Robertson 1974         | Rosaceae                                 |
| Robertson 1975         | Oxalidaceae                              |
| Robertson and Lee 1976 | Fabaceae                                 |
| Solbrig 1963           | Asteraceae                               |
| Spongberg 1971         | Staphyleaceae                            |
| Spongberg 1972         | Saxifragaceae                            |
| Spongberg 1978         | Crassulaceae                             |
| Thieret 1971           | Orobanchaceae                            |
| Thieret 1972           | Phrymaceae                               |
| Thomas 1961            | Clethraceae                              |
| Vuilleumier 1969       | Asteraceae                               |
| Vuilleumier 1973       | Asteraceae                               |
| Webster 1967           | Euphorbiaceae                            |
| Wilson 1960            | Araceae, Lemnaceae                       |
| Wilson 1960            | Convolvulaceae                           |
| Wilson 1960            | Hydrophyllaceae, Polemoniaceae           |
| Wilson and Wood 1959   | Oleaceae                                 |
| Wood 1958              | Annonaceae, Calycanthaceae, Magnoliaceae |
| Wood 1959              | Ceratophyllaceae, Nymphaeaceae           |
| Wood 1959              | Theaceae                                 |
| Wood 1960              | Droseraceae, Sarraceniaceae              |
| Wood 1961              | Ericaceae                                |
| Wood 1971              | Saururaceae                              |
| Wood 1975              | Balsaminaceae                            |
| Wood and Channell 1959 | Diapensiaceae, Empetraceae               |
| Wood and Channell 1960 | Ebenaceae, Styracaceae                   |

## METHODS

We began with card files developed independently by the authors. All issues of Brittonia, Castanea, and Rhodora were searched. Volumes covering the last 10 years of the following journals were inventoried: Annals of the Missouri Botanical Garden, Bartonia, Bulletin of the Torrey Botanical Club, Contributions of the Gray Herbarium, Journal of the Arnold Arboretum, Journal of the Elisha Mitchell Science Society, Memoirs of the New York Botanical Garden, Memoirs of the Torrey Botanical Club, Sida, and Torreya. Many unpublished theses are listed; we have tried to be complete as possible but had, of course, best access to theses at the University of Tennessee at Knoxville. Pertinent floristic literature, woody plant manuals, wildflower guides, rare plant lists, and the like were added after the systematics literature was assembled.

## THE BIBLIOGRAPHY: SUMMARY AND GUIDE

We have listed a total of 745 works. These treat 282 individual genera and 128 families. The family treatments often describe genera that are not listed separately. The general floristic and identification manuals also add to the total number of genera described.

We have arranged the literature alphabetically by taxon treated. In other bibliographies in this series, we have listed papers alphabetically by author and provided a cross-referenced index by topic. However, in the current instance, practically all of the papers treat only a single genus or family. Hence, it made most practical sense to index the papers directly by taxonomic category. In terms of the needs of field botanists, this was the best solution. We have cross-referenced all categories, however. For example, under "ACERACEAE", the reader will find a reference at the family

level; the reader is also directed to "See also Acer"--which contains a reference at the generic level. In this way, all genera are cross-referenced by family. In the index, family names appear in capitals, but only the first letter of each genus is capitalized. Under each taxon, publications are listed alphabetically by author.

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As the Nation's principal conservation agency, the Department of the Interior has responsibility for most of our nationally owned public lands and natural resources. This includes fostering the wisest use of our land and water resources, protecting our fish and wildlife, preserving the environment and cultural value of our national parks and historical places, and providing for the enjoyment of life through outdoor recreation. The Department assesses our energy and mineral resources and works to assure that their development is in the best interests of all our people. The Department also has a major responsibility for American Indian reservation communities and for people who live in island territories under U.S. administration.

