

THE MORTON ARBORETUM PLANT COLLECTIONS POLICY

1. INTRODUCTION

1.1. Purpose

The purpose of the Plant Collections Policy is to provide a guideline in developing and managing plant collections at The Morton Arboretum. This policy applies to all plants that are accessioned or otherwise recorded by the Collections Program. It does not apply to plants that are accessioned by the Research Program or to plants in natural or restored plant communities.

1.2. Governance

The Collections Committee is charged with the responsibility to administer and review this policy and make recommendations for change(s). The Committee is comprised of the Director of Collections and Grounds (chair of the Committee), Curator of Living Collections, Curator of Horticulture, Plant Records Manager, Director of Research, and at least two individuals from peer institutions. The Committee will meet biannually or more frequently as needed in person or via conference call to review the policy. If revisions are made, they will be submitted to the Executive Director for his review; he will submit the revised Policy to the Board of Trustees, as appropriate.

2. PLANT COLLECTIONS AT THE MORTON ARBORETUM

2.1. Purposes

The purpose of the plant collections is to implement the Founder's charge as contained in the Arboretum's Statement of Purpose: to establish "...a great outdoor museum arranged for convenient study of every species, variety, and hybrid of the woody plants of the world able to support the climate of Illinois..." The plant collections play an integral part to achieve the Arboretum's mission in supporting research and educational programs, as well as to enhance the aesthetic appeal of the Arboretum's land.

2.2. Definition

For purposes of this policy, "collection" is defined as a group of plants that is curated by the Collections Program and fulfills a specified objective on the grounds.

2.3. Classification

Collections are classified according to their contents and purposes as follows:

1. Taxonomic--plants that belong to a particular taxon, such as order, family, or genus. The focus is to increase genetic diversity and demonstrate taxonomic affinities.
2. Geographic--plants that are native to a particular region of the world.
3. Special Habitat--plants that require a modified soil or site to be successfully grown at the Arboretum.

4. Horticultural--plants with horticultural merits grouped together to display horticultural themes, to demonstrate effective plant combinations, or to enhance the beauty of the Arboretum landscape.
5. Endangered or Threatened-- plants of the temperate regions of the world that are endangered or threatened.
6. Evaluation-- plants assembled to test their qualities such as adaptability to the climate of northern Illinois, ornamental merit, and resistance to pests and diseases.

2.4. Collection Development

Limited space and resources require that proposed new collections be considered in relation to the mission of the Arboretum. Current site development plans such as the Collections Master Plan (2000), Core Area Master Plan (1999), Master Site Plan (1997) will serve as the basic framework in developing new collections and renovating existing collections.

2.5. Collection Renovation

Collections shall be renovated as needed basis through on-going evaluations in order to ensure the collections' long-term vitality and viability, maximize visitor experience, and enhance the collections scientific quality.

2.6. Access

All collections except those in residential and service areas of the Arboretum are open to the public during the Arboretum's normal visiting hours. When a non-routine activity such as a special event in the collection areas or research project involving collections is to occur, the curators should be consulted.

2.7. Aesthetics

Collections design must be compatible with the Arboretum's naturalistic landscape design. Therefore, collections development shall follow parameters set by the Landscape Architect.

2.8. Curators

Staff members, referred to as the "curators", shall be responsible for the development and management of each collection.

3. PLANTS IN THE COLLECTIONS

3.1. Acquisition

1. Objectives

The goals of plant acquisition are 1) to increase the genetic diversity of the collections that are of documented wild origin and 2) to acquire plants exhibiting superior ornamental qualities for display purposes.

Plants may also be acquired for any of the following purposes:

- a. To introduce plants for evaluation
- b. To conduct research
- c. To preserve rare or unusual plants
- d. To preserve plants of historic value

2. Criteria for acquisition

Each accession must meet at least one of the following criteria:

- a. It shows promise of being able to survive in the microclimate of some available outdoor site within the Arboretum.
- b. Its name and source are known.
- c. The Arboretum can properly maintain it both physically and clerically.
- d. It is not likely to be invasive in natural habitats.
- e. If a cultivar, it has specific qualities that make it potentially valuable in the Chicago region, based on the experience of Arboretum staff or outside experts.

3. Means of acquisition

The Arboretum may acquire plants through collection, exchange, gift, or purchase. Whenever possible, botanical taxa should be obtained as seeds or cuttings from plants originating from wild populations. Cultivars should be obtained from a reliable nursery or supplier.

4. Authorized personnel

The curator of collections is authorized to acquire plants for the collections and is responsible for reporting acquisitions as described in section (3.3.3.) following.

5. Conservation of wild plants

Plants representing endangered, threatened, or rare taxa shall be acquired in a manner that does not deplete wild populations.

6. Invasive Plants

Plants with potential invasiveness should not be introduced into Arboretum. A taxon of unknown nature brought into the Arboretum should be monitored and evaluated. If a plant is determined to be potentially invasive, appropriate action(s) based on the level of invasiveness should be taken to control the plant.(refer to the Arboretum's invasive plant list).

3.2. Plant Records

1. Recording information

Information about plants determined by curators to be part of collections shall be maintained in a plant records system. This system shall maintain accurate, complete and up-to-date life history information on all plants in Arboretum collections. Such information shall include, scientific name, common name, accession number, date received, means of propagation, source, provenance, location in the Arboretum,

verification information, inventory information, evaluation data, mortality data, and other information as needed.

2. Reporting information

Any staff member who acquires a plant for use on the grounds, whether woody or non-woody, should immediately report its acquisition and location and provide all pertinent source information to the plant records office. Changes in a plant's status should be reported to the plant records office as soon as the change is accomplished.

3. Inventories

Accessioned plants should be inventoried at least once every three years. Plants will be inventoried as soon as practical if circumstances preclude a minimal three-year sequence.

4. Catalog

Information contained on plants in the collections of the Arboretum shall be made public through the periodic publication of a catalog of the plants in its collections.

5. Nomenclature

Scientific and vernacular plant names shall be consistently used throughout the Arboretum. Scientific nomenclature used at the Arboretum shall conform to guidelines set forth in the "International Code of Botanical Nomenclature" (1994) and "International Code of Nomenclature for Cultivated Plants" (1995). Name changes will occur only when sufficient and justifiable data necessitate the changes.

- a. Scientific names shall be reviewed periodically to ensure that the names used at the Arboretum conform with acceptable usage.
- b. Common (vernacular) names shall be used consistently throughout the Arboretum (Arboretum publications, plant labels, and classes, etc.), and will conform to the generally acknowledged usage in the Midwestern region (refer to Guidelines Selecting Common Names at TMA).
- c. A trademark when existing, shall be used in combination with common name by prefixing it to the common name and written in all capital letters.
- d. A plant patent number when existing, shall be indicated after the cultivar name or the trademark name if the cultivar has been trademarked.

3.3. Propagation

1. Facilities

The Collections Program shall maintain facilities necessary for the propagation of plants. Priority shall be given to the propagation of plants for the Collections and Research Programs.

2. Propagating established plants in the collections

- a. A valuable plant should be propagated when its number is low, its identity has been verified, or in the judgment of a curator, its continued presence in

the collections may be in jeopardy. Accessions of special value shall be propagated under the same circumstances. When there is a choice of plants to propagate, preference shall be given to plants of known wild origin.

- b. Plants shall be propagated by the most appropriate means available. Clonal propagation by cuttings is preferred, but grafts or seeds may be used if necessary.

3. Surplus plants

- a. When plants are propagated in numbers greater than needed for the collections, surplus plants may be donated to other botanical institutions; offered for sale to Arboretum employees and members; or if not needed for other purposes, discarded or given away.

- b. Plants whose potential invasiveness nature has not been evaluated will be only distributed to public gardens at their requests.

3.4. Labelling

1. Plants in propagation

All plants should be labeled with scientific name and accession number while in propagation.

2. Accessioned plants

Each accessioned plant or group of plants on which records are kept shall be identified with a durable label. This label shall contain the following minimal information: scientific name, common name, accession number, how propagated or received, grid coordinates (if known), and annotation information. Unaccessioned plants may be labeled, when appropriate, with a label of similar style and content. Labels in the collections should be placed on the south side of each plant, attached either to the plants (at eye level whenever possible) or to a stake beside the plant as appropriate for the type and size of the plant. Unaccessioned non-woody plants may be labeled, when appropriate, with their names and the word HERBACEOUS in place of an accession number.

3. Temporary labels

Plants found to have missing, damaged, or illegible labels should be identified temporarily with a hand-written tag. The person applying this tag should inscribe all information that normally appears on the label and immediately report that a replacement label is needed to the plant records office.

3.5. Siting within collections

The Curator and Landscape Architect should work together to site plants in the collections.

3.6. Verification

Attempts should be made to verify the accuracy of each plant's name as soon as practicable following its planting in the collections. Verification should be noted in the

catalog and on plant labels. Original accession should be vouchered in the Arboretum's herbarium.

3.7. Locating on grid

The plant's grid coordinates as soon as practicable shall be determined after the plant becomes established on the grounds. This information should be included in the plant record system.

3.8. Maintenance

1. Routine care

Plants in the collections of The Morton Arboretum shall receive the following care routinely:

- a. provision of a weed-free environment
- b. irrigation as needed until the plant is established
- c. protection from deer and other destructive animals
- d. control of defoliating insects when appropriate
- e. mulching if appropriate
- f. pruning
- g. staking if necessary
- h. label maintenance
- i. fertilization as needed
- j. if located in a special habitat, maintenance of that habitat
- k. bracing or cabling if necessary

2. Special care

In order that plant adaptability may be fairly evaluated, The Morton Arboretum does not normally protect plants from normal environmental stresses that are commonly found in northern Illinois. Special care may be provided, however, when one or more of the following conditions apply:

- a. a curator determines that a plant has special aesthetic, botanic, or historic significance
- b. a plant belongs to a rare or endangered species
- c. the Arboretum is being affected by a prolonged drought or a pandemic invasion of an insect pest or disease

3.9. Evaluation

The Collections Program shall evaluate plants for their adaptability to northern Illinois, pest and disease susceptibility, horticultural merit, and potential for invasiveness. The information thus obtained shall be recorded and disseminated to appropriate audiences.

3.10. Interpretation

To help visitors appreciate and more effectively use plants in the collections, the Arboretum shall provide orientation and interpretation through appropriate media.

3.11. Collecting by visitors

Collecting propagules or plant parts from live plants in the collections is restricted to those who have received written permission from the Collections Program. Collecting cones, fruits, leaves, and other plant parts for teaching or research is restricted to those who have obtained written permission from the Collections, Research, or Education Programs.

Convention on Biological Diversity--The Arboretum abides by the principle of the Convention on Biological Diversity (1992). To conform to the CBD, anyone intending to commercialize the materials collected from the Arboretum's collections or derivatives of them must contact The Arboretum to discuss "mutually agreed terms" for its use and the appropriate sharing of benefits.

3.12. Removal of plants

1. Reasons for removals

A plant may be removed from the collections for any of the following reasons:

- a. the plant is dead or dying, or in poor condition and unlikely to survive
- b. the plant is unsightly and detracts from the beauty of the Arboretum landscape
- c. the plant poses a hazard to persons or property
- d. the plant is determined as not true-to-name and its correct identity cannot be determined
- e. the plant does not conform to the theme for the collection in which it is located
- f. the plant is occupying space needed by neighboring plants or for new accessions
- g. the plant harbors a disease or insect pest that threatens other plants
- h. the plant is surplus (i.e. there are at least two other healthy plants of that accession on the grounds)
- i. if a cultivar, the plant has been evaluated and found to be unsatisfactory
- j. the plant has proven to be excessively weedy or invasive
- k. a specimen(s) located in the construction zones and is not of value as a result of evaluation

2. Removal of dead plants

Dead plants may be removed through order of any Curator, the Landscape Architect, the Manager of Grounds Operation, or any employee authorized by these persons.

3. Removal of living plants

The curator of a collection must initiate and approve removals of living plants from that collection. If removal of the plant will have an appreciable effect on landscape aesthetics, the curator should obtain permission from the Landscape Architect.

4. Removal of hazardous trees

When a curator is not available, the Grounds Supervisor is authorized to cut down trees that pose an imminent hazard to people or property. If a hazardous tree is the last of its name or accession in the collections, the appropriate curator should be consulted before the remains of the tree are destroyed, so that propagules may be collected if necessary.

Approved by: Gerard T. Donnelly, Executive Director

Date of Approval: March 13, 2001

Date of Revision: February 11, 2003