



Plant Collections Policy

Effective: May 2024

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Introduction

Plant collections are living and organic in multiple senses, growing and changing over time. To meet institutional goals, collections must be continuously improved, appraised, tended, expanded and culled judiciously.

The **mission** of Olbrich Botanical Gardens is to enrich lives and inspire harmony between people and the natural world. Michael B. Olbrich purchased land near Lake Monona envisioning future parklands to benefit Madison residents on the fast-developing east side; the City of Madison took title in 1921.

Michael Olbrich's foresight is indebted to the stewardship fostered by the Ho-Chunk Nation. Olbrich Botanical Gardens acknowledges the sovereignty of the Ho-Chunk Nation, who have and will always be here, and honors their lasting legacy of sustainably cultivating the land so that it can be enjoyed and gardened for generations to come.

Since 1952, Olbrich Botanical Gardens has grown to currently encompass 16 acres of free, outdoor display gardens committed to creative, culturally significant and sustainably sound practices. Since 1991, the Bolz Conservatory has housed tropical and subtropical plants of cultural, ecological and economic value.

Collections exist to foster the **vision** of Olbrich Botanical Gardens to be a locally treasured, globally renowned source of beauty and knowledge celebrating the importance of plants to foster a sustainable world. The specific goals of Olbrich Botanical Gardens include:

- I. Present exceptional, diverse gardens, landscapes, and collections as a model of sustainable horticulture.
- II. Enhance Olbrich Botanical Gardens' programming and learning experiences to foster connections with the natural world.
- III. Create exceptional, inclusive experiences at and with Olbrich Botanical Gardens.
- IV. Optimize and invest in human, financial, infrastructure, and support resources to meet Olbrich Botanical Gardens' aspirations.

This collections policy guides acquisition and maintenance of living plant and seed collections for future generations by maintaining precise records, by managing the collections ethically and mindfully based on accepted standards outlined by the American Public Gardens Association, and by effectively utilizing garden resources to provide spaces to learn about the botanical world and to inspire and delight Olbrich guests and the greater Madison community.

The collections policy will be administered by the Director of Horticulture and Conservatory Curator in conjunction with the Plant Recorder, and reviewed in tandem with Olbrich's strategic plan, or not less than every five years.

Statement of Authority

The City of Madison Parks Division and nonprofit Olbrich Botanical Society work together to support and operate the Gardens. This longstanding partnership has played a key role in allowing the Gardens to grow and flourish over the years.

Founded in 1979 and governed by a volunteer Board of Directors, Olbrich Botanical Society (OBS) is a registered 501(c)(3) nonprofit that supports the Gardens through fundraising, programming, education, and a membership program over 8,000 households strong. OBS raises almost \$2 million each year to keep the Gardens free and accessible to over 340,000 annual visitors.

The City of Madison Parks Division is overseen by the mayor of Madison, the parks superintendent along with a Board of Park Commissioners. The Board of Park Commissioners (BPC) is the policy-making and recommending body for the Parks Division and consists of seven members: five appointed residents and two Alders. The BPC governs, manages, controls, improves and cares for all public parks, parkways, greenways, planning and construction, ice rinks, golf courses, conservation, cemetery, mausoleum, boat landings, Warner Park Community Recreation Center, the Irwin and Robert Goodman Pool, Mall/Concourse special events, beaches, general recreation, and Olbrich Botanical Gardens.

Olbrich Botanical Gardens is publicly owned. The City of Madison Parks Division has the primary responsibility for maintaining the Gardens and buildings, and the City of Madison also holds insurance covering replacement costs for plants within the collection in case of damage, thereby protecting the investment that generations have made in this unique community resource. At the same time, the Olbrich Botanical Society recognizes that it is in a unique position to assist the Gardens with financial, staff, and volunteer support. Ultimately, all legal and fiduciary matters pertaining to Olbrich Botanical Gardens fall under the jurisdiction of the City of Madison.

Olbrich Botanical Gardens Institutional Code of Ethics

Ethical management is a crucial part of maintaining the publicly held living collection of Olbrich Botanical Gardens. This code of ethics adheres to the American Alliance of Museums' Code of Ethics for Museums, and the principles herein apply to all employees, board members, independent contractors, interns, and volunteers (collectively referred to as employees in this document) working with the collection.

The collection is held as a public trust, and it is taken for granted that all local, state, federal, and international laws and regulations are conformed to. However, the organization must do more than simply avoid legal liability, but must take affirmative steps to ensure integrity, acting not only legally but also ethically. Our ethical obligations are to create and maintain the collection for the public good. Source documents for this Code include the City of Madison Code of Ethics, the AAM Code of Ethics, and the American Public Gardens Association's Ethics Checklist for Curators of Living Plant Collections.

Governance

The City of Madison in partnership with the Olbrich Botanical Society provides for and protects the collection and the physical, human, and financial resources that maintain it. It ensures that these resources support the collection in a robust and sensitive manner. It ensures that all employees understand and support the mission and public trust responsibilities, that resources to support the collection are used equitably and that employees and the public are treated with respect, and that these policies to promote public good are articulated and overseen.

Stewardship

The stewardship of a living collection requires the highest public trust, and carries with it the presumption of rightful ownership, care, documentation, accessibility, and responsible disposal. Ethical stewardship of the collection requires that accessions are acquired legally and ethically, held securely, maintained appropriately, and are documented. Access to collections and information must be regulated. Acquisition, maintenance, and disposal must be conducted in ways that protect and preserve natural and cultural resources, and in ways that promote the public good. Any funds obtained from the sale of deaccessioned plants will go into Olbrich Botanical Gardens general operating budget. The Olbrich Botanical Gardens Collections Policy further delineates guidelines for ethical stewardship of the living collection.

Personal conduct

Employees are agents of public purpose, and their work is for the benefit of the public. To retain public trust, employees must always act with integrity in service to the mission of the organization and the collection. Employees must treat peers with respect and fairness. Employees must not use their positions to obtain any advantage or financial gain and should be wary of the appearance of such.

Scope of Collections

Olbrich Botanical Gardens aims to cultivate display gardens showcasing sound aesthetics, cultural significance, and ecological sensibilities. The gardens foster spaces for enrichment, celebration, and contemplation.

The outdoor gardens offer mixed plantings of woody plants, perennials, and annuals that inform each garden's respective focus. Regional, cultural, and ecological value steer plant selections, anchored by site conditions and a commitment to seasonal interest. Creating wildlife habitat, incorporating native plants with good garden habits, and demonstrating gardening traditions of the peoples of Wisconsin are a few of the principles currently guiding Olbrich Botanical Gardens' plant collections.

Examples of current acquisition priorities for the outdoor gardens include:

- Plants native to Wisconsin and the upper Midwest
- Plants particularly adaptable to climate disruption
- Cultivars of native plants with particular garden-worthy characteristics
- Plants that support ecological function

Olbrich's Bolz Conservatory houses tropical and subtropical woody plants and forbs from around the world, represented by over 400 species and cultivars from around 80 plant families. Orchids are the largest taxonomic collection, while aroids, bromeliads, and palms are also prominent. Prioritizing plants of economic, ecological, or cultural value informs accessions to the tropical plant collections. Recognizing a global citizenship and encouraging biodiversity are guiding principles.

Future goals for Olbrich Botanical Gardens' plant collections include:

- Improve labelling and documentation, with efforts to track provenance
- Define criteria to inform the succession and preservation of high priority accessions
- Determine plants of concern in need of ex situ conservation
- Identify gaps and areas for expansion to enrich Olbrich Botanical Gardens' plant collections
- Strengthen partnerships with allied organizations
- Assess if any taxa are robust enough to seek accreditation through APGA's Plant Collection Network

Acquisition of plant material

Plant material is acquired in accordance with the following guidelines:

- All plant material acquisitions must be made or approved by the Director of Horticulture or Conservatory Curator.
- Plant material acquisition may occur via purchase, donation, exchange, or field collection.
- Material must be relevant to Olbrich’s mission, vision, and core values. In accordance with the 2023-2025 strategic plan, acquisitions will reflect the goal to “present exceptional, diverse gardens, landscapes, and collections as a model of sustainable horticulture.”
- Material must have a reasonable chance of being cultivated successfully without extreme manipulation of growing conditions.
- Sufficient resources such as staff, facilities, space, and budget must be available to care for acquisitions.
- Material must be acquired in accordance with all collection, export, and import regulations and laws of the country of origin, of the US Federal and individual state governments, and of international treaties such as the Convention on International Trade in Endangered Species (CITES).
- Every effort will be made to avoid the introduction and proliferation of invasive plants in Olbrich Botanical Gardens and surrounding natural areas by evaluating material for invasive potential using the Wisconsin Department of Natural Resources Regulated Species List and following recommendations outlined in the Invasive Plant Species Voluntary Code of Conduct for Botanic Gardens and Arboreta.
- Material must have a known identity and source. Appropriate records for acquisitions will be kept following procedures outlined in the Plant Records Policy (see Appendix).
- Material must be free of pests and diseases.
- Plant donations can be accepted only without any accompanying restrictions by the donor. Donors shall assign their own value for the plant donation; staff will not provide appraisals on monetary value of plant donations.
- Efforts will be made to avoid unnecessary duplication within the collection.

Care and Inventory of Collections

- Physical care will be in keeping with professionally accepted standards in the horticulture industry. Care will be taken to ensure that the collections are protected as well as possible against fire, theft, vandalism and natural disasters.
- Plants will be maintained to keep the collection in top form. Insects and diseases will be monitored and controlled using the principles of integrated pest management (IPM).
- Physical maintenance of the collections is shared by the Director of Horticulture, Conservatory Curator and the horticulture staff. Maintenance of accurate plant records and location maps is the ongoing responsibility of the horticulture staff in conjunction with the Plant Recorder.

Access to Collections

- Access to the collections may be provided to the public in a way that ensures minimal damage or destruction.
- Access to the collections may be provided to the professional community for research and teaching.
- Controlled access to the collections may be provided to professionals to take propagules. This access must be approved by the Director of Horticulture or Conservatory Curator.
- Controlled access to plant records will be provided to the public and professionals.

Evaluation, Disposal, and Deaccessioning

- All plants disposed of will be deaccessioned. Appropriate records for deaccessioned plants will be kept following procedures outlined in the Plant Records Policy (see Appendix).
- Accessioned items given to other institutions will be deaccessioned.
- A plant may be disposed of when it is no longer relevant to Olbrich Botanical Gardens mission and vision, has deteriorated beyond repair or died, has been discovered not to be true to name, or will be replaced by a better specimen.
- The Director of Horticulture and Conservatory Curator are responsible for making the final decision on all deaccessions in conjunction with the Horticulture Staff.
- Donors will not be notified if donated plant is deaccessioned.
- Private parties such as Olbrich Botanical Gardens staff and volunteers shall in no way personally benefit, materially or financially, from the disposal of deaccessioned plants.

Appendix A

Plant Records Policy

Accessioning and Plant Records

- All specimens acquired that are intended to become part of the permanent Living Collection will be added to the **Accessions Table** and then the **Plants Table** in the Living Collection database within BRAHMS.
 - When a specimen is received from a nursery, prior to it being planted in the gardens, it will be added as an **Accession** to BRAHMS, within the **Accessions Table**. **Accessions** are not yet part of the permanent Living Collection.
 - Once an Accession is physically planted in the gardens, it will be added as a **Plant** to BRAHMS, within the **Plants Table**. With this designation, the specimen becomes part of the permanent Living Collection.
 - If a Plant is removed from the permanent Living Collection, it will be deaccessioned in BRAHMS, but not deleted. Though deaccessioned plants are no longer part of the permanent Living Collection, their data will still be maintained in the BRAHMS database.
- New acquisitions that are not intended to become part of the permanent Living Collection will not be added to the BRAHMS database (e.g. annual flowers and vegetables, plants for sale, plants for educational purposes, plants for seasonal display, stock plants for propagation, and membership gift plants.)
- The Living Collection records will be continuously updated by the Plant Recorder as Plants are added to, or removed from, the permanent Living Collection.

Accessions Table:

1. New plants ordered or received for the Plant Collection will be entered into the **Accessions Table** in BRAHMS by the Plant Recorder, using the information received on the invoice for the plant order, or the Donation Form.
2. When entered into BRAHMS, each Accession will be assigned an **Accession Number** - consists of the year accessioned followed by the accession sequence number for that year.
3. Data entered into BRAHMS with each new Accession includes:

- a. *Garden Name* (Outside Garden or Conservatory)
 - b. *Donor/Supplier* (Nursery)
 - c. *Invoice Number*
 - d. *Order Day, Month, Year, and/or Received Day, Month, Year*
 - e. *Quantity Received*
 - f. *Family*
 - g. *Genus*
 - h. *Species*
 - i. *Variety* - if applicable
 - j. *Cultivar* - if applicable
 - k. *Trade Epithet* (Trademark name) - if applicable
 - l. *Hybrid* (if species is a hybrid)
 - m. *Supplied As* (e.g. plug, bare root, seeds, etc.)
 - n. *Received-As Name* (if different than what is added to *Family, Genus, Species, Cultivar, or Vernacular Names*)
 - Scientific names of plants listed in invoice will be cross-referenced with Kew Royal Botanical Gardens' *Plants of the World Online* database to ensure most up-to-date nomenclature are being used.
 - If nomenclature of a species or genus has been changed, all accessions of said species or genus will be changed in BRAHMS to most up-to-date nomenclature.
 - Cultivar names will be cross-referenced with The National Gardening Association database (garden.org).
4. Once an **Accession** is physically planted in the gardens, it will be added to BRAHMS as a **Plant** by the Plant Recorder, making it part of the permanent Living Collection.

Plants Table:

1. New Planting information will be provided to the Plant Recorder by the Horticulturists through submitting a New Planting Form. New Planting information includes:
 - a. *Garden Area/Zone*
 - b. *Map Code, Sub Code*
 - c. *Date Planted*

- d. *Quantity*
 - e. *Plant Habit* (tree, shrub, vine, perennial, biennial, grass, sedge, tropical)
 - f. *Native Status*
2. In BRAHMS, the **Accession** that is associated with the new specimen will be pulled from **Accessions Table** in BRAHMS; the data from the Accession will be combined with the additional planting information provided by the Horticulturists to create a new **Plant** in BRAHMS, located in the **Plants Table**.
 3. Each new Plant will be assigned a unique **Plant ID** - consists of the Accession Number followed by a letter.
 - a. All plants of the same name that were acquired from the same source on the same date may be assigned to the same accession number if appropriate.
 5. If the new Plant is from a cutting, division, or relocation of an existing Plant in the collection, this data will be recorded in BRAHMS as well
 - a. Cuttings and Divisions will receive a new Plant ID and recorded as new plants; relocations will maintain their original Plant ID but the location will be changed.
 6. Propagated plants, seeds and cuttings will be accessioned after they have been rooted and potted and are ready to go into the permanent collection.
 - a. If new plugs are grown from seed in the production houses at Olbrich, the seeds will be added as Accessions using their original invoices, and then later added to Plants Table in BRAHMS when planted in gardens.
 - b. Plugs grown from cuttings and/or seeds collected from existing Plants in the permanent collection will be added as Accessions using the invoice from the parent plant.
 7. Replacement plants will be assigned new accession numbers.
 8. Each plant will be entered on a map of the grounds or conservatory.
 - a. Accurate maps will be maintained, and updated annually, so that any plant can be located by the staff or public.
 - b. Each plant will be catalogued and tracked according to placement on the grounds; movement or death of any plant will be recorded in the BRAHMS database, and maps will be amended accordingly.

Labeling and Accession Tags

- Display labels and accession tags for Plants in the living collection will be made and maintained by the Plant Recorder.
- Maintenance of plant tags will be ongoing by the horticulture staff. Any corrections or replacements will be made as necessary. Tags attached with wires will be checked and adjusted every three years to prevent girdling.
- Name changes - if a plant's nomenclature is changed and accepted by botanical or horticultural nomenclature authorities (namely, Kew Gardens' *Plants of the World Online*), changes will be made to the nomenclature in the collection records in BRAHMS and accession tags and display labels will be replaced to reflect the change.

Display Labels:

1. Plastic display labels will be fabricated and put onto metal stakes by the Plant Recorder and placed in front of or near plants by horticulture staff.
2. Labels for display will include:
 - a. *Vernacular Name* (including the cultivar name-if applicable)
 - b. *Scientific name* (Genus and Species)
 - c. *Cultivar*
 - d. *Family*
 - e. *Species origin* (or "Cultivated Origin" if cultivar)
3. Every effort will be made to have the majority of woody plant labeled year-round, and perennial plants labeled when in bloom.
 - a. If there are multiple of the same plant in an area, duplicate labels are not necessary, as these may detract from the garden displays.
4. Annual plants will have seasonal labels, at the discretion of the horticulture staff.
5. Horticulturists will submit label requests to the Plant Recorder using a Label Request Form.
 - a. Label Request Forms will be submitted prior to large new plantings, and as needed throughout the growing season.

Accession Tags:

1. Each woody plant (trees, shrubs, and vines) will be tagged with a permanent aluminum accession tag.
2. Accession tags will include:
 - a. *Vernacular Name* (including the cultivar name-if applicable)
 - b. *Scientific name* (Genus and Species)
 - c. *Cultivar*

- d. *Family*
 - e. *Source* (i.e. nursery)
 - f. *Plant ID*
3. Accession tags will be produced by the Plant Recorder and will be fixed to the plant by the horticulture staff immediately when a plant is added to the permanent collection. Accession tags may be:
- a. attached to the plant with a wire,
 - b. attached to a metal stake and put into the ground on the north side of the plant (for shrubs that are cut back each year), or
 - c. attached to a stake and placed in the midst of a grouping (for woody ground covers)

Deaccessioning Plants:

If a Plant is removed from the collection for any reason, it will be deaccessioned in BRAHMS—**not deleted**—by the Plant Recorder.

1. If removed from the collection, the Plant's status in BRAHMS will be changed from "Living" to "Dead," and a reason for the Plant's removal will be entered by the Plant Recorder or other horticulture staff.
 - a. Deaccessions to be entered into BRAHMS, along with the reason for the Plant's removal, will be submitted to the Plant Recorder by Horticulturists through a Deaccessions Form.
 - b. If a Plant that has an accession tag (i.e. woody species) is removed from the collection, horticulturists may submit the accession tag—with one corner bent—, along with the reason for the Plant's removal, to the Plant Recorder
2. Accession tags for Plants that have been deaccessioned will be removed from the gardens by the horticulture staff and disposed of by the Plant Recorder.
3. If, for example, a deaccessioned Plant is later rediscovered in the gardens, the Plant's status can be changed back to "Living" in BRAHMS, and, if a woody plant, a new accession tag will be made and fixed to the Plant.