

Heritage Arboretum Development Project

Arboretum Introduction

An arboretum is a garden containing trees, shrubs, and other plants that are cultivated for visual enjoyment and educational purposes.

The Interactive Community of Arboreta (ArbNet) Arboretum Accreditation Program provides standards and guidelines for creating and developing an arboretum. The ArbNet Arboretum Accreditation Program is sponsored and supported by The Morton Arboretum, Botanic Gardens Conservation International (BGCI), and the American Public Gardens Association (APGA).

Different levels of accreditation have been established to recognize arboreta at varying degrees of development, capacity, and professionalism. All levels require planning, maintenance, and educational components. Level one requires twenty-five species of trees and woody plants, while levels three and four require five-hundred species. Many other requirements become more demanding as an arboretum proceeds through various levels. This project is to create, maintain, and enhance a Level One arboretum.

Anderson Township and Green Space Introduction

One type of limited self-government in Ohio is the township. A township is an unincorporated portion of a county that has more decision-making authority than a portion of a county that is not a township, but less authority than an incorporated city. At about 45,000 residents, Anderson Township, located in the southeastern corner of Hamilton County, Ohio, is one of the most heavily populated townships in the State of Ohio. Founded in 1793, Anderson Township remained fairly undeveloped until the suburbanization that followed World War II. Anderson Township is dominated by rolling, wooded topography that creates scenic vistas of the beautiful natural environment. Anderson Township preserves these features while witnessing significant growth.

Anderson Township has taken the lead in Ohio in acquiring and protecting Greenspace through the implementation of a Greenspace levy. As Ohio's first Greenspace Township, the community has protected nearly seven-hundred acres of property that by law will remain in a natural state.

The portion of land where the Heritage Center Arboretum is taking shape is just under five acres, of which approximately half is protected green space. There is a building on site that was built around 1820 with room additions in the 1860s. The site includes a gazebo, patio, drives, and parking lots. Some of the ground is lawn while the remainder is tree-covered.

Vision for Heritage Center Arboretum



Courtesy of Timothy J. Kloppenborg

The hope is to promote native species of trees, enhance the beauty of the area, increase the value and desirability of the Heritage Center, increase rental prices and days, and educate citizens regarding more tree species.

Related Links:

<http://www.arbnet.org>

<https://www.mortonarb.org>

<https://www.bgci.org>

<https://www.publicgardens.org>

The township staff person who is responsible for renting out the Heritage Center looked around and realized there are quite a few types of trees on the grounds. She asked the question, "could this be considered for an arboretum?" If the grounds were to be certified as an arboretum, the building and grounds could perhaps be advertised more widely and rented both more often and for a higher daily rate.

If a decision was made to pursue arboretum certification, there would be some challenges. For example, about half of the property is protected green space, so any work on that portion of the property is subject to green space policy. Another challenge is that most of the work would need to be accomplished by volunteers. A related challenge is to create a budget for this. What department would the budget come from and how much could be allocated? Who would make the decision first to create the application and then to approve the application before submission? Finally, would the end goal be to merely qualify for

arboretum certification, or would there be additional work to capitalize upon that certification and/or make additional improvements to make the land more appealing? Would brainstorming of possible future improvements dissuade decision makers from approving the basic application or motivate them further with the excitement of possibilities?

One of the questions was answered. The staff person brought the concept to the volunteer Tree Committee of the township. They considered the idea, several members walked the site with an eye toward identifying existing trees, and the committee decided to pursue certification. The Township Administrator and the Board of Trustees then agreed to assign a staff member to work with the Tree Committee to develop an application and, after reviewing the application, agreed to submit it.

Related Link:

<https://www.andersontownship.org>

The decision made was to apply for Level One Arboretum Status. This was tentatively approved subject to signs being created for, and placed in front of, each of the tree species identified. Forty-eight aluminum signs were placed. Each sign contains the Latin name and common name for each tree, an Anderson Township logo, a Heritage Center Arboretum logo, a QR code people can click on to read more information regarding that tree species, and a number so people can look up on the map where each tree is located.

One of the tree committee members also created a high-resolution map of the site showing exactly where each tree is, the buildings, drives, parking, and patio, and the elevation changes. This map will be available on-line, posted at the arboretum, and in a hallway of the government center.

Given the information in the first two chapters and here, it is time to create a charter for the project going forward.

When this project was envisioned, it was possible to state a vision for the outcomes, but way too premature to try to describe specific outputs. Therefore, it made sense to use an agile approach. Success from this project is defined as helping the customer achieve their desired outcomes. These outcomes include securing arboreta status so the center could be rented more frequently and for a higher rate along with educating citizens, especially on native plants.

An Agile approach allowed for increased visibility for stakeholders to see the plan implemented a bit at a time and to make adjustments. When certain early plans did not materialize, it allowed for adaptations. An example of this was when the garden tour date was announced for the first year of the arboretum, that date had already been rented out, so the arboretum could not be on the garden tour. Since an educational event is an essential component of arboreta status, plans shifted quickly to hosting local science teachers to encourage them to engage their students and with the state forester to bring in tree commissioners from other jurisdictions to show them how to create an arboretum.

Anderson Township's organizational structure has three elected Trustees with various departments and volunteer advisory committees. The departments impacted by this project include:

- planning and zoning (for the overall planning and how this fits in the community),
- operations (for maintenance),
- events (for site rental), and
- public works (for protecting greenspace).

The committees offer advice. Each has one Trustee and at least one staff member who works with them. The citizen volunteers on each committee are appointed one year at a time, expected to attend bi-monthly meetings, encouraged to help further, and may reapply for future years. The committees impacted include:

- Tree (to promote appropriate tree planting and maintenance),
- Greenspace (to perpetually retain designated greenspace in its natural state), and
- WeTHRIVE! Anderson (to promote beauty, clean-up, and health).

The Agile life cycle of this project started with the equivalent of a charter by the Trustees giving permission to apply for arboretum status. Arboretum status was granted based upon agreement to develop plans, maintain the facility, and use it for educational purposes. While the master plan was being developed, enthusiastic volunteers opportunistically planted some trees. It was determined that future plantings would only be accepted if they fit with the master plan. The master plan includes a vision statement, site conditions, design concept, both current and planned site maps, and recommendations specifically identified for the first year and generally identified for some time in the next four years. This master plan was iteratively developed by a few members of the Tree Committee with as much input as was possible to acquire from staff and other committees. It was presented to the Tree Committee, then the Trustees, then at the Trustees annual planning meeting with all managers from Township staff. This development and presenting of the master plan effectively shared the vision, helping to transition from initiation to planning and implantation. This master plan serves as a general roadmap for the next four or five years and specific plans for short-term development will be developed from it.

Other Agile concepts are being used on this project. One is to demonstrate a proven approach. The site map and concept included a "buffer zone" to transition from lawn into woods. Even though all stakeholders saw that, it was not until flags were placed to show exact planting spots for trees and shrubs that some stakeholders envisioned exactly what was planned and then objected. The sites for the plantings were moved and the number of plantings were reduced in response. Further, some stakeholders have said to possibly wait a year for more planting to see how this looks and how maintenance is impacted. This is an example of operating in an experiment-based manner. Progress and plans are reported every two months to the Tree Committee and every year to the Trustees.

One key question is how roles should be defined and who should fill each role. As the project started, the **Greenspace Inspector took** the active role from the Township side, acting as **product owner**. This person, however, did not have the full authority to also act as sponsor. Some of the other impacted staff functions provided active input and others did

not. One Tree Committee member acted as scrum master. However, due to the pandemic and cold winter weather, meeting in person was very difficult. Since many people involved are volunteers, scheduling virtual meetings and even securing timely feedback was sometimes difficult. All projects meet challenges, and rather than use them as excuses, methods needed to be developed to overcome them. On this project, there were more informal meetings and calls and texts between two or three people rather than larger teams.

Questions

1. What are several reasons why this project might best be planned and managed in an Agile fashion?
2. What Agile principles and values do you feel will be important for this project? Why?
3. What additional information about arboreta, Anderson Township, green space law, or the specific site and vision would you like to know as you start this project?
4. What is the minimum viable product (MVP) goal for this project?
5. Create a vision statement for this project. Write it so the charter would be for one more year of work with an eye toward on-going maintenance of the arboretum after that. In addition, write the statement to consider potential (but not yet approved) future development work after the first year.
6. Create a product roadmap showing two releases for the first year and other potential work that might be performed in future releases.
7. Who are the key stakeholders and what does each one want? Which ones have the most power?
8. How would you get all stakeholders to work together if you were the scrum master?
9. What do you feel is a sustainable pace for this project and why?
10. How can team members effectively utilize the following Agile principles to advance these projects?
 - a. Accept simplicity
 - b. Embrace change
 - c. Maximize value
 - d. Provide and respond to rapid feedback