

ANNUAL REPORT

JULY 2012- JUNE 2013



Morris Arboretum
UNIVERSITY of PENNSYLVANIA

Official arboretum of the Commonwealth of Pennsylvania



Penn
UNIVERSITY of PENNSYLVANIA





Mission Statement

The Morris Arboretum of the University of Pennsylvania is a historic public garden and educational institution. It promotes an understanding of the relationship between plants, people and place through programs that integrate science, art and the humanities. The Arboretum conducts four major activities: education, research, outreach and horticultural display. As the official Arboretum of the Commonwealth of Pennsylvania, the Morris Arboretum of the University of Pennsylvania provides research and outreach services to state agencies, community institutions and to citizens of Pennsylvania and beyond.

Photo: Paul Meyer
Pseudolarix amabilis—Golden Larch

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FY 2013 Appointee

* Elected for FY 2014

DEAR FRIENDS,

Fiscal year 2013 was a year of superlatives. By many measures it marks a pinnacle in Morris Arboretum's history and the culmination of many years of hard work and planning.

On December 31, 2012, the Arboretum successfully completed the ten-year *Always Growing* campaign, having raised more than \$61 million since 2001, surpassing our \$60 million goal. This effort made possible the platinum LEED® Horticulture Center, *Out on a Limb*—a Tree Adventure exhibit, restored fountains and garden features, endowed directorships and internships, helped underwrite Flora of Pennsylvania publications and much more. More than \$20 million in new endowment gifts will continue to pay dividends in perpetuity, supporting every aspect of the Arboretum's mission.

In spite of a slow start in the first three quarters, we finished the year with 128,510 visitors, the highest annual visitation in the history of the Arboretum. The *Big Bugs* exhibit generated great publicity. April, the opening month of the exhibit, was the largest visitation month in the history of the Arboretum. And May was the second largest! Typically, membership tracks with visitation, and membership also had an extraordinary fourth quarter, ending the fiscal year with a historic high of 7,051 member households, which included 12,873 adults and 7,913 children. Membership income for the year also increased to \$686,020, up two percent from FY 2012.

With the growth in attendance in recent years, the facilities at the George D. Widener Visitor and Education Center have become increasingly stretched. The Widener Center was originally the Morris'es'

carriage house, and was adaptively redesigned as a visitor center in 1983. This past year, we were able to implement Phase I of a renewal plan for the building, adding new restrooms and a catering kitchen, and installing a new HVAC system. Plans are now underway for improving the entry terrace and renovating the building to make the front doors fully accessible for wheelchairs and strollers.

Education programs have also never been stronger. Through programs, classes, and seminars, we serve a wide array of audiences, ranging from pre-K through college, amateur and professional horticulturists, to arborists and land managers. Revenue from classes and seminars hit an all-time high this year of \$217,643, up 19% from FY 2012.

With all this good news, it is clear the Arboretum is recovering from the impact of the recession. We are making progress, but more work is needed as we continue the challenge to keep up with the maintenance and renewal needs of our buildings, fountains, infrastructure and equipment. In recent years, investment in these areas has suffered in order to balance the operating budget. Providing stronger support for building maintenance and equipment replacement will continue to be a priority going forward. A dramatic start has been made with the establishment of a \$1.5 million historic preservation endowment and a \$745,000 equipment replacement endowment, but much more is needed. For example, an endowment of \$14 million is needed to fully fund ongoing historic preservation needs and an endowment of at least \$2 million is needed to provide a stream of income to fund timely equipment replacement. We have tackled big goals in the past, and I am confident



that we will continue to make progress in these areas.

During the past year, staff and volunteers have been envisioning future opportunities for youth education. The needs in this area have never been greater, as more and more children are growing up disconnected from the natural world. The outcome of this planning will establish long range priorities and goals for teaching and engaging youth at the Arboretum.

We hope you share our pride in all that has been accomplished this year. As an investor in the Arboretum, please take time to review this annual report. None of these accomplishments would be possible without the partnership of the board, staff and volunteers. We send our profound thanks to you, who help *strengthen* the Morris Arboretum in so many ways.

Jane Alavi, Chair, Advisory Board of Managers

Paul W. Meyer, the F. Otto Haas Executive Director

CULTIVATING THE FUTURE OF THE MORRIS ARBORETUM



Photo: Paul Meyer

More than a decade ago, the seeds were planted for *Always Growing*—The Campaign for Morris Arboretum. This campaign became the most transformational undertaking ever launched at the Morris Arboretum, and a milestone in the history of this institution.

Through the unparalleled commitment and generosity of more than 22,000 friends, volunteers, and donors, the Morris Arboretum received a total of \$61.6 million in unrestricted gifts and funds designated for capital projects, endowments, and programming. This remarkable philanthropic response to the *Always Growing* campaign has enabled the Arboretum to become a world leader as a public garden, and as a center for environmental research, education, and outreach. The Morris Arboretum has set the highest standards among peer organizations through projects and programming that are innovative, inspirational, and intellectually invigorating.

The impact of the *Always Growing* campaign on both the present and the future of this historic Philadelphia institution cannot be overstated. Thank you for your extraordinary commitment and support. Through your generosity you are cultivating the future of the Morris Arboretum for the lasting benefit of generations to come!

Melissa R. Calvert
Director of Development

INNOVATION



Photo: Paul Meyer

Innovative capital projects such as *Out on a Limb*—a Tree Adventure exhibit and the widely-recognized Platinum LEED® Certified Horticulture Center complex have redefined the meaning of environmental education and sustainability at the Morris Arboretum. Unique to the mid-Atlantic region, the *Out on a Limb* exhibit has created new opportunities for children and adults to explore trees and learn the essential role that trees play in maintaining a healthy environment. The new Horticulture Center at Bloomfield Farm provides critically important office and work space for the horticulture, education, and facilities staff, as well as garages for storing and maintaining the extensive collection of equipment and vehicles needed to preserve the public garden. The Horticulture Center is also serving as a national model for sustainable architectural design, and many professionals and students in the fields of green design, engineering, and construction have toured and studied this remarkable complex. The *Out on a Limb* Endowment and the Horticulture Center Endowment ensure that these transformational projects will be maintained for generations to come.

ACCESS & OUTREACH

The Morris Arboretum is committed to increasing public access to the garden on a broad scale. From the construction of the driveway and utility road into the Arboretum's Bloomfield Farm property in 2001, and the installation of the Entrance Gates at Northwestern Avenue in 2008, to the renovations currently underway at the George D. Widener Education & Visitor Center, the Arboretum is growing in its capacity to welcome

a larger and more diverse audience. Exceptional programming and special events developed through the Arboretum's public programs and membership departments have elevated the Arboretum's regional profile and have increased opportunities for community outreach and engagement. Robust learning opportunities, such as the new *Partners in Education* program, the *Growing Minds* series, and the Penn Student Outreach program are captivating students of all ages in fresh ways. The establishment of the Children's Education Endowment and the Steven Laden Marketing Endowment are also providing critical resources to support the Arboretum's *Always Growing* Campaign emphasis on increased access and outreach.



Photo: Paul Meyer



Photo: Paul Warchol

HISTORIC PRESERVATION & RESTORATION

A clear focus on historic preservation and restoration is essential to conserving the Arboretum's century-old iconic garden exhibits and features. Capital and endowment gifts for these efforts, contributed during the *Always Growing* campaign, have provided ongoing support for the Rose Garden, the Swan Pond and Love Temple, the Long Fountain, the Natural Areas, the Japanese Overlook Garden, the Grist Mill, the Orange Balustrade, the Japanese Hill Garden, the Mercury Loggia, and the repair and refurbishment of the Springhouse. Listed on the National Register of Historic Places, the Morris Arboretum is dedicated to securing the long-term preservation of each facet of the institution. The Historic Preservation Endowment and the creation of new endowments such as the Curatorial Endowment, endowments designated to preserve the Natural Areas, the Charles S. Holman, Jr. Key Fountain Endowment, the Elizabeth P. McLean Mercury Loggia Endowment are ensuring the long-term preservation and maintenance of the Arboretum's gardens and exhibits, water features, and historic buildings.

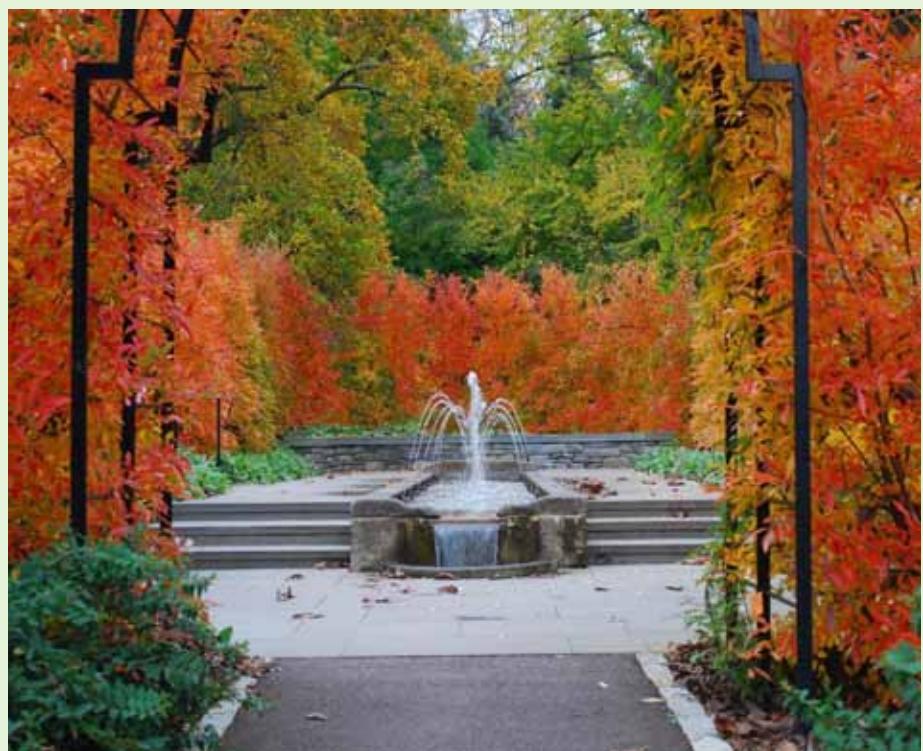


Photo: Judy Miller

INTELLECTUAL LEADERSHIP



Photo Courtesy Anthony Aiello

The *Always Growing* campaign has strengthened Morris Arboretum's mission-based commitment to education and intellectual leadership. A founding member of the North America-China Plant Exploration Consortium (NACPEC), the Arboretum's Horticulture department participates in national and international plant

expeditions that focus on the collection, propagation, and study of plants in their native environments. These global efforts are crucial to ensuring plant health, diversity, and adaptability—key components to maintaining a habitable planet.

The Morris Arboretum is Pennsylvania's state Arboretum, and has contributed to a broader understanding of the vital importance of conserving the natural environment in our region. This growth in public knowledge of native plants and their habitats has enhanced the quality of life for the residents and communities of Pennsylvania for 80 years. The Morris Arboretum's Botany department conducts local and state-wide research and education, data collection, and consultations concerning natural areas and the preservation of open spaces. The Arboretum's botanists are renowned for their excellence in research, teaching, public outreach, and publication. The Botany department is also recognized throughout Pennsylvania for its expertise in the study, evaluation, and protection of the state's natural areas, and provides leadership in the Commonwealth's state parks system and local and regional municipalities.



Photo: Paul Meyer

ENDOWMENT

Photo: Paul Meyer



Photo: Judy Miller



Through the *Always Growing* campaign, substantial endowments were established to support many aspects of the Arboretum's mission, including the Gayle E. Maloney Plant Exploration Endowment and the Plant Exploration, Evaluation, and Introduction Endowment. Key staff positions were endowed including the *Gayle E. Maloney Director of Horticulture & Curator*, the *John J. Willaman Director of Botany*, and the *McCausland Natural Lands Horticulturist*. Additionally, the *Hay Honey Farm Natural Lands Internship*, the *Martha J. Wallace Plant Propagation Internship*, and the *Charles S. Holman, Jr. Rose & Flower Garden Internship* were funded. Significant support was also designated to create a Staff Compensation Endowment and multi-year funding for a post-doctoral fellowship in the Botany department.

CAMPAIGN TOTALS

Total Number of Donors

22,943

Total Amount Raised

\$61,683,201

Total Raised for Endowment

\$20,683,201



Students of the Leonard Davis Institute of Health Economics (LDI) and the Health Care Management Department of the Wharton School SUMR program visit Morris Arboretum's Big Bugs.

SOMETHING BIG AT MORRIS ARBORETUM

Photos this page: Paul Meyer



Photo opposite page: Hoag Levins



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Some BIG things sprang to life last April at the Morris Arboretum. From April 1 through August 31, visitors enjoyed 11 *Big Bugs*—the creation of Long Island sculptor David Rogers, on display throughout the garden. The amazing “bugs” were designed using various combinations of standing or fallen dead trees, selectively harvested green saplings from the willow family, dry branches, and other forest materials. Children and adults marveled at a 16-foot, 1,200 pound praying mantis, a parade of 25-foot long ants, a dragonfly with a wingspan of 17 feet, and a four-foot spider spinning a 15-foot web, to name a few.

Events, from educational offerings to craft activities and bug exercises, were themed around the sculptures, keeping visitors entertained all spring and summer. Adventurous folks

enjoyed a special evening at the “bug crawl,” where they learned about the concept of bugs as a sustainable food source while sampling insect edibles paired with complementary beer and wine.

The popular exhibit, which first appeared at the Arboretum in 1998, was truly a BIG hit with visitors this year! The *Big Bugs* exhibit was made possible by the Madeleine K. Butcher Fine Arts Endowment.

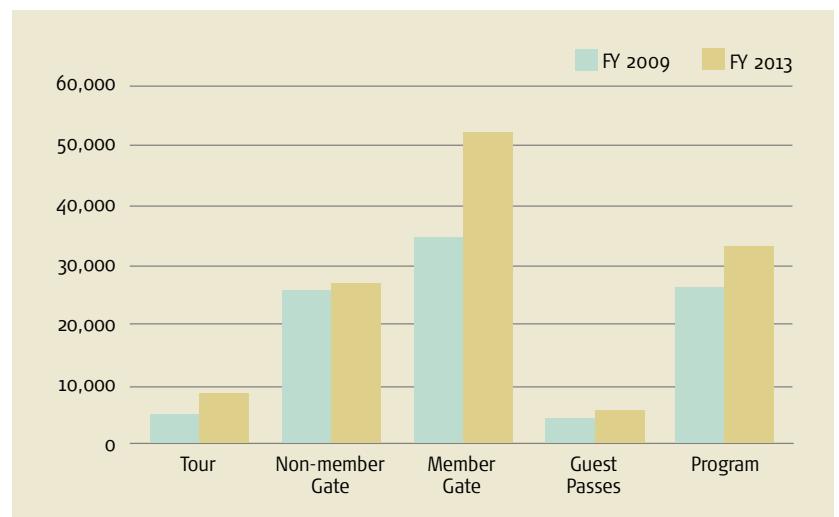


SETTING RECORDS IN ATTENDANCE

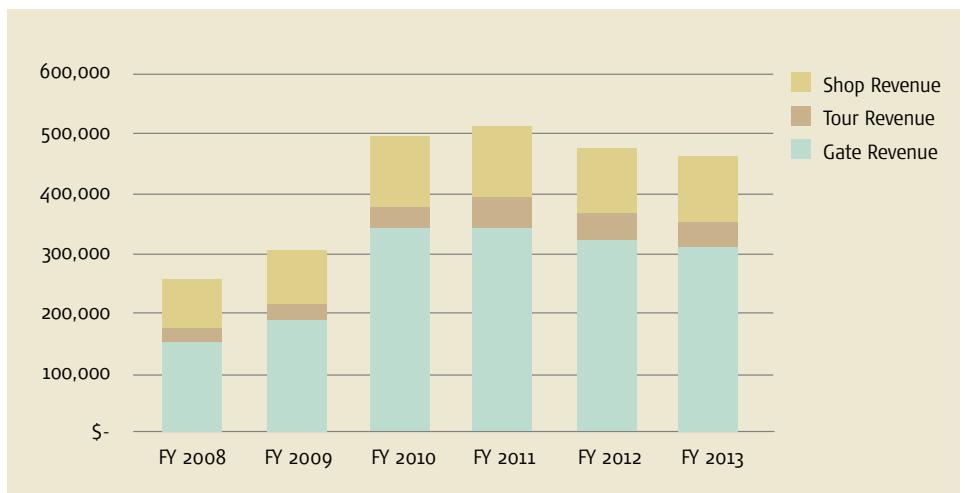
Morris Arboretum staff and volunteers welcomed 128,510 visitors to the gardens in fiscal year 2013, narrowly exceeding the previous record attendance of 128,501 in FY 2010. Fiscal year 2013 attendance included 94,826 gate visitors who came primarily to enjoy the garden and special events, and 34,684 program visitors who came to participate in activities such as classes, lectures, the community gardens, weddings, and meetings.

There was a record number of visiting members, tour participants and children (over a third of total visitation) in FY 2013. Weather remains a strong and unpredictable influence on visitation and gate revenue. Heat, rain, floods and storms frequently deterred visitors early this fiscal year. Summer and fall attendance was six percent below average due to weekend heat and rain. When the *Big Bugs* exhibit opened in April, it brought with it better weather. Attendance increased to six percent above average with record months in April and May. April (19,011 visitors) and May (19,251 visitors) of FY 2013 now rank as the two greatest visitation months on record.

Photo: Paul Meyer



All categories of visitors have increased in the four years since *Out on a Limb—a Tree Adventure* exhibit was introduced. The largest increase has been in visiting members, in association with strong membership growth. Member visits have increased 53% since FY 2009, with tour attendance increasing 83% in the same period.



Combined earned revenue from gate admissions, tours and shop sales has increased 71% since *Out on a Limb—a Tree Adventure* exhibit premiered in July 2009, adding more than \$205,000 annually to the operating budget. The number of visitors at the gate and on tours increased 67% over the same period, with 44,314 more visitors since FY 2009. Gate admission fees have not increased in this period.

TREE OF THE YEAR: DOVETREE—*DAVIDIA INVOLUCRATA* VAR. *VILMORINIANA*

From time to time, a tree will flower with extraordinary abundance. This year, the three dovetrees (*Davidia involucrata* var. *vilmoriniana*) at the Morris Arboretum, growing near the Mercury Loggia and the Log Cabin, flowered with an intensity that surpassed any year prior.

The dovetree is rich in lore and history. It was first discovered in China in 1869 by the French missionary Armand David. Though known by reputation, the tree remained rare in the western world. In 1899, Sir Harry Vietch of the famed English Vietch Nursery, commissioned a recent Kew graduate, Ernest Henry Wilson, to go to China to collect seeds of the dovetree. After much effort, Wilson not only succeeded in collecting seeds, but also went on to become a famed plant explorer, collecting and documenting more than 1,000 Chinese species (some of which he shared with the Morrises' fledgling arboretum). It was the search for the fabled dovetree, however, that first inspired his efforts in China.

The Arboretum's largest dovetree is a multi-stem specimen just above the Mercury Loggia. This tree was acquired in 1954 as a cutting from Clement E. Newbold's estate, Crosswicks, in Jenkintown. It "died" and was cut to the ground in 1984, and a young replacement was planted nearby. Amazingly, the dead plant re-sprouted vigorously the following year, rejoining the newly planted specimen in a cluster.

Dovetrees can take more than 10 years to reach flowering maturity, and many more years to flower heavily and reliably. The trees at the Arboretum usually bloom around the time of the Plant Sale in early May. In recent years, the dovetrees have all flowered reliably, but this past spring they produced the heaviest flower set ever seen at the Arboretum on a dovetree.

In his 1929 book, *China – Mother of Gardens*, Wilson wrote, "To my mind *Davidia involucrata* is the most interesting and beautiful of all trees in the north temperate flora." After observing this year's *Davidia* display, it is easy to understand his enthusiasm!

Photos: Paul Meyer



SPRINGFIELD MILLS—250 YEARS AND TURNING



The Morris Arboretum is a historic public garden, but which of its features are the oldest? The answer includes the grist mill, miller's cottage and the old mill road, all located on the Bloomfield Farm side of the property. These features are not only old, but are important resources listed in the National Register of Historic Places. The original

mill and Miller's Cottage were built by the Streeper family in 1761. Their Piper descendants enlarged both in 1854, renaming the mill as Springfield Mills. These structures and the property were purchased by John Morris in 1913, and quickly utilized to support the Morris' agricultural endeavors, including generating electric power from the mill, which served primarily as a feed mill for horses, dairy and poultry.

The Run of the Mill volunteers are dedicated to restoring the mill and its machinery to water-powered operation, and producing a consumable, stone-ground product for education purposes. The volunteers meet monthly for restoration workdays. Some volunteers come several times a week to explore the art and mystery of milling by restoring the historic machinery. In fiscal year 2013, the restoration engaged 42 volunteers who contributed almost 1,600 hours.

The year 2013 witnessed major accomplishments. The Hurst frame, which supports the millstones and great gear, was fully stabilized. The great gear and main belt shafts, as well as several belts and one set of mill stones, were restored to operation after more than 60 years of silence. An electric motor was installed to power the stones and the Oliver Evan's style millworks until the mill race is restored to provide water power. A millwright, one of few such professionals in North America, restored the grinding surface on one of the two sets of millstones, and gave a workshop to the mill volunteers and staff.

Scheduled mill tours developed by the Arboretum's education volunteers are now popular choices for school and adult groups. A dozen mill tours were

delivered to more than 300 learners in FY 2013. Public events such as Bloomfield Farm Day and a Bloomfield Farm Open House brought hundreds more community members into the mill, connecting them with local history, technology and a better understanding of how plants become food. Some lucky visitors even enjoyed very fresh, very local, stone-ground cornbread.

The mill's restoration and the education programs were supported in the past year by gifts and donated services from Richard S. Greeley in memory of Loretta Greely, Janet and John Haas, Ann and Frank Reed, the Arboretum Guides in memory of Loretta Greeley, Fairwold Chapter—Questers International Organization, Earl Jenkins, Joseph Manero & Son Masonry, and Bob Martin & Paul Madrack.

Photos: Bob Gutowski



PAUL MEYER WINS PRESTIGIOUS AWARD FROM AMERICAN PUBLIC GARDEN ASSOCIATION

At the 2013 American Public Garden Association National Conference held in Phoenix, AZ this past May, Executive Director Paul Meyer was presented with the APGA Award of Merit. The award recognizes an individual APGA member who has performed with distinction in the field of public horticulture, and has excelled in the public garden profession at one or more institution. The recipient's accomplishments should encompass some combination of botany, horticulture, gardening, research, extension, education, development or administration.

Paul's nomination for this award was a result of letters of support from individuals who have known and worked with him for a combined 135 years. He has

served the Morris Arboretum for more than 37 years, rising from Curator of Living Collections to Executive Director, a role he has held for 22 years. Under his guidance, the Arboretum has been transformed into one of the finest public gardens in America. He has undertaken a dozen plant exploration trips around the world, and is known as one of the finest plant hunters of his generation. Paul is also a co-founder of the North America-China Plant Exploration Consortium (NACPEC), and an early leader of the APGA's North American Plant Collections Consortium (NAPCC).

In accepting the award, Paul shared his honor with the Morris Arboretum board, staff, and volunteers, and thanked them for making the award possible.

Photo credit: Darryl Lee Cohen of Haute Photography



THE MCLEAN CONTRIBUTIONSHIP—A HISTORIC ENDOWMENT CELEBRATING AN EXCEPTIONAL WOMAN

This past year, the McLean Contributionship, together with gifts from McLean family members, awarded the Morris Arboretum an exceptional grant to establish the Elizabeth P. McLean Mercury Loggia Endowment. In 2013, the Arboretum commemorated the 100th anniversary of the Mercury Loggia, which includes the Mercury Loggia Temple, the Grotto, and the Ravine Garden. At this important juncture, the Morris Arboretum gratefully recognizes the Contributionship's support, which ensures that this iconic feature will be preserved for generations to come. The McLean Contributionship's generous gift also honors Elizabeth P. McLean, her passion for plants and garden history, her commitment to historic preservation, and her extraordinary leadership at the Morris Arboretum.

Photo: Susan Crane



EDUCATION GROWS AND CHANGES AT MORRIS ARBORETUM

Responding to changing lifestyle trends, many new, multiple-session classes were introduced this year and proved to be very popular. Series classes provide more substantial learning opportunities, and yield higher revenue than single-session classes. Series offerings in botany, health & wellness, and the new *Growing Minds* program were particularly successful. Continuing education classes brought in \$161,504 in fiscal year 2013, representing an 11% increase over FY 2012 (\$146,034).

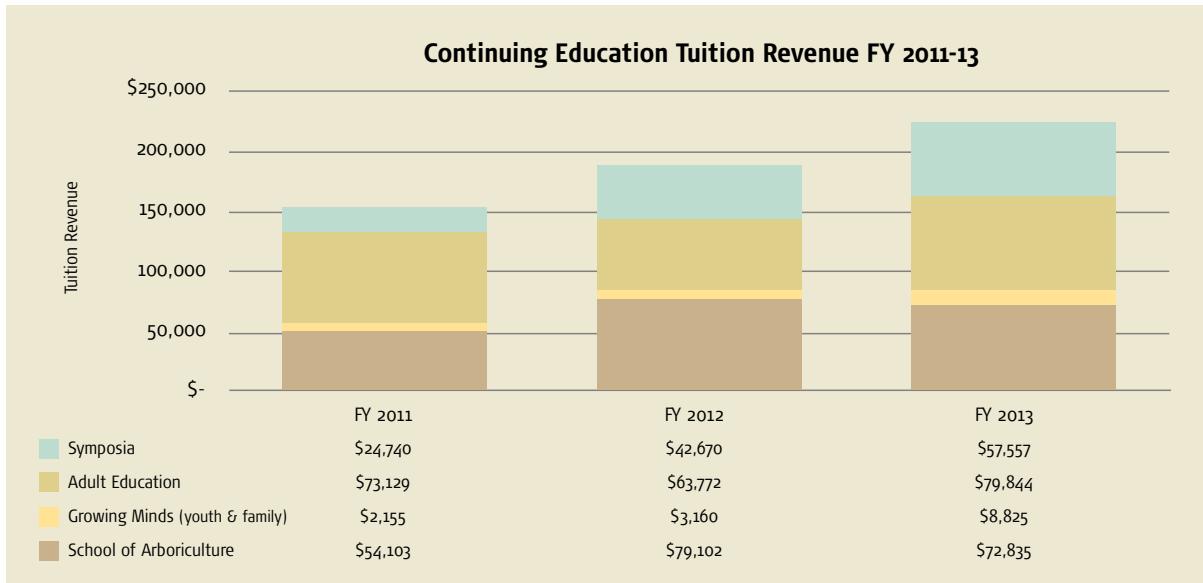
Improved e-marketing efforts increased revenue generation through greater utilization of the Arboretum's new online registration system. In FY 13, class revenue generated from targeted class "e-blasts" totaled \$14,713.

The number of cancelled classes due to low enrollment dropped substantially—by nearly half—from 11% in FY 12 to 6% in FY 13. As a result, fewer class refunds were issued, more classes ran successfully, and earned class income was more effectively retained.

Noting the increase in young families among membership, the *Growing Minds* program was launched. Registrations increased, resulting in \$8,960 in total revenue, nearly triple the revenue generated from youth & family classes in the prior year. Additional *Growing Minds* offerings will be added in coming years.

The School of Arboriculture continues to be an educational leader, providing professional education for arborists and related professionals in the region. More enthusiastic non-professionals are also using this program for both introductory and advanced education on trees and tree care.

Photo: Paul Meyer



Continuing education had a banner year, with record tuition revenue (\$229,061) from classes and symposia. More than 3,200 participants enrolled in 146 classes and three seminars.

Celebrating the 125th anniversary of Compton, the Arboretum offered a seminar for historic site directors entitled “Gardening with History: Planning and Practice.” Garden historian Elizabeth McLean opened the symposium, which was held at the Morris Arboretum, and attracted people from large historic gardens such as Winterthur, to smaller historic sites like The Highlands. More than 90 people attended to learn more about how to govern, interpret, curate, and plan historic gardens. The conference was funded in part by the National Endowment for the Humanities.

For the 24th year, the Arboretum offered its annual winter symposium on ecological landscape design in partnership with local landscape designer, Larry Weaner, who is known for his work on meadow development. This two-day symposium brought together 12 speakers from throughout the country to discuss environmental issues that relate to landscape design, including the use of native plants, woodland

restoration, and wildlife habitat creation. The sold out symposium set an all-time high for participation with 210 people attending from 12 states, a 42% increase over 2012. Gross income totaled \$52,610, a 77% increase over 2012.

The Morris Arboretum also worked with five other Philadelphia area gardens and horticultural organizations to sponsor the 2013 Woody Plant Conference. The conference featured seven speakers presenting a wide variety of topics related to woody plants from pest and disease problems, to plant exploration and design. It was attended by more than 500 amateur gardeners and landscape professionals. The conference drew from a wide geographic area, with attendees from 12 states and even one from England. Many professional groups including landscape architects, arborists, and horticulturists took advantage of this opportunity to obtain continuing education units.

Photo: Paul Meyer



Photo: Kim Soles

The Arboretum At-a-Glance

	FY 2012	FY 2013
Visitor Attendance	126,784	128,510
Active Membership Households	6,149	7,051

And Some Things You May Not Know

Age John Morris would be today	166
Number of butterfly species observed in the garden in one morning	17
Weight of one Springfield Mills millstone	1 ton
Number of <i>Big Bug</i> legs in the garden last summer	70
Number of <i>Big Bug</i> -related items sold at The Shop	1,342
Number of countries represented this year at the Garden Railway	13
Revenue generated by weddings this fiscal year	\$282,214
Average height of the trees in the Dawn Redwood Grove	100 feet

A FOND FAREWELL TO DR. ANN RHOADS

At the end of 2012, Dr. Ann Rhoads retired from a long and prolific career at the Morris Arboretum. Ann served as Director of Botany from 1976 to 2000, at which time she stepped back to the position of Senior Botanist in order to allow now director, Tim Block to assume that title.

Ann's contributions were many during her noteworthy career. She was instrumental in advancing the understanding of Pennsylvania flora when she and former Arboretum director Bill Klein, created the Flora of PA database. Building on work initiated in the 1930s by Edgar T. Wherry, they built a database of approximately 400,000 specimen records from the major Pennsylvania herbaria. In 1993, *The Vascular Flora of PA, Annotated Checklist and Atlas* by Rhoads and Klein was published by the American Philosophical Society.

Other important publications were produced during Ann's tenure, including *The Plants of Pennsylvania, An Illustrated Manual* by Rhoads and Block, which was first published in 2000 by the University of Pennsylvania press. The book proved to be such a valuable resource both in and outside the state, that a second edition which incorporated taxonomic changes was published in 2007. *Trees of Pennsylvania* was released in 2005, and *Aquatic Plants of Pennsylvania* in 2011.

Some of Ann's more rewarding roles were as teacher and mentor. She served as an adjunct professor in the biology department at the University of Pennsylvania, teaching plant systematics and field botany, and supervised or co-supervised the plant protection and Pennsylvania flora interns at the Arboretum.



Photo: Paul Meyer

As an active spokesperson for environmental issues, Ann brought critical attention to the issue of deer overabundance and its severe impact on the structure and composition of Pennsylvania's forests and natural areas. She served on statewide committees, and developed reports to help educate the public about the importance of this issue.

Throughout her career, Ann watched dramatic changes in her field, while always conveying her knowledge of

and enthusiasm for plants to those around her. While she is finally enjoying some well-deserved time off, she is still a frequent face at the Arboretum, continuing to study plants and even contemplating the publication of another book.

The Arboretum is grateful to have shared in Ann's passion for scientific observation, her love of working with students and interns, and her advocacy for the protection of the Earth and its natural resources.

PENN STUDENTS ESCAPE TO MORRIS ARBORETUM

Last year, students from the University of Pennsylvania flocked to Morris Arboretum in greater numbers than ever before. More than 1,800 Penn students came through the Arboretum gates, representing more than eight percent of the Penn student body. This substantial increase in visitation from previous years can be attributed to five years of outreach efforts that have increased awareness of and accessibility to Morris Arboretum among Penn students.

SOME HIGHLIGHTS INCLUDE:

- In the fall 2012 semester, an enthusiastic student team from Wharton's Management 100 course developed a marketing campaign and Arboretum photo contest that brought 100 new students to the Arboretum, and connected hundreds more through social media.
- Nearly 200 students experienced the Arboretum during annual events such as the Fall Festival, Bloomfield Farm Day, the Penn Glee Club Holiday Concert, and the Japanese Cherry Blossom Festival.
- The Arboretum entered its third year of the Penn Tree Program, planting trees with the classes of 2013 and 2016 on Penn's College Green.
- The Arboretum participated in the Wharton Nonprofit Board Leadership Program, through which a second-year Wharton MBA student sat on the Arboretum's Advisory Board of Managers for one year.
- Both fall and spring semester Penn Preceptorials—during which students visit the Arboretum for



Photo: Stephanie Nam

informal multi-disciplinary learning opportunities outside the classroom setting, filled to capacity with extensive waiting lists.

- The Arboretum saw a surge in the number of Penn classes and student groups who visited in the 2012-2013 academic year.

None of this growth could have been achieved without the generous support of Penn alumnus William (Bill) Hohns and his wife, Kathlene (Kathie). Encouraged by the recent success of the Arboretum's programs, last year Bill and Kathie renewed their support to Morris Arboretum for another five years, and expanded funding to include other Penn cultural entities as well, thus establishing the Hohns Family *Enhancing Student Cultural Access to Penn Entities* (ESCAPE) program. More than ever, they believe that, "Increasing awareness of the Morris Arboretum and its relationship to Penn, and ensuring that more Penn students than ever have the chance to experience and remember it, will, in the long-term, enhance the stature of the Arboretum as well as that of the University." With their new commitment, the Hohnses have set an ambitious goal for the Arboretum: to achieve a Penn student visitation rate of 15% by the end of 2017. The Arboretum is exceedingly grateful for Bill and Kathie's continued support, vision, and partnership, and is ready to meet their challenge in the coming years!

Arboretum Volunteers

Volunteers can be found on the Morris Arboretum grounds every day—guiding visitors, sharing their love of nature with school children, serving on board-level committees, and doing much of the hands-on digging, mulching, weeding, and other chores necessary to keep the gardens looking beautiful.

Without the services provided by these generous individuals, the Morris Arboretum simply would not be able to continue its mission of teaching, research, outreach and horticulture display.

Volunteering, however, is also about connections. Staff members interact closely with volunteers to ensure they are aware of the many opportunities available to them at the Arboretum. In turn, volunteers connect with the community by helping fulfill the Arboretum's mission and becoming better stewards of their environment.

No. of Volunteers*	Hours
Horticulture	62
Education (Guides)	80
Garden Railway	21
Propagation	8
Plant Sale	106
Archives	17
Run of the Millers	42
Board and Committee Members	176
Administrative	2
Moonlight & Roses	27
Total	17,970

*Many volunteers work in multiple areas



Photo: Paul Mayer



Photo: Scott Spitzer

ARBORICULTURE OUTREACH— PRESERVING AND PROTECTING TREES

One program that distinguishes the Morris Arboretum from other arboreta is its Urban Forestry consulting team. The team's outreach activities accomplish the Arboretum's mission to promote an understanding of the relationship between plants, people, and place, especially in its urban setting. Housed within the Public Programs department, the team's outreach efforts inform decision-makers and practitioners at all levels about the importance of trees, thereby conserving, protecting, and increasing the region's tree canopy, while providing environmental, social, and economic benefits.

The Urban Forestry team includes Jason Lubar, Associate Director of Urban Forestry, Robert Wells, Associate Director of Outreach Arboriculture, and the *Martha S. Miller Urban Forestry Intern*. Jason and Robert are International Society of Arboriculture (ISA) Board Certified Master Arborists and members of the American Society of Consulting Arborists. Jason is a board member of ISA's Penn-Del Chapter, and is an executive board member and treasurer of

Arboriculture, impartial services and advice, and technical assistance to decision makers and green industry practitioners. Its clients include municipalities, colleges, tree care companies, landscape architects, architects, community groups, gardens, arboreta, and businesses in the Philadelphia region and beyond.

PROJECT HIGHLIGHTS:

Princeton Street Tree Inventory and Assessment

In 2013, the township of Princeton, covering 16.25 square miles, and the 1.85 square mile borough of Princeton, consolidated into one entity to become the municipality of Princeton. The municipality is responsible for planting and maintaining trees along the streets, public rights-of-way, and municipal open space. The municipality utilizes Davey Tree Experts' TreeKeeper® software to manage trees under its jurisdiction. Princeton's municipal arborist and open space manager updated the street tree database in two small areas, but decided it was too extensive to attempt to document all of Princeton's street trees.

the Pennsylvania Urban & Community Forestry Council. The Morris Arboretum's Urban Forestry team achieves fiscal sustainability by providing tree management-related consulting, educational opportunities to practitioners through the School of

In early 2012, Princeton's municipal arborist met with the Morris Arboretum's Urban Forestry team to discuss the goal of finishing the street tree inventory and assessment. The Urban Forestry team submitted a proposal to complete the street tree inventory using Davey's data fields and the TreeKeeper software, and the proposal was accepted in June 2012.

The team completed the comprehensive street tree survey in six months. The project involved measuring and mapping more than 13,000 trees within the limits of Princeton's 110 miles of roadway. Each tree was examined, and pertinent data was entered, allowing Princeton to manage and plan its resources in a more sustainable manner. This was the largest contract the team has handled to date. Daniel Weitoish, the 2011-2012 urban forestry intern, was invaluable in seeing this project through to fruition.

William Penn Foundation Grant

The Urban Forestry team continued to collaborate with the TreeVitalize partnership through a multifaceted grant that enhances the connectivity between "environment," the city's green infrastructure, and the "community." The grant's three main facets include:

- **Keeping Philadelphia's Streets Safer:** The team partnered with Philadelphia's Park and Recreation Department (PPR) to make Philadelphia's streets safer from tree-related risk by identifying hazardous tree removals and pruning needs to ameliorate hazardous conditions within five zip codes.

This project included drafting *Philadelphia Street Tree Inspection and Hazard Remediation Standards and Operating Procedures* that can be implemented to reduce and manage street tree-related risk.

- **Monitoring Restoration Projects:** The Arboretum's Urban Forestry team is partnering with PPR's Urban Forestry & Ecosystem Management team to develop a monitoring and maintenance plan, including protocols, for seven restoration projects that have been funded by the US Forest Service.
- **Implement Targeted Tree Plantings for TreePhilly and Penn's Creating Canopy program:** To improve canopy cover on private land, the program gave away trees in partnership with University of Pennsylvania, Pennsylvania Horticulture Society (PHS), and PPR.

Photo: Rachel Brudinski



HARRIET WETHERILL PARK

Plymouth Township's 67-acre Wetherill Park is comprised of agricultural lands, wooded areas, streams and fields bounded by Butler Pike and Narcissa Road. The park is an "oasis" and a "suburban wilderness," and is the only township park with considerable wooded and natural areas. Parts of the land have been farmed for decades, and now showcase the region's agriculture heritage. To support the township's goals for the park, the PA Department of Conservation and Natural Resources funded the creation of the park's Lands Management & Stewardship Plan and the Conservation & Management Plan, which serve as a manual for the township's informed decision-making for future uses, management, and investments in the park. In 2012, the township hired a consulting team lead by LandConcepts Inc. to write these plans. The Arboretum's Urban Forestry consultants were part of the team, and were responsible for writing the Lands Management & Stewardship Plan. The 2012-2013 Urban Forestry intern, Rebekah Armstrong, made this task her intern project, and was instrumental in authoring the plan which is now being reviewed by the township.

Other work included assisting at the University of Pennsylvania on many tree-related projects, consulting at the Philadelphia Cricket Club's different campuses, as well as working with Mt Cuba Center, Philadelphia's Navy Yard, and quantifying tree damage at Windermere in Blue Bell from Imprelis, a broad leaf turf herbicide that unintentionally kills trees.



Photo: Rebekah Armstrong

MORRIS ARBORETUM'S SCHOOL OF ARBORICULTURE

Under the direction of Robert Wells, the Morris Arboretum's School of Arboriculture continues to flourish. The school hosts arboricultural experts from around the country to present a diversity of tree-related topics to the regional professional tree care community. In FY 2013, more than 400 participants attended 26 courses. Most courses are one day, but many meet multiple times. The diversity of classes included Integrated Pest Management Training, Tree Risk Assessment Course and Exam, Introductory Tree Climbing, and Up By Roots: Healthy Soils and Trees in the Built Environment. There are 13 courses scheduled for fall 2013. These classes are open to the public, but attract arborists and landscape architects by offering continuing education credits necessary to retain professional certifications. Collectively, these programs have a great impact on the quality of tree care in the region.



Shelley Dillard—Propagator

UTILIZING THE ARBORETUM'S LIVING COLLECTIONS FOR RESEARCH AND EVALUATION

Some of the research is emergent—that is, collections of plants are often assembled in order to increase the diversity of the institution's holdings, not knowing what future needs may arise. In this category are often the plants that outside researchers call upon. Other collections are developed in a focused way, with an eye toward a specific research goal, and the plants that make up the Arboretum's long-term projects are often assembled in this way. Of course it is impossible to predict which plants will be useful or needed for a future project. However, because there are limits to what can be grown, a Living Collections policy provides a framework for building and maintaining the collection. There is always a balancing act between adding to the collection, maintaining the look and feel of the Arboretum, and continuing to improve the value and relevance of the collection. To this end, there is a continual turnover in plants, not only through attrition, but also through active curation.

Many of the Arboretum's plant exploration efforts provide material for evaluation at the Arboretum, as well as material for outside research efforts. For example, since 2008, a major focus of plant exploration in China has been to collect Chinese species of ash (*Fraxinus*; see Morris Arboretum Annual Report 2008-09 and 2011-12). The impetus behind these collections is the discovery of emerald ash borer (EAB, *Agrilus planipennis*), a small exotic beetle that is devastating native and planted populations of North American ash trees throughout the Midwest and Northeast U.S. Chinese ash species have potential resistance to

EAB, yet very few of them are grown within the U.S. Since 2008, 34 collections of eight Chinese species have been made, and some of these are now ready to be planted throughout the Arboretum. With limited space, the hope is to grow a representative sampling of Chinese ashes. Thanks to the high rate of successful germination, some of these plants have also been distributed to scientists at the U.S. Forest Service, The Ohio State University, and others who are working to test EAB-resistance among these Asian species.

Photo: Bob Gutowski



The Arboretum is more than simply a garden or assemblage of plants. In reality, it is a documented museum that holds a diversity of plants—including trees, shrubs, and perennials. Visitors appreciate the Arboretum on many levels, but one of the least known uses is that of the collection being utilized for scientific research and evaluation purposes.

This work takes many forms, and includes both internal projects and collaborations with outside organizations to whom plants are provided for research programs. The real value of the Morris Arboretum's collection lies in the fact that many of the plants are of wild-collected and documented origin, providing background information for approximately one-third of the plants. This documentation, or provenance data, underscores the unique value of the collection for research purposes.

During the course of the past year, Dr. Carol Mapes of Kutztown University has been given access to the Morris Arboretum's oak collection. Dr. Mapes is working on a field guide to insect and mite galls of the northeastern United States and surrounding areas (plant galls are abnormal outgrowths of plant tissues that are caused by insects or pathogens). This is an excellent example of emergent research, where an assembled collection has potential for research applications that are not necessarily predictable as the collection is being assembled. According to Dr. Mapes, “*having access to the diverse oak collection at the Morris Arboretum has been of great benefit as I have found several galls on trees in the collection that I have not previously found. I have been working on the field guide for several years now, and finding unique galls is becoming increasingly difficult. I particularly appreciate the fact that there are many native oak trees in the collection, as most galls are found on native species.*”

Further examples of plant exchange for research involve Dr. Richard Olsen of the U.S. National Arboretum. Dr. Olsen is studying boxwood blight, a new and rapid disease that is causing dramatic leaf drop and decline of boxwoods throughout the Northeastern U.S. His research includes screening of boxwood for blight tolerance, and breeding resistant boxwood. Recently, cuttings of Chinese boxwood (*Buxus sinica*) were provided to him. These cuttings are from plants that originated on a 2005 expedition to Gansu Province, China. These plants are some of the only wild-collected Chinese boxwood in North America, and will provide the groundwork for research into the blight.

Despite being a well known and beloved garden plant, paperbark maple (*Acer griseum*) is endangered in its native habitat in China. As far as can be determined,

paperbark maple has only been introduced into the U.S. from the wild four times, including once by Arboretum Executive Director Paul Meyer and his colleagues in 1994. Many of the commercially available trees are derived from plant explorer E.H. Wilson's original collections, resulting in relatively little genetic diversity among the plants within the United States. The beginning stages of this project involve determining whether or not the diversity of cultivated plants in the U.S. accurately reflects the genetic diversity of plants in the wild, or whether further conservation efforts are needed to preserve this species.

Yet another recent research effort involved a plant collecting trip undertaken in October 2012 by Arboretum Director of Horticulture and Curator Anthony Aiello and colleague Michael Dosmann of the Arnold Arboretum of Harvard University. In light of climate change leading to warmer winters and a change in this area's USDA hardiness zone, the goal of the trip was to test the adaptability of live oak (*Quercus virginiana*) in the Philadelphia area. Tony and Michael travelled to Virginia where they collected seed from the northernmost cultivated trees in the U.S. and a natural population of live oak, with the goal of screening them for their ability to grow in the Delaware Valley and in Boston. Large numbers of seed from this trip have germinated, and will be closely evaluated for cold hardiness.

These are just a few examples of the types of research opportunities the Morris Arboretum's collection provides. Over the years, many other scientists have benefitted from the Arboretum's efforts with a variety of projects, and it is this often unnoticed aspect of the living collection that provides value and support for ongoing plant exploration and collection efforts.

Living Collection FY 13

Total number of accessioned plants	11,944
Total number of wild-collected plants	3,782
Number of countries represented by wild-collected plants and seedlots	34
Number of taxa, genera and families	2,455/292/94
Number of accessioned plants added	289
Number of wild-collected additions	134

Photo: Paul Meyer

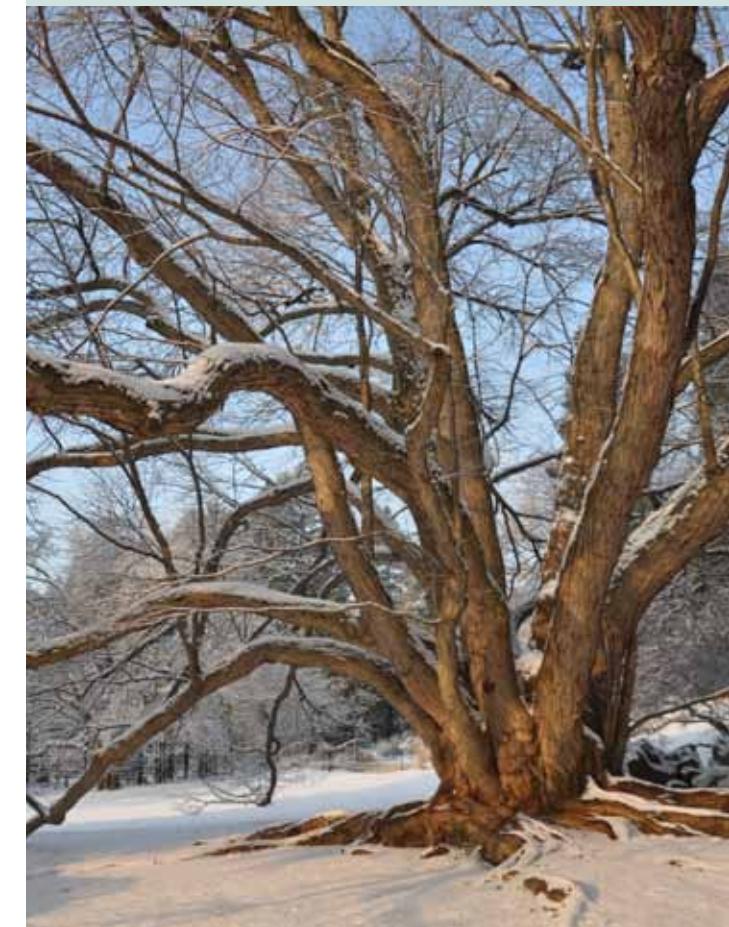




Photo: Timothy Block

Kalmia latifolia (Mountain Laurel)

The past year in the botany department presented some challenges, including staff changes and weaker than usual funding from the state. However, things turned a corner at the end of the fiscal year, promising a bright future.

Work was completed on a series of resource recovery plans for several plant species considered among the most critically imperiled in Pennsylvania. These recovery plans delineate strategies that promote protection of these species and their habitats, and allow for species recovery and stability. This work is precedent setting for Pennsylvania; never before have recovery plans for plant species been created and implemented in the Commonwealth. The species studied in this project were *Agalinis auriculata* (eared false foxglove), *Carex bicknellii* (Bicknell's sedge), *Euphorbia purpurea* (glade spurge), *Pycnanthemum torreyi* (Torrey's mountain-mint), and *Trollius laxus* (spreading globe-flower). This work was supported by a generous grant from the Pennsylvania Wild Resource Conservation Program.

Funding in the amount of \$23,800 was secured from WRCP to complete a second set of resource recovery plans. The species being considered include *Pycnanthemum clinopodioides* (mountain-mint), *Cystopteris laurentiana* (Laurentian bladder fern), *Bidens bidentoides* (Swamp beggar-ticks), *Vitis rupestris* (sand grape), and *Chenopodium foggi* (Fogg's goosefoot) (see side bar page 21).

Another new project was also undertaken, this time in collaboration with the Wissahickon Valley Watershed Association. The work will include conducting complete natural resource inventories of WVWA's eight named preserves as well as on WVWA-owned properties along the entire length of the Wissahickon Green Ribbon Trail, totaling more than 1,300 acres. The first round of site visits is complete. All flora is recorded throughout, however, the sites will need to be revisited in the fall in order to capture those species not yet evident. Funding for the project was provided by the Wissahickon Valley Watershed Association through generous donor contributions.

The department's work with the Pennsylvania Bureau of State Parks is complete for now. Reports were submitted on the natural resources of the Big Elk Creek section of White Clay Creek State Park, and the Bald Mountain section of Lehigh Gorge State Park. These reports will form the basis for appropriate management strategies for these recently acquired properties. Discussions of future priorities and funding opportunities are ongoing with the Bureau of State Parks.

RESEARCHING AND CONSERVING PENNSYLVANIA'S NATURAL AREAS

On an exciting note, this past year the teaching efforts of the botany department were expanded.

Instruction in traditional botanical skills and knowledge has been identified as an area of interest by Arboretum supporters and visitors. In an

attempt to fill this void, additional courses were added both at the Arboretum and in the biology department at Penn. Some of the new courses taught at the Arboretum included Introduction to Botany (a six-week class), Identification of Spring Flora (a four-week class), The Botany of Fruit, Poisonous and Injurious Plants, and Advanced Plant Physiology.

This summer, the Morris Arboretum welcomed Dr. Cynthia Skema as Arboretum Research Botanist. Cindy's academic background includes a bachelor's degree from Bryn Mawr College, an M.S. from the University of Edinburgh (Scotland), and a Ph.D. from Cornell University. Since 2010, Cindy has been working at Massey University in New Zealand. Her research there focused on various aspects of sexual reproduction in a genus of the mallow family (*Malvaceae*). Dr. Skema will be participating in all aspects of the work of the Botany Department, including continued development of the Pennsylvania Flora Project website (www.paflora.org).



Photo: Paul Meyer

MORRIS ARBORETUM RECEIVES PRESTIGIOUS ACCREDITATION



Lehigh Gorge State Park Photo: Timothy Block

Fogg's Goosefoot

The Botany department at Morris Arboretum is preparing resource recovery plans for several critically imperiled plant species including *Chenopodium foggii* (Fogg's goosefoot). This species was described in 1952 by Dr. Herbert A. Wahl of Penn State, and named in honor of his friend and colleague, Dr. John (Jack) Fogg, then director of the Morris Arboretum. This extremely rare plant has only ever been found in five locations in Pennsylvania, and was most recently rediscovered in Luzerne County.



This year, the Morris Arboretum was named a Level IV Accredited Arboreta by The Morton Register of Arboreta, a comprehensive list and database of arboreta and other public gardens that have a substantial focus on trees and shrubs.

Organizations that have been awarded Level IV status have met the highest levels of arboretum standards such as having:

- A scientific and/or conservation staff and the capability to collaborate on sophisticated scientific or conservation activities with other arboreta or organizations related to trees.
- The institutional capacity, stability, and commitment to hold and safeguard plants of collections or conservation value on behalf of the collective interests of the profession.
- Specific participation in collaborative scientific or conservation activities related to trees, such as the North American Plant Collections Consortium or the Global Trees Campaign.

The award denotes the highest level of recognition available, and the Morris Arboretum is the only arboretum in the Philadelphia area to receive this level of accreditation.

Photo: Judy Miller



MARKETING EFFORTS IMPACT VISITATION AND SUPPORT MEMBERSHIP

BIG BUGS WAS THE BIG NEWS THIS FISCAL YEAR

Facing lagging attendance, membership and revenue, halfway into the fiscal year in mid-December, the Morris Arboretum was presented with an opportunity to bring in a blockbuster exhibit with a proven track record of success. A five-month deal with sculptor David Rogers was negotiated for his *Big Bugs* exhibit to open at the Arboretum on April 1st.

Eleven *Big Bugs* sprung to life throughout the 92-acre garden as a perfect kick-off for spring, and a fabulous springboard for press, advertising, branded merchandise, and programming. The five-month long exhibit positively impacted visitation from its opening date through August, making April the biggest attendance month in the history of the Arboretum.

Here are some of the ways in which the *Big Bugs* exhibit was promoted:

- A 30-second video was produced which aired on-screen at four mainstream area movie theaters, as well as the Ambler, Highway, and Bryn Mawr art-film theaters.



- The exhibit was advertised on the monthly Septa pass in June. As a bonus, Septa ran *Big Bugs* ads on the digital screens in the trains and at 30th Street and Suburban Stations.



- The Shop at Morris Arboretum was positioned as Big Bug headquarters, with appealing and unusual *Big Bugs* apparel and merchandise.
- New monthly programming with bug-centric themes was developed for the Garden Discovery Series, as well as Let's Move activities to support Michelle Obama's Let's Move program to ensure a 'healthier generation of kids'.
- The first-ever *Bug Crawl: Food and Drink for the 21st Century* was held, featuring edible bugs paired with wine or beer. The event sold out, attracting a younger, more adventurous audience.



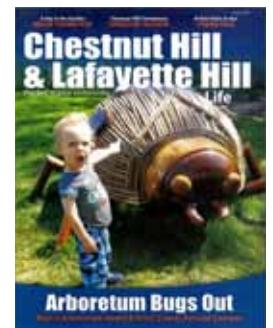
BIG BUGS RESULTED IN BIG PRESS

- The *Big Bugs* exhibit generated ongoing press in local print, radio, and online, prompting *Philadelphia Magazine*'s Real Estate/Neighborhood Chatter blog to post this entry after Memorial Day, "Judging from my Facebook timeline, half of Philadelphia went to the Shore this past weekend. The other half was at the Morris Arboretum."

- The covers of both *The Philadelphia Inquirer WKND* and Montgomery Media's *Ticket entertainment* section featured *Big Bugs*, as well as the cover of a new magazine called *Chestnut Hill & Lafayette Hill Life*.



- The Bug Crawl, in particular, appealed to the press with its unusual bug fare, garnering much pre-event press: an interview with chef, Josh Hunter, on WHYY's *You Bet Your Garden*, a posting on CBS's website, and a multitude of social media entries. Follow-up articles with photos of the Bug Crawl ran in a number of publications.



OTHER PRESS

- Paul Meyer's Award of Merit from American Public Garden Association generated cover stories in the *Springfield Sun* and the *Chestnut Hill Local*, and on Penn's home page, and in *The American Gardner* magazine.
- *Philadelphia Magazine*'s Best of Philly readers' poll nominated Morris Arboretum as Best/Fun Place to Take the Kids (just behind the Please Touch Museum), and chose the Morris Arboretum as one of its 76 Things To Love about Philadelphia with a photo of the Rose Garden.

- *Country Gardens*, Better Homes & Gardens special interest magazine featured a photo essay by Rob Cardillo, about last summer's Adirondack chairs exhibit.
- *The Baltimore Sun* included the Morris Arboretum as #4 out of 100 Things to do in Philadelphia.
- Trip Advisor continues with strong visitor reviews for Morris Arboretum.



RE-INVENTION OF THE GARDEN RAILWAY

With limited marketing dollars for a new exhibit at the 2013 Garden Railway, a prior exhibit, 'Architectural Wonders of the World' was repositioned as 2013's 'Around the World in an Afternoon', capitalizing on the idea of adventure close to home. The Garden Railway exhibit remains a favorite among families, particularly special weekends with Thomas the Tank on the tracks.



Photo: Susan Crane

PROMOTIONAL PARTNERSHIPS GREW

More visitors took advantage of promotional partner discounts in FY 13. During the busy months of April and May, there was a 123% increase (2,520 visitors) who used promotional partner discounts. Typical promotions ranged from \$2 off to half price. The promotion with the largest increase from FY 12 to FY 13 was Penn Card holder non-students who visit for free; 252 to 605.

Other promotions with increased attendance included:

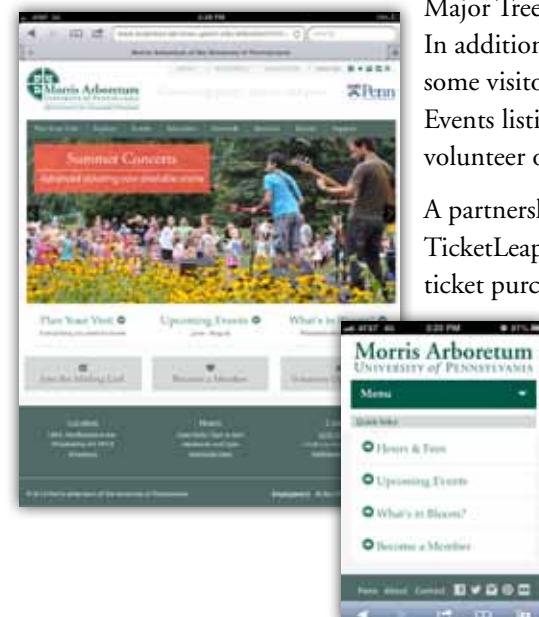
- American Horticultural Society – 160 to 247
- WHYY – 18 to 36
- Recycle Bank – 2 to 43 (This had just been added in April '12)
- Big Brothers/Big Sisters – 3 to 47
- Chestnut Hill College students – 4 to 29
- Military – 23 to 38
- Bikers/Hikers who visit for \$7 – 78 to 95

As an event partnership, a new event in June was introduced called Summer Solstice Salsa Party, featuring a jazz salsa band. To create more of an 'experience,' a partnership with a local dance instructor provided salsa lessons prior to the concert, and promoted the event to her followers. A salsa company and Iron Hill Brewery in Chestnut Hill were also brought in for free tastings.

MORRISARBORETUM.ORG GETS A MAKEOVER

In conjunction with the opening of *Big Bugs* on April 1st, a newly designed website was launched. The new site utilizes a responsive design that allows for mobile and tablet device compatibility. Additional sections were added to the site, featuring Research,

Major Trees, and Partners in Education. In addition, it is now easier to find some visitors' favorite pages such as Events listings, Garden Features, and volunteer opportunities.



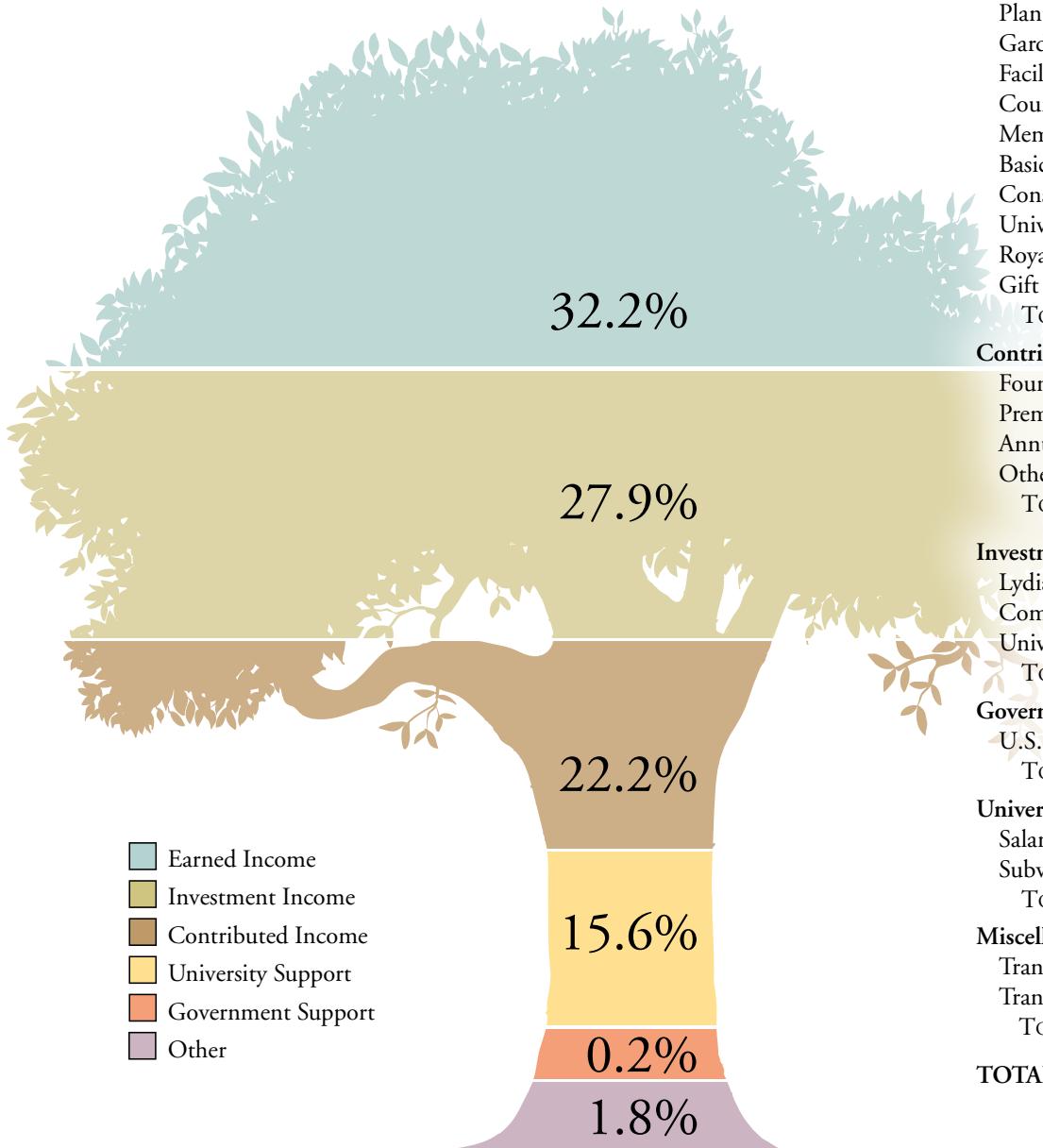
A partnership with an online ticketing site, TicketLeap.com, now allows for advanced ticket purchase to concerts and special events. Advanced online ticket purchases not only provide financial incentives for visitors, but also reduce traffic at the kiosk. Plans are underway to expand online ticketing for all paid events.





Photo: Judy Miller

FINANCIAL REPORT FY 2012-2013



Income

Earned Income

	General Operating Fund	Restricted Funds	Total Operating
Plant Sale	81,698	—	81,698
Garden Admissions Fees	345,895	—	345,895
Facilities Rentals	293,339	—	293,339
Course Fees	219,521	—	219,521
Member Events	227,664	—	227,664
Basic Memberships	494,775	—	494,775
Consulting Contracts	230,012	141,695	371,707
University Teaching	45,453	—	45,453
Royalties	65,790	—	65,790
Gift Shop Sales	125,106	—	125,106
TOTAL EARNED INCOME	2,129,253	141,695	2,270,948

Contributed Income

	General Operating Fund	Restricted Funds	Total Operating
Foundations	—	139,117	139,117
Premium Memberships	187,604	—	187,604
Annual Giving	488,607	—	488,607
Other (Project Gifts/Ovhd)	77,204	672,288	749,493
TOTAL CONTRIBUTED INCOME	753,416	811,405	1,564,821

Investment Income

	General Operating Fund	Restricted Funds	Total Operating
Lydia Morris Trust	316,048	—	316,048
Compton Fund, Other	133,924	—	133,924
University-managed Endowments	423,240	1,090,168	1,513,409
TOTAL INVESTMENT INCOME	873,213	1,090,168	1,963,381

Government Support

	General Operating Fund	Restricted Funds	Total Operating
U.S. Dept. of Agriculture	—	16,568	16,568
TOTAL GOVERNMENT SUPPORT	—	16,568	16,568

University Support

	General Operating Fund	Restricted Funds	Total Operating
Salary	338,308	—	338,308
Subvention	764,000	—	764,000
TOTAL UNIVERSITY SUPPORT	1,102,308	—	1,102,308

Miscellaneous

	General Operating Fund	Restricted Funds	Total Operating
Transfers – Internal Loans	61,965	—	61,965
Transfers, Misc.	121,128	(57,466)	63,662
TOTAL MISCELLANEOUS ACTIVITY	183,093	(57,466)	125,627

TOTAL INCOME

\$ 5,041,283 \$ 2,002,371 \$ 7,043,654

Expenses

Salaries & Benefits

Current Expenditures

Utilities
 Professional
 Repairs & Maintenance
 Equipment
 Employee Expenses
 Rent/Lease
 Supplies & Minor Expenses
 Communications
 Members Events
 Other/Contingency
 Interpretation
 Def. Maintenance / Ins. Claims
 Marketing

TOTAL CURRENT EXPENSE

SALARIES & CURRENT EXPENSE

University

Administrative Overhead
 Internal Loans
TOTAL UNIVERSITY CHARGES

TOTAL EXPENDITURES

SURPLUS/(DEFICIT)

	General Operating Fund	Restricted Funds	Total Operating
	2,749,217	972,985	3,722,202
Utilities	151,735	2,897	154,632
Professional	111,906	290,066	401,972
Repairs & Maintenance	171,118	31,689	202,807
Equipment	29,799	35,000	64,799
Employee Expenses	117,650	41,329	158,979
Rent/Lease	8,249	14,875	23,124
Supplies & Minor Expenses	441,231	27,932	469,163
Communications	201,868	41,812	243,680
Members Events	20,278	—	20,278
Other/Contingency	98,927	18,959	117,886
Interpretation	8,879	—	8,879
Def. Maintenance / Ins. Claims	—	104,845	104,845
Marketing	125,684	—	125,684
TOTAL CURRENT EXPENSE	1,487,324	609,405	2,096,728
SALARIES & CURRENT EXPENSE	4,236,540	1,582,390	5,818,930
University			
Administrative Overhead	772,398	—	772,398
Internal Loans	32,320	5,360	37,680
TOTAL UNIVERSITY CHARGES	804,718	5,360	810,078
TOTAL EXPENDITURES	5,041,258	1,587,750	6,629,008
SURPLUS/(DEFICIT)	\$ 25	\$ 414,621	\$ 414,646

Photo: Arnold Winkler



EDITH ROBB DIXON A LEGACY OF GENEROSITY

Since its founding in 1933, the Morris Arboretum has valued its unique relationship with the Widener and Dixon families. George D. Widener, Jr., a member of Philadelphia's respected Widener family and the former owner of Erdenheim Farm, was one of the Morris Arboretum's closest neighbors, and a founding member of the Arboretum's inaugural Advisory Board for almost 40 years. A great plantsman, gardening enthusiast, and an individual with a keen interest in education, Mr. Widener was among some of Philadelphia's most influential leaders in helping to establish the Morris Arboretum as a world-renowned public garden and university-affiliated educational institution, comparable to the celebrated Arnold Arboretum at Harvard University and the Royal Botanic Garden at Kew.

Upon Mr. Widener's death in 1971, his nephew, F. Eugene (Fitz) Dixon, Jr., inherited his beloved

Photo: Paul Meyer



Erdenheim Farm, and accepted an invitation to join the Arboretum's Advisory Board. Mr. Dixon and his fellow board members provided energetic and dedicated leadership at a pivotal point in the institution's history. During this period, the Arboretum hired its first full-time director and embarked upon a new master plan that guided its growth for the next 30 years. Mr. Dixon shared in his uncle's commitment to education and, in 1982, provided the critical funds needed to re-purpose the original Compton carriage house into the George D. Widener Education & Visitor Center.

The Morris Arboretum was honored that Edith Robb Dixon elected to carry on her family's



Photo: Morrisey Photography

commitment when her husband, Fitz, died in 2006. Through her involvement, Mrs. Dixon supported the construction of *Out on a Limb*—a Tree Adventure exhibit and, more recently, the renovation and expansion of the George D. Widener Education & Visitor Center. Recognizing the importance of this historic building to the Arboretum's mission, Mrs. Dixon has ensured that it will continue to serve as the gateway to the gardens, making it accessible to all. Mrs. Dixon's extraordinary generosity has provided the funding for the construction of a new handicapped-accessible foyer into the Widener Center, and a plaza that provides a larger outdoor gathering space for Arboretum visitors. At the completion of this project, the Arboretum looks forward to paying formal tribute to Mrs. Dixon and the vital role that she plays in this community.

IN MEMORIAM: W. W. KEEN BUTCHER – 40 YEARS OF SUPPORT AND ENGAGEMENT

In May, 2013, longtime Arboretum friend Keen Butcher passed away. With his wife Madeleine, Keen was an early champion of efforts to restore the Morris Arboretum. As true Victorians, John and Lydia Morris had gathered an eclectic assortment of sculpture and architectural elements for their summer estate, Compton, which became the Morris Arboretum of the University of Pennsylvania upon Lydia's death. Under Madeleine Butcher's leadership as a member of the Advisory Board of Managers, that tradition continued. Maddie's passion for art remains in the very fabric of the garden, and Keen was an eager participant in and supporter of her interest in bringing contemporary art to the garden. Their shared vision was to encourage emerging artists by providing them a garden venue for changing exhibits.

Together they established the *Madeleine K. Butcher Fine Arts Endowment*, which provides income to maintain and preserve the sculptures throughout the garden. In addition, the endowment supports the ongoing installation of exhibits to engage Arboretum visitors of all ages. In 2012, *Take a Seat! Adirondack Chairs Revisited*, invited 37 local artists to



Photo: Paul Meyer

re-interpret the Adirondack chair, one of America's great outdoor classics. In the spring of 2013, *Big Bugs* invaded the garden. Income from the Fine Arts Endowment has also provided for the installation of many multi-year, temporary exhibits, the most recent of which were *meta-Metasequoia* and Patrick Dougherty's *The Summer Palace*.

Madeleine and Keen Butcher's generous support helped transform the Morris Arboretum into the world-class public garden and educational institution it is today. Their impact on the Arboretum is one that will truly have lasting and joyful effects.



Photo: Paul Meyer

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Photos: Paul Meyer

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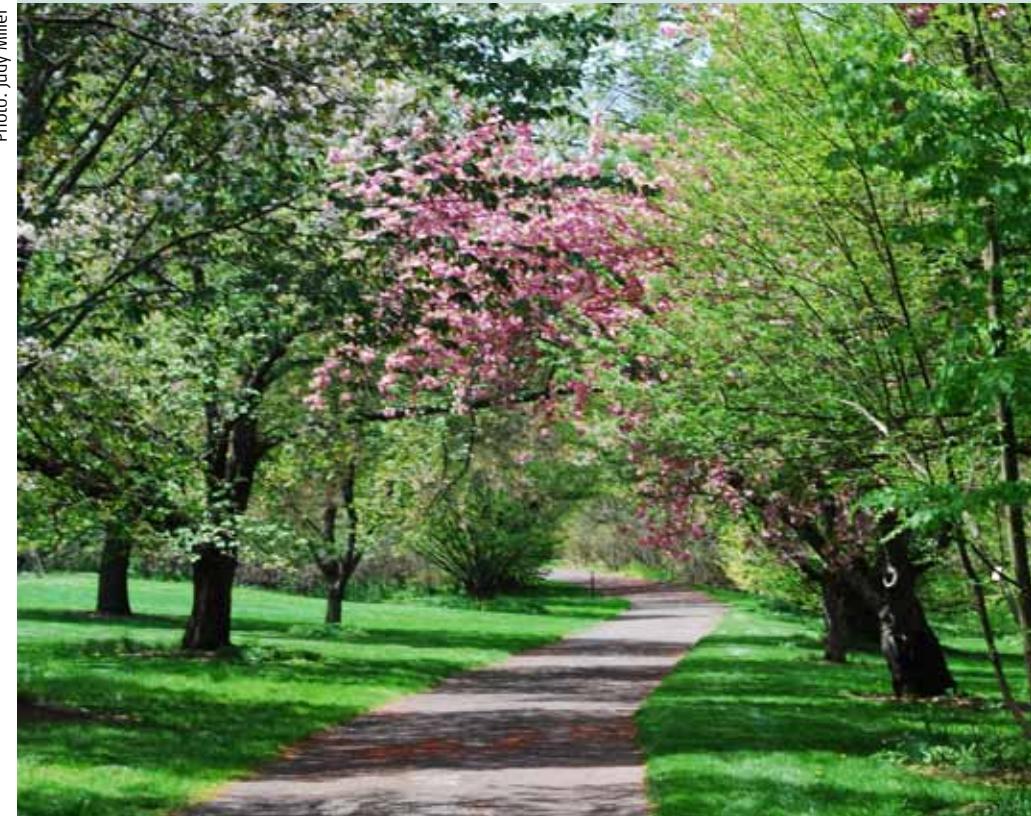
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The Collectors Circle

The Collectors Circle is a dedicated group of individuals whose leadership annual giving of \$2,500 or more is the foundation for organizational strength and capacity at the Morris Arboretum. Membership in The Collectors Circle distinguishes these individuals as leaders at the Morris Arboretum and in the surrounding community. Commitment to The Collectors Circle affirms the position of the Morris Arboretum as a world-renowned public garden by sustaining and enhancing programs of education, research, outreach, and horticultural display – the four activities outlined in the Arboretum's mission. Many of the organization's achievements today have been made possible through the generosity of donors making unrestricted gifts. In appreciation for their unrestricted gifts, members of The Collectors Circle receive benefits of regular membership along with enhanced opportunities for engagement with Morris Arboretum staff and members.

Photo: Judy Miller



*Denotes members of The Collector's Circle.

MARTHA J. WALLACE & EDWARD W. KANE—GIVING FOR THE GREATER GOOD

Morris Arboretum Advisory Board member Marty Wallace and her husband, Ed Kane, C' 71, share a deep connection to nature and a concern for the environment. Outdoor pursuits such as sailing, hiking, and skiing have been a way of life for Marty, Ed, and their two children. Marty is also an avid gardener and incorporates many native plants into their New England garden to benefit pollinators and other wildlife.

Marty and Ed advocate on behalf of the environment through both their volunteer work and their philanthropic investments. Marty first became acquainted with the Morris Arboretum during a visit more than a decade ago while Ed was serving as a Trustee at Penn. She was impressed by the Arboretum's mission, the range and quality of the collection, and its staff. First as a member of the Directors' Guild, and now as an Advisory Board member, Marty has

been keenly aware of the Arboretum's commitment to environmentally sustainable capital projects, historic preservation, and education.

In December 2012, Marty and Ed made an extraordinary leadership commitment to the University of Pennsylvania, pledging a combined gift of \$2 million designated to benefit the Morris Arboretum and the University's main campus. With this gift, the Arboretum has created the Germantown Avenue Entrance Fund for the planning and design of a new pedestrian entrance to the garden. In addition, the Martha J. Wallace Endowment Fund has been established to address the critical need for funding in areas such as staff compensation. This gift from Marty and Ed also funded the creation and endowment of a unique "green space" on the University campus, named the Edward W. Kane Park. Formerly an asphalt parking lot at 33rd and Spruce Streets, the newly-constructed Kane Park is now an urban oasis of trees and seasonal plantings interspersed with benches, lighting, and a permeable walkway.

The Morris Arboretum extends its profound gratitude to Marty Wallace and Ed Kane who have, through their generosity, helped transform the Arboretum as a public garden and as a center for environmental education. Through their gifts, Marty and Ed are enhancing the quality of life for children and adults throughout the region and ensuring that generations of Arboretum visitors will grow in their appreciation for our planet.





DONORS TO THE ANNUAL FUND

The financial needs for operating the Morris Arboretum year-round exceed the income that comes from gate admissions, education course fees, and membership dues. A robust Annual Fund ensures that the gardens and its facilities remain available and appropriately maintained for more than 128,000 annual visitors and program participants. Furthermore, the Annual Fund advances the mission-based activities of education, research, outreach, and horticultural display. Fiscal year 2013 was a record setting year. The number of donors who contributed to the Annual Fund in fiscal year 2013 grew by 7.5%. All of the donors who contribute are appreciated for their generosity and participation in advancing the Morris Arboretum's mission through their giving to the Annual Fund.

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EVERY MEMBER MAKES A DIFFERENCE

Fiscal year 2013 resulted in a record-setting year for Morris Arboretum membership.

New enthusiasm and promotion generated by the *Big Bugs* exhibit resulted in growth and a broader reach across the region for the membership program. The number of household memberships grew by 15% and the number of total members grew by 21%. With this expanded constituency, the Morris Arboretum is presented with great opportunities to engage and retain new members as well as to deliver experiences that bring loyal members back year after year.

Membership revenue is a critically important source of unrestricted operating income for the Morris Arboretum. Each member contributes to the organizational strength of the Morris Arboretum with their membership dues. The members listed on the following pages have distinguished themselves as leaders with their most generous support.

MEMBERSHIP STATISTICS FY 2013

	FY 2013	FY 2012	FY 2011	FY 2010	FY 2009
Total Active Memberships	7,051	6,149	6,038	6,293	4,873
Number of Members	20,786	17,145	17,240	17,930	13,777
<i>Adult Members</i>	12,873	11,162	11,024	11,540	8,793
<i>Child Members</i>	7,913	5,983	6,216	6,390	3,938
Number of New Memberships	2,447	1,711	1,850	2,267	1,260



Photo: Paul Meyer

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Morris Arboretum corporate members receive membership benefits that can be extended to employees and clients, including membership cards for free admission, one-time use guest passes, invitations to special events, as well as benefits at *Moonlight & Roses*, the Arboretum's annual gala. A complete listing of corporate membership benefits can be found on the website or by contacting the membership office directly at (215) 247-5777, ext. 105.

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THE LYDIA MORRIS LEGACY SOCIETY

For the last 17 years of her life following the death of her brother, John, Lydia Thompson Morris faithfully continued to develop the estate that they had established together, and that at her death, became the Morris Arboretum of the University of Pennsylvania. When she passed away in 1932, her estate plans included an endowment for "the preservation, upkeep and maintenance of ... an arboretum." In 2004, the Advisory Board of Managers of the Morris Arboretum created the Lydia Morris Legacy Society to honor all those who have provided for the Arboretum in their estate plans. Their generosity and vision will be recognized with gratitude by future generations.

Members of the Lydia Morris Legacy Society are:

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A LIFETIME OF GENEROSITY

Lorie Greeley first came to the Morris Arboretum in the mid-80s with students from the Agnes Irwin School. As the lower school science teacher, she had learned from a colleague that the Morris Arboretum offered tours to school groups. It was her interest in education, children, and nature that inspired Lorie's involvement with the youth education program at the Arboretum. Lorie passed away in November 2012. With the support of her husband, Dick, she has left a thoughtful and enduring legacy.

The daughter of German immigrants, Loretta Betke was born and raised in New York. She graduated from Barnard College, and after marrying Dick, they moved to Philadelphia with their two sons. When she retired from teaching, Lorie became a volunteer guide at the Morris Arboretum. She used her teaching experience and her interest in science to strengthen youth education tours. Lorie served as chair of the Guides' Council. She and Dick were founding members of the Directors' Guild, regular patrons of *Moonlight & Roses*, and traveled on many day trips with other Arboretum friends.

Lorie's legacy reveals the ways in which her life and interests found expression in her partnerships at the Morris Arboretum. In 2003, she established a charitable gift annuity which will benefit the Children's Education Endowment. In the fall of 2012, Lorie and Dick decided upon a gift to the ongoing restoration of Springfield Mills at Bloomfield Farm. Lorie's father was a successful baker and bakery owner in New York, and the spark for the Greeleys' interest in the mill. As corn and wheat are ground once again at Bloomfield Farm, Lorie's spirit and interest in youth and education will continue. Lorie's friends and fellow guides donated two benches at the mill site in recognition of all that Lorie Greeley meant to those who knew her.



Photo: Mark Stehle



Photo: Paul Meyer

For the first time in its 32-year history, the *Moonlight & Roses* gala was cancelled as a result of extreme weather conditions. This unprecedented cancellation of the Arboretum's premier garden party and fundraising event was unfortunate and very disappointing for everyone, especially those who had worked tirelessly for months to plan it. More than \$215,000 was raised for critical operations and programming, and for education programs that further the Arboretum's complex mission of connecting plants, people and place. The Advisory Board of Managers and the staff of the Arboretum are truly grateful to all those who supported this event for their understanding and exceptional generosity.

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