

**PLANT COLLECTIONS POLICY**  
**Worcester County Horticultural Society**  
**Tower Hill Botanic Garden**

**I. Introduction**

The Plant Collections of the Worcester County Horticultural Society at the Tower Hill Botanic Garden will be used for educational programs, display, research, and cultivar preservation. The Plant Collections are to be consistent with the purposes of the Society as set forth in the Articles of Incorporation and By-Laws.

**A. Formulation and Management of this Document**

The responsibility for the establishment of the Plant Collections Policy is vested in the Society's Board of Trustees. The Plant Collections Committee is responsible for defining the policy governing the development and management of the Plant Collections. The Executive Director is responsible for the administration of the policy. The Horticulture Director will implement the policy in conjunction with appropriate staff members.

The Plant Collections Committee shall consist of one representative of the Board of Trustees who will be appointed by the President of the Board and will chair the Plant Collections Committee (See Appendix A for Job Description), Chairpersons and an appropriate staff representative from garden subcommittees, the Executive Director, the Horticulture Director, and a staff person from the Education Department. Two additional individuals will be selected from outside of the institution by the Plant Collections Committee to serve for not more than two consecutive three-year terms. As the Society grows, the most appropriate staff members representing the Horticulture and Education Departments will serve on the committee with the total number of committee members not to exceed twelve. All members of this committee will have voting privileges. Special advisors and/or observers may be invited to provide specific expertise; they will not have voting privileges.

The Committee shall meet prior to the annual meeting of the Board of Trustees and as requested by the Committee Chairperson, the President of the Board, or the Executive Director. A dated record will be kept of actions confirmed by vote. The Chairperson of the Committee shall report to the membership at the annual meeting and upon the request of the Board of Trustees.

Revisions and exceptions to this document will be made as deemed appropriate by the Plant Collections Committee upon approval of the Board of Trustees. The Plant Collections Committee will review and/or update this document every five (5) years or sooner if needed. Next review date: 2006.

## B. Statement of Purpose for the Plant Collections of the Tower Hill Botanic Garden

The purpose of the Plant Collections Policy is to guide the development and management of the Plant Collections of the Tower Hill Botanic Garden and to help achieve the purpose of the Worcester County Horticultural Society, that is:

**The Society shall be operated as an educational organization for the purpose of advancing the science, and encouraging and improving the practice of, horticulture.** (March 3, 1842)

The stated objectives of the Society that directly relate to the Plant Collections are as follows:

**To establish a botanic garden of the highest educational and horticultural quality at Tower Hill displaying superior woody and herbaceous plants suited to on site conditions, and to develop, test, introduce and disseminate selected taxa.**

**To promote an appreciation for horticulture in relationship to wildlife, ecology, and other aspects of the natural environment.**

## II. Plant Collections\*

### A. Collection Classification and Purpose

In furthering the goals of the Horticultural Society and to comply with the design philosophy of Tower Hill Botanic Garden, (See Appendix B) the Plant Collections shall be divided into three major categories; Ornamental, Economic, and Ecologic Horticulture. Efforts will be made to complement and not compete with or repeat plant collections of existing horticultural organizations within central New England. Plants within the collections must fulfill at least one of the purposes from at least one of the following categories:

#### 1. Ornamental Horticulture\*

- a. To promote the use of woody and herbaceous plants of superior garden performance\* and suited to the cultural conditions, either indoors or out, at Tower Hill. Plants with more than one season of interest will be given the highest priority.

*Garden Flower*-- quality (length of bloom, performance: substance, fragrance, size, form, durability, and color retention, texture and color).

*Foliage*-- color, substance, texture, form, persistence and durability.

*Bark*-- texture, color.

*Fruit*-- color, persistence, size and quantity.

*Growth Habit and Character-- form, structure, silhouette, pest and disease resistance, drought tolerance, absence of objectionable maintenance characteristics. Note: Valuable plants that require high maintenance or have other objectionable characteristics\* may be used in areas where these characteristics do not pose a maintenance problem, health or safety hazard.*

- b. To cultivate uncommon plant species\*, cultivars\* and landmark varieties.\*

## **2. Economic Horticulture\***

- a. To promote economic horticulture through aesthetically displayed and creatively interpreted collections of superior fruits, nuts, herbs and vegetables.
- b. To maintain the collection of 119 pre-twentieth century apple varieties as established in April 1990 at Tower Hill Botanic Garden (1973 as the S. Lothrop Davenport Preservation Orchard on the property of Old Sturbridge Village), henceforth called 'The Davenport Collection' (See Appendix C); and to disseminate propagules of the entire collection to interested persons.

## **3. Ecologic Horticulture\***

- a. To document and manage the plants indigenous to Tower Hill.
- b. To promote the use of woody and herbaceous plants attractive as food and shelter to wildlife in an appropriate setting.
- c. To preserve and enhance the unique natural areas of Tower Hill.

## **B. Designated Garden Areas**

Each garden space at Tower Hill must have a written purpose that reflects the objectives of the Society and of the Plant Collections Policy. Guidelines for the development of the Permanent Collections of each Designated Garden Area should accompany the purpose.

The Horticulture Director, in consultation with appropriate staff and consultants, will draft the purpose, guidelines and plant lists that are subject to the approval of the Plant Collections Committee and the Board of Trustees. These documents will be attached to this policy.

## **III. Acquisition\* of Plants**

## A. **Methods for Acquisition\***

Plants may be acquired through purchase, collection, gift or loan and must meet all of the General Criteria for Acquisitions listed in this document.

1. **Purchase**
2. **Collection**
3. **Gifts**

All gifts of living plants must be unconditional. Before accepting plant gifts, a **Deed of Gift Record** (Appendix D) will be signed by the donor and the Executive Director of the Worcester County Horticultural Society. Rejection of gifts will include an explanation that these plants are, by Board policy, not acceptable at the present time for inclusion in the Plant Collections. The staff of the Worcester County Horticultural Society **will not** make appraisals of gifts.

Extensive gifts of plants or collections must be accompanied by sufficient endowment to enable curatorial and general maintenance. The Plant Collections Committee must approve these gifts and has the right to waive the endowment requirement upon the approval of the Board. If an endowed collection is deaccessioned, the endowment will be redirected within the budget for the management of the plant collections.

4. **Loans**

The Executive Director in consultation with appropriate staff members will be responsible for accepting incoming loans and granting outgoing loans. Major or extensive loans of plants must be approved by the Plant Collections Committee. A **Receipt for Loans** and a **Loan Agreement** (See Appendix E & F) will be signed by the donor and the Executive Director of the Worcester County Horticultural Society.

## B. **General Criteria for Acquisition\***

1. The taxon\* fulfills one or more of the objectives in Section I.B. of this Plant Collections Policy.
2. The taxon can be grown at the Tower Hill Botanic Garden under reasonable cultural practices.
3. The Worcester County Horticultural Society can properly relocate and care for the acquisition in terms of staff, facilities, space in the garden, and money for curatorial and general maintenance.
4. Each taxon must be true to name in the judgment of the professional staff.

5. The taxon has no known objectionable characteristics\* according to the judgment of the professional staff.
6. Each taxon acquired must have a documented garden location or use.

#### IV. Accession of Plants

##### A. Permanent Collection

For purposes of comprehensive plant records\*, all plants in the Permanent Collection\* must be accessioned\*. An **Accession Record** (See Appendix G) will be completed for each taxon upon accession. Exceptions to this rule include lawn grasses and plants indigenous to the site. Indigenous plants of exceptional merit may be accessioned.

Plants not in the Permanent Collection; e.g. plants for sale, plants for gifts, plants on incoming loan, annuals, non-persistent bulbs, plants in the nursery, plants for research and plants for educational purposes that are not part of the permanent collection, **will not** be accessioned. Annuals, tender perennials, and non-persistent bulbs which are actively regenerated at the Tower Hill Botanic Garden and are treated as part of the Permanent Collection will be accessioned.

Plants of questionable superior quality will be grown in evaluation areas. Such plants will be evaluated in writing, annually, by the Plant Collections Committee. (See Appendix I for **Evaluation Record**) The time that they spend in evaluation areas will be limited to up to two years for herbaceous plants and up to five years for woody plants. After this time, or sooner depending on the decision of the Plant Collections Committee, the plants will be accessioned and incorporated into the Permanent Collection or disposed of.

##### B. Research Collection

Plants brought into the grounds for research purposes will not be accessioned as part of the Permanent Collection. A **Research Record** (See Appendix H) will be completed for each taxon upon acquisition.

##### C. Evaluation Collection

Plants being held in evaluation areas will not be accessioned until they are incorporated into the Permanent Collection. An **Evaluation Record** (See Appendix I) will be completed for each acquisition in evaluation sites upon receipt. Plants may be held in these sites only for one or more of the following reasons:

1. The plant is being propagated for display, distribution or sale and is not of display size or quality. Stock plants used for propagation may remain in evaluation sites and be used solely for propagation.(Examples: Plants with an invasive seeding character may be prevented from

going to seed on the grounds, but allowed to go to seed under more controlled conditions in the nursery, biennials in their first year).

2. Rare and/or endangered plants that are difficult to obtain may be retained for use in propagation as parent plants while their propagules are made a part of the Permanent Collection for display purposes.
3. The plant may be part of a research project not appropriate for the display areas.
4. The plant is being used solely for educational purposes.
5. Cutting garden flowers may be grown in the nursery in the case that the cutting capacity of the display areas do not meet the needs of the Society without detracting from the display.
6. Plants of questionable superior quality may be grown in evaluation sites to determine their display value.

## **V. Deaccessioning of Plants**

### **A. Procedure for Deaccessioning**

All deaccessions must be recommended by the Horticulture Director in consultation with appropriate staff members and approved by the Executive Director. Any staff member may propose or protest a deaccession. Major deaccessions must be approved by the Collections Committee. All deaccessions must be reported to the Collections Committee by the Horticulture Director on a timely basis.

Plants may be deaccessioned if they meet one or more of the following criteria:

1. The accession is found not to fulfill at least one of the general criteria for acquisition as follows:
  - (a) The taxon fulfills one or more of the objectives in Section I.B. of this Plant Collections Policy.
  - (b) The taxon can be grown at the Tower Hill Botanic Garden under reasonable cultural practices.
  - (c) The Worcester County Horticultural Society can properly relocate and care for the acquisition in terms of staff, facilities, space in the garden, and money for maintenance.
  - (d) Each taxon must be true to name in the judgment of the professional staff.
  - (e) The taxon has no known objectionable characteristics according to the judgment of the professional staff.

- (f) Each taxon acquired must have a documented garden location or use.
- 2. The accession has deteriorated, died, or been stolen.
- 3. The accession is to be or has been replaced with a more desirable accession.
- 4. Endangered taxa can be deaccessioned only if they are stolen or safely established at a similar facility.

## **B. Dedicated Plants**

Plants which have been planted in honor or memory of a person are subject to the rules of deaccessioning and disposal. If such a plant is deaccessioned before the end of its natural life span, then the Society will replace it with an appropriate specimen or reassign the dedication to a plant in another location. All dedicated plants will be recorded in the Plant Accessions Database. A list of all dedicated plants will be provided to the Visitor Information/Services personnel on an annual basis.

## **VI. Disposal of Plants**

Disposal of deaccessioned taxa may occur by sale, donation, exchange or destruction. The Horticulture Director is responsible for the proper disposal of deaccessioned plants. Monies obtained from the sale of deaccessioned plants will be deposited into a fund for plant collections acquisition and maintenance.

## **VII. Maintenance**

The Horticulture Director is responsible for the maintenance of collections and for the maintenance records. All staff associated with the collections are responsible for the welfare of the plants under their care. Maintenance considerations will be taken into account in the design of the plantings of the Tower Hill Botanic Garden.

## **VIII. Plant Records**

The Horticulture Director is responsible for the management of the plant records system. The staff is responsible for the implementation of the plant records system. Summaries of accession, deaccession, and evaluation activities will be regularly reported to the Executive Director by the Horticulture Director.

Duplicates of records deemed appropriate by the Horticulture Director will be kept at a site separate from the plant records office .MIS will assist in the determination of an appropriate location and in duplication efforts.

The plant records system at the Tower Hill Botanic Garden will include but not be limited to the components listed below:

**A. Records Required of All Accessions**

1. Accession Records
  - a. Botanical name (cite author and reference)
  - b. Source of material/Date of acquisition
  - c. Accession number
  - d. Location /Purpose
  - e. Date of accession
2. Deaccession Records
  - a. Date of deaccession
  - b. Reason for deaccessioning
  - c. Method of disposal
3. Mapping Records

**B. Additional Records (where appropriate)**

1. Evaluation Records
2. Propagation Records
3. Federal and State Regulation Records
4. Gift Records
5. Loan Records
6. Dedication Records [person(s) by whom or for whom the plant was dedicated, label

text]

**IX. Public Access**



Public access to the grounds, records and plant material of Tower Hill Botanic Garden will be granted with the following provisions.

**A. Grounds**

The visiting public has access to designated areas during specified hours. Public accessibility and the welfare of the collections will be considered in the design and interpretation of the collections.

**B. Plant Records**

Public use of the plant records is allowed with an appointment and the assistance of a staff member.

**C. Plant Material**

Permission from the Horticulture Director is required to take propagules from the Plant Collections. A **Request for Plant Material** (see Appendix J) form must be completed and approved prior to collecting. All collecting will be done by the staff or under staff supervision. An appropriate fee may be charged to cover the cost of staff time and materials.

A distribution program will be developed to disseminate desirable plant materials.

### **Glossary**

**Accession** -- a plant or group of plants of the same botanical name, acquired at the same time from a single source that is (are) recorded in the plant records system.

**Accessioning** -- the process by which an acquisition is sequentially recorded in the plant records system.

**Acquiring or Acquisition** -- the process of obtaining any taxon by gift, purchase, exchange, loan, or collection for consideration as part of the Plant Collections.

**Acquisition** -- an acquired taxon.

**Cultivar** -- a plant under cultivation that differs from other members of the same species in one or more significant characteristics. A cultivar may be derived from an abnormal individual in the wild, be developed through hybridization or be selected under cultivation. It is maintained in cultivation primarily through vegetative propagation or by selection because of its unique characteristics. Cultivar names are capitalized and should be placed within single quotation marks or preceded by cv. (abbreviation for cultivar). They are not underlined.

**Deaccessioning** -- the process whereby an unwanted or dead accession is removed from the active part of the plant records system.

**Disposal** -- the removal of deaccessioned plants from the property. 'Disposal' is distinguished from 'deaccessioning' as it refers to the physical removal of the plant itself, not removal from the plant records system.

**Ecologic Horticulture** -- the maintenance and/or enhancement of the natural environment to promote the harmonious relationship between wildlife and man.

**Economic Horticulture** -- The cultivation of plants for man's benefit for reasons other than ornament, e.g. culinary, medicinal, fragrance, fiber, etc.

**Landmark Variety** -- a plant variety or cultivar that is considered a great achievement in horticultural history.

**Non-accessioned Plants** -- Plants that have been acquired by the Society but are not recorded in the plant records system; e.g. Plants for sale, plants on incoming loan, plants for educational purposes that are not part of the Permanent Collection, annuals, or plants treated as annuals, plants in the nursery, non-persistent bulbs, plants for research and plants for gifts.

**Objectionable Characteristic** -- that which makes a plant undesirable for cultivation in a public garden. Characteristics considered objectionable are as follows:

1. Vigorous and uncontrollable growth.
2. Prolific seed production to the point of becoming a weed problem within the garden or within the wild.
3. Chemicals within the plant that cause health or safety hazards to a majority of persons.
4. A plant that puts excessive economic demand on the resources of the garden.
5. A plant that is an alternate host to a disease that is considered destructive to valuable plants in the collection or in the wild.

**Ornamental Horticulture** -- the cultivation of plants for decorative purposes.

**Permanent Collection** -- Plants that are an integral part of the Tower Hill Botanic Garden, or other properties owned by the Worcester County Horticultural Society, on a year to year basis.

**Plant Collections** -- all living plants within the territories owned by the Worcester County Horticultural Society.

Or  
All plants used for display, education, conservation and/or research by the Worcester County Horticultural Society.

**Plant Records** -- a system that documents useful information regarding the plant collections of the Society.

**Research** -- Investigation or experimentation aimed at discovery or interpretation of facts. Applied research is the practical application of general principles to solve definite problems. Pure or basic research does not seek specific solutions to particular problems but instead seeks generalized knowledge.

**Superior Garden Performance** -- Determination of superiority will be made through recommendations of knowledgeable authorities, e.g. other horticultural institutions, plant societies, respected horticulturists and knowledgeable staff members.

**Taxon (plural: taxa)** -- A general term used for a taxonomic group of any rank without being specific; e.g. genus, species, variety, form, cultivar.

**Uncommon Plant Species or Uncommon Plant Cultivars** -- Plants that are of special merit or garden value that are not commonly cultivated in this area.

## Appendix A

### **Job Description of the Chairperson of the Plant Collections Committee**

1. The Chairperson must be a current member of the Worcester County Horticultural Society Board of Trustees.
2. The Chairperson can serve in this capacity for no more than two consecutive three year terms. The Chairperson who has served the maximum term may be re-elected after an interval of not less than one year.
3. The Chairperson is accountable to the Executive Committee and the Board of Trustees.
4. The Chairperson must have a basic understanding of the Plant Collections at the Tower Hill Botanic Garden.
5. The Chairperson must report annually to the membership at the annual meeting. The Chairperson must also report to the Board of Trustees upon request.
6. The Chairperson facilitates the review of the Plant Collections Policy every five years or sooner if deemed appropriate.
7. The Chairperson facilitates the Plant Collections Committee review and approval of extensive gifts, extensive loans, and research projects and all major revisions, deletions or additions to the Plant Collections Policy.
8. The Chairperson is responsible for the selection of members of the Plant Collections Committee.
9. The Chairperson facilitates the review process for the guidelines, purpose statements and plant lists for each of the Designated Garden Areas as the need arises.

10. The Chairperson is responsible for insuring that the Committee supports the Executive Director in the administration of the Plant Collections Policy as set forth and approved by the Board of Trustees.

## Appendix B

### **Design Philosophy for the Tower Hill Botanic Garden**

1. Choice of plants, individual garden design and overall design of the grounds will be planned for year-round interest.
2. The gardens will be designed in harmony with the existing natural landscape and with a minimum of environmental disturbance.
3. Plant culture will be a major educational and interpretive theme throughout the collections, and the garden design will emphasize the pairing of the cultural requirements of plants with the natural environmental conditions of the site.
4. The design of the gardens will emphasize and display attractive and culturally compatible plant combinations.

## Appendix C

### **Davenport Collection**

#### **Standard References for Pre-Twentieth Century Apple Varieties**

The Apples of New York, (S.A. Beach, 1905)

The New American Orchardist (William Kendrick, 1835)

Book of Fruits, (Robert Manning, 1838)

'Apple Varieties in Maine' (Thesis- Frederick Charles Bradford, University of Maine, Orono, 1911)

The American Fruit Book, (S.W. Cole, 1849)

Fruits of America, (C.M. Hovey, 1851)

Fruits and Fruit Trees of America, (A.J. Downing, 1869)

The Culture, Management of Fruit Trees, (William Forsyth, 1803)

A Practical Treatise on the Management of Fruit Trees, (George Jaques, 1849)

The American Fruit Culturist (John Thomas, 1903)

Appendix D  
**Tower Hill Botanic Garden Deed of Gift Record**

Date

I hereby donate without limiting conditions to the Worcester County Horticultural Society the following articles to be the absolute property of the Society:

Quantity	Name & Description/Condition	Appraised Value
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Donor Signature \_\_\_\_\_

Address

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone ( ) \_\_\_\_\_

Appraiser's Signature

Address

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone ( ) \_\_\_\_\_

Approved by Executive Director

Date

Received by

Date

Major gifts approved by the Plant Collections Committee

Signature of Chairperson

Amount of Endowment

Endowment waived--Signature of Chairperson

Appendix E  
**Tower Hill Botanic Garden Receipt for Loan**

From

Address \_\_\_\_\_ Zip

Phone

The following items as a loan to the Worcester County Horticultural Society for a period from \_\_\_\_\_ to  
-

Description	Value
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It is my understanding that the above items loaned to the Worcester County Horticultural Society are subject to the following conditions.

1. For the period of the loan the items may be displayed, stored or otherwise used by the Society at its discretion, subject to exercising the same care and decision in such display, use and storage as is customary in dealing with similar items owned by the Society.
2. The Society will insure each item against casualties for the period of the loan and in the amounts shown on this receipt as the value of each item. It is agreed that the liability of the Society for loss or damage thereby ceases and is replaced by the liability of the insurance company.
3. It is further agreed that each item will, while on display, be identified as the property of the lender.
4. After receiving reasonable notice, the Society will return items loaned from the lender on presentation of this receipt.
5. Any item that has been left with the Society on loan for a period of five years from the date hereof, and without having a request been made for its return, shall in consideration for its storage and safeguarding during said time be deemed an unrestricted gift to the Worcester County Horticultural Society and shall thereupon become the property of the Society.

Signature \_\_\_\_\_ Date

Executive Director \_\_\_\_\_ Date

Received by \_\_\_\_\_ Date

\*\*\*\*\*

To be signed upon return of items.

Date \_\_\_\_\_ Received from the Worcester County Horticultural Society the above listed items.

By

**Tower Hill Botanic Garden Loan Agreement**

From the Worcester County Horticultural Society.

To

Address

\_\_\_\_\_ Zip \_\_\_\_\_ Phone

The following items for

For the period from \_\_\_\_\_ to \_\_\_\_\_.

Description                      Value

Special Treatment

Materials from the Society's collection may require special treatment or handling as indicated above; the recipient is responsible for the return of the objects in the same condition in which they were loaned. The borrower is also responsible for insurance coverage in the amounts indicated until the objects have been returned to the Society.

Received \_\_\_\_\_ Executive Director

Date

\*\*\*\*\*

Loan Extended to

Executive Director

**Tower Hill Botanic Garden Accession Record**  
(Minimum Information Required)

Botanical Name

Accession Number \_\_\_\_\_ Author/Registrant

Common Name \_\_\_\_\_ Family

Location/Purpose

Accession# \_\_\_\_\_ P.I. # \_\_\_\_\_ Source

Date Received \_\_\_\_\_ How received

Approximate age at time of receipt

Number received \_\_\_\_\_ Nativity

Deaccession Date

Reason for Deaccession

Method of Disposal

Other Information/Historic Reference:

Dedication Information:

Person(s) by whom and/or for whom the plant was dedicated:

Dedication Text for Label:

Comments:



Appendix H

**Tower Hill Botanic Garden Research Record**

Botanical Name \_\_\_\_\_ PI#  
Date Received \_\_\_\_\_ How rec'd \_\_\_\_\_ Number

Source  
Additional Information

Appendix I

**Tower Hill Botanic Garden Evaluation Record**  
(Minimum Information Required)

Botanical Name

Location

Purpose

Date Received \_\_\_\_\_ How rec'd \_\_\_\_\_ Number

Expiration Date

Source \_\_\_\_\_ PI#

Additional Information:

Evaluation Date:

Comments:

Appendix J

**Tower Hill Botanic Garden Request for Plant Material**

Name of Person Requesting Material

Professional Affiliation:

Date of Request

Description and Purpose of Request:

Amount Requested:

Date Desired:

Fee:

Authorized By (Horticulture Director): \_\_\_\_\_

Date of Authorization:

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Date of Collection:

Staff Supervisor: