

The Power of Peers: Using a Peer Review to Galvanize your Garden

- Lucinda (Cindy) Brockway, The Trustees (Moderator)
- Chipper Wichman, National Tropical Botanical Garden
- Edward Moydell, Bloedel Reserve
- Sharon Loving, Longwood Gardens





What is the purpose?

- Practical tools
- Staging the visit
- Strategic highlights
- Lessons learned
- Implementing recommendations



The Power of Peers: Using a Peer Review to Galvanize your Garden

Lessons Learned from the NTBG



Chipper Wichman, Director and CEO
National Tropical Botanical Garden

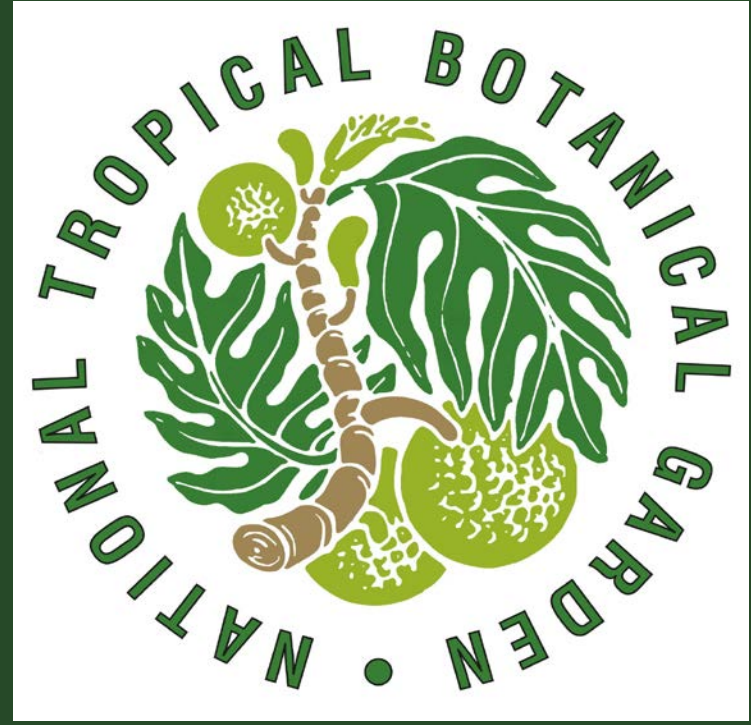
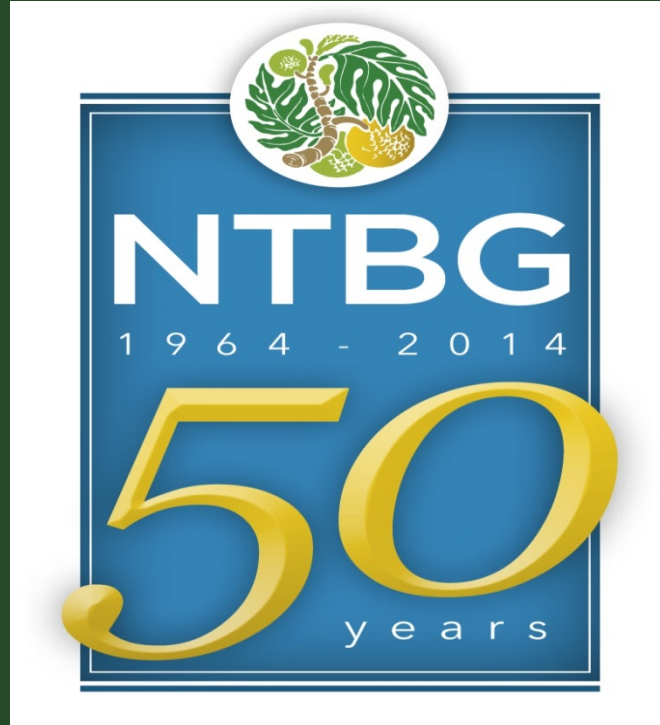


CHANGING PERSPECTIVES: PLANTING FOR THE FUTURE

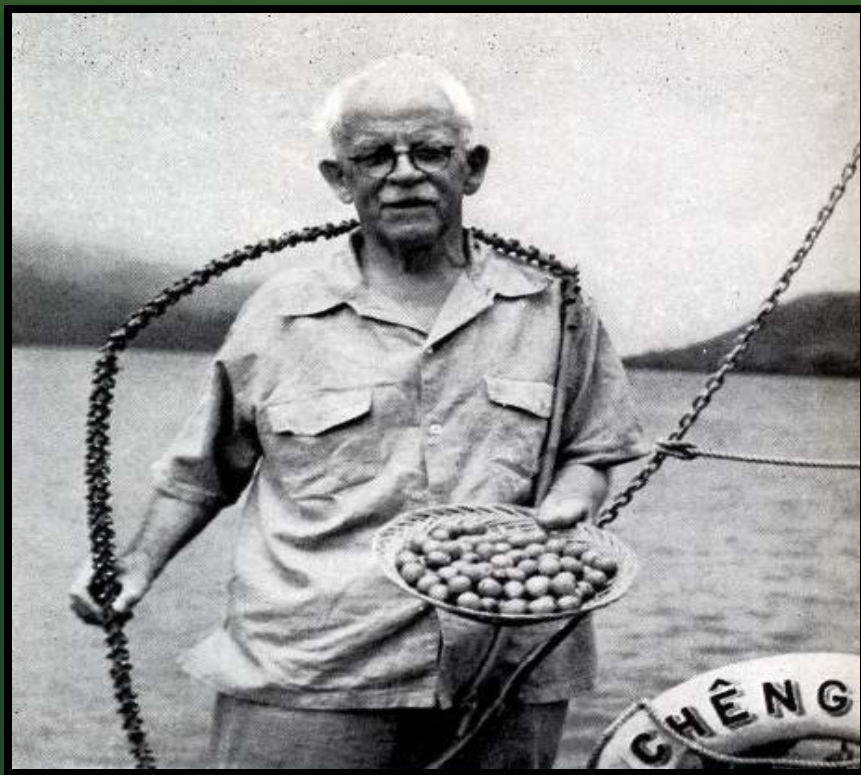
2016 AMERICAN PUBLIC GARDENS ASSOCIATION ANNUAL CONFERENCE



National Tropical Botanical Garden



Conceived by dreamers that were over 5,000 miles apart ...



David Fairchild (1869-1964)



Joseph Rock (1884-1962)

The birth of an institution destined to make a difference





Public Law 88-449
88th Congress, S. 1991
August 19, 1964

An Act

To charter by Act of Congress the Pacific Tropical Botanical Garden.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,

CREATION OF THE CORPORATION

SECTION 1. The following persons: Henry Francis duPont, Winterthur, Delaware; Deane Waldo Malott, Ithaca, New York; Horace Marden Albright, Los Angeles, California; Robert Allerton, Kauai, Hawaii; and Paul Bigelow Sears, New Haven, Connecticut; and their successors, are hereby created and declared to be a body corporate by the name of Pacific Tropical Botanical Garden (hereinafter referred to as the "corporation") and by such name shall be known and have perpetual succession and the powers, limitations, and restriction herein contained.

Pacific Tropical Botanical Garden, Charter.

COMPLETION OF ORGANIZATION

SEC. 2. The persons named in section 1 shall be the incorporators of the corporation and members of the initial board of trustees and are authorized to complete the organization of the corporation by the selection of other trustees and officers, the adoption of bylaws, not inconsistent with this Act, and the doing of such other acts necessary to carry into effect the provisions of this Act.

OBJECTS AND PURPOSES OF CORPORATION

SEC. 3. The objects and purposes of the corporation shall be—

(a) to establish, develop, operate, and maintain for the benefit of the people of the United States an educational and scientific center in the form of a tropical botanical garden or gardens, together with such facilities as libraries, herbaria, laboratories, and museums which are appropriate and necessary for encouraging and conducting research in basic and applied tropical botany;

(b) to foster and encourage fundamental research with respect to tropical plant life and to encourage research and study of the uses of tropical flora in agriculture, forestry, horticulture, medicine, and other sciences;

(c) to disseminate through publications and other media the knowledge acquired at the gardens relative to basic and applied tropical botany;

(d) to collect and cultivate tropical flora of every nature and origin and to preserve for the people of the United States species of tropical plant life threatened with extinction;

(e) to provide a beneficial facility which will contribute to the education, instruction, and recreation of the people of the United States.

78 STAT. 496,
78 STAT. 497.

POWERS OF CORPORATION

SEC. 4. The corporation shall have the following powers:

(a) to sue and be sued, and to complain and defend in any court of competent jurisdiction;

(b) to adopt, use, and alter a corporate seal;

(c) to choose such trustees, officers, managers, agents, and employees as the activities of the corporation may require;

(d) to adopt, amend, and alter bylaws, not inconsistent with the laws of the United States of America or of any State in which

Public Law 88 - 449

August 19, 1964

...to establish, operate, and maintain...**an educational and scientific center** in the form of a botanical garden or gardens...with such facilities as libraries, herbaria, laboratories, and museums...for encouraging and conducting research in basic and applied tropical botany..."

NTBG's First Peer Review Effort

Scientific Advisory Committee(s)
1967 - 1984

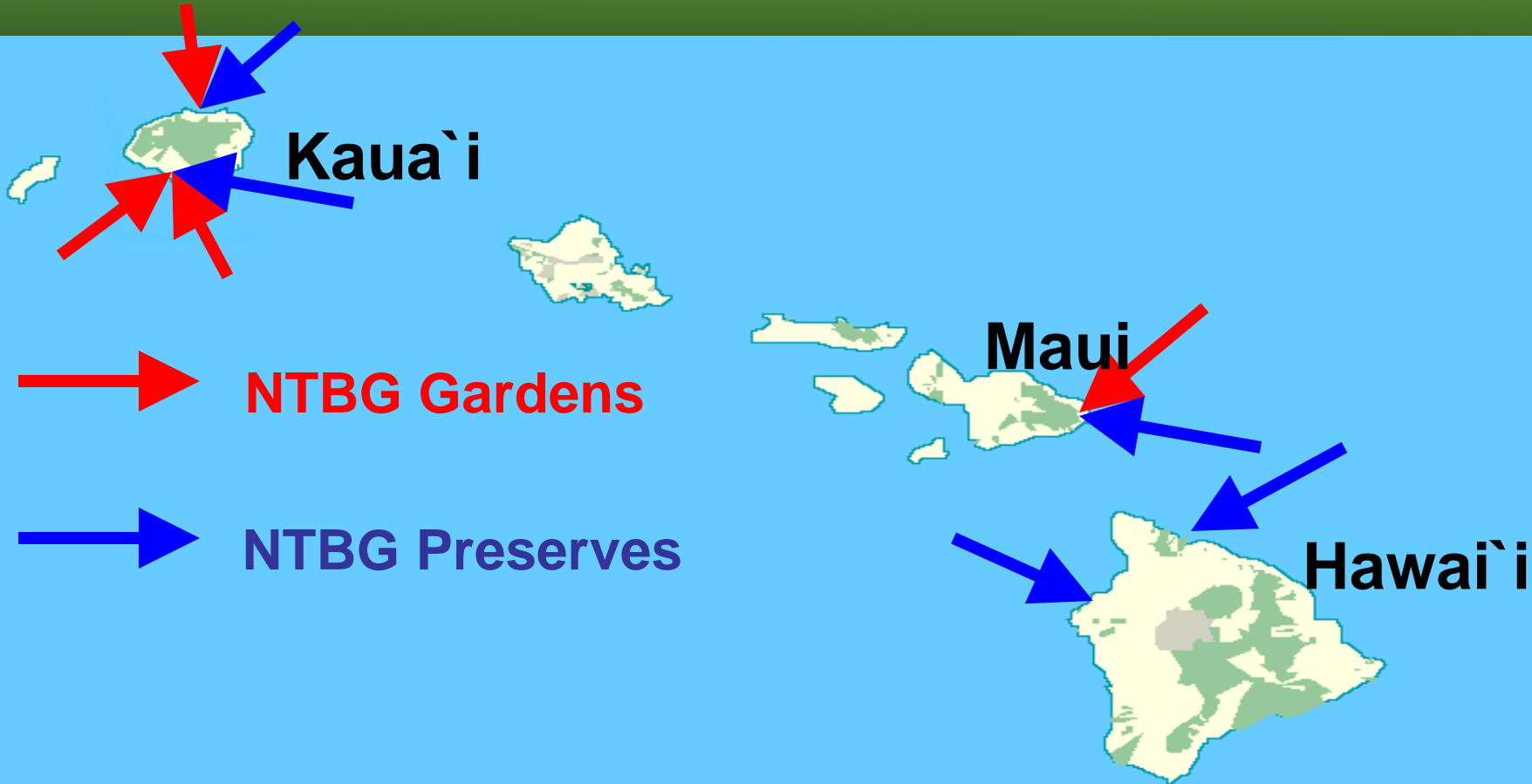
1967 SAC Recommendations:

- Hire research staff in horticulture and botany
- Focus on plants of Hawaii and the Pacific basin
- Provide facilities for visiting scientists and students
- Develop an active scientific publications program
- Develop multiple garden locations



*N. P. Kefford, Wm. L. Stern, Richard A. Howard, F. R. Fosberg,
Harold St. John, Colin G. Lennox, Mildred E. Mathias, Charles H.
Lamoureux, Paul R. Weissich, George W. Gillett, Sir George Taylor.*

NTBG's Hawai`i Locations

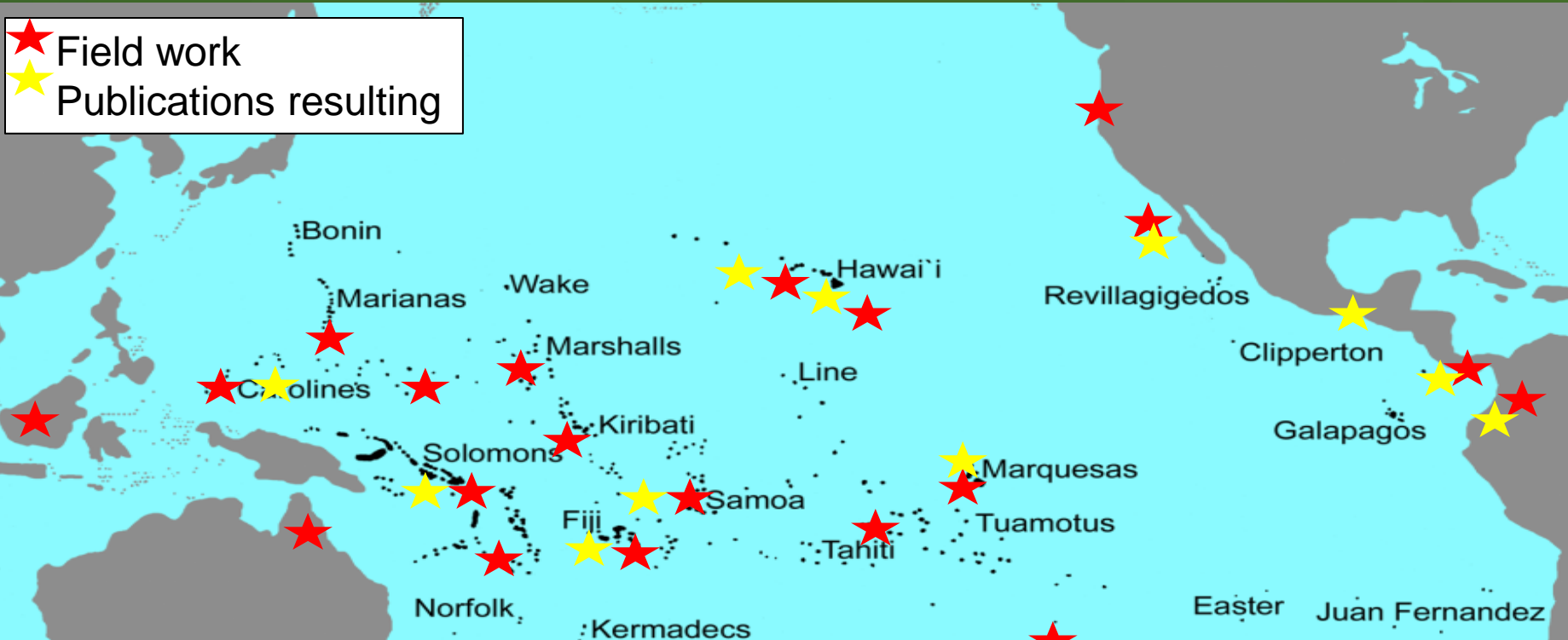


NTBG's Florida Location



Pacific Island Focus

★ Field work
★ Publications resulting



★ Madagascar & Mascarene Is.
★

2016 NTBG Snapshot

Number of Botanical Gardens:	5
Number of Botanical Preserves:	5
Accessioned Plants in LC:	99,820
Total Number of Acres:	2,000
Number of Ecosystems:	5
Scientific Books Published:	26
Number of Employees:	131

Mission of NTBG

(revised in 2004)

The mission of the National Tropical Botanical Garden is to enrich life through discovery, scientific research, conservation, and education by perpetuating the survival of plants, ecosystems and cultural knowledge of tropical regions.

International Peer Review Summits

Used to focus our mission driven programs and improve best practices

- 2004 Conservation Summit
- 2006 Horticulture Summit
- 2007 Ethnobotany Summit
- 2009 Science Summit
- 2011 Education Summit

COST: About \$20,000 each



Peer Review Outcomes

- **2004 Conservation Summit**
 - White paper, new organizational structure & new facilities
- **2006 Horticulture Summit**
 - Creation of Board Committee, new org structure, revised LC Policy
- **2007 Ethnobotany Summit**
 - International Declaration, Breadfruit Institute,
- **2009 Science Summit**
 - Use of new research facilities, ICTB, completion of flora projects
- **2011 Education Summit**
 - Vision Statement, revised programmatic focus, delivered at garden level

Integrating Peer Review into Operations

Via Key Staff Appointments

McBryde Chair – Dr. Warren Wagner, Smithsonian Institute NMNH

Crum Chair – Dr. Barry Tomlinson, Harvard Professor Emeritus

Via National Board of Trustees – mission focused expertise

Dr. Ghilleen Prance (Science)

Dr. David Rae (Horticulture)

Dr. John Rashford (Education)

Via Visiting Curators of our Living Collection

Dr. John Dransfield (world palm expert) – 2016

Gregg Holtzman (local Cycad expert) – 2017

Secrets of Success

- Ensure you have an adequate budget to pull this off
- Carefully select who you invite
- Inviting creates opportunity for important exchanges
- Involvement creates buy-in
- Consider professional facilitation if appropriate
- Provide training & support on organization & programs
- Create a safe environment for all participants
- Produce a written product with clear recommendations
- Share recommendations with staff and Board members
- Incorporate recommendations into strategic and master plans
- Have FUN!!!!!!!

Thank You!



BLOEDEL
RESERVE

Horticulture Peer Review

Ed Moydell, Executive Director

About Bloedel Reserve

Quick Facts

- 150 acre public garden & forest preserve
- Bloedels acquired property in 1951
- Opened to the public in 1988 – 501(c) 3
- 50,000+ annual guests, ~3,500 members
- ~\$3 million annual budget
- 5,000 different kinds of plants
- Japanese Garden, Moss Garden, Glen, Reflection Pool
- 32 Staff, 170 Volunteers, 21 Trustees





Our Founders

- Founder's Vision: "a place where people find refreshment & tranquility in the presence of natural beauty."
- Mission – "to enrich people's lives through a premiere public garden of natural and designed PNW landscapes."
- Philosophy of harmony with nature, connection of people and plants

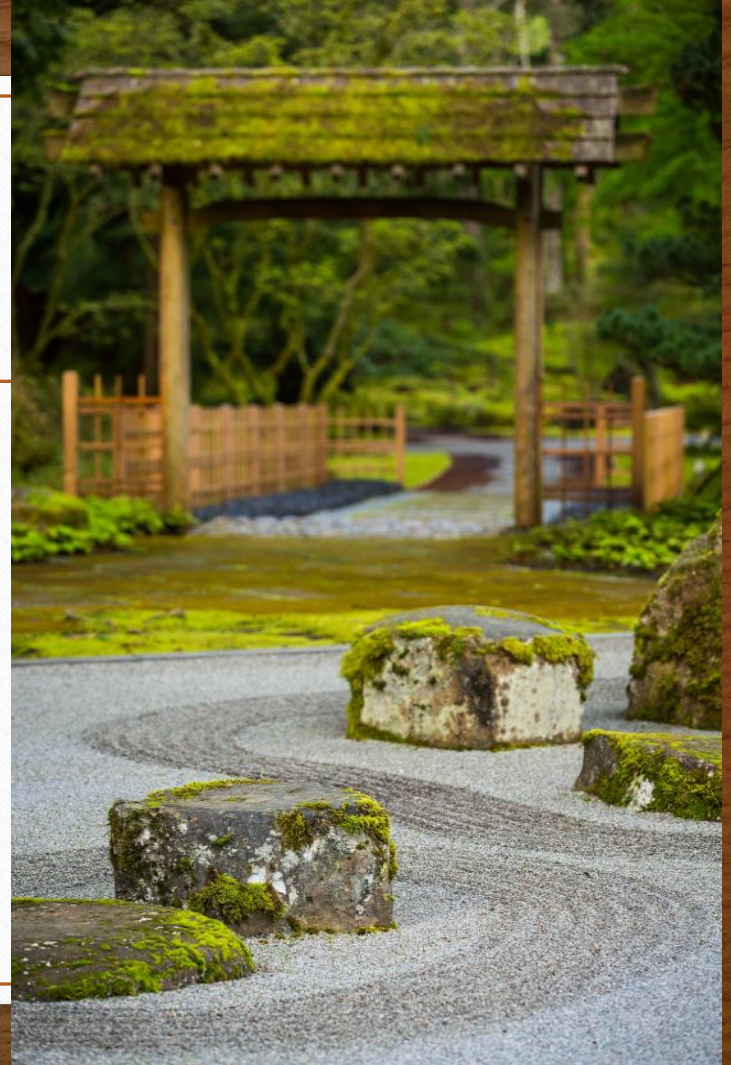
Founding Operational Model

- Focus on experience of "having the place to yourself"
- Limited attendance
- Limited sources of revenue
- Closely knit Board of Trustees
- Limited public programs and events
- A truly unique place
- Achieved great recognition and acclaim



Transition on the Horizon (2000's)

- Challenges build
 - Sustainability questioned
 - Deferred maintenance builds
 - Stock market hits bottom (2009)
- Board expands, bylaws rewritten
- Fundraising program initiated (2006)



Rapid Transition (2009 to 2015)

- Leadership transitions
- Reservations discontinued (2010), attendance rises from 27,000 to 50,000+
- Rapid growth and growing pains
- Increased public programming
- Gift Shop introduced (2011)
- Garden / Facility Renovations
- Foundational planning

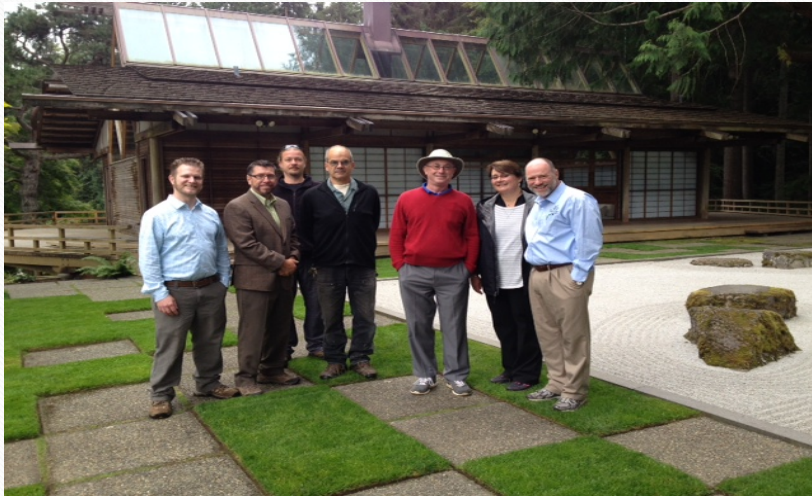


Origins of Peer Review (2014)

- New Board Committee established
- Grounds staffing temporarily reduced
- Need for more decision making information
- Desire for increased shared understanding
- Idea for Peer Review Emerges



Committee Composition



- Shared dedication to quality
- People who inspire trust and confidence
- Diverse budgets and missions
- Leaders at different levels
- Awareness of challenges specific to our region
- Critical thinkers

Questions / Charge for the Committee

- How does experience of gardens reflect our mission and vision?
- How does our garden quality compare to other gardens? Who are our peers?
- Which gardens are best maintained, which need more attention?
- Are there different methods of organization, tools, or equipment that would allow for more efficient, effective care of the grounds?
- Impression of staffing levels
- How can Staff, ED, and Board work together optimally?

Visit Components

- Site tour
- Socializing with Board – recognize the experts
- Stakeholder meetings: time with Board, Committee, ED, Dept. leadership, front line staff
- Presentation and narrative summary
- Stay in Trustees' homes



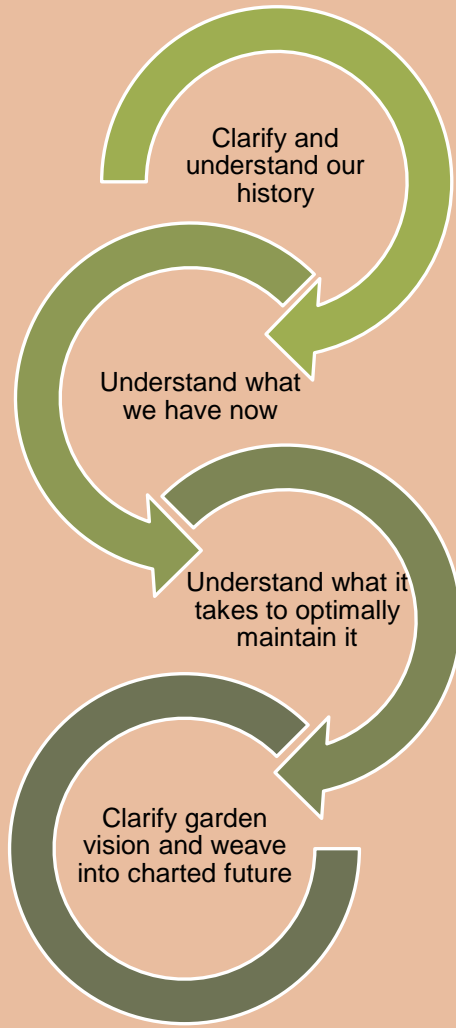
Outcomes / Recommendations

- All questions answered – but we didn't ask the most critical questions
- Bloedel identified as one of the “finest experiential gardens”
- That experience isn't well defined or broadly understood
- Need to define design intent and maintenance standards
- Weave findings into Master Plan

Lessons Learned

- Allow more free time for group discussion
- Final report delivered by Committee more broadly than originally imagined– groups had been unintentionally siloed
- Peer Committee selection is critical
- The power of peers... is strong
 - Built trust by Staff
 - Energized Trustees
 - Set a touchstone for future reference
 - Unified people and clarified priorities
- Donors and funders very interested by this process

Enhanced Communication



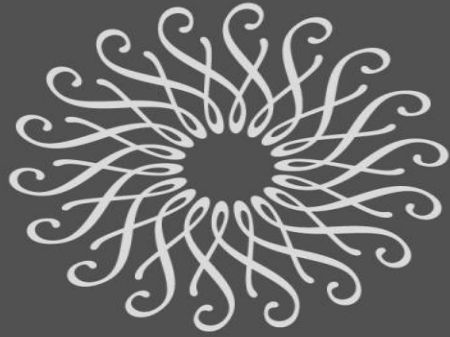
**Resulting
Grounds &
Facilities
Priorities**

Results Thus Far

- Heritage Landscape Report completed – grant supported
- Structural changes made
- Equipment purchased / donated
- Awareness of Bloedel's unique landscape nature increased by Board and Staff
- Master Plan project priorities revised
- Peer review being considered an ongoing advisory body



Thank
You!



LONGWOOD
GARDENS

American Public Garden Association 2016 Annual Conference

Longwood Gardens

Sharon Loving, Director of Horticulture



Longwood Visiting Committee

Longwood Visiting Committee

May 1973

- Origination of idea rooted in academic rigor
- Six members
- One topic per meeting
- Visiting Committee Members – criteria
- Six-year term –last year Chair
- Freedom to discuss programs and make suggestions
- No authority to make final decisions or commit expenditures
- Adequate time to meet and formulate a report to the Board of Trustees before departing

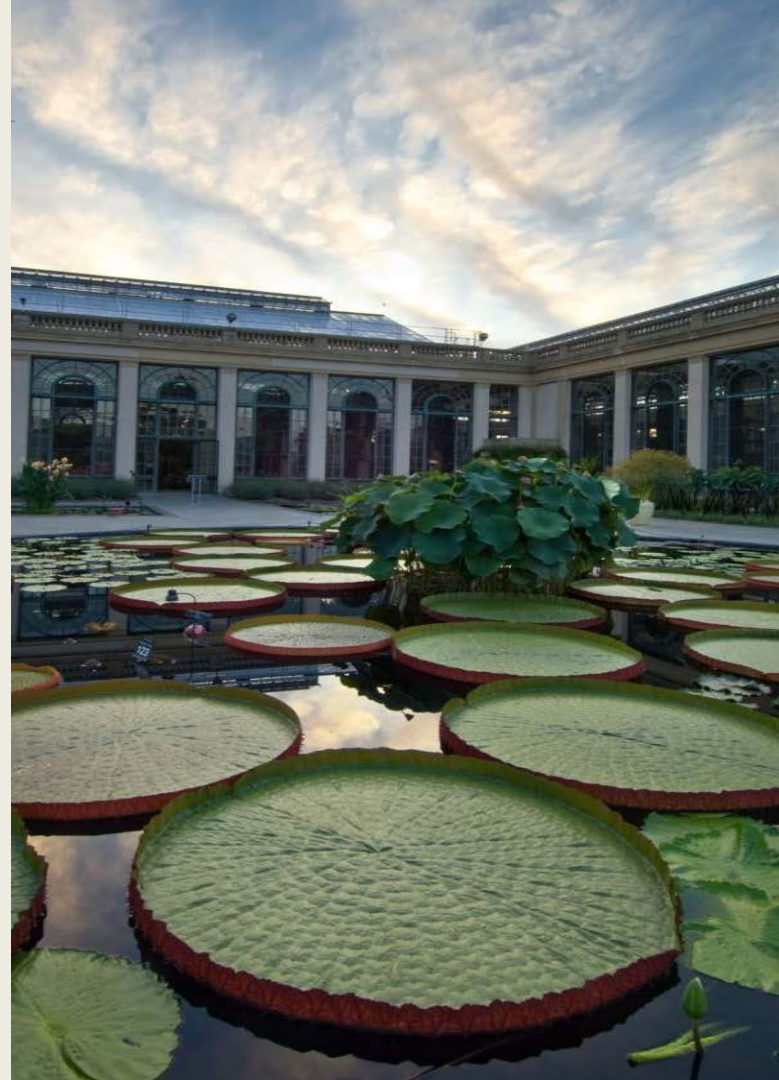
Initial Process ...

- Entire Visiting Committee toured property every visit
- Pre-meeting package content
- Entire Visiting Committee performed a general evaluation with a deep dive into a specific topic
- Verbal report given to Board of Trustees followed by written report
- No front-line staff present for report
- 3-day minimum visit

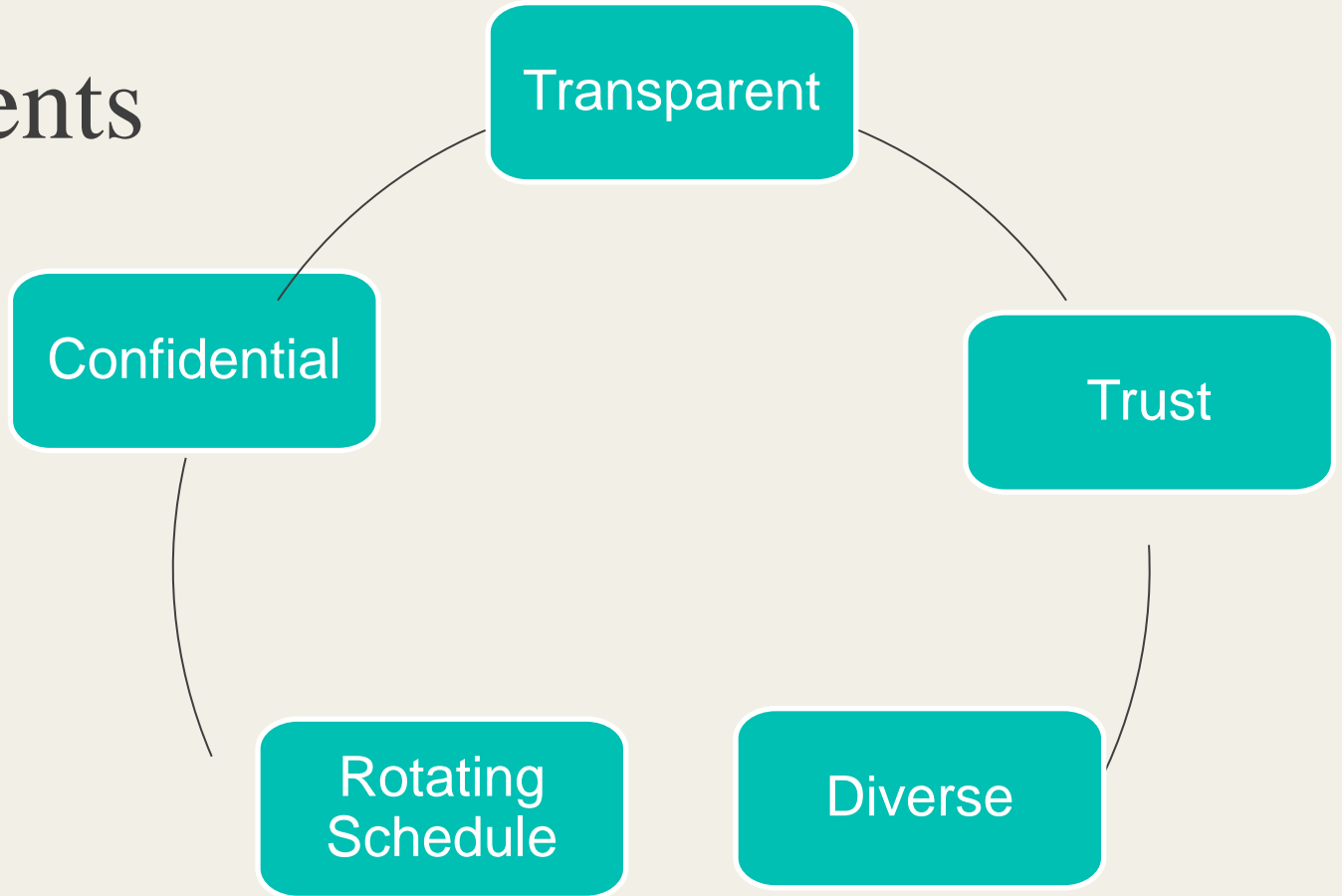


What We've Learned

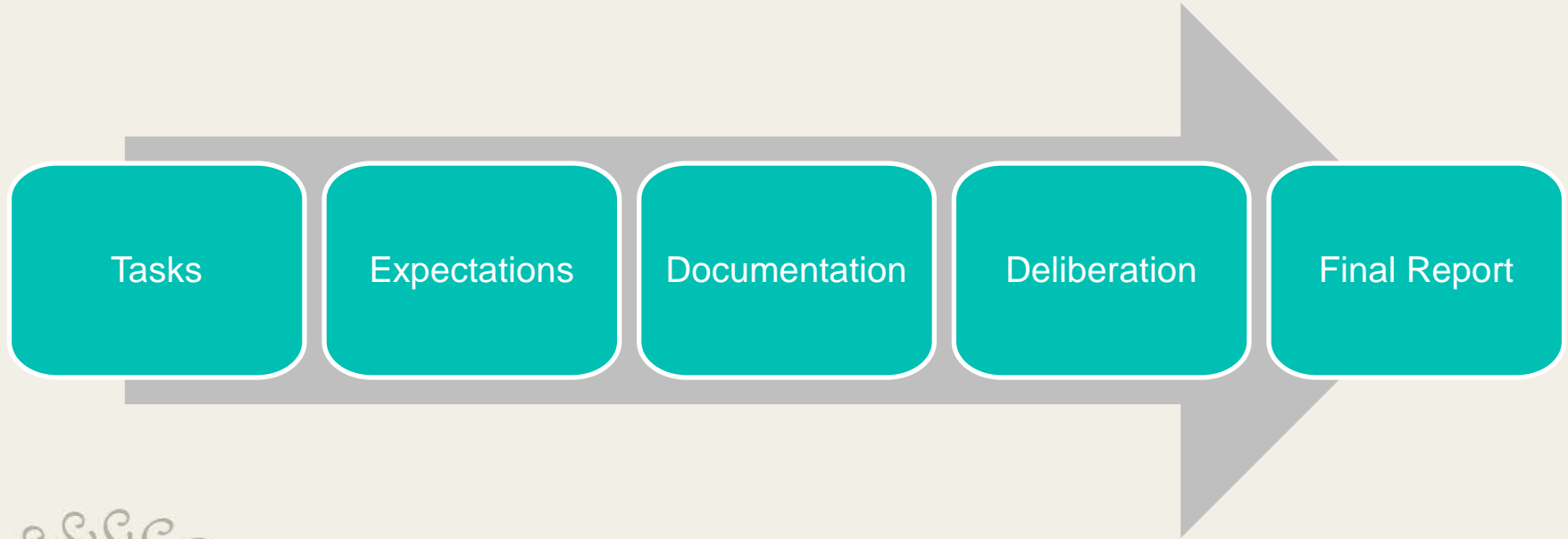
- Meeting Topic - Strategic
 - Pre-meeting Package content
- Committee members
- On-Site Tours
- Presentation to the Board
- Lengthen – 5 days + optional tour
- Involve frontline staff in Board presentation
- Close the loop - Report back to Board & the Visiting Committee



Critical Components



Current Process



Committee Composition

- Expertise
- Experience
- Ego's



Potential Subjects



Planning

Organizational
Structure



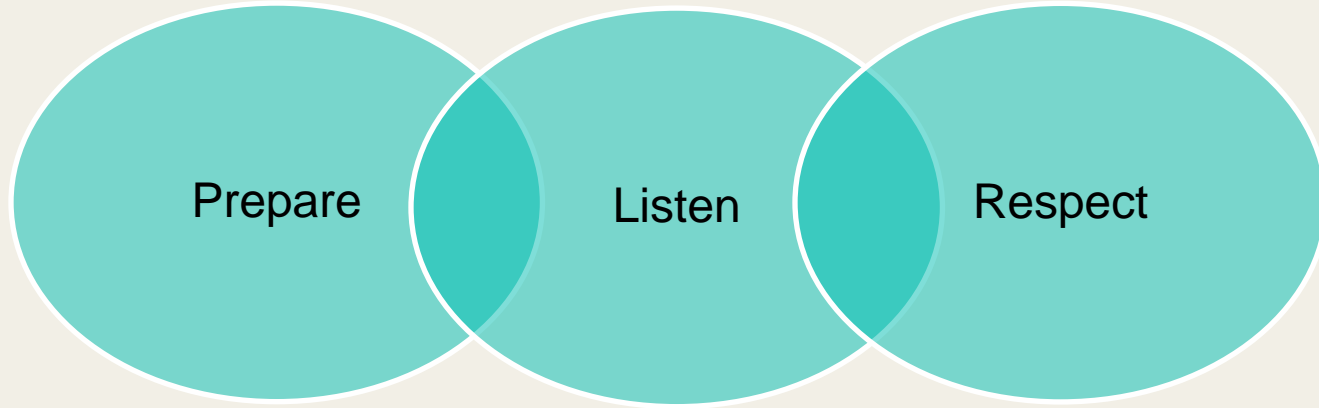
Specific Programs,
Displays or Exhibits

Strategic Overview
of
One Department



Peer Review Committee Member

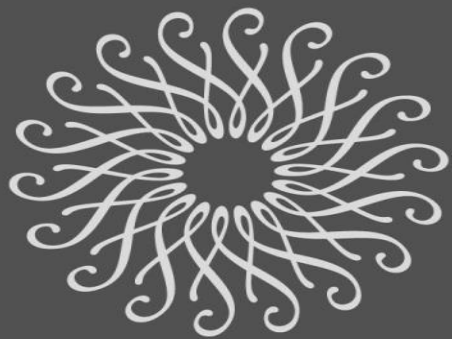
What I've Learned



*It's said that a wise person learns from his mistakes.
A wiser one learns from others' mistake.
But the wisest person of all learns from other successes."*

- John C. Maxwell





LONGWOOD
GARDENS

Questions & Discussion

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