

**ACTION PLAN
PROGRESS REPORT
The Arboretum
2019 – 2020**

The following report reiterates recommendations of the 2019 review committee report and provides details concerning progress in response to the recommendations in Fiscal Year 2020. A copy of the original committee report is available at https://administration.ca.uky.edu/files/arboretum_action_plan_committee_report_oct.2019_final.pdf

Recommendation 1: Evaluate and refine the role of each area of the vibrant leadership coalition, including the director, department chair, Advisory Board, Friends of The Arboretum, the college, and the university.

1. A. We recommend the February 5, 2014 Revision of Organization and Operating Procedures for The Arboretum, State Botanical Garden of Kentucky be revised to:

1.A.1. Reflect the current college and university administrative structure. The Arboretum director reports to the Chair of the Department of Horticulture who, in turn, reports to the Dean of CAFE.

1.A.2. Reflect that the role and purpose of The Arboretum's Advisory Board is to advise the Chair of the Department of Horticulture and the Director of The Arboretum.

1.A.3. Include that future Advisory Board appointments by both partners incorporate input from the Advisory Board to strengthen Board effectiveness. (crosswalk with 2.F.)

1.A.4. Include that regular Advisory Board meetings occur four times a year (March, June, September and December) to provide more in-depth discussion. Special meetings may be scheduled as needed.

1.A.5. Establish term limits for UK representatives (possibly to match LFUCG term limits), board composition guidelines, and onboarding process for Advisory Board.

1.A.6. The Arboretum will keep track of Advisory Board terms of UK representatives so at the appropriate times the Dean of CAFE can write a letter to the UK President requesting new or reappointed members.

FY2020 progress on 1.A.

Assessment method. How we will measure progress on this item: A subcommittee of the Advisory Board worked to update the Organization and Operation Procedures.

Results: Four of six items have been successfully addressed. Clarification regarding items **1.A.1**, **1.A.2**, **1.A.3** and **1.A.4** were included in the 24 January 2020 update to the Organization and Operating Procedures for The Arboretum. Both items **1.A.5** and **1.A.6** are in the process of being addressed (as of 4 November 2020), see item **2.F**. A draft document will be shared with Horticulture Department Chair Dr.

Mark Williams and then with the Advisory Board at their December 2, 2020 meeting. Assuming agreement is reached, the document will be passed to College leadership for review.

Analysis of results and reflection: We think it important to establish guidelines for board composition not just for UK representatives, but also for Mayoral appointees.

Ongoing improvement actions: TBD following review by college leadership

1. B. We recommend that the Advisory Board review progress and plans in the following areas and make recommendations where appropriate:

1.B.1. Establishing The Arboretum's budget priorities

1.B.2. Periodic strategic planning

1.B.3. Fundraising

1.B.4. Development of additional resources from grants, public appropriations and income

1.B.5 Educational programming, research and outreach efforts for and at The Arboretum

1.B.6. Design, planning and establishment of new or proposed buildings, structures, gardens or horticultural/landscape features.

1.B.7. Updates on progress will be made at every Advisory Board meeting

FY2020 progress on 1.B.

Assessment method. How we will measure progress on this item: Advisory Board meeting agendas and notes indicate these topics are addressed at each meeting.

Results:

The list of topics in **1.B** above are the basis of a typical Advisory Board quarterly meeting agenda. Arboretum Director prepares agenda for each Advisory Board meeting in consultation with the co-chairs. Various Arboretum staff are asked to attend to share information or to generally contribute to the overall discussion. Beth Vaughn in the CAFE Office of Philanthropy and Alumni attends meetings and shares fundraising matters. Horticulture Chair Mark Williams attends meetings to hear updates, listen to concerns and contribute to discussion. The presence of both Ms. Vaughn and Dr. Williams at meetings has proven to be very helpful in building support, trust and confidence in Arboretum endeavors and operations.

1. B. 6. Last fall the senior horticulturist presented the plan for the removal of the Modern Rose Garden and creation of the Teaching Perennial Garden to the advisory board. Comments were positive and suggestions that the horticulturist collaborate with current Hort Dept. staff and faculty were followed. He gained input from the Horticulture Extension agent for Fayette County Jamie Dockery as well As Horticulture Extension Professor Rick Durham and Horticulturist Shari Dutton. Emily Ellingson presented on the progress of the

WAKY area on the Interpretative Master Plan. Eric Smith presented his internship project on the Alumni Drive Entrance Wetland Project.

Analysis of results and reflection: Advisory Board review of progress among these key initiatives and inclusion of internal and external stakeholder perspectives continues to benefit the Arboretum.

Ongoing improvement actions: Continue to bring matters to the attention of the Advisory Board for their education and information, and to hear from internal and external stakeholders.

1.C. The Subcommittee is supportive of the motions made and passed at the Friends of The Arboretum (FOA) Board of Directors (BOD) July 17, 2019 meeting.

1.C.1. A motion was made and approved to change terminology from “member/membership” to “Friend(s) of The Arboretum” with the additional clarification that this will apply to all individuals making a qualified gift to The Arboretum.

1.C.1. A second motion was made and approved to suspend the operations of the FOA BOD pending the implementation of a Transition Committee to be appointed by Mark Williams.

FY2020 progress on 1.C.

Assessment method. How we will measure progress on this item: Changes and/or updates to the “Friends of The Arboretum Charter of Organization in support of the University of Kentucky-Lexington-Fayette County Arboretum” were considered and evaluated over an extensive period. Concomitant to the change in Friends membership was the acknowledgement by board directors that the board’s original goal (c. 1991) of providing support for The Arboretum (which at the time had no full-time staff) had been successfully accomplished and should be celebrated. The then-executive committee (president, vice-president, past-president, secretary and treasurer) who had served in these roles for five years, were duly thanked at an event in winter 2020 (prior to the current COVID-19 pandemic).

Results: Changes to the above referenced document were discussed at the Friends Board meeting on July 17, 2019. The motion to “transition Friends of The Arboretum from a Board governed organization to a membership and volunteer group coordinated by The Arboretum” was approved and accepted.

The new donor recognition model was implemented July 1, 2020. All donors who make a qualifying gift receive the benefits of being a Friend of The Arboretum. This process is managed by Arboretum administrative staff.

Analysis of results and reflection: The new model of recognizing all donors who make a qualifying gift to The Arboretum be considered as “friends” will enable us to equitably recognize all donors.

Ongoing improvement actions: We hope to hire a part-time employee to manage the donor tracking effort and other tasks.

1. D. We recommend that succinct vision, mission and values statements be updated and/or

developed as part of the strategic planning effort. Staff and stakeholders shall have extensive input into this process.

FY2020 progress on 1.D.

Assessment method. How we will measure progress on this item: Development of a vision, mission, and values statement document.

Results: The COVID-19 pandemic has greatly affected our ability to gather and meet for important goals such as this. We hope that we will have an opportunity to address this goal in 2021.

Analysis of results and reflection: The Arboretum truly needs to develop vision and values statements and to revisit its mission statement. The lack of a vision statement to inspire staff was noted as long ago as a 2015 UK-HR lead team building session but has not been addressed. The Arboretum's professional staff have a strong desire to work here, a passion for their respective fields of work, and should participate in the development of a shared vision.

Ongoing improvement actions: TBD

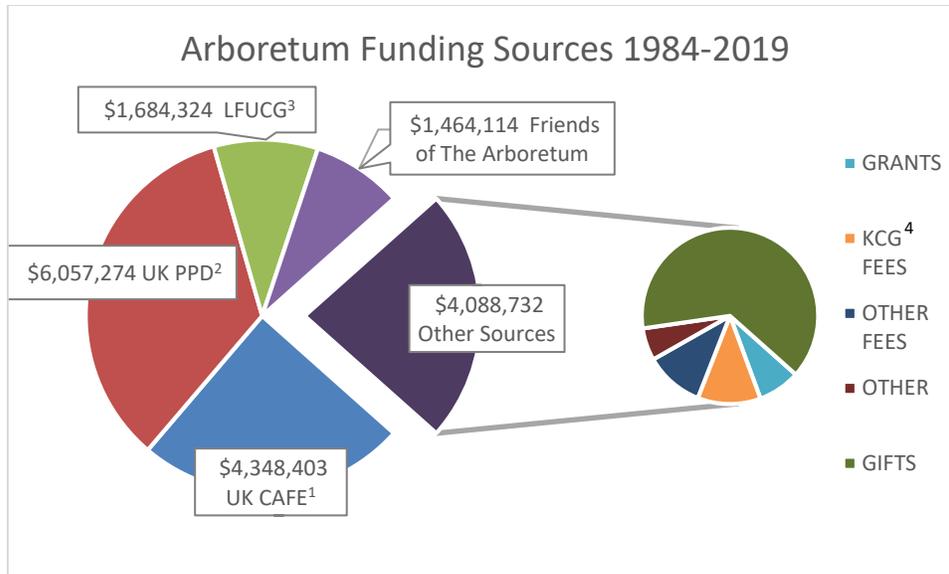
Recommendation 2: Continue to engage LFUCG leadership in strategic planning and discussions to enhance the UK partnership with local government.

Continue to engage LFUCG leadership in strategic planning and discussions to strengthen further the UK – LFUCG partnership.

The Arboretum was created through a partnership of the University of Kentucky and the Lexington Fayette Urban County Government. Throughout its existence it has received essential funding and support from both partners. If The Arboretum is to continue building excellence of programs and facilities, this partnership must be sustained and strengthened.

The subcommittee (Mayor Gorton, Council Member Susan Lamb, Arboretum administrator Mark Williams, Dewayne Ingram, Beth Vaughan, and Scott Smith attending) met on June 11, 2019 in the Mayor's Office to discuss recommendations and strategies for achieving this goal. This recommendation and those that follow arose from a thoughtful and fruitful conversation related primarily to the LFUCG partnership with the Arboretum.

2. A. The history of funding by LFUCG and UK should be documented and included in the Action Plan Committee's report. See Appendix A for additional information.



1. UK College of Agriculture, Food and Environment
2. UK Physical Plant Division
3. Lexington-Fayette Urban County Government
4. Kentucky Children's Garden

The Arboretum funding history from all sources is provided in a separate file. This record demonstrates that both LFUCG and UK have made substantial investment in The Arboretum on a continuing basis throughout more than three decades. The LFUCG investments have been predominantly in support of projects, facilities and programs while the UK investment has supported a base budget of recurring and operating funds. Thus, the budgeting process and the types of support have differed for UK and LFUCG and are likely to differ in the future. However, both partners have been and will continue to be essential to the development of The Arboretum. Undoubtedly, future advancement is dependent on continuing growth of support and investment from multiple sources.

FY2020 progress on 2.A.

Assessment method. How we will measure progress on this item: The evidence of financial support over time of the two partners and other supporters was included as an Appendix in the official report.

Results: The history of funding provided in the report was very informative reading. While UK PPD and UK CAFE have provided the preponderance of funds, LFUCG and others have made substantial contributions.

Analysis of results and reflection: As this report is being prepared (October 2020) during the COVID-19 pandemic, both LFUCG and UK are facing severe budget restraints. Overcoming this will likely be a multi-year effort.

Ongoing improvement actions: The budget analysis provided by the review committee will be updated annually and shared with the Advisory Board, college leadership, and LFUCG leadership to maintain ongoing recognition of current partnership support areas.

2. B. In the near future, opportunities for additional support from LFUCG are most likely to be in the form of grant programs and non-recurring collaborative agreements. These opportunities should be evaluated and actively pursued by Arboretum staff, LFUCG partners and other collaborators.

The subcommittee did not directly discuss the possibilities for recurring operating funding for The Arboretum from LFUCG, although this issue was raised in preliminary Committee surveys. Any such discussions should occur among UK and LFUCG leadership.

FY2020 progress on 2.B.

Assessment method. How we will measure progress on this item: Grant awards for Arboretum projects will be tracked over time and included in the annual budget report.

Results: While a very worthy recommendation, we have not actively pursued grants or non-recurring agreements during the ongoing pandemic.

Analysis of results and reflection: N/A

Ongoing improvement actions: We will follow recommendation **2.C.** and develop a needs list in 2021 before pursuing grants, to ensure efforts are focused in areas that will create the greatest and most sustainable impact.

2. C. Arboretum leadership and advisors should compile a “needs list” of appropriate opportunities for LFUCG funding, revise this annually, and share with LFUCG leadership.

Examples, which could be appropriate targets for LFUCG investment, include:

- 2. C. 1. Expansion of the parking lot as a demonstration, education project of pervious paving.
- 2. C. 2. Storm water or water quality community education programs.
- 2. C. 3. Plantings or landscaping which demonstrates and supports public education about environmental or resource issues, analogous to the KU street tree planting.
- 2. C. 4. A shared environmental education staff position (as was jointly funded by the partners in the past).

FY2020 progress on 2.C.

Assessment method. How we will measure progress on this item: A needs list will be developed and updated every six months with input from Arboretum Staff, Advisory Board, and other key stakeholders including university faculty partners. The list will be included in the Implementation Plan report annually, and used for identification of and communication with potential funding sources.

Results: Arboretum staff have considered and are in agreement with the example needs list identified by the review committee.

Analysis of results and reflection: We concur that item **2.C.1.** (expanding the parking lot and constructing it in an environmentally responsible manner) is needed. In light of the future Visitor Center expansion and renovation project likely using the existing parking lot as a storage and lay down area, we think this would be best addressed post-construction.

The Arboretum could assist with item **2.C.2** by hosting programs on-site. The topic of storm water or water quality community education programs is a topic about which we have previously lead programs with financial assistance from LFUCG. However, this area is not the field of expertise of our staff and internal (from UK) or external sources would be needed.

We feel we can best educate the public about The Arboretum and its resources (per **2.C.3.**) by creating stronger interpretation. We have worked with Dr. Lauren Cagle (UK College of Arts and Sciences) to establish an understanding of what visitors and non-visitors know about us, what they want to know, and how we can best communicate information. Our efforts have been delayed by the current pandemic and by a lack of financial resources. We hope to make progress on our interpretive planning effort in 2021 so that we can draw attention to the educational aspects of the plant collections and representative Kentucky landscapes.

We enthusiastically agree about the benefits of and need for a jointly funded environmental education staff position (per **2.C.4.**).

Ongoing improvement actions: The needs list will be updated every 6 months with input from Arboretum Staff, Advisory Board, and other key stakeholders including university faculty partners. Funding opportunities will be identified based on the needs list, and proposals submitted accordingly.

2. D. The Arboretum should collaborate with Cooperative Extension, Parks and Recreation, Urban Forestry, non-profits and other appropriate organizations to make Arbor Day at The Arboretum even more of a major annual event.

Although the suggestion was made in preliminary Committee discussions, the subcommittee agrees that there would be limited interest in increasing the number of partnership events at The Arboretum, and benefits would be minimal. Additional partnership events are not recommended at this time.

The subcommittee believes that one annual high visibility event involving a community-wide partnership would best advance the LFUCG partnership with The Arboretum.

FY2020 progress on 2.D.

Assessment method. How we will measure progress on this item: We will track the participation in the event each year as total headcounts of attendees and as number of collaborating organizations. These counts will be provided annually to the Advisory Board and in the annual Implementation Plan Report.

Results: Due to COVID-19, the Arbor Day celebration was not held in 2020. We have actively sought the input and involvement of Fayette County Cooperative Extension, LFUCG Urban Forestry, UK Urban Forest Initiative (UFI) and others in planning for the annual Arbor Day/Party for the Planet events since at least as early as 2014. The Arbor Day/Party for the Planet celebration is in April and usually scheduled with consideration for LFUCG's Reforest the Bluegrass and Hazardous Waste Disposal events. LFUCG Urban Forestry, Environmental Commission and others often contribute financial support for the event and bring educational materials and staff to the event.

Jesse Dahl and Emily Ellingson worked with LFUCG Parks and Recreation employees to choose and identify the 2020 Arbor Day tree. Arboretum staff were given a guided tour of Parks and Recreation's nursery. Because of COVID-19, the 2020 Arbor Day celebration was canceled, but because of our connection with Parks and Recreation, we were able to give them 60+ potted trees and shrubs to add to their nursery and use for their programs.

Analysis of results and reflection: As a unit with a small staff and limited marketing/financial resources, we would love to attract even more people to the Arbor Day event, but need more resources to achieve this recommendation.

Ongoing improvement actions: We are considering scheduling the Arbor Day/Party for the Planet event for fall 2021 to align with UFI's annual Tree Week celebration and in the hope that the COVID-19 pandemic will have lessened by that time and allow gatherings to occur.

2. E. While the current partnership with Parks and Recreation has been fruitful and positive, future opportunities for growth of the LFUCG partnership may be found with other local government entities, including Urban Forestry, Environmental Services and the Environmental Commission. We recommend that stronger linkages with staff and programs in these units be developed.

FY2020 progress on 2.E.

Assessment method. How we will measure progress on this item: Identification of key individuals in these organizations, and invitations to participate in various ways with Arboretum partnerships (i.e., collaborative grants, Advisory Board membership, educational and research initiatives, and staff field days for example).

Results: This recommendation was not addressed yet as of this FY2020 reporting.

Analysis of results and reflection: N/A

Ongoing improvement actions: TBD

2. F. We recommend that future Advisory Board appointments by both partners become more intentional in order to strengthen Board effectiveness in guiding Arboretum planning and

programs. This could be accomplished in part through more communication among leadership of The Arboretum, CAFE, LFUCG, and current Board members when making future Board appointments. Representation and engagement of the UK and LFUCG partners may be strengthened through an even more active, informed, representative Advisory Board, including members from key areas such as VisitLex. (crosswalk with 1.A.3.)

FY2020 progress on 2.F.

Assessment method. How we will measure progress on this item: Development and implementation of protocol for board composition and qualifications.

Results: As of this writing (November 2020) all five of the UK-appointed members' terms have expired and two city-appointed representatives' terms will expire January 2021.

Analysis of results and reflection: We concur that it will be beneficial for all Advisory Board appointments to become more intentional.

Ongoing improvement actions: We are developing a protocol for board composition and qualifications and will present it at the December 2, 2020 Advisory Board meeting.

2. G. Limited knowledge of The Arboretum, locally and beyond, significantly constrains community perception of The Arboretum as a substantial asset. To sustain progress toward The Arboretum goal - becoming a nationally and internationally recognized botanical garden and therefore an elite community asset - we recommend additional efforts to promote community awareness.

Simple examples might include:

- 2. G. 1. Attractive brochures or informational material available at VisitLex and other regional visitor centers
- 2. G. 2. Better cross links on LFUCG and Arboretum web sites and social media
- 2. G. 3. Increased interstate and local wayfinding signs
- 2. G. 4. Annual presentations to the LFUCG Council about The Arboretum
- 2. G. 5. Hosting Council and other LFUCG leadership at The Arboretum for a reception scheduled close to Arbor Day celebrations.

FY2020 progress on 2.G.

Assessment method. How we will measure progress on this item:

We will report on the number, distribution method, and target audience of promotion materials annually in each Implementation Plan Report. Promotional materials developed and distributed as a collaborative effort with other units/organizations will also be tracked and reported.

Results:

We have had weekly Facebook and Instagram posts thanks to our Horticulture Department intern Education coordinator. We did weekly Facebook live sessions throughout the summer. We have used Canva to update and make more professional graphics and social media posts to advertise classes and events. We have posted several youtube videos on topics ranging from I-Naturalist to Growing Hydrangeas in Kentucky. We initiated a quarterly Volunteer Newsletter.

The Arboretum's best path to recognition as a community asset, a **public garden**, is through the American Public Gardens Association (APGA) of which we are a dues-paying member. We benefit from the resources and connections to other public gardens in the US and beyond.

We are a **public garden** (defined as an institution that maintains collections of plants for the purposes of public education and enjoyment, in addition to research, conservation and higher learning; public gardens are staffed by professionals trained in their given area of expertise and **maintain active plant records systems**, similar to a museum) and we are both a **botanical garden** (botanical gardens are defined as gardens that contain a wide array of herbaceous and woody plant collections, offer educational programs, and research programs focused on plant improvement, conservation, ecology and basic science; they have botanically diverse collections of plants) **and an arboretum** (in contrast, arboreta focus on study and display of woody plants, and typically offer educational programs for children, students and adults.)

We participate in various forums (education, plant conservation, membership and development, facilities, marketing, visitor services, etc.) where staff from various gardens can share information and connect with each other to share best practices, ask questions, and learn from each other.

Based upon the volume of people we see on the grounds, we believe there is a perception and understanding issue of our intent. For example, we are not truly a park as we manage and maintain plant collections and keep records of them, rather than simply presenting them for aesthetic qualities. Because we are so "visited" we feel that developing an interpretive master plan and then following through with signage, printed materials, and programming will best position us for greater understanding by the community at large.

2.G.1. **Brochures** – The Arboretum has created and provided printed brochures and bookmarks to VisitLex and regional visitor centers, real estate offices and regional and local tourist venues for many years. This self-funded effort would benefit from financial support to underwrite costs presently borne by donations to Arboretum.



University of Kentucky, 500 Alumni Drive
Lexington, KY 40506, (859) 257-6955
<http://arboretum.ca.uky.edu>

The Arboretum is a public garden, an arboretum and a botanical garden. The differences are explained in a display at the Doratha Smith Gattis Visitor Center. **Visitor parking** is available except on the days of UK football home games.

Doratha Smith Gattis Visitor Center
Closed to the public on the days of UK football home games.

JAN 2 to MAR 31, 2020	APR 1 to OCT 31, 2020
Mon-Fri 8:30 am - 4:00 pm	Mon-Fri 9:00 am - 4:30 pm
Sat Closed	Sat 8:30 am - 4:30 pm
Sun Closed	Sun Closed

Nov 1 to DEC 31, 2020
Mon-Fri 8:30 am - 4:00 pm
Sat Closed
Sun Closed

Outdoor entrances are available from dawn to dusk except on days of UK football home games near the Kentucky Children's Garden entrance.

Kentucky Children's Garden: Visit our website or see our brochure for more information about the Kentucky Children's Garden. <http://arboretum.ca.uky.edu/gardens/childrens>

APR 1 to OCT 31, 2020
Wed-Fri 10:00 am - 5:00 pm
Sun Closed

Closed to the public on the days of UK football home games.

Arboretum Explorer: Learn about plants, take self-guided tours, and more with this web-based database that can be accessed on your smartphone, tablet, or desktop computer. <http://uky.arboretumexplorer.org>

Reservations: While there is no admission charge, donations are critically important to our operations and are gratefully accepted. Learn more about donations at the Doratha Smith Gattis Visitor Center or on our website. <http://arboretum.ca.uky.edu/donate>



Admission
(Must be purchased at the Gattis Visitor Center)

\$5	Individual
\$18	Family group (up to 5 people)
\$98	Season membership (up to 5 people per visit)

Bring your 2019 member card and save \$5 off a season membership! Arboretum Friends receive a 10% discount (must have current card to receive discount).

Hours
Admission must be purchased by 4:30 pm
Spring, Summer & Fall: April 1 through October 31, 2020
Wed through Sat: 10 am to 5 pm
Sun: 10 am to 5 pm
Closed: July 4, 2020
UK Homecoming game days (except Saturdays, August through October)

For your safety, The Arboretum closes during inclement weather or if we are full. Following our hour closure, hours of operation are subject to change without notice.

Kentucky Children's Garden
The Arboretum, State Botanical Garden of Kentucky
University of Kentucky
500 Alumni Drive, Lexington, KY 40505
(859) 257-6955
Dawn.Babbly@uky.edu

The Arboretum, State Botanical Garden of Kentucky
(859) 257-6955
<http://arboretum.ca.uky.edu/gardens/childrens>
<http://arboretum.ca.uky.edu>

The Arboretum, State Botanical Garden of Kentucky
University of Kentucky



Above, left to right: Visit The Arboretum and Kentucky Children's Garden brochures, and Arboretum Explorer bookmark distributed by VisitLex and at regional locations.



University of Kentucky, 500 Alumni Drive
Lexington, KY 40506, (859) 257-6955
<http://arboretum.ca.uky.edu>

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Visitor's Guide to The Arboretum State Botanical Garden of Kentucky

Welcome to The Arboretum, designated our state's official Botanical Garden in 2000. Our mission is to showcase Kentucky landscapes and serve as a resource for environmental and horticultural education, research, and conservation. Established in 1991, The Arboretum is a resource used often by University of Kentucky students, faculty and staff, Lexington residents, and visitors from across the United States and abroad.

Our grounds include the Gattis Visitor Center, the Wall, Across Kentucky, The Arboretum Woods, and the Horticultural Displays and Gardens, which include a variety of plants and sculptural and water features—as well as two acres devoted to the Kentucky Children's Garden.

We use Arboretum Explorer to maintain records of the trees, shrubs, and vines in our collection as well as the locations of all memorial and honorary tributes on our grounds. Place your identification tags that list a unique accession number, botanical name, location on the grounds, and location in the wild. Animals and perennials are identified with ground markers.

Help us save trees! Please consider returning this brochure to the parking lot booth when you leave so that others may use it.

THE ARBORETUM TRIBUTE PROGRAM

Tree Tributes & Contributions



ARBORETUM EXPLORER
STATE BOTANICAL GARDEN OF KENTUCKY
uky.arboretumexplorer.org

The Arboretum Mission is to showcase Kentucky landscapes and serve as a resource center for environmental and horticultural education, research, and conservation.

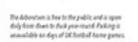
WHAT IS ARBORETUM EXPLORER?
Arboretum Explorer is a web-based database that can be accessed on your smartphone, tablet, or desktop computer to "highlight" the plants and learn more about The Arboretum.

To access Arboretum Explorer go directly to uky.arboretumexplorer.org or visit arboretum.ca.uky.edu and go to the "99% Access Kentucky" tab.

NAVIGATION

- You can locate plants by using an interactive MAP of The Arboretum grounds.
- You can also SEARCH our database for specific plants, or choose from a list of plants under the NAMES tab. The results of this search will give you the Arboretum location, the origin, and the unique number that staff use to identify individual plants.
- Under our FEATURES tab, you can find memorial trees and benches, facilities, specialty gardens and more.
- You can take a self-guided TOUR created by Arboretum staff to help you reach our native trees or shrubs.

For more information about The Arboretum, visit <http://arboretum.ca.uky.edu>.



The Arboretum is free to the public and is open daily from dawn to dusk year-round. Parking is available on the days of UK football home games.

Above, left: Visitor's Guide to The Arboretum 8 panel brochure; right, Tree Tributes & Contributions donation program. Both of these brochures are self-funded and available onsite at The Arboretum.

2.G.2 Better crosslinks on LFUCG and Arboretum web sites and social media - Arboretum has worked with VisitLex for many years to supply information for VisitLex website. Creating "cross links" on Arboretum web site and LFUCG would be more achievable if there were a staff member dedicated to marketing and development.

2. G. 3. Increased interstate and local wayfinding signs – This item not addressed yet as of this FY2020 report.

2. G. 4. Annual presentations to the LFUCG Council about The Arboretum – Arboretum is prepared to do this if given permission.

2. G. 5. **Hosting Council and other LFUCG leadership at The Arboretum for a reception scheduled close to Arbor Day celebrations.** All council members have been invited to attend the annual Arbor Day celebration and opening ceremony since at least 2014. The year of greatest council turnout was in 2014 when the Mayor and UK President signed the updated agreement regarding The Arboretum. Mayor Gorton, Vice Mayor Steve Kay, Council Member Susan Lamb and UK VP Mary Vosevich have been guest speakers at recent Arbor Day events. Having a reception around the time of Arbor Day would be more achievable if we had more staff and financial resources.

Analysis of results and reflection: Although much promotional work has been achieved over the years leading up to the committee recommendations, additional stretch goals are dependent upon greater resources, specifically increased staffing.

Ongoing improvement actions: We will continue to seek opportunities to increase resources in support of this area (see Recommendation 3).

Recommendation 3: Create new business and philanthropic opportunities through development of a business plan and comprehensive fundraising strategy.

Assessment method. How we will measure progress on this item: We will maintain an ongoing list of opportunities, and report on the list updates annually in the Implementation Plan Report. Completion of a full business plan and fundraising strategy will signal achievement of this recommendation, and the plan will be provided as an appendix to the Implementation Plan report when complete.

Results: Indicated below for each sub-recommendation.

Ongoing improvement actions: We will continue working with Philanthropy to update the list regularly, and attach the full business plan and fundraising strategy when complete. The plan will be shared with Arboretum Staff and Advisory Board, and will clarify how these groups can interact with the plan to enhance success.

3. A. Review naming/giving levels across The Arboretum to ensure congruency with University guidelines

3. A. 1. Develop new list of naming/giving levels

FY2020 progress on 3.A.

Results: Molly Davis has shared information with Beth Vaughn (historic lists of opportunities and minimum gift amounts) and discussed, along with Mark Williams, the suggested minimum gifts for various spaces (indoors and outside) in the renovated and expanded Dorothea Smith Oatts Visitor Center. As of October 2020, we have Schematic Design drawings of the renovation/expansion and are refining the naming opportunities and minimum gift amounts.

Analysis of results and reflection: We have more work to do to arrive at a comprehensive and up-to-date list for all the potential naming opportunities on the property.

3. B. Develop comprehensive fundraising plan for five years, with yearly action items that includes annual fund, capital gifts, major gifts, cultivation, stewardship, etc. in conjunction with CAFE Philanthropy staff

3. B. 1. Work with UK Graduate students in health care to determine opportunities for grants to cover new areas

3. B. 2. Plan should include all projects and endowment opportunities within The Arboretum

3. B. 3. Investigate new giving options such as text-to-give

3. B. 4. Investigate options for promoting payroll deductions among UK faculty and staff to support The Arboretum

FY2020 progress on 3.B.

Assessment method. How we will measure progress on this item: We agree that a comprehensive fundraising plan is needed to guide our efforts. We all are facing challenges in the midst of the pandemic.

Results: We installed three large banners from UK Cafe Philanthropy with qr codes where visitors could scan and make a donation with their smart phones.

Currently, we are focused on cultivating donors and raising major gifts for the Visitor Center expansion/renovation.

However, thanks to the efforts of Beth Vaughn and Tressa Neal, we launched our third Annual Giving Campaign in September 2020. The Campaign implementation plan (including sample letters to donors on letterhead that includes Arboretum leadership, staff and Advisory Board members) was shared with the Advisory Board at their September 2, 2020 meeting.

Analysis of results and reflection: We agree that a comprehensive fundraising plan is needed to guide our efforts. We all are facing challenges in the midst of the pandemic.

3. C. Rewrite the case statement for fundraising for The Arboretum

3. C. 1. Work with Martin School to conduct economic and functional impact study to help rewrite statement

3. C. 1. Statement should clearly articulate impact of gifts on larger community through The Arboretum

FY2020 progress on 3.C.

Results: We concur that an updated case statement for fundraising is a worthy goal. In the midst of the current pandemic, we have not pursued asking the Martin School to conduct an economic and functional impact study.

Analysis of results and reflection: We rely on the guidance and expertise of CAFE Philanthropy to achieve this goal.

3. D. Document year-round staffing needs for Arboretum indoor and outdoor staff, include cost projection of positions

FY2020 progress on 3.D.

Results: In this current pandemic environment, a reduction in our State budget has compelled us to assign a portion of three of the four CAFE-funded staff members' salaries to gift and/or income (earned revenue) accounts. The CAFE-funded director position remains fully paid on State funds. The Education Coordinator/Kentucky Children's Garden manager remains paid on gift and income accounts (no State funding). It will be important to discuss with UK PPD their ability to continue to support Arboretum and whether more financial support for grounds workers is feasible (over 50% of Arboretum's annual budget is expended by UK PPD on funds that are not managed by Arboretum).

Analysis of results and reflection: We concur that a long-term (10 to 15-years) staff plan is needed to guide strategic staff additions. A long-term staffing plan was presented to the Advisory Board c. 2015 but we were unable to make any progress due to a lack of recurring funds. We will revisit and update the long-term plan and associated costs. The plan should also consider the staffing needs for the opening of the renovated/expanded Visitor Center (3 to 5-year range) and accompanying relocation of grounds staff and director to an off-site location.

3. E. Review and recommend a revised membership/Friends structure and donor recognition

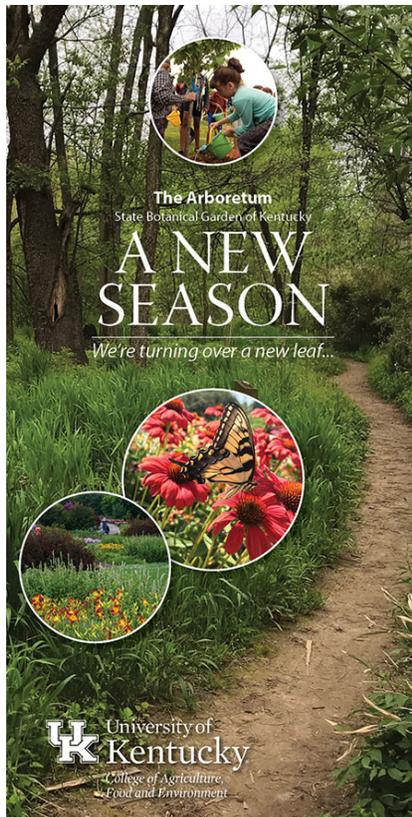
3. E. 1. Consider rates for Friends recognition levels

3. E. 2. Recommend benefits to donors for giving levels

FY2020 progress on 3.E.

Results:

A new model to recognize donors as Friends was developed at the same time as discussions about changes in the Friends Board of Directors occurred. Several discussions with the UK Alumnae Association occurred to understand their timeline, deliverables and lessons learned from their similar effort in 2018-2019. A 5 ½-inch X 11-inch brochure was produced with the assistance of Ag Communications and the CAFE Office of Philanthropy. The brochure was mailed in January 2020 to all current, Founding, Lifetime and lapsed Friends to give everyone ample time to ask questions and understand the intended changes. The brochure explained that the change in donor recognition would take place on July 1, 2020.



PICK YOUR PASSION!
New opportunities to align your investments with your interests:

Kentucky Children's Garden Fund
Enrich the lives of children around the Bluegrass by funding hands-on educational programs.



Walk Across Kentucky Native Plants Collection Fund
Help preserve Kentucky's botanical diversity, promote research and expand the Kentucky ecosystems represented within each region.



The Arboretum
State Botanical Garden of Kentucky

A NEW SEASON
We're turning over a new leaf...

Donor and Volunteer Benefits:

	Levels of Support:						
	PANPAW CIRCLE	REDBUD CIRCLE	SASSAFRAS CIRCLE*	HEMLOCK CIRCLE	WALNUT CIRCLE	TULIP TREE CIRCLE	BUR OAK CIRCLE
Arboretum monthly electronic newsletter	✓	✓	✓	✓	✓	✓	✓
Listing in donor honor roll on website	✓	✓	✓	✓	✓	✓	✓
Arboretum mailed calendar of events			✓	✓	✓	✓	✓
Arboretum Friend Card which provides:			✓	✓	✓	✓	✓
• 10 percent discount on items in our Gift Shop							
• 10 percent discount on Kentucky Children's Garden season membership							
• Discount at participating Garden Centers (at merchant's discretion)							
• American Horticulture Society (AHS) Reciprocal Admission Program (RAP) privileges							
Additional cards available for purchase (\$5 each)							
AHS RAP printed guide						✓	✓
Private after-hours event in the gardens							✓
Other Benefits (available by request)							
One 1-day pass to KCG (admits up to 5 people)				✓	✓	✓	✓
Arboretum water bottle					✓	✓	✓
Arboretum mug						✓	✓
*I support The Arboretum™ t-shirt							✓

*Friends of The Arboretum Founding and Lifetime members will receive Sassafras Circle benefits for their Lifetime. Additional contributions or volunteer hours made each year will count toward higher recognition levels.
The new model of recording and recognizing volunteer hours will start January 1, 2020. Volunteers are asked to record their volunteer hours in the Volunteer Notebook located in the Dorothea Smith Ottis Visitor Center. Volunteers will be recognized and receive benefits at the annual meeting tentatively scheduled for winter 2021.

Above, left: The cover of "A New Season" 6-panel brochure mailed to Friends. Right: A table showing levels of support and benefits was featured and explained what donors could expect for their gift.

Analysis of results and reflection: This sub-recommendation has been achieved and we consider this item complete. We will monitor donation levels and donor feedback to consider an necessary adjustments to the levels going forward.

3. F. Investigate options to work with UK Healthcare, UK HR, UK student activities and other UK areas to help support existing programs at The Arboretum

FY2020 progress on 3.F.

Results: In October of 2019 The UK MANRRS chapter (Minorities in Agriculture, Natural Resources and Related Sciences organization) worked with The Arboretum who help provide crafts and educational opportunities for children at our annual Amazing Autumn Event.

In the spring of 2020, the Education Coordinator partnered with the UK Horticulture Club to invite club members to outreach events. One outreach event was executed with a UK Horticulture student and Arboretum staff in April at Julius Marks Elementary School.

Analysis of results and reflection: We would welcome support from others in UK who have an interest in supporting our mission of education, conservation and research.

A student fee assessment has been discussed several times over The Arboretum’s history but not been pursued. The image below shows the various fees assessed on UK students. Even a small assessment of a few dollars per student would be extremely helpful in helping to support education and other programmatic efforts at The Arboretum.

2020-2021 MANDATORY FEE ASSESSMENT POLICY			
	Full-Time	Undergraduate Part-Time	Graduate Part-Time
Mandatory Fees Assessed			
All Undergraduate and Graduate Students			
Diversity Fee	\$6.00	\$0.50	\$0.70
Environmental Stewardship	4.00	0.35	0.45
Kentucky Kernel	2.00	0.15	0.25
Student Government Association	12.00	1.00	1.40
Technology	99.00	8.50	11.55
WRFL Student Radio	5.50	0.50	0.65
Total	\$128.50	\$11.00	\$15.00
Mandatory Fees Assessed			
Undergraduate and Graduate Students with at Least One Class On-Campus			
Campus Modernization – Enhancing the Core	\$6.00	\$0.50	\$0.70
Center for Community Outreach	4.00	0.35	0.45
Johnson Center	80.00	6.70	8.90
Student Activities Board	16.25	1.40	1.85
Student Center	131.25	11.35	14.95
Student Center Renovation	81.00	6.80	9.00
Student Involvement	27.25	2.30	3.05
Student Services	13.50	1.15	1.50
Transportation Services	5.00	0.45	0.60
Total	\$364.25	\$31.00	\$41.00
Mandatory Fees Assessed			
Full-Time Undergraduate and Graduate Students with At Least One Class On-Campus			
International Study Abroad	\$6.75		
Student Health Fee	160.00		
Student Wellness	15.00		
Total	\$181.75		
GRAND TOTAL	\$674.50	\$42.00	\$56.00
Summary of Mandatory Fees Assessed by Student Classification			
Full-Time with At Least One Course On-Campus	\$674.50	\$674.50	
Full-Time with No Courses On-Campus	\$674.50	\$128.50	
Part-Time with At Least One Course On-Campus ¹	\$42.00	\$56.00	
Part-Time with No Courses On-Campus ¹	\$42.00	\$15.00	
Enrolled in Annualized Program ³		\$1,524.00	
Fees are subject to change without notice.			

University of Kentucky

Above: The 2020-2021 UK Mandatory Fee Assessment Policy.

3. G. Analyze entry fee for Kentucky Children’s Garden and review daily passes and annual pass rates

FY2020 progress on 3.G.

Assessment method. How we will measure progress on this item:

Results: We analyzed KCG entry data from the Point of Sale (POS) system and decided to close the garden on Sundays, and we simplified our schedule to be consistent throughout the season of operation.

Analysis of results and reflection: The Kentucky Children’s Garden (KCG) did not open in 2020 due to the current pandemic. When the entry fee and annual pass rates are analyzed before the next season of operation, it will be important to discuss what the earned income is intended to support. Specifically, is the earned income intended to fully self-support its operation? Can an endowment be established to support its operational costs (staff, maintenance, educational materials, etc.) and allow low-cost entry for disadvantaged families?

Another consideration is the seasonal nature of the KCG, meaning that, in the off-season, we earn no income through entry fees, but we still have staff commitments. The KCG manager uses the off-season to plan for the next year, perform outreach, and expand the pool of visitors for the coming year. The manager also expends much effort training student interns and part-time staff each year prior to opening for the season. The establishment of other children’s gardens in Winchester and Louisville are potential competitors in the market.

3. H. Expand existing foot race policy to become event policy, make recommendations for fees to be charged for renting space, incorporate UK event policies.

FY2020 progress on 3.H.

Assessment method. How we will measure progress on this item:

Results: Prior to the current pandemic, a foot race policy was developed in conjunction with two 5K’s held here with the support of John’s Run/Walk Shop. The events were well-executed and funds raised were used for the Kentucky Children’s Garden operations and for plant collecting trips for the Walk Across Kentucky Native Plant Collection staff.

Analysis of results and reflection: Having more than one foot race here per year is not feasible without more staff to participate in managing the event.

We have a Visitor Center rental policy which will need to be updated and revised once there is space to rent for programs and events with the Visitor Center expansion and renovation. UK’s Event Management Team (Meet at Big Blue) requires all who want to have an event on campus to use their online system, as it is linked to all possible entities affected by and important to coordinate with on an event.

Ongoing improvement actions: TBD

3. I. Create an Education Funding Plan that is part of business plan, but robust enough to stand alone and work with the college business center to assess cost of staffing and programs

FY2020 progress on 3.I.

Results: During the current pandemic we have successfully transitioned to delivering programming online and via taped video. We are far more focused on delivering education focused on the plant collections and the natural world than we have ever been in my tenure here. This is thanks to the collaborative efforts of staff members Dawn Bailey, Emily Ellingson and Jesse Dahl.

Analysis of results and reflection: We concur that creating a plan for how we fund educational programs for the KCG and beyond, is vitally needed. Education is one of three cornerstones in our mission statement and thus deserving of thought and action.

3. J. Investigate existing 501(c)(3) option within Bluegrass Community Foundation and as a stand-alone entity that would be acceptable within UK policy

3. J. 1. Review structure of Markey, UK Women's Club, UK Alumni Association, CAFE Alumni Association and 4-H Foundations to determine best practices.

3. J. 2. Review and recommend how the 501(c)(3) would work without Friends Board/Committee Structure.

3. J. 3. Consult with legal counsel within the college to determine advantages and challenges of establishing 501(c)(3)

FY2020 progress on 3.J.

Assessment method. How we will measure progress on this item:

Results: This recommendation has not been addressed yet.

Analysis of results and reflection: This recommendation is certainly worthy of consideration and we look forward to working toward this going forward.

3. K. Develop cost benefit analysis of fencing entire Arboretum or fencing portion of Arboretum and make recommendation on which would have higher return on investment

3. K. 1. Review swipe card systems to allow members/neighbors to access through fence in neighborhoods surrounding Arboretum

3. K. 2. Review how Flight 5191 Memorial access would be impacted with fencing and make recommendations regarding family visitations

3. K. 3. Review budgetary requirements for changing exhibits within a fenced area to draw return visits

FY2020 progress on 3.K.

Results: No progress has been made on this recommendation.

Analysis of results and reflection: This is certainly worthy of consideration; some context may be helpful. The Arboretum's most recent Master Plan (c. 2015) calls for fencing the center of the property (understood to be the gardens immediately beyond the Visitor Center and including the Home Demonstration Garden, Fragrance Garden, Teaching Perennial Garden, etc.) and using the Visitor Center as the portal through which one pays admission and enters the paid admission area. The Flight 5191 Memorial was excluded from the fenced area. While admirable in its goal to generate earned income, it does not address the concern that the land outside this core area is left open to theft, vandalism and destruction. Many adjoining property owners have created their own private entry to the grounds which would require a great deal of tact and diplomacy to address if the entire property were fenced.

3. L. Develop a long-term business plan (10 years minimum) and a short-term business plan (5 years) that ties to strategic and master plans for The Arboretum and includes a site assessment of grounds areas and functions.

3. L. 1. Utilize CEDIK, SBDC and college resources to assist with plan

3. L. 2. Consider using MBA students to assist with plan

FY2020 progress on 3. L.

Results: This item has not been addressed yet as of this 2020 report.

Analysis of results and reflection: This recommendation is certainly worthy of consideration. Some information about earlier efforts may be helpful. We sought the assistance of the SBDC (under the direction of Becky Naugle, c. 2015-2016) but were not successful in developing a complete plan. Internal members Susan Campbell, Beth Vaughn, Stacy Borden and Molly Davis of Subcommittee Three of the Arboretum Action Planning Committee (Business Plan and Fundraising Strategy) will be called upon to assess next steps in developing a plan.

3. M. Develop a more robust gift shop in new visitors center building

FY2020 progress on 3. M.

Results: The plans for the expanded/renovated Visitor Center include space dedicated to gift sales.

Analysis of results and reflection: This sub-recommendation is complete with respect to planning. We look forward to setting up the gift area and welcoming guests when the building is completed.

3. N. Investigate viability and strategies for implementing a parking fee

FY2020 progress on 3. N.

Results: Discussions with two vendors specializing in paid parking strategies occurred in 2016-2017. At that time, a rough cost estimate to implement the parking measures were approximately \$50,000.

Analysis of results and reflection: No action was taken to implement paid parking due to the cost, questions about enforcement, and whether UK Parking and Transportation Services would take ownership of the lot and subsequent revenue.

3. O. Investigate feasibility of UK and/or LexTran putting The Arboretum on the bus route so that more area residents have a means to visit The Arboretum. Investigate feasibility of the Medical Center and/or the Ronald McDonald House providing a shuttle to and from The Arboretum so patients and families of patients have a means to visit The Arboretum.

FY2020 progress on 3. O.

Results: No progress has been made on this recommendation

Analysis of results and reflection: N/A

Recommendation 4: Prioritize renovation and expansion of existing visitor's center at The Arboretum. Continue to update facilities and develop assessment tools for equipment and space quality and utilization (gift shop, meeting space, classroom space).

4. A. Collect data on utilization of space to identify bottlenecks and opportunities for expansion with a goal to establish a world class Arboretum.

FY2020 progress on 4. A.

Assessment method. How we will measure progress on this item: We will assess our log of visitor numbers, purposes, and institutions annually and identify any needs for adjustment to the way space is utilized accordingly.

Results: Efforts to prioritize renovation and expansion of the existing visitor center have focused on the development of Schematic Design (SD) documents with the firm Lord Aeck Sargent (LAS). LAS made delivery of the final SD plans in September 2020. These documents are being used to talk to potential donors of major gifts (\$25,000 or greater).

We ask for visiting groups and classes to complete a form prior to their visit to us. We use this data to calculate the number of visitors, purpose of visit and institution making the visit. We do not seek demographic or other restricted data.

Analysis of results and reflection: With our current space limitations, we are continuing to track visitors but have limited ability to make space use adjustments.

Ongoing improvement actions: We look forward to the ability to make space use adjustments as needed when the new facility is completed.

4. B. Visit peer institutions to gauge current Arboretum resources and to help identify future needs.

FY2020 progress on 4.B.

Assessment method. How we will measure progress on this item: We will report peer institution visits annually in the Implementation Plan Report.

Results: Visits to peer institutions have occurred in the following ways: Arboretum director attended APGA National Conferences in 2014 (Denver Botanic Gardens) and 2015 (Minnesota Landscape Arboretum); and visited JC Raulston Arboretum, Duke Gardens and North Carolina Botanical Garden (all in 2016). The Native Plants and Horticultural teams make an annual visit to a regional public garden. Public gardens visited include Boone County Arboretum, Yew Dell Gardens, Bernheim Forest and Research Center, Cave Hill Cemetery, and Lexington Cemetery.

Analysis of results and reflection: Peer visits are occurring and are very beneficial to ensure broad perspective of possibilities for the Arboretum and provide benchmarks for comparison.

Ongoing improvement actions: We will continue visits annually and seek other opportunities to further broaden this perspective.

4. C. Inventory Arboretum plant collections, equipment, and space.

FY2020 progress on 4.C.

Assessment method. How we will measure progress on this item: The updated inventory itself serves as our assessment method for this recommendation.

Results: Arboretum plant collection records are maintained using the IrisBG (Botanical Garden) collection management system. The initial cost to purchase software was approximately \$7,000 and was purchased in 2014. An annual fee of approximately \$2,000 is a recurring expense.

The Arboretum has existing inventories of the native plant collection and worked with the Urban Forest Initiative on a Sustainability Challenge Grant in 2020 to measure the DBH and condition of all trees and shrubs in the Arboretum.

The Administrative Assistant annually completes a space inventory for the Visitor Center.

In the fall of 2019, both grounds teams (Natives and Horticultural Teams) worked with Taylor Renfro in PPD to inventory all hand tools, and motorized equipment in our sheds. This covered everything from mowers to watering cans.

Our one CAFE truck is inventoried annually by the director.

The 200 new perennials in the Perennial Teaching Garden were mapped and labeled at time of planting. Plantings in the renovated Memorial Rose garden were labeled and mapped upon completion. Over 400 new labels were added.

Analysis of results and reflection: IrisBG provides “back of house” accessibility to plant records for our staff, as well as a public-facing and publicly available database of information for prospective visitors. It is also available when on-site at a kiosk in our Visitor Center and through personal devices such as a cellphone.

Ongoing improvement actions: Inventories of Horticulture collections to follow.

4. D. Develop and implement a new design for The Arboretum Visitors Center. This process should be inclusive and transparent, and involve a thorough assessment of current and future space needs, including increased utilization as an event space.

FY2020 progress on 4.D.

Assessment method. How we will measure progress on this item: See above response to item **4.A.**

Results: The new design for the visitor center included the involvement of UK Capital Project Management (CPMD), CAFE leadership, Horticulture and Landscape Departments leadership, and Arboretum leadership. The Advisory Board and Arboretum staff were informed and regularly updated on progress. Increased space (indoor and outdoor) devoted to programming and potential events is included.

Analysis of results and reflection: See 4.A.

Ongoing improvement actions: See 4.A.

4. E. Develop and implement a design for a Ground Crew facility that facilitates increased management capacity of the plant collections.

FY2020 progress on 4.E.

Assessment method. How we will measure progress on this item: We will report on updates to the design and implementation when available in each annual Implementation Plan Report. This item is dependent upon completion of the new building.

Results: The Schematic Design plans for the Visitor Center expansion and renovation include the relocation of grounds staff and director to an off-site/on-campus location as there is not adequate budget to include these staff in the expansion plans. Arboretum staff worked with 3rd year studio Landscape Architecture students in fall 2019 to develop conceptual designs for a new grounds maintenance facility.

Analysis of results and reflection: The schematic design plans have generated concerns from staff about how they will be able to perform their work tasks in an efficient and expedient manner, maintain communications with fellow staff, and serve visitors.

Ongoing improvement actions: The development of a facility for staff devoted to plant care and those who administer the operations of The Arboretum will be a high priority for the department in future years.

Recommendation 5: Continue existing and create additional professional development opportunities for staff and director.

5. A. Report on continuing education in which Arboretum staff have participated (2014 to 2019).
FY2020 progress on 5.A.

Assessment method. How we will measure progress on this item: The list of professional development activities will be updated annually and report on in the annual Implementation Plan Report.

Results: A list of professional development opportunities in which Arboretum staff participated from 2014 to 2019 was shared during the review process and is attached to this document as Appendix A:
Recommendation 5 – Arboretum Staff Professional Development Activities.

Analysis of results and reflection: The list of professional activities in which staff have participated is extensive, and at times has been paid for personally. Wherever appropriate, Arboretum has sought and received partial funding through the CAFE Dean's Professional Development Fund.

Ongoing improvement actions: We will continue this process indefinitely and seek new opportunities and funding sources. See also recommendation 5.B.

5. B. Identify internal and external professional development (PD) opportunities for all Arboretum staff, including director. Support at least one PD engagement per staff member each year (including college support or grant funding, when applicable).

Examples of some UK and CAFE opportunities are:

- CAFE Business Center professional development resources website:
 - https://cafebusinesscenter.ca.uky.edu/files/staff_professional_development_opportunities.pdf
- UK HR Training and Development programs/courses:
 - <http://www.uky.edu/hr/training>
- UK Employee Education Program:
 - <http://administration.ca.uky.edu/content/employee-education-program-cafe>
- CAFE staff mentoring program:
 - https://cafebusinesscenter.ca.uky.edu/files/mentor_program_-_web_site_wording.pdf
- CAFE staff online orientation course
- CAFE supervision online orientation course (coming soon)
- CAFE Staff Professional Development Fund:

- https://cafebusinesscenter.ca.uky.edu/files/staff_professional_development_fund_-_testimonials.pdf
- UK Environmental Health and Safety classes:
 - <http://ehs.uky.edu/classes/>
- College Business Management Institute (CBMI):
 - <https://www.sacubo.org/Professional%20Development/CBMI>

FY2020 progress on 5.B.

Assessment method. How we will measure progress on this item:

Results: Dawn Bailey (as of August/September 2019 Education and Kentucky Children’s Garden Coordinator) participated in the CAFE staff mentoring program and reported having an excellent experience.

In 2020, at least one staff member received CAFE Staff Professional Development funds to attend a conference in March.

Staff members have also had fees paid for the International Society of Arboriculture certified arborist status.

Several staff have participated in free zoom webinars through the American Public Garden Association.

Analysis of results and reflection: For this reporting period (fiscal year 2020 [July 1, 2019 to June 30, 2020]) opportunities for PD in calendar year 2020 have been greatly reduced, canceled or postponed.

Ongoing improvement actions: We will continue this process indefinitely and seek new opportunities and funding sources. See also recommendation 5.A.

5. C. Collaborate with Physical Plant Division (PPD) supervisor Stacy Borden to identify PD opportunities for PPD staff assigned to The Arboretum and provide these opportunities.

FY2020 progress on 5.C.

Assessment method. How we will measure progress on this item: PPD professional development engagements will be included in our annual listing of PD completed by Arboretum staff. (See recommendation 5.A.)

Results: One of the two full-time PPD staff assigned to Arboretum sought and found different employment in February 2020. As of October 2020, a replacement for this position has been hired.

Analysis of results and reflection: One of the two full-time PPD staff assigned to Arboretum sought and found different employment in February 2020. As of October 2020, a replacement for this position has been hired.

Ongoing improvement actions: We look forward to investigating professional development opportunities for PPD staff in collaboration with Stacy Borden going forward.

5. D. In collaboration with PPD, determine a way for Arboretum staff to learn how to apply for admission to UK and register and take courses aligned with The Arboretum's mission under the UK Employee Education Program (EEP) at appropriate times of day. IF EEP opportunities are not available to all Arboretum staff, provide a rationale.

FY2020 progress on 5.D.

Assessment method. How we will measure progress on this item: Evidence of employee engagement in continuing education through EEP when desired will indicate success regarding this recommendation.

Results: Former PPD employee and Walk Across Kentucky groundsworker, Robert Castlen, took classes aligned with natural resources and The Arboretum's mission in 2019.

Analysis of results and reflection: EEP opportunities are available to all Arboretum staff, but must be scheduled in keeping with the requirements of operating a public facility and with other team members' schedules of work in mind.

Ongoing improvement actions: We will continue seeking opportunities to support EEP engagement for Arboretum and PPD employees who wish to participate, keeping the Arboretum's mission and scheduling need in mind.

5. E. Determine the feasibility of fundraising for a PD fund for Arboretum staff.

FY2020 progress on 5.E.

Assessment method. How we will measure progress on this item: We will measure success on this recommendation by increased funds available for PD each year.

Results: The Annual Giving Campaign underway as of this writing (November 2020) benefits The Arboretum's Development Fund.

Analysis of results and reflection: This fund has the flexibility to be used to support staff as well as operational needs. We prefer this as a way to raise funds for Professional Development and staff support rather than initiating a new fundraising campaign.

Ongoing improvement actions: After completion of the Annual Giving Campaign, we will assess the funding availability for PD in 2021.

5. F. Seek someone from UK HR or a local trainer who can provide guest services training and team building activities to Arboretum personnel in order that they have the ability to provide outstanding guest services fitting for a public garden.

FY2020 progress on 5.F.

Assessment method. How we will measure progress on this item: Training activities will be reported annually in the Implementation Plan Report.

Results: While no training has yet taken place as of this writing (November 2020) this recommendation is certainly worthy of further exploration.

Analysis of results and reflection: Guest services is a specialized topic and an outside trainer may need to be hired; additional financial resources would be needed to pay for these services.

Ongoing improvement actions: TBD

5. G. Seek advice from UK HR on ongoing mentoring and performance feedback on a more regular basis than an annual performance review.

FY2020 progress on 5.G.

Assessment method. How we will measure progress on this item: We will report on efforts to address this recommendation in each annual Implementation Plan Report.

Results: While formal guidance from UK HR has not yet been sought, the director has made greater effort to provide more regular feedback and ongoing mentoring to staff who are receptive to it. The current Department Chair has worked with the three professional staff members at The Arboretum to better learn about their responsibilities and this has been well-received and appreciated.

Analysis of results and reflection: Staff largely appreciate this effort for more regular feedback.

Ongoing improvement actions: TBD

Recommendation 6: Develop a process to work with faculty and students to enhance utilization of The Arboretum, and to be more fully aligned with the university's land-grant mission of teaching, research, and extension.

6. A. Action Plan Recommendation Connected to All Three Mission Areas: Develop and publish a publicity brochure highlighting faculty, student, and extension opportunities for use of The Arboretum. Provide the brochure through New Faculty Orientation, Faculty Council, Student Tours, New Extension Agent Orientation, and County Extension Offices.

FY2020 progress on 6.A.

Assessment method. How we will measure progress on this item: Completion of the recommended brochure will be evidence of success regarding this recommendation.

Results: No results to report at this time.

Analysis of results and reflection: This is a great idea and definitely worth further exploration. Resources to fund such an effort would include research, writing, design and printing costs.

Ongoing improvement actions: TBD

6. B. Teaching and Learning: Take actions to increase educational use of The Arboretum in intensive ways and in a broad spectrum of more occasional interactions.

6. B. 1. Explore opportunities within the CAFE Horticulture program curriculum to create a public gardens certificate or emphasis area using The Arboretum as a host for high impact practices in education. Consider collaboration with the CAFE Department of Community and Leadership Development for non-profit management, the CAFE Department of Landscape Architecture for design, and Public Health or Behavioral Medicine units for the health benefits of contact with nature.

6. B. 2. Communicate with faculty members in specific departments to encourage greater use of The Arboretum by courses in plant identification, planting design, soil science, ecology and evolutionary biology or others that could benefit from The Arboretum as a learning venue.

6. B. 3 Publicize the opportunity for faculty members university-wide to use The Arboretum as a venue for experiential learning on The Arboretum website, through contact with the Center for Enhancement of Learning and Teaching and other institutional education coordinators, and in venues such as UKnow.

6. B. 4. Develop plans for sharing information about The Arboretum with incoming UK undergraduate students, possibly involving K-week, UK 101, See Blue orientation days, and others.

FY2020 progress on 6.B.

Assessment method. How we will measure progress on this item: We will report annually on initiatives/collaborations in support of this recommendation in each Implementation Plan Report. We anticipate an increase in reported items each year, and an increase in collaborating faculty.

Results: The notion of creating a public garden-specific program/internship/certificate is very appropriate and in keeping with our mission. Molly Davis and Emily Ellingson attended a UK student recruitment fair in January 2020 to seek a student intern for this purpose. While we interviewed several students, we did not hire anyone. However, this does not mean that it is not worth further pursuing. Long-established and well-funded programs at Cornell University and Longwood Gardens (among others) provide multiple ways for students and post-grads to further their public garden-specific skills. Dr. Mark Williams (Horticulture Department Chair) and Molly Davis have discussed this notion as a way to attract more students to study Horticulture and incorporate The Arboretum.

6.B.1. Early in 2020, leaders of the UK Horticulture Club (Dr. Geneve), Office of Kentucky Nature Preserves (Tara Littlefield), and The Arboretum (Emily Ellingson) met to discuss the potential for partnerships to collect and grow uncommon and endangered Kentucky native plants. This is in the initial stages and has not been discussed since COVID-19, but is a possibility.

6. B. 2. We formed a Collections Technical Advisory Group (CTAG) in 2017 to serve as an advisory group to Arboretum staff with plant collections responsibilities. The group includes faculty and staff from CAFE and Arts and Sciences Departments of Biology, Biosystems and Agricultural Engineering, Entomology, Forestry and Natural Resources, Horticulture, Landscape Architecture, Plant Pathology, and Soil Science, as well as staff from Fayette County Extension Horticulture. We have longstanding relationships with faculty

and staff in most of these departments and we frequently coordinate with them and/or provide information about The Arboretum to their classes. We collaborate and assist with their Arboretum-specific research projects, classes and labs.

6.B.2. Usage of The Arboretum by UK classes is being tracked. Images of native trees taken by a volunteer are being uploaded into the Arboretum Explorer database and used by dendrology classes, due to direct communication between Arboretum and UK staff.

We worked with the Departments of Horticulture and Landscape Architecture on two UK President's Sustainability Challenge Grant projects installed at The Arboretum that address stormwater issues.

6. B. 3. Our recently established Perennial Teaching Garden has been used by Fayette County Extension Horticulture multiple times this year to film Master Gardener Conference pieces, instructional videos for their Toolbox series of classes, and other topics.

6. B. 4. We have been a site for K-Week student volunteers since at least as early as 2014. Our staff take care and make effort to find suitable volunteer tasks for what is usually a 2-hour period of 12-30 student volunteers.

We would be very interested in being shown to prospective students and their families by CAFE Student Ambassadors.

Analysis of results and reflection: See our reflections above in each sub-recommendation results statement.

Ongoing improvement actions: Arboretum staff is very keen on this initiative to increase student engagement and is in communication with faculty partners and outside organizations to do so.

6. C. Extension Education: Develop the capacity for The Arboretum to serve as a venue for Extension programming related to environment and sustainability, horticulture, landscape architecture, nutrition connected to gardening, horticultural therapy/stress reduction, and other interest areas.

6. C. 1. Ensure that design and construction of the Visitor Center addition results in indoor and outdoor space that facilitates extension education programming. When facilities are in place, communicate with Extension faculty and specialists in CAFE to encourage use of The Arboretum as a venue for programming.

6. C. 2. Continue developing interpretation at The Arboretum to convey knowledge about environmental benefits of native plants, horticultural practices, environmental sustainability, and landscape design to a general audience.

FY2020 progress on 6.C.

Assessment method. How we will measure progress on this item: Completion of the building with space for Extension programming and completion of the Interpretive Master Plan initiatives will signal success regarding this recommendation.

Results:

(6. C. 1.) As of September 2020, we received Schematic Design drawings of the planned Visitor Center renovation and expansion. There are multiple indoor and outdoor spaces which can be used for programming.

(6. C. 2.) Our internally developed interpretive master plan has reached a point where financial resources are needed to continue. Dr. Lauren Cagle has provided extensive expertise with the research component. Funding is needed to enlist the professional services of an interpretive planner, not only to evaluate and synthesize our research, but to develop a cohesive plan.

Analysis of results and reflection: Internally, we are as complete as possible on this recommendation at this time.

Ongoing improvement actions: When the new building is completed and when we identify funding for a professional interpretive planner, we will continue progress on these initiatives.

6. D. Research: Communicate with faculty and staff at UK and other institutions/organizations about the availability of The Arboretum as a venue for research and demonstration projects.

6. D. 1. Create concise synopses of research projects conducted at The Arboretum over a multi-year period and highlight the description on The Arboretum website.

6. D. 2. Work with CAFE Research Office to track annual totals for grants and publications supported by The Arboretum facilities.

6. D. 3. Working with UK Foundations Philanthropy, identify potential faculty collaborations to seek research funding specific to public gardens projects.

6. D. 4. Develop a seminar presentation highlighting the historical importance of Botanical Gardens and a spotlight on the potential of our own Arboretum to increase awareness in UK units of potential interest.

6. D. 5. Investigate grant opportunities for joint application with LFUCG.

6. D. 6. Investigate feasibility of UK and/or LexTran putting the Arboretum on the bus route so that more area residents have a means to visit the Arboretum. Investigate feasibility of the Medical Center and/or the Ronald McDonald House providing a shuttle to and from the Arboretum so patients and families of patients have a means to visit the Arboretum.

6. D. 7. Determine with the chair of the Department of Horticulture and the Dean of CAFE the feasibility of adding a new faculty or staff line that focuses on research and education at The Arboretum.

FY2020 progress on 6.D.

Assessment method. How we will measure progress on this item: As with 6.B., we will list all research engagements annually in the Implementation Plan Report, with an expectation to see increases in number of engagements and participants each year.

(6. D. 1.) No progress made on this item.

(6. D. 2.) No progress made on this item.

(6. D. 3.) Beth Vaughn and Molly Davis in 2019 met with Sarah Mardon about opportunities for corporate grants for STEM-related projects. Further conversations about public garden-specific grants have not yet occurred.

(6. D. 4.) Emily Ellingson and Molly Davis presented about the resources of The Arboretum to CAFE at a “Lunch and Learn” event in February 2020. Molly and Emily have (separately) presented about The Arboretum to a variety of audiences—garden clubs, interested groups, through OLLI, etc.

(6. D. 5.) (see 2. B.) We have not actively pursued grants or during the ongoing pandemic. We believe we should follow the recommendation of 2.C. and develop a needs list before pursuing any grants.

(6. D. 6.) (see 3. O.) No progress has been made on this recommendation.

(6. D. 7.) In the current pandemic situation, and with budget cuts and limited funds, no progress has been made on this item.

Analysis of results and reflection: N/A

Ongoing improvement actions: TBD

Recommendation 7 (added by Arboretum staff following completion of review committee reporting): Care, maintenance and development of plant collections.

Feedback from staff indicates the programmatic review missed a key piece when reviewing The Arboretum --the plant collections. The Arboretum is more a *museum* than a *department* and reviewing it based partly on the American Alliance of Museum's Core Standards for museums may be beneficial. These core standards address the following areas: Public Trust and Accountability, Mission and Planning, Leadership and Organizational Structure, Collections Stewardship, Education and Interpretation, Financial Stability, and Facilities and Risk Management.

Specifically, Arboretum Staff recommend that the following key areas are addressed in the cycle of this Implementation Plan through development of core documents:

- Disaster planning (collections and general)
- Collections development
- Collections care and maintenance (increasing staff, developing standards, equipment needs)
- Climate Change Adaptation planning
- Temporary plant nursery operations

FY2020 progress on 7.

Assessment method. How we will measure progress on this item: The creation of core documents (disaster policy, development plan); the inclusion of people of color in Arboretum leadership, visitorship, outreach, etc.; the creation and implementation of interpretive signage

Results: Emily Ellingson attended a Climate Adaptation Planning course in the spring, in conjunction with the Urban Forest Initiative's funded President's Sustainability Challenge Grant and UK Faculty Mary Arthur, Rob Paratley and Ned Crankshaw, and started the process of thinking about climate change and our plant collections.

Analysis of results and reflection: Staff regularly plan development of the different plant collections, although there is not a collections development plan.

Ongoing improvement actions: We will continue developing the recommended core documents and include them in materials provided to future review committees.

Appendix A: Recommendation 5 – Arboretum Staff Professional Development Activities

Dayna Baston (Administrative Assistant)

- UK and CAFE training related to financial management, employment (IES) system, fiscal year close out, credit card safety, cash handling, etc.
- Initial and ongoing training on TAM (The Assistant Manager) system purchased for Kentucky Children’s Garden admission and other earned income

Dawn Bailey (Education Coordinator and Kentucky Children’s Garden Manager)

- 2019, Nov. 18-19 - Project Learning Tree Workshop at The Louisville Nature Center
- 2019, Dec. 4 - Project Wet and Getting Little Feet Wet Educator Training at Redwood Cooperative School
- 2020, June 30 - Butterflies of Kentucky of Central Kentucky: Identification, Diversity, and Ecology at Floracliff Nature Sanctuary

Jesse Dahl (Horticulturist)

- 2014, January - Kentucky Fruit and Vegetable Conference, Lexington, KY
- 2014, February - CKOTA (Central Kentucky Ornamental Turf Association), Horticulture Conference, Lexington, KY
- 2015, Jan. 5-6 - Kentucky Fruit and Vegetable Conference, Lexington, KY
- 2015, Jan. 21-22 - KNLA Kentucky Nursery and Landscape Association, Kentucky Landscapes Industries Expo, Louisville, KY
- 2015, February 13 - CKOTA (Central Kentucky Ornamental Turf Association), Horticulture Conference, Lexington, KY
- 2015, October 5-7 - APGA, American Public Garden Association, 2015 Symposium Operational Excellence, Smart Practices for Today’s Public Gardens, Madison, WI
- 2016 - University of Kentucky Landscape Architecture, 3D Graphics Lecture, Lexington, KY
- 2016, January - Kentucky Fruit and Vegetable Conference, Lexington, KY
- 2017, February - CKOTA (Central Kentucky Ornamental Turf Association), Horticulture Conference, Lexington, KY
- 2017, January 8-9 - Kentucky Fruit and Vegetable Conference, Lexington, KY
- 2017, February - CKOTA (Central Kentucky Ornamental Turf Association), Horticulture Conference, Lexington, KY
- 2017, July 26 - APGA (American Public Garden Association) National Plant Diagnostic Network (, NPDN), Plant Sentinel Network Workshop, Clermont, KY
- 2018, January 8-9 - Kentucky Fruit and Vegetable Conference, Lexington, KY
- 2018, February - CKOTA Central Kentucky Ornamental Turf Association, Horticulture Conference, Lexington, KY
- 2018, July 30- August 3 - Perennial Plant Association, Perennial Plant Symposium, Raleigh, NC
- 2019, September 19 - Kentucky Chapter of The Wildlife Society, Invasive Species Workshop, Richmond, KY
- 2019, January 23-24 - KNLA Kentucky Nursery and Landscape Organization, Winter Educational Outing and Expo, Louisville, KY
- 2019, February 14 - CKOTA (Central Kentucky Ornamental Turf Association), Horticulture Conference, Lexington, KY

Appendix A: Recommendation 5 – Arboretum Staff Professional Development Activities
(continued)

- 2019, April 14 - TCIA Tree Care Industry Association, Tree Care Academy, Chipper Operator Specialist, Chainsaw Specialist, Lexington, KY

Molly Davis (director)

- American Public Gardens Association (APGA) annual conference, 2014, Denver, Colorado (CAFE and self-funded)
- American Public Gardens Association (APGA) annual conference, 2015, Minneapolis, MN (CAFE and self-funded)
- American Society of Landscape Architects (ASLA) Kentucky chapter annual conference 2014, 2015, 2016, 2017, 2018, 2019 (various locations, self-funded)
- Central Kentucky Ornamental and Turf Association (CKOTA) annual conference, 2014, 2015, 2016, 2017, 2018, 2019 (Lexington, self-funded)
- UK Supervision training

Emily Ellingson (Curator and Native Plants Collection Manager)

- APGA Education Symposium, 2017, Norfolk, Virginia (CAFE funded)
- APGA annual conference, June 2019, Washington DC
- Central Kentucky Ornamental and Turf Association (CKOTA) annual conference, 2018, 2019 (CAFE-funded)
- Various workshops in Kentucky (Pine Mountain, Mammoth Cave National Park) about plants
- UK Supervision training

Jackie Gallimore (former Kentucky Children’s Garden and Education Manager)

2016

- November - Professional Environmental Educator Certification, Workshop 1
 - Location: Buckhorn State Park Resort, KY
 - Time: 3 days
 - Cost: \$149.40 for hotel and per diem; registration fee for all 4 PEEC Workshops \$450 (?)
 - Paid for by: mostly Arboretum, travel paid personally (not included in total)
- December - Professional Environmental Educator Certification, Workshop 2
 - Location: Cumberland Falls State Park Resort, KY
 - Time: 3 days
 - Cost: \$173.55
 - Paid for by: mostly Arboretum, travel paid personally (not included in total)

2017

- February - Grant Writing Workshop
 - Location: Downtown Lexington
 - Time: 5 hours
 - Cost: \$25 (?)
 - Paid for by: Arboretum

Appendix A: Recommendation 5 – Arboretum Staff Professional Development Activities
(continued)

- February - Professional Environmental Educator Certification, Workshop 3
 - Location: Louisville Zoo, KY
 - Time: 3 days
 - Cost: \$240.50
 - Paid for by: mostly Arboretum, travel paid personally (not included in total)
- March - Professional Environmental Educator Certification, Workshop 4
 - Location: Barren River State Park Resort, KY
 - Time: 3 days
 - Cost: \$243.10
 - Paid for by: mostly Arboretum, travel paid personally (not included in total)
- April – Urban EE Course from Cornell University
 - Location: Online
 - Time: Approximately 10 hours
 - Cost: \$50
 - Paid for by: Personal
- June – Introduction to EE Course from Cornell University
 - Location: Online
 - Time: Approximately 10 hours
 - Cost: \$50
 - Paid for by: personal
- July - Environmental Education Curriculum Facilitator Training
 - Location: KSU Research Farm
 - Time: 8 hours
 - Cost: free
 - Paid for by: time paid for by Arboretum, lunch and travel paid personally
- August - Kentucky Science Teacher Association Conference
 - Location: Lexington, KY
 - Time: 2 days
 - Cost: registration fee \$150 (?)
 - Paid for by: Arboretum, travel personal
 - Note: presented with Meg Gravil about KCG field trips and research
- September - 2017 KAEE Conference
 - Location: Gilbertsville, KY
 - Time: 3 days
 - Cost: registration \$150 (?), lodging \$200 (?), travel
 - Paid for by: Registration and lodging (?) paid by arboretum, travel paid by personal
- November - APGA Education Symposium
 - Location: Richmond, VA
 - Time: 5 days
 - Cost: \$158 Meals, \$675.28 lodging (shared with Emily), Motor pool vehicle, \$350 registration (?)
 - Paid for by: Arboretum

Appendix A: Recommendation 5 – Arboretum Staff Professional Development Activities
(continued)

- October - Southeastern Forest and Climate Change Training
 - Location: KSU Environmental Education Research Center
 - Time: 1 day
 - Cost: Free
 - Paid for by: time paid by Arboretum, travel and lunch paid by personal
 - Note: resulted in a mini-grant

2018

- May - Project Underground Training
 - Location: KSU Environmental Education Research Center
 - Time: 1 day
 - Cost: Free
 - Paid for by: time paid by Arboretum, travel and lunch paid by personal
- July - National Children and Youth Gardening Symposium
 - Location: Ithaca, NY
 - Time: 5 days
 - Cost: \$156 meals, \$25 baggage, \$337.26 airfare, \$531.36 lodging, \$350 (?) registration fee
 - Paid for by: Horticulture Department
 - Note: presented with Meg Gravil about KCG field trips and research
- August Certified Interpretive Guide Training
 - Location: Chicago, IL
 - Time: 5 days
 - Cost: \$ 500 registration (?), \$850 (?) hotel, 300 (?) travel, 150 (?) meals
 - Paid for by: all personal except paid for time
- Summer Semester – Museum Origins from Northwestern University
 - Location: Online
 - Time: Approximately 80 hours
 - Cost: \$1,200
 - Paid for by: all personal
- September - KAEE Conference
 - Location: Berea, KY
 - Time: 3 days
 - Cost: \$180 registration
 - Paid for by: Arboretum, travel paid by personal
 - Note: presented with Meg Gravil about KCG field trips and research
- October - Project Leopold Training
 - Location: KSU Environmental Education Research Center
 - Time: 1 day
 - Cost: Free
 - Paid for by: time paid by Arboretum, travel and lunch paid by personal

**Appendix A: Recommendation 5 – Arboretum Staff Professional Development Activities
(continued)**

- Fall Semester – Museum Management from Northwestern University
 - Location: Online
 - Time: Approximately 80 hours
 - Cost: \$1,200
 - Paid for by: all personal

2019

- Winter Semester - Interpretive Master Planning online class with Dr. John Veverka
 - Location: Online
 - Time: Approximately 80 hours
 - Cost: \$275
 - Paid for by: Arboretum
 - Note: in progress
- Winter Semester – Learning and Museums from Northwestern University
 - Location: Online
 - Time: Approximately 80 hours
 - Cost: \$1,200
 - Paid for by: all personal
 - Note: in progress
- Summer Semester - Exhibit Design from Northwestern University
 - Location: Chicago, IL
 - Time: 3 days
 - Cost: \$800
 - Paid for by: all personal
 - Note: Will receive a Museum Studies Certificate upon completion of this semester

Professional Development Activities involving all staff:

- Arboretum staff have, from time to time, participated as a group in trainings offered by UK HR.
- Arboretum staff had a retreat with CAFÉ faculty Dr. Lori Garkovich in December 2016.
- Arboretum staff and volunteers participated in Active Shooter training
- Arboretum staff annually participate in all-staff orientation and refresher (May or June each year)