The Morris Arboretum is proud to print this Annual Report on FSC® (Forest Stewardship Council) certified paper, which supports the growth of responsible forest management worldwide through its international standards.
Mission Statement

The Morris Arboretum of the University of Pennsylvania is a historic public garden and educational institution. It promotes an understanding of the relationship between plants, people, and place through programs that integrate science, art, and the humanities.

The Arboretum conducts four major activities: education, research, outreach, and horticultural display. As the official Arboretum of the Commonwealth of Pennsylvania, the Morris Arboretum of the University of Pennsylvania provides research and outreach services to state agencies, community institutions, and to citizens of Pennsylvania and beyond.

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Moses Feldman,
Jane Bradley Alavi

WARREN R. CONNELL
F. Otto Haas Executive Director

As an environmental institution, we are committed to reducing energy consumption and carbon dioxide emissions as much as possible. Through this study, the energy usage in our 15 buildings was analyzed. The Arboretum’s total carbon dioxide output for FY 2015 was calculated as 700 Metric Tons of Carbon Dioxide Equivalent (MTCDE). This was offset by 293 MTCDE credits for the carbon captured by the Arboretum’s trees, for a net total of 407 MTCDE released. In part, because of the effort from its trees, the Arboretum has a relatively small carbon footprint for an institution of its size, but nonetheless, we want to do better.

As part of the TC Chan study, priorities for energy saving investments were identified, especially those where we could get the most savings for each dollar invested. Highest among these priorities is the replacement of aging and inefficient heating and cooling systems (HVAC), and upgrading the incandescent and fluorescent lighting throughout the Arboretum to LED lighting systems.

Planning and financing the HVAC and lighting projects was completed, and through a low-interest loan from the University, those projects will be implemented in fiscal year 2017, which began July 1st. It is anticipated that savings from utility costs will cover the loan payments. In addition to the energy savings, the program also represents a big step forward in renewing the Arboretum’s infrastructure.

Given the size of our gardens, facilities, and programs, the Arboretum operates on a lean budget—but it is important to note—a balanced one. Many needs remain unfunded, but through planning exercises such as the ones described above, we will continue to move forward and address our highest priorities, one by one.

This annual report, you will read about these and many more initiatives. Each year, with your help at members, we are able to advance the Arboretum one step at a time. We simply could not do what we do without your generous support.

Please visit often and observe the progress that you, through your membership and support, help make possible.
In 2016, philanthropy was in full bloom at the Morris Arboretum. Gifts and grants for general operations, special projects, and endowments totaled more than $3 million. In this report, we are honored to pay tribute to the individuals, foundations, corporations, and government agencies who helped us surpass our fundraising goals, further strengthening the Arboretum’s financial position.

Many of these donors have supported the Arboretum through gifts to the Annual Fund and the membership program. Our Collectors Circle donors who make unrestricted annual gifts of $2,500 or more—continue to grow, having doubled in numbers in the past three years alone. Combined, the Annual Fund and the membership program generated nearly $13 million in FY 16, greatly helping to ensure the Arboretum has sufficient financial resources to maintain and enhance its beautiful grounds and offer its programs to an ever-broadening audience.

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In FY 16, after a rigorous review process, the Arboretum received its first-ever operating grant from the Philadelphia Cultural Fund (PCF). This grant is a testament of the Arboretum’s value to the Philadelphia community and recognizes the high quality of our work. The Philadelphia Cultural Fund grant was made possible through an allocation in the city budget that it approved by the Mayor and the City Council.

The next phase, renovating the west wing of the barn, will provide a three-season space for the Arboretum’s growing education programs. The Arboretum was thrilled to receive grants and contributions providing seed funding for Zephrail, a supplementary summer youth education program developed in partnership with ACLAMO (Accion Comunitaria Latinoamericana of Montgomery County) family center in Norristown. The Wells Fargo Community Foundation helped to launch fundraising efforts for this program with a lead gift in May 2016.

Work on climate change conservation status of several species currently listed as “tentatively undetermined” continues with a grant from Western Pennsylvania Conservancy. Contributions of the species we’re looking at this year: viburnum (Virginia creeper’s spin)—what is known to occur naturally in Pennsylvania in only one species currently listed as “tentatively undetermined.”

A major commitment from the Korman Family Foundation in support of the perpetual care of a Tree Adventure exhibit ensures that the Arboretum’s general operations will continue to be enjoyed by future generations of Arboretum visitors.

A great from the Keystone Historical Preservation Program of the Pennsylvania Historical and Museum Commission, along with gifts from several board members, supported the replacement of the roof on Bloomsfield Barn.

We’ve undertaken a botanical inventory project in Chester County with sponsorship from the French Heritage Commission, it’s taking place at and around the historic location of Warner Farm. George Warner would have repaired weapons with his troops after the Continental Army’s defeat at Bredenfleld, prior to the long winter at Valley Forge. Some properties have been purchased by The Trust, while conservation easements have been placed on others for a total of nearly 550 acres in this important conservation effort.

As of this writing, plans are being finalized for the Arboretum’s first-ever dataset made possible by the Walterian Foundation up to University standards for safety and functionality. Once these changes are complete, the 150,000+ historic and contemporary specimens will be used for scientific and educational purposes, and the Arboretum will soon be able to partner with researchers and educators from institutions all across the country.

A great from the Keystone Historical Preservation Program of the Pennsylvania Historical and Museum Commission in support of the annual meeting of amateur and professional botanists is underway as well. Lastly, the Botany Department continues to be a leader in our university teaching of plant courses has taken many paths without much success to date. We will, however, continue to push on this front.

Lastly, the Botany Department continues to be a sponsor of the Pennsylvania Botany Symposium, a major event in the American professional botanical (and, indeed, anyone interested in plant) life of our state and region.

Looking Forward in Botanical Research

This past year in the Botany Department was very busy, as always. On the floristic research front, we saw the wrap-up of a major project, the continuation of another, and the beginning of yet another interesting survey. Our other research efforts continue to grow through improvements to our lab facilities and the expansion of our technological abilities. As expertise in education to subsequent educational loans has led to greater involvement in university teaching and public outreach efforts.

We continue to teach Field Botany (BIOL 400) every fall semester, and interest in the course continues to grow in spite of students’ stated desire for more botanical education, exploration of efforts to expand university teaching of plant courses has taken many paths without much success to date. We will, however, continue to push on this front.

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**Horticulture Highlights: Research, Restoration, and Redesign**

**PLANT EXPLORATION AND RESEARCH: PAPERBARK MAPLE**

Last year, Anthony Aiello, the Gayle E. Maloney Director of Horticulture and Curator, participated in a plant exploration trip to China as part of a conservation project involving paperbark maple (Acer griseum). There, he, along with colleagues Lisa Bartholomew (Morton Arboretum, Lisle, IL), Michael Dowsett (Arnold Arboretum, Jamaica Plain, MA), and Wang Xinying (Botanical Garden), Tony visited with populations of *Acer griseum* across its native range in eastern China.

Despite being well-known, paperbark maple is endangered in its native habitat in central China. There have been a limited number of introductions into Western cultivation, and there is probably little diversity among the plants within the United States or Europe. The aim of this project is to determine whether or not the genetic diversity of cultivated plants accurately reflects that of plants in the wild, or whether further efforts are needed to help conserve this species.

With support received from The Maple Society and The Chanticleer Foundation, Tony and his colleagues traveled within a 500-mile radius in Xi’an, the capital of Shaanxi Province. Their travels took them to paperbark maple populations stretching east to west from Shanxi, Henan, and Shaanxi, to Gansu provinces, and south into Sichuan and Chongqing.

The trip was especially informative because they were exposed to a wide range of conditions and habitats across the range of *Acer griseum*. In total, they came back with 36 samples of paperbark maple from nine locations, in five provinces.

With continued threats to plants around the world, this project has highlighted the importance of well-documented living collections in providing a basis for plant conservation efforts. By providing an understanding of the number of botanic garden collections sufficient to help conserve this species, this project will serve as a model, and benefit anyone interested in maple conservation.

**FLOWERING CHERRY PROJECT**

Beginning in 2009, Tony Aiello and Plant Propagator Shirley Dillard have been involved in a project of verifying, propagating, growing, and distributing Japanese flowering cherries (*Prunus*) from the Arboretum’s collection and those of other gardens throughout the Northeast. This project started with a goal of extending the flowering season of the cherry collection, and evolved into propagating cultivars that were unique to several other botanic gardens. Every April, Tony and Shalaki visit gardens to observe the trees in flower, and return in June to take cuttings which are then rooted in the Arboretum greenhouse. These trees grow quickly, and within one to two years can be distributed to other gardens, ensuring that the rare varieties are duplicated in several locations. Over this time, the Arboretum has expanded the diversity of its holdings by adding 34 new taxa to the collection.

This has also helped verify the collection, ensuring that trees are correctly identified, and that those that were initially labeled were removed. And, in the process, Tony has worked with several other gardens to identify and verify their collections, helping to improve curatorial consistency across several institutions. The growth of this collection coincides with the continued popularity of the annual Cherry Blossom Festival, a perfect fit with the length of flowering time for these high visibility areas, adding seasonal interest over a longer period of the growing season. These include a large bed on the north side of the parking lot, the landing at the terminus of the Wistaria Walk, The Gayle E. Maloney Fountain garden, the He-Ha Wall, and the two large summer beds along the south side of the Azalea Meadow.

**Garden Improvements**

A number of improvements have been made to infrastructure and garden design throughout the Arboretum. At the Garden Railway, along with clearing out some overgrown areas and rejuvenating several plants, the John Morris fountain was restored, and nine buildings were added or refurbished. The restored fountain sits at the lower end of the garden, and was constructed in the early 1900s along with the Hill and Water Garden. The restoration involved repairing the roundabout and installing a new circulation system for the fountain. New and refurbished buildings included The Philadelphia Waterworks, Philadelphia Museum of Art, the Fisher Fine Arts Library at the University of Pennsylvania, the Betsy Ross, Bouvier, Latta, Powell, and Trump Houses, and the First Post Office. The Garden Railway is supported, in part, through the generosity of Gwen and Ed Asplundh, and by gifts given in memory of Joe Shettleworth.

Elsewhere throughout the Arboretum, several perennial beds were redesigned and replanted. All of these enhancements and improvements are intended to increase the length of flowering time for these high visibility areas, adding seasonal interest over a longer period of the growing season. These include a large bed on the north side of the parking lot, the landing at the terminus of the Wistaria Walk, The Gayle E. Maloney Fountain garden, the He-Ha Wall, and the two large summer beds along the south side of the Azalea Meadow.
Last spring, Morris Arboretum worked with talented local fiber artist Melissa Maddoni Haims to create the exhibit *Wrapped Up: Yarnbombing at Morris Arboretum*. The first wrapped feature to capture visitors’ attention as they entered the Arboretum was the crazily quilted Pump House roof. The sun was shining for the opening reception on March 26th as Melissa sewed the last few pieces of yarn around the trunks of several *Toona sinensis* (cedrela) trees in the Sculpture Garden (pictured at left and below middle).

Prior to the exhibit, the Arboretum hosted a full house of 65 knitters and crocheters who created individual pieces that were sewn together around the posts of the bridge near the Log Cabin. Given only size as a specification, everyone present, from the youngest knitter at age five, to the eldest at 87, became an artist and an important contributor to the exhibit. Volunteers also came back to work with Melissa as she joined the pieces together.

Visitors were delighted with Melissa’s colorful woven additions, sometimes found in the most unexpected places throughout the garden, including the Love Temple, Seven Arches, and at the large mono maple near the Japanese Overlook Garden. The yarnbombing exhibit graced the garden through the end of the summer when it was time for the color palette of fall leaves to take its place.

*Wrapped Up - Yarnbombing at Morris Arboretum*

Photos: Laura Brandt, Susan Crane, and Paul Meyer
A Year of Creative Development to Awaken the Senses

With major support from The Pew Center for Arts & Heritage, the Awaken the Senses project is intended to prototype innovative interpretation techniques in the garden. The Arboretum is a special place that prompts us to look anew, breathe deeply, listen closely, and feel gently while exploring the grounds. Through this project, we aim to explore the potential for technology to call attention to and enhance sensory experiences.

The project began with audience research efforts that explored visitors’ greatest interests and collected information about their habits in the garden. We learned that 84% of our visitors carry a smartphone and 65% are active in social media. These findings helped inform the strategies and the sharing of our plant collection records with our visitors. Results will also include information about the plants—such as photos taken throughout the seasons—about the plant’s historical importance or the current uses of the plant. Visitors expressed strong interest in learning more about the plants that grow here and the history of the site. Each featured location will have an accompanying audio recording to put it in historical context. See Lydia Morris’s (since 1929) at the spot we call Lydia’s seat, and watch the pool fill with azure water as you pull the contemporary image over the same spot.

Audience research efforts at the American Public Gardens Association annual conference resulted in a new exhibition about botany in the Upper Compton estate. This tour will feature various artists’ interpretations of the Morris Arboretum. A composer, choreographer, painter, and poet present this work in developing this experience. Other tours will feature the Arboretum’s architecture, gardens, great trees, native trees, and sculptures.

In addition to developing a better understanding of our visitors and their preferences, the project has also resulted in a new exhibit at the Morris Arboretum Gallery and in a presentation about our innovative audience research efforts at the American Public Gardens Association annual conference. This fiscal year we worked on developing our technology infrastructure to bring Wi-Fi service into the gardens and to enable the sharing of our plant collection records with our visitors. As we look ahead, we plan to deliver a range of interpretive tools to enhance the visitor experience. The Calico Caminet tool will allow visitors to search for plants of interest and locate where they are planted at the Arboretum. Results will also include information about the plant—as plants taken throughout the year—to provide a sense of how the plant changes with the seasons.

A series of tours and mobile tours are also in development. History buffs may enjoy looking back in time through our Then and Now experiences. This tour will assist visitors to see beloved garden locations as captured in history contrasted with contemporary images of the same spot. Each featured location will have an accompanying audio recording to put it in historical context.

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By focusing on connecting people with information about our living collection and our natural surroundings, we diminish the sensory experience. This tour will invite people to see the history of the site, to learn about the history of the site, and to explore the connections between plants and animals. We hope these projects and make them available to our visitors, we will engage in further research to see how they are used and how we might refine and improve them. Additionally, there has been a great deal of interest in this project from our garden and museum partners, and we look forward to sharing the lessons we learn from Awaken the Senses with them.
The Morris Arboretum is a historic public garden and educational institution. Experiences here connect and engage people of all ages with the plant world and with each other. These experiences deepen the appreciation of how we, as individuals and communities, depend on plants. Plants are critical to life processes, including breathing and eating, and to the quality of our daily life. Our mission is to prepare every visitor to be a better steward of the plant world that sustains us.

Connecting and Engaging Through Education

Facilitating youthful connection with the wonders, experiences, and knowledge of the plant world is the heart of our youth education program. Future stewards are nurtured through these connections. In the past few years, we have redirected and secured additional resources to develop new programs that serve youth within and outside of school. Programs in Education, Summer Adventures Camp, and Growing Minds were developed as part of a long-range plan for Youth Education. They build on our successful curriculum-based tours while adapting to personalized family and partner organization needs. It is time to secure the staff and material resources necessary to grow our youth education programs further. We plan to expand program capacities for youth tours, summer camp and the ALCAMO (Accion Comunal Latinoamerica de Montgomery County) ¡Explorar! Summer Bridge Program—a new partner engaged this past year.

Personalized and Shared Youth Experiences

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Professional and Passionate Adults Learning Together

Morris Arboretum is a leader in continuing and professional education, with over 6,500 participants. More than 180 classes, lectures and workshops are offered annually. The School of Arboriculture offered 24 classes to 507 participants in FY 2016, including many non-professional enthusiasts wishing to increase their knowledge and skills. The biennial Invasive Plant Conference, co-sponsored with the Mid-Atlantic Invasive Plant Council, had 114 participants from 12 states.

The Intern Program, now in its 37th year with over 250 alumni, remains a national model for professional development in public horticulture and plant sciences. The nine, year-long internships are each partly or wholly endowed.

Adult tours, which include many special needs groups, are a key program delivered by volunteer guides.

Summer Adventure Camp = Fun + Learning

This year saw the biggest year yet for Morris Arboretum’s Summer Adventure Camp. Enrollment was the highest ever with 90 campers participating, many for multiple weeks. Four of the seven weeks were at full enrollment as we achieved 87% capacity for the summer.

Some highlights included an Eco Expedition week full of discovery and adventure, Mad Science week with experiments galore, and the ever-popular art weeks where campers used the Arboretum’s unique flora and fauna as inspiration to draw, paint and sculpt. The camp program will continue to grow as we develop additional youth education facilities at Morris Arboretum’s Bloomfield Farm.
**Marketing Matters**

A **Social Year for Morris Arboretum**

- @morrisarboretum has 12,539 Facebook followers, our predominant social media platform.
- Facebook followers increased at a rate of 21.66% this past fiscal year, and our Facebook account made approximately 3.9 million Impressions.
  - Engaged fans are 75% female, 25% male
  - Women between the ages of 35-44 appear to be the leading force among our fans
  - Top Facebook posts, by engagement, last fiscal year include:
    - The newly wrapped/yarnbombed Love Temple
    - Staff member Bob Gutowski measuring a record snowfall with a yardstick (16" and still falling…)
- @morrisarboretum has 7,369 Instagram followers. We increased our followers during the fiscal year at a rate of 173.5%. The top three engaged hashtags are: #morrisarboretum, #visitphilly and #visitpa.
- @morrisarboretum has 4,244 Twitter followers. Followers increased by 24.4% during this time period. Morris Arboretum’s Twitter profile made approximately 290.2 thousand Impressions. We sent 507 tweets.
  - There were 390 retweets and 821 clicks.
- Our Twitter followers are 53% female, 47% male
- Women between the ages of 35-44 appear to be the leading force among the followers

**Aerial Videos add Magic to Website**

A series of Arboretum seasonal aerial videos were shot, beginning with cherry blossoms in early spring, followed by the Rose Garden in June (pictured top right).

**Morris Arboretum Captures Media Attention**

- WHYY TV12 Friday Arts on Patrick Dougherty’s *A Waltz in the Woods*
- Garden Design magazine - Spring 2016 issue (pictured middle right)
- WHYY 90.9FM You Bet Your Garden
- Philadelphia Inquirer Garden Design cover story about “Arboretum Voices.” A related Facebook post reached 3,493 people
- Washington Post highlighted Morris Arboretum’s champion trees – “The trees a garden writer would put on his ‘Fantasy Flora’ team.”
- Fodor.com lists Morris Arboretum as one of the 10Best in Philadelphia
- GB&F magazine featured Patrick Dougherty’s *A Waltz in the Woods* as its spring attraction
- CBS3 Film Out as a Lead with on-air reporter Martha Johnson and Director of Horticulture Tony Audo (pictured bottom right)
- Whipped Up Yarnbombing at Morris Arboretum was featured in numerous publications including the University of Pennsylvania Gazette.
- Animal Planet’s international programming featured Patrick Dougherty’s *A Waltz in the Woods* on stations across Europe.
- *GARDEN DESIGN* magazine featured Patrick Dougherty as its spring attraction.
- *Wrapped Up*: Yarnbombing at Morris Arboretum was featured in numerous publications including the University of Pennsylvania Gazette.
- Animal Planet’s international programming featured Patrick Dougherty’s *A Waltz in the Woods* on stations across Europe.

**GARDEN DESIGN**

**REACHING OUT THROUGH PARTNERSHIPS**

Each year, the Morris Arboretum partners with local cultural institutions in an effort to build community relationships, reach new audiences, and offer Arboretum members discount opportunities. As an anchor institution in the community, the Morris Arboretum collaborates all year long with the Chestnut Hill Business Association.

The Arboretum also partners with the University of Pennsylvania for communication and outreach on an ongoing basis.
The board and staff of the Morris Arboretum continue to make timely maintenance and stewardship of our facilities and infrastructure a top priority. This past year, income from endowments combined with several generous gifts, supported a number of important facility and infrastructure projects, making this a banner year for restoration and renewal. A Master Plan was launched in 1978, and historic preservation again became a high priority at the Arboretum. Since that time, the gardens and structures have gradually been restored, and every attempt has been made to address new maintenance issues as they arise. The Arboretum has truly never looked as beautiful as it does today, but more remains to be done.

Several years ago, at the urging of the Advisory Board of Managers, a new Historic Preservation Endowment and other facility endowments were successfully launched, and we continue to work to build these lines of support. Income from these endowments is restricted to the ongoing maintenance and restoration of our historic features and structures.

Facilities first restored 20 to 30 years ago are again due for renewed investment. The gardens and structures have gradually been restored, and every attempt has been made to address new maintenance issues as they arise. The Arboretum has truly never looked as beautiful as it does today, but more remains to be done.

A comprehensive structural study of the barn, led by Metcalfe Architecture & Design in collaboration with engineers and a historic preservation firm, determined that the next phase of restoration will focus on the barn’s west wing. Additional conservation steps need to be taken in order to preserve the historic integrity of the barn while also creatively repurposing part of the building’s space for educational use.

The critical first step in the preservation of the Bloomfield Barn—the replacement of the failing cedar shake roof—was accomplished through a generous $50,000 Keystone Historic Preservation grant from the Pennsylvania Historical and Museum Commission (PHMC), a state agency funded by the Commonwealth of Pennsylvania, and a matching grant from the CHG Charitable Trust. The critical first step in the preservation of the Bloomfield Barn—the replacement of the failing cedar shake roof—was accomplished through a generous $50,000 Keystone Historic Preservation grant from the Pennsylvania Historical and Museum Commission (PHMC), a state agency funded by the Commonwealth of Pennsylvania, and a matching grant from the CHG Charitable Trust. The critical first step in the preservation of the Bloomfield Barn—the replacement of the failing cedar shake roof—was accomplished through a generous $50,000 Keystone Historic Preservation grant from the Pennsylvania Historical and Museum Commission (PHMC), a state agency funded by the Commonwealth of Pennsylvania, and a matching grant from the CHG Charitable Trust.

The familiar red barn at Morris Arboretum’s Bloomfield Farm is an important architectural survivor that tells of historic land use and patterns of agricultural development in this region. The Arboretum is committed to preserving this building in order to offer unique opportunities to strengthen visitors’ understanding of the critical relationship between people, plants, and place from the Colonial era to the present day.

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Award-winning Springfield Mills

Springfield Mills, also located at Bloomfield Farm, passed a milestone last year with every machine restored to operation, enhancing our demonstration of the machines, and showcasing the history of making food from plants. The volunteers brought the mill full-time for more than 1,200 visitors on Mill Demonstration Days and group tours. Bob Gutowski and Tom Wilson received a Model of Excellence Honorable Mention from University of Pennsylvania President Dr. Amy Gutmann in recognition of their leadership efforts in overseeing the renovations. The award also acknowledges the achievements of the mill volunteers and other staff in preserving the historic mill, restoring it to operational status for educational use.

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More Than Just a Parking Lot

The parking lot at Morris Arboretum received an Excellence in GIS Award from the Sustainable Business Network of Greater Philadelphia (SBN) in 2016 for its Demonstration Porous Parking Lot. The Early Adopter award (given to public or private projects 10 years or older) honors exemplary public and private projects and the teams of people behind them that are bringing the environmental, social, and economic benefits of green stormwater infrastructure to life in Philadelphia and the region.

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Preserving and Protecting Trees Throughout the Region

Urban forestry—the combination of these words seems oxymoronic. We visualize the word “urban” as our cities; built by humans, gray infrastructure, concentrated activity, noisy, sharp angles, rustling in summer and harsh in winter. On the other hand, “forest” evokes impressions of a lush green system; diverse, calm, and lush.

Alas, getting the “forest” into the city and maintaining its health can be like forcing the proverbial square peg into a round hole. This process, called “urban forestry,” is what the Morris Arboretum’s Urban Forestry Consultants do for us. We walk the land and collect data, oversee the installation of trees and proper tree management as a critical part of urban infrastructures.

The Morris Arboretum’s Urban Forestry Consultants do this by providing unbiased, third-party consulting services, advice, and technical assistance to developers, municipal operators, and construction crew. The Urban Forestry consultants partner with all members of the project team to successfully save trees in our urban forest.

Consulting Ensures Preservation of Trees During Construction

Large, mature trees with good biological and structural health are important green resources, especially within our cities. However, without proper planning, trees or wooded areas can be annihilated by construction activities such as land clearing, trenching for foundations or utilities, or changes in soil grading and hydrology. Successful tree preservation ensures that the project’s goals are achieved without jeopardizing the health and lifespan of protected trees. This collaborative process includes almost everyone involved in the project, from the client and landscape architect, to the foreman, machine operators, and construction crew. The Urban Forestry consultants participate in numerous construction projects and provide expert advice and opinions that guide how best to preserve trees during construction.

An example of this is the preservation of two large, mature Chinese scholar trees (Atractocarpus japonicus) adjacent to Meyerson Hall on Penn’s campus. These trees are part of Meyerson’s original planning design and thus are valuable historically and functionally. The Urban Forestry consultants determined that the safest and most viable way to achieve project goals and preserve these trees was to tunnel under the main’s roof. Usually tunneling is fairly straightforward; however, because of the proximity to underground utilities, including a high voltage line and a very constructed work area, estimating under the roof had to be carefully done by hand with small excavators. The consultants laid out this strategy beforehand, and were on site during the tunneling activities to guide the contractors performing the work. This complicated project exemplifies how the consultants partner with all members of the project team to successfully save trees in our urban forest.

Morris Arboretum’s School of Arboriculture

Under the direction of Robert Wells, the School of Arboriculture hosts arboricultural and landscape experts from around the country who present on a diversity of tree and landscape related topics to professionals in the region. In FY 16, more than 500 participants attended 26 courses. Student courses are being held in fall 2016 including Tree Climbing for Women, the Tree Canopy Conference, and the Green Roof Conference. Classes and conferences are open to the public and especially attractive to arborists and landscape architects.

Volunteer efforts play an important role in helping many non-profit achieve their missions. The volunteer program at the Morris Arboretum provides the community with unique opportunities to engage in the Arboretum’s daily operations.

Arborist-volunteers receive training to guide visitors through the garden or help schoolchildren fulfill science curriculum requirements in fun and unique ways. They learn proper horticultural techniques while tending the Arboretum’s gardens. They give tours and answer questions or lend a helping hand to office staff. Volunteers also enjoy workshops, social gatherings, day trips, and interacting with one another while sharing experiences and making memories.

Were it not for the generous service of these 300 individuals, the gardens would not look so beautiful, visitors wouldn’t be so warmly welcomed and informed, behind-the-scenes projects would take longer, and the Arboretum would not have so many wonderful ambassadors. Three cheers for our volunteers!

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### Income

<table>
<thead>
<tr>
<th>Source</th>
<th>Operating Funds</th>
<th>Restricted Funds</th>
<th>Total Operating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earned Revenue</td>
<td>92,044</td>
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<td>92,044</td>
</tr>
<tr>
<td>Garden Admissions Fees</td>
<td>572,556</td>
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<td>572,556</td>
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<tr>
<td>Facilities Rentals</td>
<td>281,674</td>
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<td>281,674</td>
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<tr>
<td>Grants</td>
<td>229,424</td>
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<td>229,424</td>
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<tr>
<td>Member Events</td>
<td>516,533</td>
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<td>516,533</td>
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<tr>
<td>Basic Membership</td>
<td>444,188</td>
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<td>444,188</td>
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<tr>
<td>Consulting Contracts</td>
<td>206,016</td>
<td>109,780</td>
<td>315,796</td>
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<tr>
<td>Plant Sale</td>
<td>60,357</td>
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<td>60,357</td>
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<tr>
<td>Tuition</td>
<td>58,014</td>
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<td>58,014</td>
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<tr>
<td>Gift-Sale</td>
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<tr>
<td>Total Operating</td>
<td>2,177,857</td>
<td>100,780</td>
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<table>
<thead>
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<th>Operating Funds</th>
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<th>Total Operating</th>
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</thead>
<tbody>
<tr>
<td><strong>Contributed Revenue</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundations</td>
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<td>286,167</td>
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<tr>
<td>Premier Memberships</td>
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<tr>
<td>Annual Giving</td>
<td>675,304</td>
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<td>675,304</td>
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<tr>
<td>Other (Project Gifts/Endch)</td>
<td>175,271</td>
<td>451,534</td>
<td>626,805</td>
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<tr>
<td><strong>Total Contributed Revenue</strong></td>
<td>2,541,093</td>
<td>1,139,031</td>
<td>3,680,124</td>
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<table>
<thead>
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<th>Source</th>
<th>Operating Funds</th>
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<th>Total Operating</th>
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</thead>
<tbody>
<tr>
<td>Investment Revenue</td>
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</tr>
<tr>
<td>Morris Trust - Operating</td>
<td>334,437</td>
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<td>334,437</td>
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<tr>
<td>Compton Fund, Other</td>
<td>160,385</td>
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<td>160,385</td>
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<tr>
<td>University-managed Endowments</td>
<td>470,180</td>
<td>1,341,594</td>
<td>1,811,774</td>
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<td><strong>Total Investment Revenue</strong></td>
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<td>1,341,594</td>
<td>3,306,596</td>
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<table>
<thead>
<tr>
<th>Source</th>
<th>Operating Funds</th>
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<th>Total Operating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Support</td>
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</tr>
<tr>
<td>PMHC/Other</td>
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<td>64,771</td>
<td>64,771</td>
</tr>
<tr>
<td><strong>Total Government Support</strong></td>
<td>64,771</td>
<td>–</td>
<td>64,771</td>
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<th>Source</th>
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</tr>
</thead>
<tbody>
<tr>
<td>University Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary</td>
<td>187,943</td>
<td>–</td>
<td>187,943</td>
</tr>
<tr>
<td>Subvention</td>
<td>432,781</td>
<td>–</td>
<td>432,781</td>
</tr>
<tr>
<td><strong>Total University Support</strong></td>
<td>620,724</td>
<td>–</td>
<td>620,724</td>
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<th>Total Operating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfers - Internal Loans</td>
<td>71,000</td>
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<td>71,000</td>
</tr>
<tr>
<td>Transfers - Miscellaneous</td>
<td>108,266</td>
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<td>108,266</td>
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<tr>
<td><strong>Total Miscellaneous</strong></td>
<td>180,266</td>
<td>–</td>
<td>180,266</td>
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<tr>
<td><strong>Total REVENUE</strong></td>
<td>$3,383,399</td>
<td>$2,423,046</td>
<td>$5,806,445</td>
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</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Operating Fund</th>
<th>Restricted Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Benefits</td>
<td>2,997,142</td>
<td>1,099,577</td>
<td>4,096,719</td>
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</tbody>
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### Program Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Operating Fund</th>
<th>Restricted Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>4,419</td>
<td>8,406</td>
<td>12,825</td>
</tr>
<tr>
<td>Horticulture</td>
<td>284,623</td>
<td>258,372</td>
<td>543,995</td>
</tr>
<tr>
<td>Education &amp; Visitor Experience</td>
<td>452,020</td>
<td>79,660</td>
<td>531,680</td>
</tr>
<tr>
<td>Facilities</td>
<td>280,587</td>
<td>388,720</td>
<td>669,307</td>
</tr>
<tr>
<td>Development</td>
<td>208,787</td>
<td>11,834</td>
<td>220,621</td>
</tr>
<tr>
<td>Marketing</td>
<td>123,944</td>
<td>12,620</td>
<td>136,564</td>
</tr>
<tr>
<td>Administration</td>
<td>186,875</td>
<td>55,771</td>
<td>242,646</td>
</tr>
<tr>
<td>University Teaching</td>
<td>839,451</td>
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<td>839,451</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$5,296,978</td>
<td>$1,962,088</td>
<td>$7,260,166</td>
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</table>

### Change in NET ASSETS)

<table>
<thead>
<tr>
<th>Category</th>
<th>Operating Fund</th>
<th>Restricted Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance Sheet Activity</td>
<td>$83,521</td>
<td>$462,958</td>
<td>$546,479</td>
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### Cumulative cash effect

<table>
<thead>
<tr>
<th>Category</th>
<th>Operating Fund</th>
<th>Restricted Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CUMULATIVE CASH EFFECT</strong></td>
<td>$152,225</td>
<td>$290,449</td>
<td>$442,674</td>
</tr>
</tbody>
</table>
LEADERSHIP GIFTS AND PLEDGES

T he Morris Arboretum is grateful to the following individuals who have provided generous operating, programmatic, or capital support through new gifts, pledges, or pledge payments totaling $2,500 or more in fiscal year 2016.

$250,000 AND ABOVE
Jane & Leonard Korman

$100,000 - $249,999
Gwendolyn & Edward Asplundh
Susan & Moe Feldman
Mary & Richard Graham
Rebecca Sturtevant and the estate of George W. Marsh Jr.
Mary D. Sturr
Martha J. Wallace & Edward W. Kane

$50,000 - $99,999
Jane & Leonard Korman

$10,000 - $24,999
Anonymous (2)
George W. Connell
Edith R. Dixon
Lehman E. Kapp
Lee Laden
Susan & Robert Peck
Ann L. & Frank Reed

$5,000 - $9,999
Anonymous
Jane & Abass Alavi
Barbara & Philip Albright
Hali & Scott Asplundh

$2,500 - $4,999
Cynthia & John Affleck
Jan Albaum & Harry Cerino
Barbara & John H. Ball
Barbara & Robert Butterworth
Jane & George Brant
Allan Branscum
Linda & David Gleeson
Doranne H. Hamilton
Pamela & James Hill
Lynda & W. Anthony Hinckley
Karen & Richard Kochick
Janet & H. Lewis Klein
Henry S. Miller Jr.

$250,000 - $2,499
Pamela & Giannou Warr

$200,000 - $249,999
Judy & Louis J. Appell Jr.
Andrea Baldick
Jessica Bernard
Susan & John Campbell
Josie R. Dening & Robert A. Boyer
Wendy & Walter Driska
Lisa M. Gensmill
Kathy & William Harrell III
M.leine P. Harris
Meg & Richard Hayne
Elizabeth W. Heimbach
Jocee R. Hill & Ming Fang
Christine James
Augusta Linsinger
Sarah & Ted Lodge
Bonnie & Peter MacDonald
Sandra L. McLain
Elizabeth P. McLean
Leigh & John Mehler
Hiram H. Munger

$100,000 - $199,999
Anonymous (2)
Deceased

$25,000 - $49,999
Beatrice & Robert Bast
Philippe de Spoelberch
Phoebe A. Driscoll
Kathlene & William Hohns
Joan Kronick
Marguerite & Gerry Lenfest
Jane MacElree
Frances & James Maguire

$2,500 - $9,999
Maxine M. Field
Joseph P. Flanagan Jr.

$1,000 - $2,499
Carol A. Dolinskas
Elizabeth Farley
Christina & Constantine Fournaris
Linda & David Gleeson
Doranne H. Hamilton
Pamela & James Hill
Lynda & W. Anthony Hinckley
Karen & Richard Kochick
Janet & H. Lewis Klein
Henry S. Miller Jr.

$500 - $9,999
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Barbara & John H. Ball
Barbara & Robert Butterworth
Jane & George Brant
Allan Branscum
Linda & David Gleeson
Doranne H. Hamilton
Pamela & James Hill
Lynda & W. Anthony Hinckley
Karen & Richard Kochick
Janet & H. Lewis Klein
Henry S. Miller Jr.

$100 - $499
Daughter of Hiram H. Munger

$25 - $99
Daughter of Hiram H. Munger

$10 - $24
Daughter of Hiram H. Munger

$5 - $9
Daughter of Hiram H. Munger

$1 - $4
Daughter of Hiram H. Munger

$0.50 - $1
Daughter of Hiram H. Munger

Photo: Susan Crane

Photo: Paul Meyer
**CORPORATE, FOUNDATION, GOVERNMENT, AND NON-PROFIT DONORS**

The Morris Arboretum is grateful to the following corporations, foundations, government agencies, and non-profit organizations who have provided generous operating, programmatic, or capital support through new gifts, pledges, or pledge payments of $250 and above in fiscal year 2016.

### $500,000 and Above

- $500,000 - $999,999
  - Jane & Leonard Korman Family Foundation
  - Edward W. Kane & Martha J. Wallace Family Foundation
  - Hebrew Children's Home
  - Pew Center for Arts & Heritage

### $250,000 - $499,999

- $250,000 - $499,999
  - William Penn Foundation

### $100,000 - $249,999

- $100,000 - $249,999
  - Edward W. Kane & Martha J. Wallace Family Foundation
  - Moses Feldman Family Foundation
  - Edward W. Kane & Martha J. Wallace Family Foundation

### $50,000 - $99,999

- $50,000 - $99,999
  - The CHG Charitable Trust
  - The Haviland Trust Company
  - Kafka Family Foundation
  - Pennsylvania Historical and Museum Commission

### $25,000 - $49,999

- $25,000 - $49,999
  - Foundation for the Carolinas
  - Otto Hahn Charitable Trust
  - Jena C. Madella Family Foundation
  - The Maguire Foundation
  - The Marshall Reynolds Foundation
  - Raynor Institute and Foundation
  - Schoell Chadbourn Charitable Fund

### $10,000 - $24,999

- $10,000 - $24,999
  - American Beryl Fund LLC
  - The McKee Fund Foundation
  - The Philadelphia Cultural Fund
  - Swarts Charitable Trust
  - Wells Fargo Foundation
  - Zimmerman Haubach Foundation

### $5,000 - $9,999

- $5,000 - $9,999
  - Avon Foundation
  - Ballard Spahr LLP

### $1,000 - $2,499

- $1,000 - $2,499
  - Aileen K. & Brian L. Roberts Foundation
  - Allied Barton Security Services
  - American Rhododendron Society
  - The Bartlett Tree Foundation, Inc.
  - Bessemer Trust Company
  - Bluestone Foundation
  - The Downs Foundation
  - The Lee F. & Phoebe A. Driscoll Foundation
  - Garden Adventures, Ltd.
  - The Geraldine Stutz Trust Inc.
  - J. H. D. Gift Fund
  - Metcalfe Architecture & Design

### $500 - $999

- $500 - $999
  - All Ways Gone Touring, Inc.
  - American Society of Landscape Architects
  - AREUFIT Health Services, Inc.
  - Bowman Properties, Ltd.
  - The County of Camden
  - Fairfield Foundation
  - The Geraldine Stutz Trust Inc.
  - J. H. D. Gift Fund
  - Land Concepts, LLC
  - The Maple Society
  - The Maple Society - European Branch
  - The Union League of Philadelphia

### $250 - $499

- $250 - $499
  - American Society of Landscape Architects
  - AREUFIT Health Services, Inc.
  - Bowman Properties, Ltd.
  - The County of Camden
  - Dover Kenton Foundation
  - The Geraldine Stutz Trust Inc.
  - J. H. D. Gift Fund
  - Land Concepts, LLC
  - The Maple Society
  - The Maple Society - European Branch
  - The Union League of Philadelphia

### $50 - $99

- $50 - $99
  - American Society of Landscape Architects
  - AREUFIT Health Services, Inc.
  - Bowman Properties, Ltd.
  - The County of Camden
  - Dover Kenton Foundation
  - The Geraldine Stutz Trust Inc.
  - J. H. D. Gift Fund
  - Land Concepts, LLC
  - The Maple Society
  - The Maple Society - European Branch
  - The Union League of Philadelphia
The Collectors Circle

This Circle is dedicated to the leadership gifts to the Annual Fund whose enthusiastic annual giving of $2,500 or more is the foundation for organizational strength and capacity at the Morris Arboretum. This list acknowledges donors who made new gifts or pledge payments in fiscal year 2016.

$50,000 and Above
Susan & Moses Feldman

$25,000 - $49,999
Margaret & Gary Lawlor
Jane MacElwee
Frances & James Maguire
Mary El Stoer

$10,000 - $24,999
Andrea Roberts
Joanna Berevid
Edith B. Dixon
Lisa M. Gremill
Meg & Richard Hovey
Jessica Berwind
Andrea Baldeck

$5,000 - $9,999
Richard & Jocelyn Stoddard
J. Allen & Mary Coe

$2,500 - $4,999
Barbara & Robert Barratt

$1,000 - $2,499
Nancy & Stephen Kurtz
Marylin & Stephen Leonard
Florence & Richard Mahatian
Gary D. Miller
Lela Louisa Mollett
Kris Van Steur Peddicord
Charlotte A. Pope
Nancy & John Roberts
Mary & Stephen Ashton
Phyllis & Bruce Neader
Susan & Walter Evans
Ellen & Jay Hass

$500 - $999
Mary B. Coe

$1 - $499
Trisha & Ryan Mattson

Annual Fund Donors

To ensure the Morris Arboretum year-round excels in making the most of membership dues. The Annual Fund is a significant source of support for the Arboretum’s annual operating budget. This list acknowledges donors who made new gifts or pledge payments in fiscal year 2016 of $250 or more.

$1,000 - $2,499
Nancy & David Butler
Rebecca Bier & David Poll
Emily & Edward Daubler
Susan & Walter Evans
Susan & Robert Fleming
Elizabeth H. Goodwill

$500 - $999
Mary D. Starr
Frances & James Maguire
Jane MacElwee
Marguerite & Gerry Lenfest
Anonymous (2)

$100 - $249
Pamela & James Hill

$50 - $99
Mira Zergani & Antonio Quiles

* Denotes

Photo: Paul Meyer

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Leadership Members

Membership revenue is a critically important source of unrestricted operating income for the Morris Arboretum. All membership contributions to the organizational income for the Morris Arboretum. All members contribute to the organizational membership revenue is a critically important source of unrestricted operating income for the Morris Arboretum.

Members at a Glance

Active member households = 6,416
Adult members = 11,699
Child members = 7,583
New memberships in the last year = 1,675
Members live as far away as Mudersbech, Germany!

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The Lydia Morris Legacy Society

For the last 17 years of her life following the death of her brother, John, Lydia Thompson Morris continued to develop the estate that they had established together. When she passed away in 1932, her estate plans included an endowment for the preservation, upkeep, and maintenance of an arboretum. In 2004, the Advisory Board of Managers created the Lydia Morris Legacy Society to honor those who have provided for the Arboretum in their estate plans.

Last June, Arboretum friend and member Henry S. “Rusty” Miller, Jr. passed away unexpectedly. In addition to their longtime membership, Rusty and his husband, Ken Nimblett, were founding members of the Arboretum’s Directors’ Guild, members of the Lydia Morris Legacy Society, members of the Collectors Circle, and passionate advocates for the Arboretum’s mission. Rusty was also a keen traveler, and he and Ken enlivened many of the Arboretum’s trips abroad, most recently to New Zealand.

Rusty’s mother, Martha, was also an active member of the Arboretum community, and in 1989 she established the Martha S. Miller Urban Forestry Internship Endowment. This endowment has enabled the Arboretum to provide professional and academic training, specifically in the area of urban forestry, for almost 30 young people over the past three decades.

In establishing the Miller Urban Forestry Internship Endowment, Martha made both a financial and personal commitment to “her” interns. Rusty and Ken continued that commitment following Martha’s death. Each year, they made a point of meeting and befriending the young person who benefited from the Miller Endowment. Following Rusty’s death, the Arboretum received a planned gift from a charitable remainder unitrust, or CRUT, towards the Miller Endowment. To honor his memory along with his mother’s, the endowment will be officially renamed as the Martha S. Miller & Rusty Miller Urban Forestry Internship Endowment.

We are tremendously grateful for the many years that Rusty was part of the Arboretum family.
Market Value of Endowments

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The Morris Arboretum was thrilled to honor Mrs. Edith R. Dixon at Moonlight & Roses presented by The Haverford Trust Company. A dedicated planning committee, led by co-chairs Joann Lytle and Elizabeth Salata, helped to make this the Arboretum’s most successful fundraising gala to date. This record-breaking year saw a 7.3% increase in gross revenue with tickets sales at an all-time high. The event continues to grow, attracting new corporate sponsors each year. The Haverford Trust Company—a longtime lead donor to Moonlight & Roses—partnered with the Arboretum again as the Moonlight & Roses title sponsor.
A PREMIERE DESTINATION

In-Kind Donations

All Things Acer
The Arnold Arboretum of Harvard University
Buchman Industries
Bunzl Hospitality Services
Howard W. Barnes
Buddenbrock’s Bakery
Broken Arrow Nursery
Brotzman’s Nursery
Chamberlair
Charles C. Crossen
The Classic Tent Company
Clare/MacArthur
Don Schmidt Nursery, Inc.
The Duke Barber Co.
Foster & Main
Lisa M. Gammell
Lucie English
Highground Gardens
The Hill Company
Iron Hill Brewery & Restaurant
J.G. Akerboom Nurseries, Inc.
Longwood Gardens, Inc.
Mango
Henry S. McNeal
Thomas J. Meserve
Moon Forest Botanical Garden
The New York Botanic Garden
Pennsylvania Ballet
Coomer Farm
Plaza Run Nursery
The Polly Hill Arboretum
Pruden Gardens Center
Frederick H. Ray
Andy Schoyer
Erie & Nina Schneider
The Scott Arboretum
Scott Counsellors, Inc.
Edward T. Shion
Susan Smith
Stroudside Vidki
Neil B. Strachan
Tagus Lambs, Inc.
Top of the Hill Café
Tyler Arboretum
US National Arboretum
USA/ARS Thad Cochran
Southern Horticultural Laboratory
Milton & John Vos Eriksen
Werner Museum, Garden & Library
Woodland Landscape Plant
Garnetia Repository

MATCHING GIFT ORGANIZATIONS

ACE Charitable Foundation
Aeon Life & Casualty Co.
Aamath Charitable Fund
The Asplundh Foundation
Avea Communications
The Boeing Company Gift Matching Program
Cipriani Foundation
General Electric Company
Glissembilith Inc.
Goldman Sachs Group, Inc.
IBM Matching Gifts Program
Johnson & Johnson Corporation
Johnston Control Inc
Mees & Company, Inc.
Monterial Investment Partners
Pittsburgh Virginia Corporation
The Priort Charities Trusts
PNC Bank Foundation
Presbyterian Match Fund
Giles Program
SmithKline Beecham

Tributes and Memorial Gifts

In memory of Irene Andrews
Anne & Michael Young
In memory of Henry Bode M.D.
Joyce and John Lappin
In honor of Edie & Bill Cerveny
Sandra & Thomas Cerveny
In memory of George Buchanan
Jennifer & Sam Bourne
In honor of Carroll & John Carter
Cynthia & John Carter
Melanie & William Emminger
Neal & Charlie Robinson
Kerysta & Kevin Sue
Anne & Greg Spierer
In honor of Paul & Nancy Corby’s 50th Anniversary
Tonia Uffner
In honor of Sandra Clapham
June & Robert Clapham
Leigh Anne & Steve Spokane
In memory of John L. Croom
Ditko & Harmon Andrews
E. Armstrong
Beth & All & Angie Timmik
Penelope Brodie & George C. Condon
Frank M. Eberle
Willis & Ed Gray
Carolyn & William McGlocklin
John M. Metzler
Hiram H. Mengel
Pennsylvania Chamber of Business and Industry
Philadelphia Convention & Visitors Bureau
Dorothy & Ronald Partington
Rosalie & George Rodin
Mark Sappis
The Toomey Family
E. Bruce Wachowiak
The Walker Family
Jean & Frederick Yantrasheva
Sally & John Y. Yantrasheva

PHOTOGRAPHS

Photo: Bob Gutowski

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