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**LIVING COLLECTIONS POLICY**

Reviewed and approved by the Board of Trustees January 23rd, 2023.

**MISSION STATEMENT**

Lotusland’s mission is to preserve and enhance the distinctive estate and botanical gardens of Madame Ganna Walska. Lotusland educates and inspires visitors with its collections, sustainable horticulture practices, and plant conservation.

**HISTORY OF LOTUSLAND**

Ganna Walska Lotusland is a 37-acre botanical garden located in Montecito, California, which contains approximately 3,700 taxa from around the globe. The property was home to several owners, including commercial nursery owner Ralph Kinton Stevens (1882-1913) and the Gavit family (1915-1937), before being purchased by Madame Ganna Walska (1941-1984). Madame Walska further developed the plant collections and gardens until her death in 1984. After 60 public hearings over nine years, Lotusland was granted a Conditional Use Permit from the County of Santa Barbara in 1992. The garden officially opened to the public in 1993. It now welcomes 15,000 visitors annually, in addition to 5,000 students from Santa Barbara County.

**PURPOSE OF THE LIVING COLLECTIONS POLICY**

This document is intended to guide the development, management and enhancement of the Living Collections at Ganna Walska Lotusland. The Living Collections Policy, approved by the Board of Trustees, will be administered by the Executive Director together with the Plant Collections Committee, which is composed of the Director of Conservation and Curator of the Living Collections, the Assistant Curator of Living Collections, the Director of Gardens and Facilities, the Grounds Supervisor(s), one member of the Board of Trustees, and one or more additional advisory member(s). This Committee shall meet at least once a year. Any requests for variances or exceptions to the policy will be reviewed and approved or disapproved by the Board of Trustees. Revisions of the policy will be recommended by the Committee for review and approval or disapproval by the Board of Trustees.

**PURPOSE OF THE LIVING COLLECTIONS**

The Living Collections at Lotusland are fundamental to achieving the mission of the organization. Through implementation of this policy, the Living Collections at Lotusland can be preserved and enhanced to showcase the historic estate and vision of the late Madame Ganna Walska, to foster increased knowledge and appreciation of its plants, and to contribute to worldwide conservation efforts through public education, professional communication, and collaboration with other scientific institutions.

**ETHICAL AND LEGAL CONSIDERATIONS**

In all actions, Lotusland and its staff shall act as responsible conservationists whose aim is to preserve and guard the Living Collections. Plant specimens that have been collected in such a careless manner as to impair their scientific or display value shall not be accepted. Staff should not collect any plants in a manner that threatens the existence of limited populations. Any plants received from other sources will only be accepted with proper documentation that addresses these issues.

All plant material and specimens will be acquired only when they have been collected, exported, and imported in full compliance with the laws and regulations of the country or countries of origin, of the Federal Government of the United States, and of the individual states in the United States. Evidence of proper collection in accordance with government regulations should be provided whenever possible. Lotusland will refuse to acquire specimens in any case where it has cause to believe that the circumstances of their collection involved the recent unscientific or intentional destruction of sites, or where state or federal laws or international treaties, such as the Convention on the International Trade of Endangered Species (CITES), have been violated. Lotusland will cooperate with authorities of any state, the United States, and other countries in legal action against those committing improprieties regarding plant collection and transport.

In an effort to prevent introduction of invasive plant species, Lotusland shall abide by the suggestions outlined in the St. Louis Declaration on Invasive Plant Species Voluntary Codes of Conduct for Botanic Gardens and Arboreta (see Appendix A attached).

**SCOPE OF THE LIVING COLLECTIONS**

1. **Living Collections Classifications**

Living Collections at Ganna Walska Lotusland can be divided into seven collection categories, which serve to guide collections development, management, and enhancement decisions. Plants held in the Living Collections should fall into one or more of these categories.

* **Geographic Plant Collections** – accessions representing the native flora of a specific region of the world, such as an ecoregion, country, or state.
* **Taxonomic Plant Collections** – accessions belonging to a particular taxon, such as an order, family, genus, or species.
* **Thematic Plant Collections** – accessions that are grouped together based on shared characteristics, such as growth habit or cultural requirements.
* **Ecological Plant Collections** – accessions that serve an ecological purpose, such as encouraging proliferation of beneficial insects and pollinators.
* **Display Collections** – accessions that are assembled for aesthetic reasons.
* **Conservation Collections** – accessions that serve to preserve the germplasm of rare and threatened plant species.
* **Historic Collections** – accessions that relate to the history of the Lotusland property, its owners, or significant horticulturists who were involved with creation of the garden.

1. **Core Collections**

Core collections are essential to achieving Lotusland’s mission as an organization and are regarded as high priority. Core collections may be found in multiple core garden areas (see below).

* Agave
* Aloe
* Palm
* Bromeliad
* Cactus
* Cycad (Lotusland is a member of the Cycad Multisite Group through the American Public Gardens Association’s Plant Collection Network)
* Euphorbia
* Fern (Pteridophyta)
* Begonia

1. **Core Garden Areas**

Core garden areas are based upon a central theme and are to be maintained in perpetuity, due to their historical and botanical importance to Lotusland. The Living Collections Plan outlines each core garden area in detail with regard to the core collections contained therein.

* Aloe Garden
* Australian Garden
* Blue Garden
* Bromeliad Gardens (Upper and Lower)
* Shade Palm Garden
* Cycad Garden
* Cypress Allée and Water Stairs
* Dunlap Cactus Collection
* Fern Garden
* Insectary Garden
* Japanese Garden
* Main Drive Gardens: Sycamore Canyon Entry (Lower Main Drive), Main Drive Cacti, Main Drive Euphorbia, Dracaena Circle
* Main House Gardens: Main Lawn, Geranium Terrace, Parterre (Roses), Topiary and Succulent Clock, Maze, and Pavilion Patio
* Nursery, Greenhouse, and Roundhouse
* Olive Allée
* Orchards (Citrus and Deciduous)
* Palmetum
* Succulent Garden
* Theatre Garden
* Tropical Garden
* Water Garden

1. **Other Garden Areas:**

Lotusland contains several other garden areas that are of lesser priority and are not visited by the public on tours. These areas shall be considered for inclusion as future core garden areas.

* Perimeter Plantings (Ashley Road, Sycamore Canyon Road, Cold Springs Entry, Insectaries)
* Pine Forest
* Arboretum
* Bamboo/Eucalyptus Forest

**ACQUISITION**

The Curator of the Living Collections, in consultation with the Director of Grounds and Facilities, the Grounds Supervisor(s), and appropriate staff members, will oversee the acquisition of all permanent plants for the Living Collections. Major acquisitions/whole collections must be reviewed by the Plant Collections Committee. All plants acquired must meet the goals and objectives of Lotusland’s mission and be in accordance with the classifications set forth in this policy. Sufficient resources shall be available for adequate permanent care and maintenance of the plant(s) in terms of staff, facilities, and space. Plants requiring extraordinary or special cultural requirements shall be thoroughly considered before inclusion into the Living Collections.

Plants may be acquired for the Living Collections in the following ways:

1. **Field Collection:** Plant material must be obtained by garden staff in compliance with all relevant national and international laws and must fulfill one or more of the collections classifications.
2. **Gifts:** Gifts of plants and/or collections will be accepted only if the plant(s) fulfill(s) one or more of the collections classifications. No donor restrictions may be placed on gifts of plants. Lotusland encourages all gifts of collections to be accompanied by sufficient endowment funds for their long-term maintenance. Gifts incorporated as permanent collections shall subsequently be treated in the same manner as the other Living Collections. Lotusland retains the right to deaccession and dispose of gifts. Staff shall not give appraisals for the purpose of establishing the tax-deductible value of gifts or purchases offered to Lotusland. Where appropriate, Lotusland may assist owners in finding qualified professionals who can provide such appraisals.
3. **Exchange:** Plants obtained via exchange with other gardens and institutions should meet one or more of the collections classifications.
4. **Purchase:** Plants obtained through purchase should meet one or more of the collections classifications.
5. **U.S. Fish and Wildlife Service Plant Rescue Center Submissions:** Ganna Walska Lotusland is a registered Plant Rescue Center (PRC) through the United States Fish and Wildlife Service (USFWS). Living material imported into the United States in violation of CITES or lacking other permits, and confiscated by the USFWS, may be occasionally offered to Lotusland. The decision to accept or refuse confiscated plant material shall be determined by the Curator of the Living Collections in consultation with the Plant Collections Committee if appropriate. As a PRC, Lotusland has the right to incorporate confiscated plant material into its Living Collections and may display, propagate, or otherwise use them for purposes consistent with CITES. However, PRC plants must be retained by Lotusland and remain U.S. Government property. Lotusland may not trade, sell, or otherwise dispose of PRC plant material. However, propagules of PRC plants, which become the property Lotusland, may be traded, sold, or disposed of through other means, at Lotusland’s sole discretion.

**ACCESSIONING AND PLANT RECORDS**

All plants in cultivation in the garden shall be accessioned, except for turf grasses, long established hedges, native oaks that grow outside of cultivated areas, private residence landscapes (at the Gate House or Pink Cottage), and plants propagated for sale, exchange, or donation.

Upon arrival at Lotusland, plant material for inclusion into the Living Collections shall be inspected by the Manager of Sustainability for signs of pests and diseases. The Curatorial Department is responsible for the management of the plant records system and for the implementation of the accessioning, labeling, mapping, and inventory process. Plant records data are documented in a Microsoft Access database, using the Botanic Gardens Conservation International’s International Transfer Format for Botanic Garden Records. The Living Collections are mapped using ArcGIS. The plant records system includes both accession and deaccession records as well as propagation data. Plants propagated asexually or vegetatively from existing accessions shall retain the original accession number followed by a “P” qualifier. Plants propagated sexually (by seed or spore) shall be given a new accession number with the parent plant(s) accession number(s) retained in the records.

Inventories shall be made of the Living Collections by the Curator of the Living Collections and/or the Assistant Curator on an ongoing basis. Curatorial Staff will update the plant records systems, check updated scientific nomenclature, and replace missing or broken accession labels. Display labels will be ordered by Curatorial Staff once per year with recommendations from garden staff, docents, and volunteers.

**DEACCESSIONING**

Accessions may be deaccessioned from the Living Collections when recommended by Horticulture Staff and must be approved by the Curator of the Living Collections. Deaccession information must be retained in the plant records system, including the reason why an accession was deaccessioned. Reasons for deaccessioning include:

1. The accession is no longer relevant to the mission of Lotusland
2. The accession has died or is missing
3. The accession has deteriorated and is unsightly or hazardous
4. A more desirable accession could replace the current accession
5. Active research on the accession has been discontinued
6. Data on the identification or authenticity of the accession is irretrievably lost
7. The accession is determined to be invasive
8. The accession is a host for pests or diseases that threaten other plants in the collection

Disposal of deaccessioned plants may occur by sale, donation, exchange, or destruction. Surplus plant material from the garden or nursery may be distributed to Lotusland staff, volunteers, or other appropriate parties, at the discretion of the Curator of the Living Collections. This plant material is for personal use only and is not for resale.

**MAINTENANCE AND EVALUATIONS**

The Director of Gardens and Facilities, the Grounds Supervisor(s), and the Horticultural Staff are responsible for the care and maintenance of the Living Collections following Lotusland’s commitment to sustainable horticulture practices. The Curator of the Living Collections, the Director of Gardens and Facilities, and the Grounds Supervisor(s) are responsible for regular evaluations of the health, potential invasiveness, and continued relevance of the Living Collections, in consultation with the Manager of Sustainability and other appropriate staff members or Committees. Outside experts may be invited to provide evaluations for groups of plants for which staff expertise is lacking.

**ACCESS AND USE**

Ganna Walska Lotusland provides open and reasonable access to the Living Collections and to plant records information, for research, conservation, education, and horticultural purposes, within the parameters of its Conditional Use Permit granted by the County of Santa Barbara. Lotusland retains the right, at its sole discretion, to refuse access to the Living Collections and to any associated documentation. Curatorial Staff shall maintain records of plants or propagation materials donated by Ganna Walska Lotusland to other organizations, plant societies, or individuals. No plant material may be removed from the property without prior permission from and supervision by the Curator of the Living Collections.

**APPENDIX: Voluntary Codes of Conduct for Botanic Gardens and Arboreta**

From the St. Louis Declaration on Invasive Plant Species (February 2002):

1. Conduct an institution-wide review examining all departments and activities that provide opportunities to stem the proliferation of invasive species and inform visitors. For example, review or write a collections policy that addresses this issue; examine such activities as seed sales, plant sales, bookstore offerings, wreath-making workshops, etc.
2. Avoid introducing invasive plants by establishing an invasive plant assessment procedure. Predictive risk assessments are desirable and should also include responsible monitoring on the garden site or through partnerships with other institutions. Institutions should be aware of both direct and indirect effects of plant introduction, such as biological interference in gene flow, disruption of pollinator relationships, etc.
3. Consider removing invasive species from plant collections. If a decision is made to retain an invasive plant, ensure its control and provide strong interpretation to the public explaining the risk and its function in the garden.
4. Seek to control harmful invasive species in natural areas managed by the garden and assist others in controlling them on their property, when possible.
5. Promote non-invasive alternative plants or, when possible, help develop non-invasive alternatives through plant selection or breeding.
6. If your institution participates in seed or plant distribution, including through *Index Seminum*, do not distribute known invasive plants except for bona-fide research purposes, and consider the consequences of distribution outside your biogeographic region. Consider a statement of caution attached to species that appear to be potentially invasive but have not been fully evaluated.
7. Increase public awareness about invasive plants. Inform why they are a problem, including the origin, mechanisms of harm, and need for prevention and control. Work with the local nursery and seed industries to assist the public in environmentally safe gardening and sales. Horticulture education programs, such as those at universities, should also be included in education and outreach efforts. Encourage the public to evaluate what they do in their own practices and gardens.
8. Participate in developing, implementing, or supporting national, regional, or local early warning systems for immediate reporting and control. Participate also in the creation of regional lists of concern.
9. Botanical gardens should try to become informed about invasiveness of their species in other biogeographic regions, and this information should be compiled and shared in a manner accessible to all.
10. Become partners with other organizations in the management of harmful invasive species.
11. Follow all laws on importation, exportation, quarantine, and distribution of plant materials across political boundaries, including foreign countries. Be sensitive to conventions and treaties that deal with this issue, and encourage affiliated organizations (plant societies, garden clubs, etc.) to do the same.