



# the BULLETIN

A quarterly publication of the Arboretum Associates

Fall 2008 Vol.32, No.3

## Fall Plant Sale Saturday, October 11

Fall is the time to take out your wish list of those plants you saw blooming earlier in the year and said "I've got to get these for my garden." It's the time to take advantage of warm days and cool nights, the sun remaining lower in the sky, and hopefully a good rainy season. Planting in the fall means less work as well as letting nature water for us (we hope) to get roots well-established. I usually wait to start my fall planting until after the first good rain of the season, so I can get my spade in the soil without first having to use the hose to pre-soak the ground. Fall planting is great for many frost hardy plants. If you are gardening in a location that gets significant freezing temperatures, wait to plant those more sensitive species until early spring. If you need advice about all of this, come to the Arboretum plant sale

October 11 where staff and volunteers will be available to answer your gardening questions and help you make plant selections. Take advantage of coming to one location for two great plant sales, as our sale is held in conjunction with the California Native Plant Society.

One of our featured Australian plants this fall is *Banksia seminuda* or River Banksia. This is a beautiful, fast-growing small to medium sized tree with linear leaves, deep green on the upper surface and silvery grey below. Flowers are cylindrical, with golden yellow or red spikes. This *Banksia* can be grown in full sun or semi shade. Our plants were grown from seed and will become sturdy trees, but may take several years to be mature enough to bloom.

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*Banksia seminuda*



## Arboretum is Honored as 2008 Non-Profit of the Year in Conservation

The Board of Directors of the Chuck Haugen Conservation Fund (CHCF) selected the Arboretum for the 2008 Non-profit of Year Award. The award was jointly presented by CHCF President, Bruce Delgado and Alec Arago of Representative Sam Farr's office at the CHCF annual picnic on June 7th at Toro Park.

Within the mission of the CHCF, to inspire and appreciate volunteers and professionals who contribute to the conservation of the Monterey Bay area ecosystems, in the words of Bruce Delgado,

"The Board of Directors of CHCF wishes to appreciate your Arboretum for nearly 45 years of providing the community of researchers and students, plant enthusiasts and conservationists, a place to learn about plants and conservation issues. We especially appreciate all the effort by the Arboretum to build strong ties between the university and the community. Our board members have experienced meetings and conferences held at the Arboretum and have been impressed by the number of interns and volunteers that are included in the Arboretum's operations. Your strong ties with the Santa Cruz chapter and State California Native Plant Society are invaluable in our opinion for the conservation of Santa Cruz County's portion of the Monterey Bay watershed.

Of course the nuts and bolts of what you do to house collections of rare or endangered plants from around the

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## Admission Fee Tubes Report

On July 1, the Arboretum began charging admission to visit the gardens. Entry fees for non-members are \$5 for adults and \$2 for children between 6-17. Arboretum Associate members are always welcome for free. Entry is also free to children under 6, volunteers, those only visiting to shop at Norrie's Gift Shop, UCSC students, to all on Community day (the first Tuesday of each month), and to members of gardens participating in the American Horticultural Society's Reciprocal Admission Program.

As "Donation" tubes we averaged \$6,400 annually; yielding less than 7 cents per visitor for the estimated 40,000 visitors we welcome each year. These voluntary donations were not raising sufficient funds to cover the costs of servicing our visitors, and Arboretum Associate members covered these costs through annual dues and gifts. After the first two months, the "Pay Here" tubes have yielded \$5,200 in much needed revenue to cover these costs.

The Arboretum thanks John and Jenny Bost, Phyllis Norris, Marie Beckham, Lynda Haworth, Sherry Eisendorf, Bill Grant, Peggy Williams, Paula Cole, and Mary Ann Leer, and Norrie's volunteers for being greeters and answering questions from visitors during the first month. Some visitors have raised questions about the new admission fee but most understand that this is necessary to proactively address our budget challenges. We hope our neighbors and those who visit regularly will join the Arboretum Associates and continue to enjoy the Arboretum and its benefits.

## Arboretum Awarded Grant for Improved Collection Stewardship

The Arboretum was awarded a Museums for America (MFA) grant from the Institute for Museums and Library Services (IMLS) for a project titled: *Enhanced Stewardship: Collections Data, Seed Repository, and Herbarium*. Beginning October 1, this two-year grant will be used to implement a new collection record database program, BGBase. The new program will be used for all Arboretum collections, making them more comprehensive, secure, and accessible for all users. A collections recorder will be hired and a long-term seed storage facility and a small regional herbarium will be established, enabling the Arboretum to better conserve and build collections and participate more fully in regional and international conservation efforts. This initiative will improve the Arboretum's capability to support collections care, education, research, and outreach.

## Australian Plant Susceptibility to Sudden Oak Death, (*Phytophthora ramorum*)

Ph.D. candidate, Kylie Ireland is doing research into Australian plant susceptibility to the disease Sudden Oak Death (SOD; *Phytophthora ramorum*) using plants from the Arboretum. Australia does not yet have SOD, and so all of her research is being conducted in California. "The Arboretum's collections have been invaluable to my research as this large collection has allowed me to work with many of the ecologically important Australian species key to my research", says Kylie. She hails from Murdoch University in Perth and is associated with the Centre for Phytophthora Science and Management. The Australian Cooperative Research Centre for Plant Biosecurity and the Department of Environment and Water provides funds for her work. Preliminary results of her research shows the majority of Australian species to be susceptible to varying degrees to SOD, with some *Eucalyptus* showing high susceptibility.

## Sara Reid, New Hire in Education

The Arboretum is pleased to introduce Sara Reid, the new assistant in Education. Sara was hired as part of the grant from The Christensen Fund project titled, *Culture in the Collections*.

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### Comments from our Visitor's Book

"Beautiful. Exotic plants from Australia seemed like something from another planet."

– visitor from San Jose (June 2005)

"Thanks for all the beauty you bring to the world!"

– visitor from Berkeley, CA (February 2005)

## The Bulletin of the UCSC Arboretum Associates Volume 32, No.3 Fall 2008

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Dear Arboretum Friends,

Under the present state budget crisis, with the economy in a deepening slump, the Arboretum is experiencing challenging times yet also, thankfully, has reason to celebrate. Last fiscal year, retail sales from Norrie's was equal to the previous year despite the reduction in plant sales overall due to the light brown apple moth quarantines and restrictions. With the state budget crisis, UCSC is adversely affected, and cost-saving measures on-campus are resulting in increased costs for the Arboretum for services provided by UCSC. With almost no non-academic resources available on campus, there is little hope for any improvement for support of the Arboretum and its programs in the short term. With UCSC, we are clearly mostly on our own.

The news is not all bad. We are grateful and appreciate that you, our donors and members, are loyal to the Arboretum and dedicated to its mission. Thank you. Last year we enjoyed record gift-giving levels and submitted several foundation proposals for support of our collection care, research, and outreach activities. In this issue we celebrate some of the good news. The Institute for Museums and Library Services (IMLS), Museums for America (MFA) grant to the Arboretum for enhanced collections stewardship directly supports objectives within our Collections Plan. The State Parks and Recreation contract for restoration of upland coastal scrub vegetation at Laguna Lagoons supports the involvement of the expertise of the Arboretum in local conservation efforts. In education, we are improving the interpretation

of the collections with grants from The Christensen Fund and the Slosson Endowment. We are ever vigilant for opportunities to contribute to and collaborate in regional and global plant conservation efforts. Plant sales last fiscal year ranked as two of our best ever. In the cover article, see what's available at the sale coming up on October 11th and plan to come to the sale and support the Arboretum. Our new admission fees and increased membership levels are generating much-needed revenue.

Basic operational support for the Arboretum comes from memberships and donor gifts, annual support, endowments, UCSC campus, and special gifts. Presently, the largest majority of our expenses is salaries supporting basic maintenance of the collections. Over the past five years this expense has grown to meet minimum collection-care levels. UCSC provides 14% of our total revenue for operations in one, state-supported salary, and also in overhead costs for electricity, water, and propane. Due to fluctuations in grant support, the Arboretum must constantly assess the basis of our operational support to cut costs and be more efficient. We constantly look for opportunities to sustainably preserve and support this invaluable and irreplaceable collection. For collection security alone, operational support needs to be permanently available and dependably budgeted.

Grants from foundations, government, and individuals are generally restricted to developing opportunities and enhancing our capacity to improve the standard of our collection conservation activities. We will continue to depend on grants to supplement operational support. Grants will be important for moving forward with objectives outlined in our plans. The IMLS/MFA grant supports priority goals of our Collections Plan for improving our curation stewardship and sustaining the value of our collections.

The Arboretum is committed to move forward with our plans and programs with grants, especially within regional and global plant conservation efforts including collection development, research, and education. Grants are generally short-term and are valuable for upgrading technology and other improvements, yet are not normally available to support basic operations.

Unfortunately, still eluding the Arboretum are permanent sources of sustainable

operational support for basic curation and care of the collections. Without grants to offset costs, operational support needs to be available to cover basic collection care without risk to the value of the collection. This is why we value and need your consistent support as donors and members. Volunteers play a key role in providing direct support of collection care and, so, offset some of these costs for the Arboretum.

Thanks to the dedication and commitment of Arboretum Associates and donors past and present, our endowment is strong, roughly 5% of the value of the total UCSC endowment. The earned interest supports a portion of our operations annually and, as the endowment grows, will be a major source of permanent support in the future. The article titled, "Plant the Seed, Grow the Garden; Gifts to Benefit the Donor and the Arboretum" presents ways you might consider making a gift to the Arboretum within planned giving opportunities. We work hard to raise the operational support necessary and at being more efficient; trying to do more with less. We are working at all levels from the UC Office of the President to individual donors and Arboretum Associate members to become more financially secure. Arboretum supporters who love plants and believe in our mission are investing in the conservation of this collection and contributing to regional and global conservation efforts for plants.

In these challenging times, it is best to focus inward on sustaining our valuable collections, keeping our expert staff supported, and building the foundations necessary to advance when economic and financial conditions improve.

Peggy Williams is stepping down after three years as Arboretum Associates President. Thank you Peggy for your leadership, dedication and commitment to the Arboretum Associates. Peggy will continue on the Board as Past-President and continues her involvement in activities at Norrie's. Matthew Thompson, current Vice-President, will be the next President of the Board beginning this Fall.

Thank you all for being Arboretum Associate members. As always, I am interested in hearing your thoughts and ideas about the Arboretum.

**Non-Profit of the Year...** (cont'd - p. 1)

world, your maintenance of the Native Plant Entrance Garden, and the vision and startup of the 50-acre California Province Gardens are projects that should be sung about from the rooftops. We at CHCF wish to help appreciate you and to inspire you to keep going in part by letting you know how much the Arboretum is appreciated throughout the Monterey Bay region for its contributions to the conservation of this area's natural heritage/ecosystems."

In addition to being recognized as the Non-Profit of the Year and \$250 award, at this event the Arboretum also received a "Certificate of Recognition" from the California State Assembly signed by Assemblyman John Laird and a "Certificate of Special Congressional Recognition" signed by Congressman Sam Farr. "We are extremely pleased to be recognized for our work and contribution to the conservation of plants regionally", said Executive Director, Dan Harder.



*Puya berteroniana*

## Substitute “Plant Conservation”

Although I can’t recall her name after 45 years, my high school civics teacher left a lasting impression on me. She was a human rights activist when I was in high school in the 60’s, and she inspired me to get involved in student leadership. That experience, I have come to realize, helped shape my life and career from that point. I learned then that I could help mobilize resources to help other students learn and grow. And I liked doing that. It led me eventually into higher education fundraising as a career.



My civics teacher was also fond of repeating the phrase, “The price of liberty is eternal vigilance.” It takes constant commitment, she would remind us, if we want to preserve the many hard-won liberties we cherish, liberties that were gained by the dedicated efforts of many who came before us. In plant conservation efforts, the price of preservation is also “eternal vigilance”.

Another person who shaped my career is the executive director of the Sierra Club, Carl Pope. I was fortunate to be hired by Carl as a major gift fundraiser during their Centennial Campaign, and I helped them build their volunteer leadership and giving programs in Northern California. The Sierra Club Centennial Campaign focused on raising funds to expand the preservation efforts of major ecosystems across the country. I learned a lot about ecosystems, and worked with many very dedicated volunteers and donors. When someone asked Carl why their Centennial Campaign was so critical and timely, he said, and I paraphrase, that he’d rather address preserving the country’s ecosystems now, than when the problem gets much worse. It was time, he said, to be vigilant.

So, I hope this gives you some idea why I have gotten involved in fundraising, and why I am here at the Arboretum. I value its mission, and want to help it grow and thrive. I have had the privilege of meeting and working with many dedicated volunteers and donors who care about this special place, the collections, and the people who protect them. We are, however, facing a significant funding challenge, given the rough economy and the university’s tight finances. If we want to make sure the Arboretum has the necessary resources to help preserve the world’s plant diversity, both at the Arboretum, and in the world, we too need to be more vigilant.

*Tad Sterling – Development Director – (831) 427-2998 – sterling@ucsc.edu*

SPECIAL PROJECTS YOU CAN SPONSOR!	SPONSORSHIP LEVEL
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Front Entrance Gate and Wall	\$1,000
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New Native Garden Planting Beds	\$500
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Hummingbird Trail Signage & Interpretation	\$250
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Sponsor a Student Intern	\$500
Succulent Greenhouse Improvements	\$500
Sponsor an Issue of the Bulletin	\$250
Nursery/Growing Area Improvements	\$250
Cutting Garden Shade Hut & Work Area	\$250
Succulent Garden Renovation	\$500
Memorial & Tribute Benches	\$3,500
Curator Discretionary Funds (for Australia, South Africa, New Zealand, Native California, Rare Fruit, Succulent Garden, and the Nursery)	\$100

## Community of Friends Membership Program

### MEMBERSHIPS

#### California Poppy \$45 (1 adult card)

*Individual, Senior, Student. Non-Transferable*

- Free admission to the Arboretum
- Discount at Norrie’s & Local Nurseries
- Priority Entrance to Plant Sales
- Discount on Admission to Lectures, and Events
- Recognition in Bulletin
- Quarterly Bulletin
- Reciprocal Admission to AHS Affiliate Gardens
- Invitation to Members Only Events
- One Garden Admission Guest Pass

#### Salvia \$65 (2 adult cards)

*Dual, Family - All the above*

- Admission of one guest accompanying each member
- One additional Garden Admission Guest Pass (two total)

#### Kauri Circle \$100–\$249

*Poppy and Salvia Benefits above, plus—*

- Two additional Garden Admission Guest Passes (four total)
- 2 Guest Passes for Priority Entrance to Plant Sales
- 1 Specially Propagated Plant

#### Erica Circle \$250–\$499

*All of the above, plus—*

- Invitation to “Behind the Scenes” Event

#### Banksia Circle \$500–\$999

*All of the above, plus—*

- Invitation to Curator Events

#### Protea Circle \$1,000 & above

*All of the above, plus—*

- Invitation to Director’s Dinner

#### Life (1 or 2 Cards)

*Poppy & Salvia Benefits above for Life, plus—*

- Protea Circle benefits for one year

## A Message from Peggy Williams, Arboretum Associates President



Well, it's finally here; this is my last column as President of the Arboretum Associates. In September, I will turn the *Banksia* gavel over to my, oh so, capable successor, Matthew Thompson.

In thinking about what to say in this particular column, I have pondered several "last" presentations - the marvelous finishing lecture of Randy Pausch, for example; or the heart-wrenching farewell by Leontyne Price when, in her farewell performance at the Met, she sings Aida's farewell to her homeland. Not that

I would rise to the level of any of these presentations, but they do inspire me.

And so the words "abundance" and "gratefulness" kept whirling around in my brain. My tenure in office has been abundant in the many friends I have made and in the assistance I have received from both staff and volunteers during that time. And I am truly grateful for all of it. This is an abundant place. It has plants that are comparable to none; they take your breath away with their beauty, their strangeness and their elegance. It has volunteers who are like no others in the world - generous, delightful people who enjoy being with one another as they give of their time and energy to help make things happen. And, of course, our staff has no parallel. They are talented, hard-working, and generous with their time and spirit. All of us who have the privilege to work with them benefit in so many ways. And there are the many donors who give large and small amounts to help pay the costs of keeping the Arboretum the vital place that it is.

But today, I experienced the feeling of true "gratefulness." Today the Aussie Weeders came to our place and weeded our garden. I tell you folks, there is nothing like it. They set to work under their magnificent leader, Melinda, like a botanical swat team to rid the garden of every jot and tittle of material that did not warrant a place there. It would have taken me months

to do what they did, and once I finished, I would have had to start all over again. I can tell you that anyone who plans to bid on them at the next plant sale is going to get serious competition from me.

I will not be leaving soon ("Forgotten, but not gone," as they said of F. Scott Fitzgerald when he missed the train taking him away from Hollywood.); I will still be at Norrie's and doing Norrie's intake of inventory, on the events committee and in various other places where I can stir up trouble. I look forward to working with all of you in several capacities in the future.

Be well, and do good work.

-Peggy

## Plant the Seed, Grow the Garden;

### Gifts to Benefit the Donor and the Arboretum

As a member of the Arboretum, you are aware that its important work continues only through the generosity of its supporters, people like you and me. Besides the satisfaction of advancing our mission, there may be other benefits for the donor such as naming opportunities, income tax savings and increased income. Below is a comparison of the benefits of various types of gifts.

Outright gifts are where the donor does not retain any control or financial interest. It may be a gift of cash, securities, or real estate. With few exceptions, the donor can deduct the fair market value of the gift on his/her income tax return, i.e. reduce one's taxable income by the value of the gift. Generally the maximum deduction in any year is limited to 50% of the donor's adjusted taxable income (ATI) with any excess deduction carried into future years. Every gift is unique since the tax benefits depend on many different factors (ie. cost basis). The Arboretum will work with you, the donor, and your tax advisor to make sure that you get the maximum benefit from your gift.

A donor who owns appreciated securities or land may find it more beneficial to make a gift of the appreciated property because the Arboretum, unlike the donor, can sell the property without owing capital gains tax. Appreciated assets are assets that you own that have gone up in value, i.e. investment properties, stocks. For example, the owner of land worth \$100,000 (with a basis of \$30,000) would be hit with about 25% capital gains tax on the \$70,000 of appreciation - about \$17,500 in taxes! By donating the property to the Arboretum, we will sell the property and apply the full \$100,000 to our mission. You can also use appreciated assets to fund gifts that will provide a guaranteed stream of income to you

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## Thank You to Our Special Sponsors

We wanted to express our thanks to each and every one of you who have made Sponsorship gifts from January 1, 2007 to June 30, 2008 in support of the Special Projects and Music Series

### Special Project Sponsors:

**Aroma Garden Renovation** - Jean Beevers, Elspeth Bobbs, Ray Collett, Lynda and Peter Haworth, Fredaline and Harry McDonald, and Phyllis Norris

**Birdbaths** - Heather and Darryl Richman

**Visitor's Guide & Map** - Susan S. Martin

**Collections and Garden Funds (including Curator Discretionary)** -

*Unrestricted:* Lawrence Bazel & Diane L Gibson

*Australia:* Ray Collett, Martin and Susan Garbowitz, and Edward Lax

*CA Native:* California Native Plant Society, Lee and Emily Duffus, Heather and Darryl Richman and Carole Kelley

*Nursery & Propagation:* Linda Locatelli, Ann and Ed Schwabecher, Edna and David Vollmer

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**Front Entrance Renovation** - Jenny and John Bost, Francesca Deaver, Alison Galloway, Bob and Sim Gilbert, Carole Kelley, Flora Ling and Paul Sturm, Susan Martin, Peter Prindle, Jeff and Lisa Rosendale, Barbara Shields, Matthew Thompson, and Peggy Williams

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**Hummingbird Trail & Signage** - Mrs. Philippe Hammerness and Susan Martin

**Memorial Benches** - Kiki May, Fredaline and Harry McDonald, Ranko Petroni

**New Zealand Travel Fund** - Shirley Harder, Jeff Rosendale

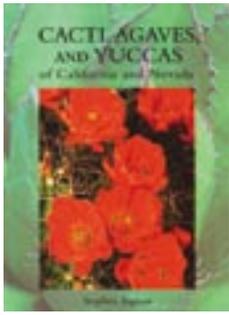
**Student Intern** - Linda Caruthers, Rachel Spencer and Kevin Rooney

**Visitor's Guide and Map** - Susan Martin, Surf City Growers, Lincoln and Lee Taiz

### Music Series Sponsors:

**Series** - Independent Energy Systems, Pacific Sun Properties

**Single Concert** - Joni Janecki & Associates



## Book Review

### *Cacti, Agaves, and Yuccas of California and Nevada,* by Stephen Ingram.

Cachuma Press 2008, 244pp, with 262 color plates, 16 botanical watercolors and 52 range maps.

Although I'm a botanist who deals with the technical details of some succulent plants, what I did first when I received the final version of *Cacti, Agaves, and Yuccas* was admire the photos and illustrations.

Author Stephen Ingram helps remind us of what it is like to be in the habitats of these succulents with excellent photos of Joshua trees in the sun with wildflowers, in the snow, and after sunset with a new moon. Sixteen watercolors by E.O. Murman are remarkable for their accuracy, beauty and realism. Great photos, a book not so technical that it scares off the neophyte, but with enough detail and careful research to make it useful to a professional botanist: Ingram and Cachuma Press have scored on all three counts.

You might think that as a long-time lover of cacti and succulents, I might be biased in favor of those plants and I guess I am. However, the cholla, *Cylindropuntia proliferata*, is one of my least favorite plants when I'm pulling its branches off of my leg with pliers. Even that vicious species looks attractive in this book, but not enough to make me forget the spines. Other species are much less aggressive and their symmetry and sculptural qualities can be appreciated by spine-phobes, at least from a safe distance or through the book. The delicate nature of the petals will surprise those unfamiliar with anything but the multi-armed denizens of the dry seasons.

This is more than a small format coffee table book, the photos and range maps on their own will serve as useful tools for identifying the plants. With a bit more time, the careful descriptions allow one to be more certain of the correct identifications. In addition to being a useful field guide, there are sections on culture, conservation, ecology, and places to see the plants in the wild. By placing much of the technical information in eight appendices, a key, and a glossary, Ingram doesn't bog down readers, but lets his prose keep them moving through the descriptions and sections on conservation, horticulture, and ecology. If you have any interest in succulents, you should look at this book and come hear the author talk about the subject in September too.

— Stephen McCabe

Available at Norrie's at the Arboretum and at Ingram's talk at the Arboretum on Monday September 22, 2008 at 7:00 pm.

## Fall Plant Sale... (cont'd - p. 1)

Another Australian native we have found to be very popular with gardeners is *Correa* 'Dawn in Santa Cruz.' This plant is a hybrid *Correa* developed by the first director, Ray Collett. Blooming winter and spring, it has pink bell like flowers with chartreuse tips. This shrub grows about 4 feet tall and wide and does well with dappled sun or light shade.

If you are looking for groundcovers, we have several California natives including *Arctostaphylos edmundsii* 'Carmel Sur', both cultivars of *Arctostaphylos uva-ursi*, 'Pt Reyes' and 'Radiant' and *Ceanothus gloriosus* 'Heart's Desire'. Also from our native California collection is *Arctostaphylos pumila* or Sandmat Manzanita. This plant is a low growing shrub with light olive green leaves spreading out from 3 to 6 feet. It can tolerate heavier soils and can be grown in light shade or full sun. And for a tough attractive plant that provides food for native pollinators, plant *Eriogonum giganteum* or St Catherine's Lace. This plant is drought tolerant and has showy flat white flower clusters during the summer.

From our South African collection, look for *Leucadendron* 'Rising Sun'. This hybrid is

vigorous and grows into a bushy shrub 7 to 8 feet tall and as wide. It is attractive all year long, and especially from fall into the winter when the bracts which surround the flowers become deep pinkish red. It is both drought and frost tolerant once established. We will also have both male and female plants of *Leucadendron macovanii*, the acacia-leaf cone bush. This is a fast growing shrub with narrow leathery green leaves. The female form has the prominent seed cones.

*Hebe topiaria* comes from our New Zealand collection and grows into a rounded well-branched tidy shrub, 3 to 4 feet tall and wide. It has elliptical grey green leaves with white flowers.

The following is an abbreviated plant sale list. For a more complete list of Fall Plant Sale offerings, go to [arboretum.ucsc.edu](http://arboretum.ucsc.edu) after October 3.

- Adenanthos cuneatus*
- Banksia speciosa*
- Banksia victoriae*
- Beaufortia squarrosa*
- Berberis pinnata* ssp. *insularis* 'Shnilemoon'
- Brachysema celsianum*

## Plant the Seed... (cont'd - p. 5)

for life (an annuity) in the form of a Charitable Gift Annuity (CGA) or a Charitable Remainder Trust (CRT).

Annuities. Yes, you can plant a tree, pick and enjoy the fruit, and still have the tree benefit future generations. The beauty of a Charitable Remainder Trust (CRT) and Charitable Gift Annuity (CGA) is that you can make a gift, retain the right to income (an annuity), receive an income tax deduction, and, ultimately, benefit the Arboretum. The Arboretum's interest is called the charitable remainder interest because the Arboretum gets that which remains after the income interest ends. While many CRTs are funded with cash, securities, or investment real estate, a donor can fund the trust using his or her home. In this case, the donor can receive an income stream and retain the right to live in the home. If the donor wants a greater tax deduction, he/she can forego the income stream and get a larger tax deduction. On the other hand, donors can donate a partial

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*Isopogon cuneatus*

- Correa pulchella* 'Pink Eyre'
- Erica canaliculata*
- Fuchsia* — various species
- Grevillea lanigera* — cream and red
- Grevillea* 'Long John'
- Grevillea* 'Ruby Clusters'
- Hebe evenosa*
- Hebe venustula* 'Sky Blue'
- Hibbertia truncata*
- Isopogon cuneatus*
- Leucadendron argenteum*
- Leucadendron galpinii*
- Leucadendron* 'Wilson's Wonder'
- Mahonia gracilis*
- Olearia traversii*
- Prostanthera aspalathoides*
- Protea* 'Pink Ice'
- Puya mirabilis*
- Salvia apiana* and other sage species
- Ugni molinae*
- Zieria prostrata*

## Plant the Seed... (cont'd - p. 6)

interest of his/her home before selling it. This way the donor is able to keep the tax free amount (cost basis + improvements) and use what would have been the taxable portion to fund a Charitable Gift Annuity (CGA) or a Charitable Remainder Trust (CRT). This enables the donor to again bypass capital gains and create a lifelong income stream.

**Wealth replacement.** With a CRT the charity keeps the trust assets at the end of the trust term, which is likely to be at the death of the donor. This may cause some potential donors to shy away from this kind of gift as it diminishes what is received by the donor's surviving family members. This is a legitimate concern especially where the younger generation has not yet established financial well-being. One strategy, if the donor is insurable, is to establish an irrevocable life insurance trust that obtains sufficient life insurance on the donor to replace the value of the property transferred to the CRT. Proceeds from the CRT may be sufficient to cover the insurance premiums. The beauty of this plan, when properly done, is that the donor's taxable estate is reduced (thus lower taxes) and the family members can get a liquid asset (cash) at significant tax savings.

**Bequests.** From the donor's standpoint, the major benefit of a transfer at death is that wealth transferred is no longer needed to maintain his or her lifestyle. Naming possibilities can give comfort to the donor's family and friends since this creates a lasting memorial to the person's good deeds and generosity. The vehicles discussed earlier are attractive to donors who want to increase their income now and leave a gift to the Arboretum.

**Conclusion.** Only lifetime gifts, outright or CRTs/CGAs, give the donor an income tax deduction. These gifts also give the Executive Director, staff, and friends of the Arboretum a chance to express their appreciation directly to the donor. The donor also has a chance to see his/her generosity make a positive difference. The donor can also become more involved in what and how they want their gift to be realized. When children and grandchildren of the donor become aware of the contribution, they too have a chance to express their pride in his or her accomplishments.

Creating a CRT will increase the donor's income which will result in greater financial security that in turn might make it easier to help other family members and/or engage in wealth replacement strategies. If estate and capital gains taxes are a concern, both lifetime gifts (whether outright or as a CRT/CGA) and bequests avoid inclusion in the donor's taxable estate and thus are not subject to this tax. Transfers that take place at death do not

generate an income tax deduction for the donor since his or her income tax year closes as of the date of death.

Lifetime charitable gifts, when compared to gifts at death, generally create greater benefits for the donor. Nevertheless, a person may have good reasons to prefer a combination of lifetime and transfers at death. The alternatives should be discussed with his or her estate and tax planning advisors. The Arboretum would like to be a recipient of your generosity and stands ready to work with you.



## News & Notes... (cont'd - p. 2)

Sara is from San Leandro, CA and has been associated with the Arboretum since fall of 2006. She recently graduated from UCSC with a degree in Environmental Studies and a degree in Anthropology. Ethnobotany has always interested Sara, and the study of the relationship between plants and people has proven to be a natural intersection of her two majors. The Arboretum provided an opportunity for Sara to take her interests and turn them into a useful project. For her senior internship she completed

the self-guided Ethnobotanical Tour to the California Natives Entrance Garden in the fall of 2007. In learning about past and present uses of native plants, Sara reflected on the value of traditional knowledge and analyzed how it may influence our connections with the environment today. Her project was a starting point for larger ethnobotany projects in the garden and she is now working as an assistant to Stephen McCabe to develop educational materials on plant uses throughout the Arboretum. Sara hopes that the ethnobotany projects at the Arboretum will highlight cultural histories, as well as encourage a more personal, present day connection with the landscape.

## California Department of Parks and Recreation Restoration Project with the Arboretum

The CA Department of Parks and Recreation is working with the Arboretum on the Laguna Lagoon Uplands Coastal Scrub Restoration Project to harvest local seed and then grow 120,000 plants to be transplanted into the project site on five acres on the north side of Laguna Creek. Seeds were harvested last fall and winter and are now growing in easily planted tubes. The plants are in poly houses near the coast at the Long Marine Lab and the Center for Ocean Health. Francis Campbell has expertly managed this project with great help from students, Aurora Gaines, Ryan Fry, and Jordan Hyman. The 18-month contract is the type of work the Arboretum is becoming increasingly involved in as regional needs for knowledge and expertise in native plants increases. This contract allows the Arboretum to establish a long-term seed storage facility, providing low-temperature and low-humidity conditions for a repository of collected native and accessioned collection seed.



## Curator Event in the Eucalyptus Grove

Melinda Krajl (Curator of the Australian Collection) and Matt Ritter (CalPoly San Luis Obispo Professor and Arboretum Visiting Scholar) talking *Eucalyptus* in the Grove to Rosemary Raphael and Lorna Clark. Photo by Mike Clark.

## **nursery discount program**

Arboretum Associates can enjoy 10% discounts on plants (and sometimes on related merchandise) at the following nurseries:

### **Drought Resistant Nursery**

850 Park Ave., Monterey, CA 93940 • (831) 375-2120

### **Garden Company**

2218 Mission St., Santa Cruz, CA 95060 • (831) 429-8424

### **Golden Nursery**

1122 Second St., San Mateo, CA 94401 • (650) 348-5525

### **Hidden Gardens Nursery**

7765 Soquel Dr., Aptos, CA 95003 • (831) 688-7011

### **Ladera Garden Center**

380 Alpine Rd., Menlo Park, CA 94028 • (650) 854-3850

### **Pottery Planet**

2600 Soquel Ave., Santa Cruz, CA 95062 • (831) 465-9216

### **Lumbermens Garden Center**

235 River St., Santa Cruz, CA 95060 • (831) 423-0223

### **Sierra Azul Nursery**

2660 East Lake Ave., Watsonville, CA 95076 • (831) 763-0939

And, of course,

**Norrie's Gift Shop** at the Arboretum.

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The **Arboretum** at UC Santa Cruz is a living museum **inspiring** stewardship of the world's biodiversity through research, **education**, and the **conservation** of rare, endangered, and **extraordinary** plants.

*Moving? Please let us know the address of your next garden... Thanks*

## Norrie's Gift Shop at the Arboretum at UCSC



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Norrie's Gift Shop is open daily 10AM-4PM  
The Jean & Bill Lane Library is open by appointment.  
Visit the Arboretum's website at: [arboretum.ucsc.edu](http://arboretum.ucsc.edu)  
For information, or if you have any disability-related needs, call  
(831) 427-2998 or fax us at (831) 427-1524.