



CENTER FOR PLANT CONSERVATION

# Save Plants

**Greater than the sum  
of its parts, the CPC  
network saves more  
plant species together  
than would ever  
be possible alone.**

Sandhills milkvetch (*Astragalus michauxii*)

## 2020 ANNUAL REPORT

Photo credit: Michael Kunz, North Carolina Botanical Garden



## THANK YOU

As we reflect on 2020 and the extreme challenges of the COVID-19 pandemic, I am inspired by the resiliency, responsiveness, leadership, and outstanding accomplishments of CPC. Our exceptional staff, led by Dr. Joyce Maschinski, have kept keen eyes and steady hands on our mission. Our phenomenal PI network has strengthened, maintained an impressive portfolio of research and field work, and continues to grow. We have also engaged new collaborators in public-private partnerships, particularly throughout California (CA), where professional and private citizens groups secured State legislature funding for the CA Biodiversity Initiative. Aimed at protecting all CA native plant species, this Initiative is now emerging as a model for other states and regions of the U.S.

As a result of CPC's innovative collaborations, we have also reached new milestones in our mission "to safeguard and conserve imperiled native plants by advancing science-based plant conservation practices, connecting and empowering plant conservationists, and inspiring all to protect biodiversity for future generations." With nearly 70% of the federally-defined endangered North American native plant species in our National Collection's conservation frameworks, CPC will not rest until all threatened native plants are secure and the sound conservation theory and 'best practices' we advance are disseminated to scientists, communities, and the public worldwide.

With deep admiration and gratitude, I thank all of our supporters and donors who have made so much of this possible. I hope you will join me in celebrating our recent achievements as we confidently begin discussing next steps and formulate new dimensions of our vision to 'Save Plants'.

*Dr. Barbara Millen, Chair, CPC Board of Trustees*



# resilience adaptation innovation

Despite the extraordinary challenges of 2020, CPC can tout many accomplishments. Thanks to the dedication of our Board of Trustees, our stalwart staff, and indomitable conservation partners, with resilience, adaptation and innovation we SAVED PLANTS. From collections of new species to rediscoveries of species thought extinct, from connecting ecosystems to planting natives, we have worked steadily toward our mission. Our wonderful donors and federal agency supporters have given us exciting opportunities to expand rare plant collections, our knowledge of and impact on plant conservation practice.

As part of the path to personal and community health, saving rare plants from extinction promotes a healthy natural world, which in turn promotes human well-being. Our commitment to plant conservation reflects our desire for our children and great grandchildren to inherit a healthy planet.

*In gratitude,*  
Dr. Joyce Maschinski, President & CEO



# WHY PLANTS MATTER

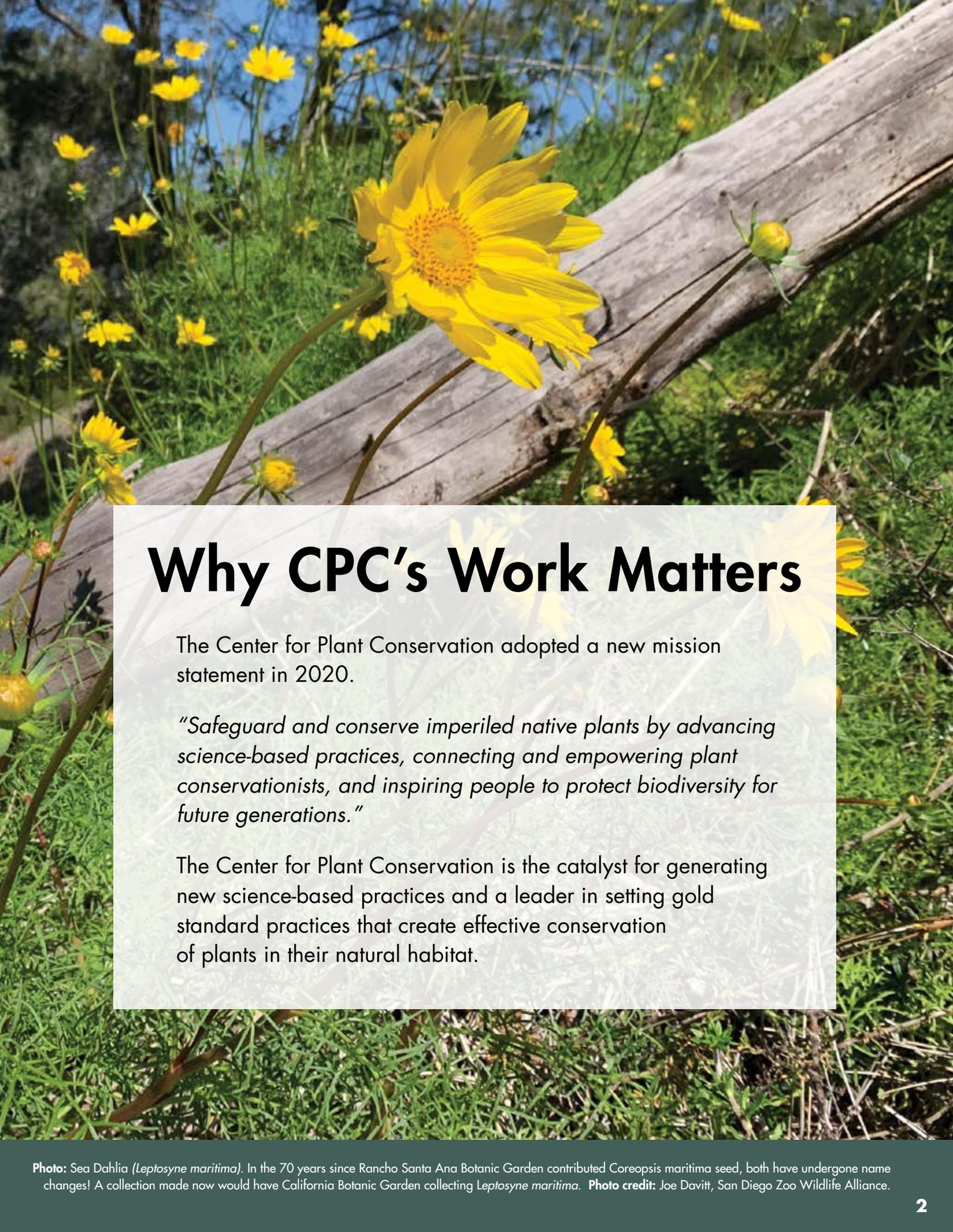
The buzzing bee, the grazing gazelle, and the urban city dweller depend on plants to survive. Providing clean air, healthy soils, food, clothing, medicine, shelter, and beauty, **PLANTS ARE THE FOUNDATION FOR LIFE ON EARTH.**

Plants surround us and are part of our lives in almost every way, every day. But we tend to forget the importance of plants and often take them for granted.

At the Center for Plant Conservation we know the importance of plants and work nonstop to ensure that all plants in North America are saved from extinction.

We know that healthy ecosystems depend on plants. When a species becomes endangered, it is a sign that the whole ecosystem is at risk. When a species goes extinct, the loss has a ripple effect on many interdependent insects, birds, mammals, and plants. Each species that is lost triggers the loss of other species within its ecosystem. Saving plants saves the ecosystems, the very ecosystems humans need.

**Saving nearly 1 plant a week for the past 35 years**



# Why CPC's Work Matters

The Center for Plant Conservation adopted a new mission statement in 2020.

*"Safeguard and conserve imperiled native plants by advancing science-based practices, connecting and empowering plant conservationists, and inspiring people to protect biodiversity for future generations."*

The Center for Plant Conservation is the catalyst for generating new science-based practices and a leader in setting gold standard practices that create effective conservation of plants in their natural habitat.

# resilience

In the midst of the pandemic and national social unrest, how did we continue to do plant conservation?

We can't talk about 2020 without acknowledging the challenges of the year. But the Participating Institutions in CPC's network were resilient and resourceful as they carried on the important work of safeguarding and conserving imperiled native plants.

In some parts of the country, early in the year, conservation teams were not allowed to leave their homes, while in other places, following social distancing regulations, field work pushed on. Wearing masks and keeping six feet apart while conducting field work had its own challenges. Tom Kaye, Ph.D., executive director of the Institute for Applied Ecology (IAE), noted complications arising in training and answering specific questions in the field, but they got the work done. The IAE teams monitored reintroduced populations of the threatened golden paintbrush (*Castilleja levisecta*) – using separate equipment where possible and sanitizing shared equipment between uses.

Getting to the field sites posed additional obstacles. Safety standards recommended not sharing vehicles for long durations, such as traveling to a study site. To monitor Cook's desert parsley (*Lomatium cookii*), which requires overnight travel, Kaye's team drove separately, camped and cooked separately, and worked in the field separately. Although this method was slower and a bit more expensive, they were able to get strong data on existing populations and seedling recruitment in reintroduced patches.



**Left photo:** Monitoring Cook's desert parsley (*Lomatium cookii*) required overnight travel for the IAE team. They travelled and camped completely separately to abide by health guidelines, and got the work done. **Photo credit:** Tom Kaye, Institute for Applied Ecology. **Inset photo** of Cook's desert parsley (*Lomatium cookii*). **Photo credit:** US Fish and Wildlife Services.



**Photo:** The IAE field team conducted their monitoring of threatened golden paintbrush (*Castilleja levisecta*) while wearing masks and taking sanitary precautions with equipment. **Photo credit:** Tom Kaye, Institute for Applied Ecology.

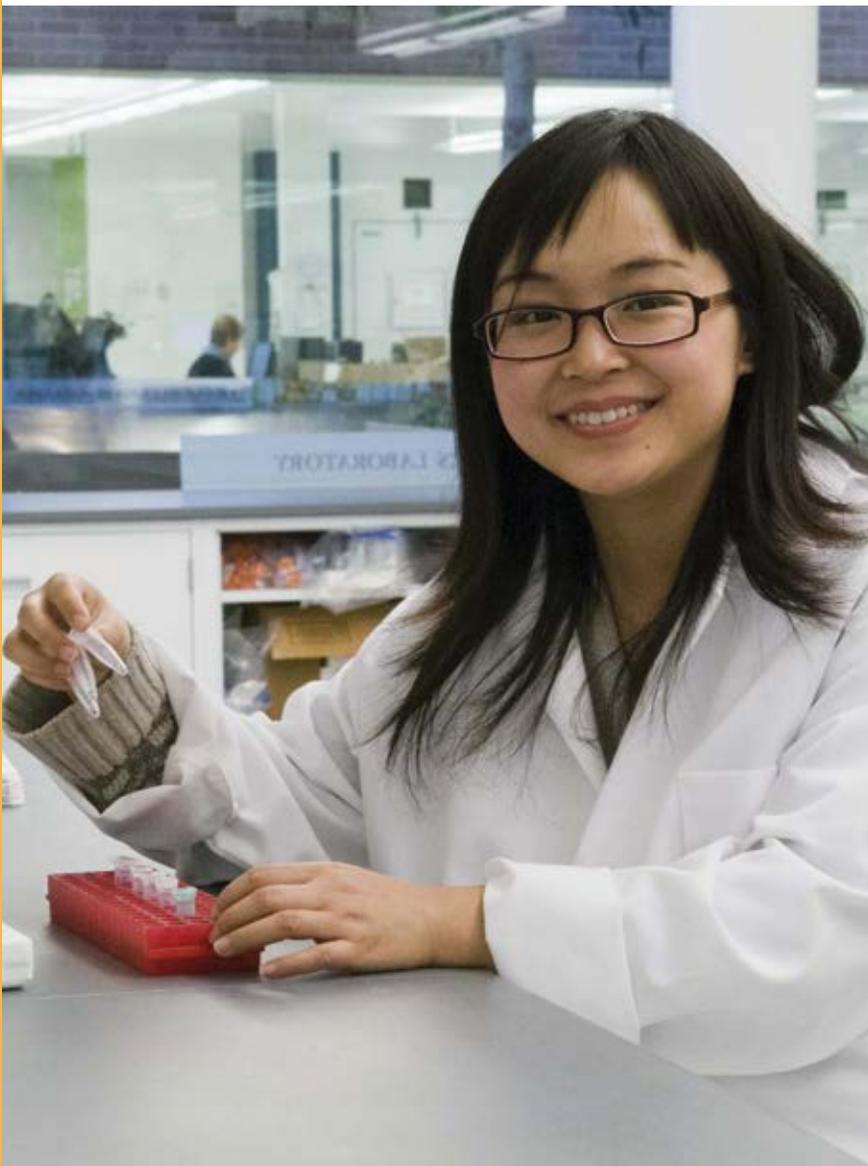
# resilience

Holly Forbes at the University of California Botanical Garden (UCBG) was excited to get the “OK” to conduct field work in late May of 2020. Despite limited staff and restrictions for taking volunteers with her, Holly and her team pursued some conservation priorities, such as monitoring the endangered Baker’s larkspur (*Delphinium bakeri*). Even though the field season for several early-flowering taxa had passed, the nimble UCBG team turned their attention to late blooming, late fruiting species for conservation activities.



**Left photo:** UCBG Horticulturists onsite for critical collection care during shelter-in-place closure (left to right: James Fong, Eric Hupperts, Gideon Dollarhide).  
**Photo insert:** Baker’s Larkspur (*Delphinium bakeri*).  
**Photo credits:** Vanessa Handley, Ph.D., University of California Botanical Garden.

It was no less challenging for those conservation officers working in the labs. As shutdown orders spread across the country in March 2020, teams scrambled, with just a few days' notice to move plants from growth chambers to greenhouses, shutting down tissue culture work, prepping the seed bank for closure, and more. At the San Diego Zoo Wildlife Alliance Plant Conservation, Post-doctoral fellow Joseph Ree's work was deemed essential and he was able to continue his care of endangered Nuttall's scrub oak (*Quercus dumosa*) plants as well as experiments in controlled aseptic conditions.



Although many labs in CPC's Participating Institutions were idle, the researchers were certainly not. At the Chicago Botanic Garden (CBG), staff pivoted to a new focus when their molecular genetic work was put on hold. CBG's IMLS-funded pedigree management forged ahead, with a focus on database and software development, as well as creating a project website, conducting literature reviews on target taxa, and any other aspect of the project that could be tackled from home.

Many CPC institutions found their conservation programs constrained, and faced significant impacts on project timelines and budgets. But for none of them has the waiting time become time lost. Researchers dug deeper into the literature, formulating new projects and experiments, and getting creative in their stay-at-home tasks.



**The CPC National Meeting is a valuable tool for bringing the leading plant conservationists in the CPC network together to share ideas and spark new ways to tackle the task of saving the rare and endangered plants. In early March of 2020, plans were well underway with Denver Botanic Garden for another great national meeting to be held in May.**

**Then we watched the fallout of the pandemic spread across the country – the closures, no travel rules, and stay-at-home orders. We had no way of knowing how long these restrictions would last.**

**“What did we do about the National Meeting?”**

At first, we delayed the meeting, as we waited for more information about the pandemic, then we postponed it until October. Finally, we adapted – we went virtual. Going virtual had its challenges, but it also had some advantages. One of the biggest advantages was that more people from more institutions had the opportunity to attend and learn about the great work that is being accomplished within the network and the great new synthetic collaborations being spearheaded by the National Office.

The online format and correspondingly low registration fee welcomed a broader audience. Institutions that could previously send just a single representative were able to have many staff members participate this year. Interested conservationists attended from a wider range of institutions than can typically attend. And, with more than 170 registrants, the event was larger than ever.



Our annual Star Award was presented virtually to Jennifer Ramp Neale via a video that allowed her wonderful colleagues to laud her excellent work in plant conservation for imperiled native plants in Colorado.

Lightning talks, a poster session, breakout groups, a keynote presentation by George Gann, Executive Director & Chair of the Board, The Institute for Regional Conservation International Policy Lead, Society for Ecological Restoration gave the event all the hallmarks of a traditional National Meeting. Despite not being able to be together physically, we managed to capture the essence of the CPC National Meeting virtually in 2020.



Another new feature in 2020 was the inaugural CPC National Meeting Photo Contest. Attendees used their downtime to peruse more than 130 photos entered and “like” their favorites to vote in the competition.



# a year of champions

A community of practice, a network, a brain trust – The Center for Plant Conservation is many things, but at its core, it is the individuals who dedicate their time and energy to saving rare and endangered plants. Each month in our newsletter we highlight one of these fine people and share their stories and their passion for plants.



**January – Dan Gluesenkamp,**  
Former Executive Director of  
California Native Plant Society

Dan has the ability to paint a vibrant picture of his conservation dreams. Perhaps more importantly, he will leave you with a great sense of hope. Fulfilling one of his conservation dreams, Dan and his team were instrumental in securing the state funds for seed banking as part of the California Biodiversity Initiative.



**February – Polly Pierce,**  
Founding CPC  
Board of Trustees

Native plant enthusiast only begins to capture the essence of Polly Pierce. Polly is truly a champion for native plants. Polly's involvement contributed to the early success of CPC. She dedicated many years to serving on the CPC board and continues to support CPC with her generosity and wisdom.



**March – Wes Knapp,**  
North Carolina  
Natural Heritage Program

Wes is leading the charge to assess plant extinction in North America north of Mexico. Better understanding of extinction has opened his eyes to the extent of our knowledge, and sometimes our lack of knowledge, about rare plants. Working with Natural Heritage Programs, he is helping coordinate field surveys and data sharing efforts, which are mission critical for plant conservation.



**April – Omar Monsegur-Rivera,**  
USFWS, Caribbean  
Ecological Service Field Office

The Isle of Enchantment has many treasures. Among them is Omar Monsegur-Rivera, a man who watches over the diverse and numerous endangered plants of Puerto Rico. Deeply respected and admired by his colleagues, Omar moves recovery actions forward. Through his actions, some of the rarest ferns in Puerto Rico are thriving in cultivation at Fairchild Tropical Botanic Garden.



**May – Kristin Haskins,**  
Executive Director,  
The Arboretum at Flagstaff

Kris leapt at the chance to co-edit *Plant Reintroduction in a Changing Climate: Perils and Promises*, thus ensuring we included a chapter on the importance of mycorrhizae for establishing healthy plant populations. Her great enthusiasm, exceptional writing and editing skills, and great determination to help others learn about applications of science to plant conservation proved invaluable for the book.



**June – Jennifer Ceska,**  
Conservation Coordinator, State  
Botanical Garden of Georgia

Over many years, Jennifer's warmth and smile has nurtured the Georgia Plant Conservation Alliance, an extremely dedicated group of conservation biologists working together on species recovery actions for Georgia's imperiled plant populations.

Let's look back at the CPC Conservation Champions of 2020. From board members to botanists, educators to native plant enthusiasts, CPC 2020 Conservation Champions represent the breadth of talent needed to save rare plants.



**July – Anne Frances,**  
Lead Botanist,  
NatureServe

As the botanist coordinating the plant species information for NatureServe, Dr. Anne Frances has helped refine standardized methods and data structure that allow national and international datasets to achieve a bird's eye view of plant conservation. Anne has spearheaded efforts to examine overlooked regionally rare species and improve effective conservation through connecting information from garden collections to wild population assessments.



**August – Lindsay Marshall,**  
CPC Board of Trustees,  
Chair of Advocacy Committee

Sometimes an idea needs a champion. And that is just what Lindsay Marshall was – a champion for the idea of CPC using advocacy as a tool to save plants. Lindsay brought her experience, expertise and enthusiasm for advocacy to the CPC Board. She has gently guided and prodded the organization into the realm of sharing our voice on behalf of plants on Capitol Hill.



**September – Wendy Gimble,**  
Associate Director, University of  
Washington Botanic Gardens

Wendy has steadily grown the Rare Care Program, building partnerships with federal, state, and local agencies to provide critical information needed to conserve and recover Washington's native rare species. Citizen scientists and students participate in rare plant monitoring, ex situ conservation, reintroduction, and education. Her efforts to combine good research with land manager needs has gained her great respect as a conservation leader.



**October – Jennifer Ramp Neale,**  
Director of Research and Conservation,  
Denver Botanic Gardens

Jennifer Ramp Neale received the CPC 2020 Star Award, which honors those who demonstrate the concern, cooperation, and personal investment needed to conserve our imperiled native plants. Her clear communication, science-based recommendations, and collaborations with a broad array of partners have contributed to knowledge of and protection for imperiled native plants in Colorado. Her efforts have been a shining model for the CPC Network.



**November – Todd Bittner,**  
Director of Natural Areas,  
Cornell Botanic Gardens

Charged with the stewardship of 3,600 acres of natural areas at Cornell Botanic Gardens, Todd Bittner has the joy and challenge of overseeing a diverse landscape, from gorges to bogs, meadows to old growth forests. His careful attention to his charges, including federally endangered plants, and his wonderful commitment to engaging students and the public to connect and care for nature are exemplary.



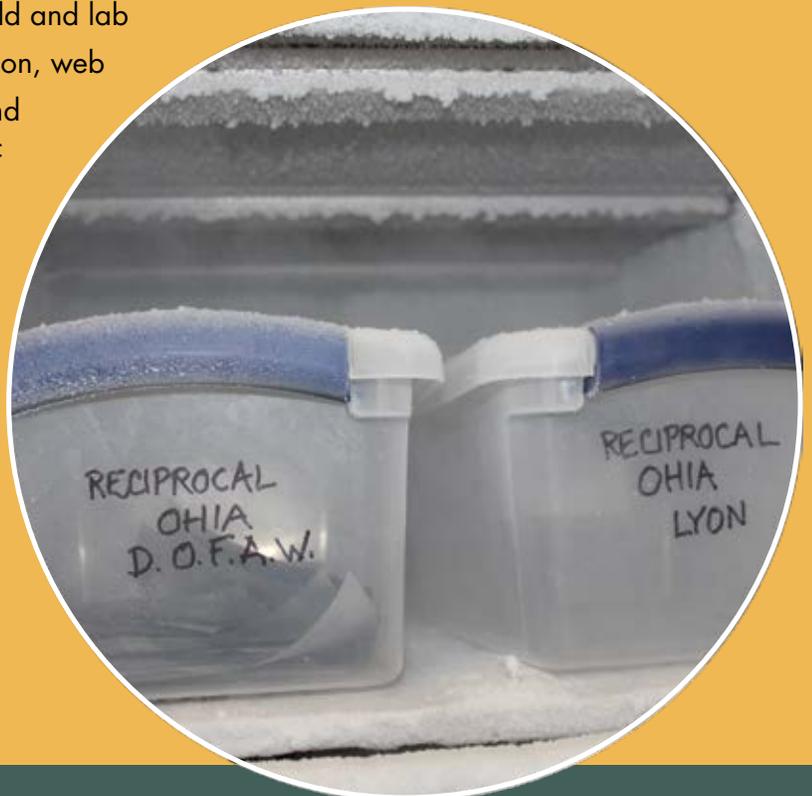
**December – Dr. Barbara Millen,**  
Chair,  
CPC Board of Trustees

Barbara truly understands that native plants are essential for healthy human communities. She understands that rare plants are gems of value that are part of our natural heritage, that give us a sense of place, that provide us fuel we need to recharge and restore. Active in her Boston environs and on her family lands, Barbara brings to CPC a wonderful perspective and appreciation for a healthy, resilient organization.

# innovation

Seed banking is an amazing conservation tool. It is relatively cost effective and easy compared to maintaining mature plants on the grounds of a botanic garden for decades. Once the seeds are collected and processed, conservationists must simply dry the seeds and place them in a freezer. The majority of rare plant seeds survive this treatment, at least initially. In fact, the CPC National Collection is maintained primarily as seeds that are stored in “orthodox” storage at  $-18\text{ C}^{\circ}$  in the freezers of botanical gardens. However, like all living things, seeds age and degrade over time. Uncertainty about the length of time a seed collection can survive obscures the need to replace collections and thus presents an obstacle to plant collections planning.

To ensure better stewardship of rare plants in seed collections, CPC’s National Office spearheaded a grant written by Dr. Katie Heineman and received \$476,040 from the Institute of Museum and Library Services National Leadership Grant for Museums to test aging and longevity in wild rare plant species seeds in a new way. Working closely with CPC conservation partners and the National Laboratory for Genetic Preservation (NLGRP), CPC will disperse the funding over three years to support all field and lab work, coordination, web development, and data analyses of this new project.



Left photo: *var. proctorii* in Sierra Bermeja, Puerto Rico.  
Photo insert: Ohia seed in frozen storage at National Tropical Botanical Garden.  
Photo credits: Joyce Maschinski



Biochemical indicators have been used to measure seed aging reliably and predict seed longevity in crop species. RNA integrity number (RIN) has shown particular promise as a metric of seed aging. **To assess the usefulness of this cutting-edge research in conservation collection curation, this research project will be the first known application of RIN to assess aging of seeds from wild rare plant species.**

Across the network, institutions will re-collect seed from the rare plant populations and compare to seeds collected from the same populations decades earlier. New and old seed will then be subjected to a suite of tests, including the examination of RNA integrity, to determine how each species holds up against time in storage. The results will help us understand how long seeds from different habitats and with different traits can be expected to survive in storage.

CPC's seed banks aim to keep seeds alive for decades or centuries as safeguards against the loss of wild populations. Applying this innovative new technology to wild species will be especially useful for conservationists, given the enormous variation wild seeds display in germination requirements and storage behavior. This research holds the promise of making saving plants much more effective.

# new species

## in the CPC National Collection

The CPC National Collection of Endangered Plants, a living conservation collection of imperiled plants, is an important conservation resource. It serves as an emergency backup in case a species becomes extinct or no longer reproduces in the wild.

The COVID-19 pandemic restrictions and consequences could not deter the CPC network from conserving new species of rare plants. Collectively, CPC institutions added about 390 species to the National Collection, bringing the total number of species in the National Collection to 2,038.

CPC always strives to support plant conservationists safeguarding rare plants across the nation. This year, financial support generated and distributed by CPC was key to a number of conservation successes. Over half of the National Collection additions are the result of collection efforts from the California Plant Rescue project, a collaborative effort to conserve the state's rare plants. CPC members in California are working in conjunction with other institutions to divide and conquer the task of saving plants. CPC administers funds from the state of California to support this California Biodiversity Initiative project. A stunning total of 191 rare plants were collected this year, enabling the state to come close to the Convention of Biodiversity goal of conserving 75% of rare native plants in collections by 2020. Although just shy of the goal, this achievement is particularly remarkable given the access, permitting, and staffing restraints on the California institutions during this pandemic year.

Additional conservation efforts supported by CPC in 2020 include seed collections in Arizona and New Mexico through our agreements with the U.S. Forest Service Region 3 and Kew Foundation America. Maria Mullins at the Institute for Applied Ecology collected small-headed goldenweed (*Lorandersonia microcephala*) and Pecos fleabane (*Erigeron subglaber*) in north central New Mexico. Sheila Murray from The Arboretum at Flagstaff collected two species of Indian paintbrush (*Castilleja mogollonica* and *Castilleja kaibabensis*) on Forest Service land in Arizona.



Left photo: Kaibab Plateau Indian paintbrush (*Castilleja kaibabensis*). USFS collection.  
Photo credit: Sheila Murray, The Arboretum at Flagstaff.

# Some of the latest additions to the collection



## Plant Sponsorships

When a participating institution accepts responsibility for a National Collection species, it makes a long-term commitment to help secure and recover the species for future generations. They invest significant resources and effort in securing and holding the imperiled plant material, and drive the research and new technologies on the best ways to grow, manage, and restore these native species.

To offset some of the expenses of collecting, growing and researching these species, CPC created the Plant Sponsorship program. Plant sponsorships provide the participating institution responsible for the named species steady, stable funding for the long-term work. A sponsorship does not cover all the expenses, but it provides significant help and stability.

In 2020, we added one more fully funded sponsored plant to the list, Texas Windmill Grass (*Chloris texensis*), which is under the care of Mercer Botanic Garden in Texas. We currently have 276 of the 2038 plants in the National Collection fully sponsored.



# financials

We are pleased to share selected financial data for the Center for Plant Conservation derived from the audited financial statements for 2018, 2019, and 2020. For more detailed financial information, please see our audited financial statements on our website at [saveplants.org/about-us/reports-and-finances](https://saveplants.org/about-us/reports-and-finances).

In 2020, our operating revenues, without donor restrictions, were \$1,336,344 and these surpassed our operating expenses of \$1,198,803 by \$137,541, which comprised our net operating income without donor restrictions.

For 2020 Program Services expenses were \$845,584, or 71% of total expenses. This included \$418,909 for National Office expenses (staff salaries, expansion and maintenance of National Collection database, newsletter production, and support of the CPC network): \$138,000 paid to 30 Participating Institutions for Plant Sponsorships; \$12,500 paid to two Participating Institutions for seed collecting from US Forest Service and Kew Foundation of America; and \$120,969 paid to contractors for work related to the CPC Rare Plant Academy funded by a grant from the Institute for Museum and Library Services.

CPC's endowment, named the Plant Conservation Fund, includes funds established by donors to provide for specific activities and general operations. The endowment assets at fair value increased in the past three years from \$4,691,254 in 2018 to \$5,588,856 in 2019 and \$5,638,603 in 2020.

The annual draw from the endowment to Operating Revenue is based on the Board approved draw policy. ...A rate of 5% was applied to the average of the prior three years fair value on December 31 of each year.

The net investment earnings on the endowment relative to the draw and the resulting effect on the endowment was as follows:

	<b>2020</b>	<b>2019</b>	<b>2018</b>
Net Investment Earnings	\$287,553	\$1,118,612	(\$240,744)
Draw	(\$240,206)	(\$231,230)	(\$218,272)
Surplus (deficit) effect on endowment	\$47,347	\$887,382	(\$459,016)

Our change in net assets, which is our bottom line taking into account operating results, endowment results together with all other financial effects was as follows:

	<b>2020</b>	<b>2019</b>	<b>2018</b>
Change in Net Assets	\$157,938	\$981,926	(\$419,981)

The California Biodiversity Initiative was created by ‘Executive Order B-54-18’ promulgated by Governor Brown in order to “improve understanding of the State’s biological richness and identify actions to preserve, manage, and restore ecosystems to protect the State’s biodiversity from climate change.” As part of the California Biodiversity Initiative, the state of California allocated \$3,200,000 in 2019 and \$200,000 in 2020 to support the California Plant Rescue Program to make rare plant seed collections for the conservation of California flora. CPC, as fiscal sponsor for the California Plant Rescue Program, received these funds from the state, and manages and disburses them to the 12 members of California Plant Rescue per agreed upon terms. CPC has placed the corpus of the funds in a temporarily restricted account, while retaining 5% of the total funds as administrative cost recovery as agreed upon in the California legislative appropriation. During 2020, CPC disbursed \$473,701 to the members of California Plant Rescue.

*Thanks to the hard work and generosity of our Board of Trustees, our donors and partners, The Center for Plant Conservation continues to be a vibrant and sustainable organization that Saves Plants.*

# financials

## Selected Financial Data

The data set forth below are derived from the audited financial statements of CPC, which are included in full on our website at [saveplants.org/about-us/reports-and-finances](http://saveplants.org/about-us/reports-and-finances) and should be read in conjunction therewith:

### STATEMENT OF ACTIVITIES DATA:

#### OPERATING DATA:

	2020	2019	2018
<b>Operating Revenues</b>			
Grants and contributions without donor restrictions	\$347,224	\$402,909	\$464,485
In kind contributions (SDZG)	459,116	549,386	528,048
Government grants + contracts without donor restriction	174,284	113,436	151,259
Participating institution fees	70,825	41,825	35,250
National meeting	14,050	29,620	25,685
Draw from accumulated investment earnings (released from donor restricted endowment)	240,206	231,230	218,272
Other Net assets released from donor restrictions	30,000 <sup>1/</sup>	40,000 <sup>1/</sup>	25,000 <sup>2/</sup>
Other income	639	10,942	2,082
<b>Total Operating Revenues</b>	<b>\$1,336,344</b>	<b>\$1,419,348</b>	<b>\$1,450,081</b>
<b>Operating Expenses</b>			
Program Services:			
National office	\$691,494	\$803,956	\$821,330
Plant sponsorships	138,000	137,500	137,500
Seed collecting at Pls	12,500	85,000	81,000
National meeting	3,590	49,079	29,216
Sub-Total Program Services	845,584	1,075,535	1,069,046
Management and General Support	255,342	264,961	215,782
Fundraising	97,877	114,528	101,448
<b>Total Operating Expenses</b>	<b>1,198,803</b>	<b>1,455,024</b>	<b>1,386,276</b>
<b>Net operating income (loss) after draw from accumulated investment earnings</b>	<b>\$137,541</b>	<b>(\$35,676)</b>	<b>\$63,805</b>
<b>Effect of changes in funds subject to donor restrictions</b>			
Draw from accumulated investment earnings (released from donor restricted endowment)	(\$240,206)	(\$231,230)	(\$218,272)
Other net assets released from donor restrictions	(30,000) <sup>1/</sup>	(40,000) <sup>1/</sup>	(25,000) <sup>2/</sup>
Government grants + contracts with donor restrictions	—	160,000 <sup>3/</sup>	—
Contributions with donor restrictions - Additions to endowment	2,400	10,220	230
Subtotal	(\$267,806)	(\$101,010)	(\$243,042)
<b>Net income (loss) before non-operating income and expenses – Investment earnings, net</b>	<b>(\$130,265)</b>	<b>(\$136,686)</b>	<b>(\$179,237)</b>

<sup>1/</sup> Satisfaction of donor restrictions for 2019 and 2020 portions, respectively - Funding of administration of CA Plant Rescue Program.

<sup>2/</sup> Satisfaction of donor restriction - Endangered MO Plants.

<sup>3/</sup> Funding of administration of CA Plant Rescue Program for 2019 thru 2022.



**NON-OPERATING / INVESTMENT EARNINGS /  
CHANGE IN NET ASSETS DATA:**

	2020	2019	2018
Net operating income (loss) before non-operating income and expenses - Investment earnings, net	(\$130,265)	(\$136,686)	(\$179,237)
Non-operating income (loss) - Investment earnings, net	288,203	1,118,612	(240,744)
<b>Change in Net Assets</b>	<b>\$157,938</b>	<b>\$981,926</b>	<b>(\$419,981)</b>

**ENDOWMENT DATA:**

Endowment at fair value, beginning of year	\$5,588,856	\$4,691,254	\$5,150,040
Investment earnings, net of expenses	287,553	1,118,612	(240,744)
Draw from accumulated investment earnings (5% of 3 year rolling average endowment)	(240,206)	(231,230)	(218,272)
Contributions	2,400	10,220	230
Endowment at fair value, end of year	\$5,638,603	\$5,588,856	\$4,691,254
Approximate annual percentage return on endowment	5.1%	23.8%	(4.7%)
Surplus of Investment earnings over (or shortfall from) Draw from accumulated investment earnings	\$47,347	\$887,382	(\$459,016)

**STATEMENT OF FINANCIAL POSITION DATA: ASSETS**

Cash and cash equivalents - operating	\$594,343	\$333,586	\$330,977
Cash and cash equivalents - endowment	58,093	106,021	60,033
Cash and cash equivalents - restricted funds held for others (including CDs)	2,756,299	3,040,254	—
Cash and cash equivalents - CA Biodiversity overhead for 2020 through 2023	90,000	120,000	—
Subtotal Cash and cash equivalents	\$3,498,735	\$3,599,861	\$391,010
Accounts, grants and contributions receivable	41,832	29,051	4,506
Other assets	15,713	15,728	49,500
Endowment investments (at fair value)	5,580,510	5,482,835	4,631,221
<b>TOTAL ASSETS</b>	<b>\$9,136,790</b>	<b>\$9,127,475</b>	<b>\$5,076,237</b>

**Liabilities**

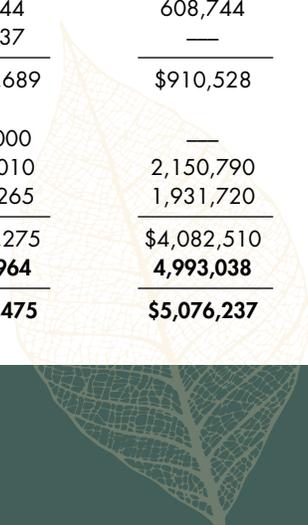
Accounts payable and accrued expenses	\$182,271	\$94,989	\$41,671
Deferred revenue	13,351	17,522	41,528
PayCheck Protection Program Loan	51,976	—	—
Fund held on behalf of others	2,756,299	3,040,000	—
<b>Total Liabilities</b>	<b>\$3,003,888</b>	<b>\$3,152,511</b>	<b>\$83,199</b>

**Net Assets**

Without donor restrictions			
Undesignated	\$404,299	\$266,108	\$301,784
Designated by Board for an endowment	608,744	608,744	608,744
Accumulated endowment investment earnings	171,001	127,837	—
Total without donor restriction	\$1,184,044	\$1,002,689	\$910,528
With donor restrictions			
Donor restricted - temporary in nature	\$90,000	\$120,000	—
Endowment - perpetual in nature	2,163,410	2,161,010	2,150,790
Accumulated endowment investment earnings	2,695,448	2,691,265	1,931,720
Total with donor restriction	\$4,948,858	\$4,972,275	\$4,082,510
<b>Total Net Assets</b>	<b>6,132,902</b>	<b>5,974,964</b>	<b>4,993,038</b>

**TOTAL LIABILITIES AND NET ASSETS**

<b>\$9,136,790</b>	<b>\$9,127,475</b>	<b>\$5,076,237</b>
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Photo: Maintaining space between gallon pots increases air flow at the Fairchild Tropical Botanic Garden Nursery.  
Photo credit: Fairchild Tropical Botanic Garden Nursery.