November 7, 2005

We are pleased to welcome you, on behalf of the University of Florida Environmental Horticulture program, to the Independent Breeder’s Conference. This first time event is bringing independent breeders together with some of the best plant breeding companies in the world.

Our goal is to help independent plant breeders bring their hybrids successfully to market, thus providing new and unusual plants to the consumer. We hope the forum offered by the mix of presentations, discussions and personal interactions will promote greater discussion between plant breeding companies and independent breeders in the future. Also, throughout the program, independent breeders will learn practices for evaluation, licensing and protection of new and unique plants.

The Independent Plant Breeder’s Conference would not be possible without the support of our industry sponsors. We extend a sincere and heartfelt “Thank You” to the industry leaders who share our vision and interest in introducing more plants to the public.

We wish you a great conference and many successes in the future as a result of the information, discussion and interaction at this conference.

Terril A. Nell, Co-Organizer

David G. Clark, Co-Organizer
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Agenda

Friday, November 18, 2005

4:00 PM  Conference Registration Open (until 7:00pm)

Saturday, November 19, 2005

7:00 AM  Conference Registration Open (until 5:00pm)
Sponsor Displays in Grand Cypress Ballroom, Salon D
Morning Refreshments in Grand Cypress Ballroom, Salon D

8:45 AM  Welcome & overview of the conference – Dr. Terril Nell, Chair,
Environmental Horticulture Department, IFAS, University of Florida

STEP 1
STACKING THE DECK IN YOUR FAVOR: THINGS YOU SHOULD KNOW

9:00 AM  Runaway success or niche specialty? Which will your plant be? –
Dr. Brian Corr, Ball Horticultural Company.................................................  (p. 3)

9:50 AM  Protecting your new cultivars – Dr. C. Anne Whealy, Proprietary Rights
International and Ms. Beth Lamb, Lamb & Lamb, Inc. .........................  (p. 7)

10:40 AM Refreshment Break in Grand Cypress Ballroom, Salon D

11:00 AM Keeping it clean! – Dr. Philip Harmon, Department of Plant Pathology,
IFAS, University of Florida...............................................................................  (p. 9)

11:50 AM Boxed Lunch Provided in Grand Cypress Ballroom, Salon D

STEP 2
STAND UP AND TESTIFY: LEARNING FROM THE PEOPLE WHO HAVE SUCCEEDED

1:00 PM  Selecting the one that works! – Mr. Jim Berry, Plant Development
Services Inc. (PDSI)

1:50 PM  Using an eye for plants – Mr. John Gray, Lake Area Nurseries .......  (p. 13)

2:40 PM Refreshment Break in Grand Cypress Ballroom, Salon D

3:00 PM Picking someone to spend your life with – Mr. Tony Avent, Plant
Delights Nursery

3:50 PM Meet Your Sponsors

5:15 PM  Break (free time till Breeder Showcase & Reception)

6:00 PM Breeder Showcase & Reception in Grand Cypress Ballroom, Salon D and
Assembly Foyer
**Independent Plant Breeder’s Conference**

**Sunday, November 20, 2005**

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<td>7:45AM</td>
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<td></td>
<td>Sponsor Displays in Grand Cypress Ballroom, Salon D</td>
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<tr>
<td></td>
<td>Morning Refreshments in Grand Cypress Ballroom, Salon D</td>
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<tr>
<td>8:15AM</td>
<td><strong>Welcome &amp; Introduction</strong> – <strong>Dr. Dave Clark</strong>, Environmental Horticulture Department, IFAS, University of Florida</td>
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**STEP 3**

**DO YOU HAVE A PLAN?**

**WHAT SHOULD YOU BE LOOKING FOR IN A BUSINESS RELATIONSHIP?**

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<td>8:30AM</td>
<td><strong>Priceless or worthless?</strong> – <strong>Ms. Pam Allenstein</strong>, American Association of Botanical Gardens &amp; Arboreta, NAPCC Coordinator (North American Plant Collections Consortium) .......................................................... (p. 15)</td>
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<td>9:20AM</td>
<td><strong>It is about more than the cultivar</strong> – <strong>Mr. John Gaydos</strong>, Proven Winners ................................................................. (p. 17)</td>
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<td>10:10AM</td>
<td>Break</td>
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<tr>
<td>10:30AM</td>
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<tr>
<td></td>
<td>Moderator: <strong>Dr. Dave Clark</strong></td>
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<td></td>
<td>Panelists: <strong>Ms. Pam Allenstein, Mr. Tony Avent, Mr. Jim Berry, Dr. Brian Corr, Mr. John Gaydos, Mr. John Gray, Dr. Philip Harmon, Ms. Beth Lamb and Dr. C. Anne Whealy</strong></td>
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<tr>
<td>11:30-11:40AM</td>
<td><strong>Conference Wrap up</strong></td>
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Speaker Summaries

Listed in order of presentation.
Runaway Success or Niche Specialty – Which Will Your Plant Be?

Brian E. Corr  
Ball Horticultural Company, West Chicago, Illinois

Why are some plants found at nearly every garden center while other equally beautiful ones remain obscure and hard to find? Many factors determine the success of the launch of a new plant. Some factors such as production time, flowering season, propagation method and culture requirements are determined by the plant. Others such as marketing support, sales region, intellectual property protection and pre-introduction trialing result from cooperation between the breeder and the company bringing the plant to market. All these factors are influenced by market requirements however. Knowing what the market requires for a successful launch makes product introduction much easier.

I imagine that most of us attending this conference are here because we are plant nerds. I know I’m one. I truly enjoy finding new plants, trying them in my garden and talking about them with other plant nerds. If all we want to do is find plants and grow them then being a plant nerd is enough. However, the day we decide we want to be rewarded for the work we do developing new plants is the day we need to acquire knowledge not always found among plant nerds. We need to understand the world in which our plants are produced, bought and sold. I hope to describe some of the truisms that govern the marketing and sales of plants today.

Plants are sold world-wide by an incredibly diverse range of methods. However, plants are sold in volume in specific ways. In the mass-market there are market realities which cannot be ignored.

Market realities

Us plant nerds may fuss and complain, but most plants for garden use are sold in a very narrow time frame in the spring. Further, they are sold in flower. If we expect a plant to sell in volume, it should be possible to sell it in flower in the proscribed sales window. Perhaps the one indisputable fact of life for plant sales is that a plant must show some of its appeal at the point of sale or sales will be severely limited.

People buy what they know. No one wants to be embarrassed at the garden center. I am convinced that many geraniums, pansies, petunias and impatiens are sold simply because the buyer knows what they are. The ‘home run’ of new plants is one which is instantly recognizable as something known but equally recognizable as something new. Wave™ petunias and Dragon Wing™ begonias have succeeded in part because they are instantly recognized as both old and new.

Another truism however is that a light under a bushel is of no benefit to anyone. Even plants as beautiful and innovative as Wave petunias and Dragon Wing begonias needed banners, buttons and balloons and all sorts of marketing to get any attention. A marketing program to support a new introduction needs to incorporate all the various methods of getting information out. Marketing is not simply advertisements and giveaways. Will your new plant be seen in prominent trial sites? Do garden writers get samples for their gardens?

While it may be true that no one will love your new plant as much as you, for success you need to find some other people who will at least care deeply about it, and ideally you will find lots of those people. No matter what you might have heard, your plant will not sell itself. You are going to need
people to go out there and sell, and you want boots on the ground, not hypothetical salespeople. We live in a big world with wildly differing cultures. Having salespeople in those differing cultures will help get the plant to market.

You cannot buy love for your plant, but you can rent it. Salespeople usually are highly motivated and competitive. They are primed and ready to go out and either sell your plant or sell against it. Which they do is determined primarily by the financial incentive to the salesperson. Salespeople do not want to discount what they sell. They want to sell at full price. The way to get a salesperson to promote your plant is to tell him/her that only he/she has this plant to sell in the territory and they can price it as high as practical with no fear someone else will come in and undercut them on price. Making your plant available to many people can be a recipe for cutthroat competition and plummeting prices.

Matching the plant to the realities

By definition all the plants sold in quantity around the world fit into growing conditions that are standard growing conditions. Introducing a plant that does not fit these standards is a challenge. The best chances for introduction success are with those plants that have similar pH requirements to current crops, grow well under moderate irrigation regimes, require neither unusually heavy fertilization nor are sensitive to high salts levels, and can be grown at temperatures commonly found in commercial horticulture.

A ‘winner’ new plant does not necessarily have to be a cookie cutter match to what is sold today, but fitting into current production plans is certainly the path of least resistance. For example, although estimates vary there is general agreement that most growers in North America sell 60 to perhaps as much as 80 percent of their annual business in a window that only lasts about six weeks or so in the spring. A plant that can look its best during the peak of spring is more likely to be picked up by growers than one that is best in mid-summer.

However, sometimes it is better to zig when everyone else zags. The plant choices for autumn sales are limited. A plant that looks great in autumn has less competition.

Another example of the benefit of zigging while everyone is zagging is in the area of cut flowers or flowering potted plants. Trying to make a better poinsettia would be quite a challenge, since there are powerful breeding companies all around the world devoting extensive resources to make one better than you can. However, a plant that could be grown instead of a poinsettia at Christmas would have great potential. In a similar way there are many breeders working on roses, chrysanthemums and carnations for cut flowers, but plants that could be grown as alternative cut flowers would have great potential.

Matching the introduction process to the realities

Introducing a new plant is a process, not a moment. The process should begin before the plant is ever identified. Ideally an independent breeder is in contact with someone very early in the process who can give advice and counsel on the ideal product specifications. What stem length is needed for specialty cut flowers? How should I test for shipping tolerance? What should the height to width ratio be for a flowering potted plant? What is the appropriate comparison in trials for a garden plant?
Another important step early in the introduction process is to trial the plant in a wide range of environments. This process has to be in balance with preserving confidentiality of the plant while simultaneously getting the plant into a wide range of growing environments. How does the new plant perform in Northern Europe? Will it satisfy the English gardener? Can it tolerate Australian conditions? Even in North America the differences between Florida, California and Ontario are significant. A perfectly good plant can be ruined by performance claims made in ignorance. An independent breeder needs to work with someone with a good trialing agreement (sometimes called a Material Transfer Agreement) to protect his/her rights.

The importance of a good Material Transfer Agreement (MTA) is evident when one considers the importance of intellectual property protection for a new plant. For example, US plant patents cannot be issued if the plant has been ‘disclosed’ more than a year prior to application for the patent. Trialing under a properly constructed, confidential MTA would not be considered disclosure, but displaying the plant in unprotected trials likely would be.

It is not an overestimation to say that marketing is everything and everything is marketing. Therefore it is never too soon to start thinking about how the plant will be marketed. Will there be any exclusive distribution? What sort of promotion can be done? Good advice is needed to ensure pricing is properly considered. Unfortunately many breeders are convinced that a high royalty per plant is the best way to ensure the highest return on a plant. This is often counterproductive. The total production cost for a plant has to be considered relative to realistic market conditions. While there are always zealots willing to pay any price for the newest plant, most mass market distribution streams are very price conscious. Setting the price at a point which will require a selling price completely different from similar products is a sure route to low volumes and therefore minimal returns to the breeder.

**Summary**

Perhaps the single most important thing an independent breeder can do is start to work with someone to help commercialize a new plant at the earliest possible opportunity. Someone experienced in the realities of the commercial ornamental horticulture market can guide the breeder through trialing, pricing, crop timing, etc. Keeping these market realities constantly in focus helps bring a product to market with the greatest chance for success.

**Contact Information**

Brian E. Corr, Ball Horticultural Company, 622 Town Road, West Chicago, IL 60185 USA; Phone: +630-231-1400; Email: BCorr@ballhort.com; Web Site: www.BallDiscoveries.com
Protecting Your New Cultivars

C. Anne Whealy
Proprietary Rights International, Tolar, Texas

● Types of Protection Available
  ○ Plant Variety Protection
  ○ Trade Secrets
  ○ Contract Law
  ○ Plant Breeder’s Rights
  ○ Trademarking
  ○ U.S. Utility Patents
  ○ U.S. Plant Patents

● The Process of Development
  ○ Trialing agreements
  ○ Patent timeclock
  ○ Calculating the return on your investment

● Patent Rights
  ○ Patent term
  ○ The right to exclude
  ○ Licensing agreements, royalties and enforcement

● The Plant Patent Application Process
  ○ Patentability
  ○ Parts of the application
  ○ Filing
  ○ Examination
  ○ Issuance and grant
  ○ Approximate costs

● Infringement: Consequences & Remedies

● Avoiding Potential Problems
  ○ When to file
  ○ Proper labeling and notice of protection

● Future Issues
  ○ Increased litigation
  ○ Essentially-derived
  ○ Minimum distance/novelty

Contact Information
C. Anne Whealy, Proprietary Rights International, P.O. BOX 220, Tolar, TX, USA 76476; Phone: 1-254-835-5150; Fax: 1-254-834-3571; Email: CAWHEALY@aol.com
Keeping It Clean!

Phil Harmon  
Plant Pathology, IFAS, University of Florida, Gainesville, Florida

Disease Management Guide for Ornamental Plants—Breeders Quick Guide  
Strategies to minimize risk of losses, risk of spreading pathogens, and management inputs

I. Diagnose and Manage Disease Problems—the key to efficient management is correct diagnosis. The following steps are further discussed in the Professional Disease Management Guide for Ornamental Plants (http://edis.ifas.ufl.edu).

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<th>Action</th>
<th>Cost</th>
<th>Benefit</th>
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<tr>
<td>Scout for disease symptoms regularly; keep an eye on the plants.</td>
<td>Time. Thorough scouting takes trained staff and time away from other jobs.</td>
<td>Regular scouting helps you find a problem quicker. Diseases are easier to manage the quicker the problem is discovered.</td>
</tr>
<tr>
<td>Identify the cause for symptoms observed: diagnose yourself, submit a sample to be diagnosed, or hire a consultant.</td>
<td>Time, training, and experience. Diagnosing plant problems is an art and science that takes all three to do well. Samples cost money to send and have processed ($20 at UF plant disease clinic).</td>
<td>Knowing the cause of the problem (whether disease or abiotic) is half the battle. An incorrect diagnosis can result in poor management decisions that make problems worse rather than better.</td>
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<tr>
<td>Develop a management plan to address the problem.</td>
<td>Time to seek advice, answers—cash for consultant if used.</td>
<td>An effective plan will not only minimize the current loss, but should consider how to prevent future loss.</td>
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<tr>
<td>Treat or destroy diseased plants.</td>
<td>Cash, time, and/or plant material. Chemical and cultural management options cost time and money.</td>
<td>If your management plan was successful, the cost for treatment or removal is less than the losses that would have occurred had you done nothing.</td>
</tr>
<tr>
<td>Alter cultural practices or the environment to reduce the likelihood of additional outbreaks.</td>
<td>Varies depending on what can be done to prevent disease. Environmental changes might involve new irrigation equipment or increasing plant spacing.</td>
<td>In many cases cultural control options can reduce disease likelihood and severity to nearly zero. In other cases, diseases will occur with regularity, but will result in fewer losses.</td>
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<tr>
<td>Keep records of what problems occur, how the problems spread, and any management tactics you use.</td>
<td>Time.</td>
<td>Diseases tend to recur given similar conditions year after year. Good records allow you to evaluate and improve your management plan.</td>
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Continue to scout… (start over at the top)
II. General Concepts to Help Prevent Disease—The cliché holds true: an ounce of prevention is worth a pound of cure. Keeping healthy plants healthy is much easier than getting diseased plants healthy.

How can we prevent disease?

1. Keep the pathogens out! Diseases are caused by pathogens. Pathogens spread to healthy plants various ways. In general the most common are by air, water, soil, plants, and insects. What can we do?
   a. Air and Water can be filtered to remove pathogens. Water and soil can be treated with chemical (such as chlorine) or heated (by composting or pasteurization) to kill pathogens. We don’t want to use native soil or collected surface water without treatment. Sanitize shoe soles, tools, and everything else possible before bringing into your facility.
   b. Check propagation material or stock plants for disease (see scouting). Use only clean plants to start. Isolate and monitor new material closely.
   c. Manage insect vectors of viral diseases. Remove and destroy any nearby infected plants that could harbor viruses.

2. Keep the pathogens away from your plants! We can’t keep all pathogens out. Reduce the chance pathogens will come into contact with and successfully infect your plants. How?
   a. Don’t stress plants. Proper pruning, fertility, irrigation, and other horticultural practices keep plants healthy, prevent wounds, and decrease the likelihood pathogens will successfully cause disease.
   b. Keep soil or water that could contain pathogens off your plants. Nursery cloth, plastic mulch, proper cultivation, and adequate drainage all help.
   c. Maintain an environment favorable for plants but not pathogens. Avoid extended periods when leaves are wet, when soil is saturated, and when air is humid. Maintain acceptable temperatures and soil characteristics (pH).
   d. Use resistant cultivars when available.

3. Kill or remove pathogens in the facility! Sanitation is the term to use—keep the facility clean. If few pathogens live in the facility, the chances of them causing a disease problem are smaller than if many are present in large numbers. How do we reduce the populations?
   a. Remove any sick plant. Even if the cause is unknown, removing a sick plant and isolating or destroying it removes the chance the problem could spread. Watch the plant and only reintroduce if the problem is solved.
   b. Remove dead plant material from the vicinity. Most pathogens can survive on dead plant material for some time. Compost and plant trash piles should be located as far away from healthy plants as possible.
   c. Keep weeds away. Weeds can harbor pathogens that can spread to your plants.
   d. Routinely sanitize surfaces and tools. In houses concrete walkways, wooden and metal benches, and workers’ shoes can be sanitized with anti-microbial soaps, dilute bleach solutions, and other products (see guide).
4. Use protectant fungicides! Protectant fungicides are best used on susceptible hosts if disease occurs nearby, conditions are favorable for disease (generally extended periods of wet, humid, rainy conditions), and the product selected is effective for that disease. See the guide for important fungicide selection tips.

Contact Information
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Using an Eye for Plants

John Gray
Lake Area Nursery, Hawthorne, Florida

Creating a new plant can take years in breeding work and years in marketing to introduce your plant to the mass consumer. Take your time and enjoy your work. It is NOT a get rich quick scheme so you must enjoy your passion. Do not rely on it to support you. It may be somewhat easy to create a new variety but to create a new variety that is used by the mass market is a challenging endeavor. To create a winner you must have some of the following characteristics.

1) Working with the right plant variety. If you are breeding a plant that most people have not heard of you will have a hard time in marketing. If the consumer knows the plant you are working with it is much easier introducing a new variety, color or plant form. But follow your passion and instincts because your variety may come into the lime light without your marketing.

2) Choose the right color if it is a flowering plant. Red is usually the most popular. You will sell more if you have the right color. Or create multiple colors and make a “line of new varieties”.

3) Select a plant that is easy to grow and has a vigorous growth habit. If it is hard for you to grow as the specialist it will be very difficult for the consumer to grow. If the consumer cannot grow the plant easily they will not buy it again. You must have repeat business!

4) Market timing is important. What is ‘in’ favor in the gardening world? Visit your local nurseries, mass market centers and see how your variety would stack up to what’s on the market and what are the new trends in gardening. Try to go with the flow not against it.

5) Test your plant’s appeal with the consumer. They must ‘choose’ to BUY it over the mass of other choices of plants. Your friends will always tell you it is great but it is the buying public that makes the final decision. There is a difference in liking something and spending hard earned money on it. Try different parts of the country if possible.

6) The plant name and a good photo will sell the plant. Naming your plant after your wife or daughter is great but the buying public will not know them. Give the name some careful thought and make it catchy if possible.

7) Get free advertising by going to the grower magazines and submitting your plant to the ‘new variety’ show case. This is usually free except for a color photo. Most horticultural magazines have this section in one or two magazines per year. You may be contacted from growers throughout the world.

8) Think world wide. USA, Europe, Japan and Australia are the best world wide markets. But don’t get side tracked; the USA is the biggest and the best so focus in your own back yard.

9) Luck! Being in the right place at the right time with the right plant.

Contact Information
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Priceless or Worthless?

Pamela Allenstein  
NAPCC Coordinator, American Association of Botanical Gardens & Arboreta, Wilmington, Delaware

Plant breeders’ introductions represent valuable contributions to the world’s horticultural heritage. Stock plant collections assembled by breeders may include species not yet represented in botanical gardens or arboreta. Too often, this germplasm is lost to future generations when individuals fail to plan ahead. By the time public gardens or other collectors are contacted, many valuable holdings may be dead or missing. By planning ahead and better understanding the options available, breeders can make provision over the years for the ultimate fate of their life’s work.

Regardless of where your collection might end up, thorough documentation is key. Establishing a plant records system at an early stage will help ensure that valuable information is retained. Keep careful records of plant provenance and make sure to label your collection. Document the parentage of each hybrid, and record observations of its characteristics and optimal growing conditions. Photograph your collection, being careful to tie each image to written records. Include a contacts file of those with whom you share plants from your collection. Track their movement so others can re-create your collection should the original specimens be lost. Publicize your collection by giving talks, writing articles, and hosting open houses. Be sure to share your passion for plants with students and children who represent the next generation of plant enthusiasts.

Seek out botanical gardens, arboreta, plant societies, and individuals who may have an interest in your collection and establish on-going relationships. Discuss the options for dispersal or inheritance of your collection with your business partners and family. Document your decisions in a living will so your expectations will be clear. Learn more about plant collections policies of public institutions to which you may be considering donating your collection. Public gardens today are being held to the highest ethical standards regarding plant procurement, and must be able to document they are abiding by all state and national laws governing rare and endangered plants as well as international treaties regarding the equitable sharing of resources. Consider establishing a foundation or even a botanical garden to ensure your horticultural legacy will be maintained in perpetuity. Gene banks and other long-term germplasm repositories are an excellent alternative for well-documented material, especially species of known wild origin. A number of associations and networking organizations can assist you in these activities.

Plant breeders and private collectors spend a lifetime pursuing their passion, accumulating a wealth of knowledge and valuable germplasm. Decisions concerning acquisition, record-keeping, and long-term care are all factors in determining how valuable your contributions might be to future generations. Planning ahead and taking steps along the way will help ensure this legacy will live on.

Contact Information
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It is About More Than the Cultivar

John Gaydos
Proven Winners, Rochester, Michigan

Gaydos’ presentation will focus on the relationship that develops between a breeder and the marketing agent. This relationship is very important to both parties; the value is never realized if the breeder simply looks at the agent as a shill, or as the relationship as a single event in time. The partnership between that grows between breeders and the marketing organization is one of mutual reliance, guidance and financial security. A marketing and production firm should be able to develop an in-depth network of both plant-side and market-side support. Plant-side includes but is not limited to: thermal therapy labs so that the breeder’s plants are clean of all economically impactful viruses, TC labs so that the clone remains true to form, virologists & pathologists that determine the best horticultural practices to bring this new plant to market. Market-side includes but is not limited to: Market specialists for product placement, brand managers for inclusion into a marketing brands, advertising specialists for press releases, photography & POP development. This network is available to breeder partners so that together the breeder and agent can bring the cleanest, most production efficient horticultural products to the global garden market and be assured that the industry and the gardener will be excited and interested.

This service based relationship includes Horticultural Research, Horticultural Technologies, Market Research, Industry Education, Product Promotion, Plant Protection & Royalty collection.

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Phone: 248-652-1789; Fax: 248-928-5025; Email: john@provenwinners.com,
Web Site: www.provenwinners.com
Notes
We would like to extend a very special thank you to the following companies for actively supporting this program.