

# Strategic Plan 2019 – Operational Outline



Morris Arboretum  
UNIVERSITY of PENNSYLVANIA



**Strategic Plan 2019  
Operational Outline**  
February 18, 2019

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# 1. Sustain and Build Fiscal Stability

## 1.1 Goal: Successfully Complete the *Ever Green* Campaign by June 30, 2021

### Actions:

- Raise \$36 million between FY2013 and FY2021 for the following areas:
  - Growing Community Access, Outreach, and Education Efforts - \$8.5M
  - Enhancing the Garden, Preserving History and Optimizing the Visitor Experience - \$11.75M
  - Creating and Disseminating New Knowledge - \$3.75M
  - Strengthening Annual Support and Building Member Engagement - \$12M
- Sustain and grow sources of unrestricted income, including Membership, Annual Fund, and Moonlight & Roses. *Development*
- Grow the Arboretum's pool of active major gift prospects through enhanced cultivation efforts. *Development*
- Promote the Lydia Morris Legacy Society as a planned giving society to a younger constituency. *Development*
- Grow interest and giving for the Arboretum among Penn alumni. *Development*
- Build a more nimble response mechanism for private, state, and federal grant opportunities. *Development*

## 1.2 Goal: Sustain Net-Earned-Revenue Growth in Fee-Based Programs

### Actions:

- Evaluate all programs for new income potential and net revenue growth. *Education & Visitor Experience*
- Implement and evaluate Holiday Garden Rail Nights expansion beginning in December 2018. *Education & Visitor Experience, Horticulture, Marketing, Membership*
- Expand range of fee-based programs and events. *Education & Visitor Experience*
- Assess and pilot adult experiential programs, including members-only events. *Education & Visitor Experience, Marketing, Membership*
- Promote Lecture and Conference program endowments. *Education & Visitor Experience and Development*

## 1.3 Goal: Optimize Use of Customer Relationship Management (CRM)/Point of Sale System

### Actions:

Continue improvements in reporting and analysis based on new CRM/POS applications, provide analysis of visitation trends for targeted marketing and membership acquisition and use data to enhance customer engagement and program adaptability. *Education & Visitor Experience, Finance, Marketing, Membership*

- Hire Business analyst/Web manager as direct report to the Director of Finance with a dotted line to Director of Marketing
  - Expand target marketing using social media and CRM data.
  - Meet data analysis and reporting needs for all departments.
  - Document and improve business practices in Admissions, Registrations, Membership and Retail functional areas.
- Evaluate timed-ticketing for events.
- Develop on-line General Admission sales
- Assess members' discount for general admission tickets

## 1.4 Goal: Increase Operational Efficiencies

### Actions:

- Identify and purchase a work order system that includes infrastructure information (fountains, garden features, roads, paths and buildings) to increase workflow, service, and project planning and production. *Facilities*
- Develop timeframe for scheduled equipment replacement, and increase the equipment replacement fund. *Horticulture*
- Plan and budget for dedicated customer service (phone reception) staff. *Finance and Education & Visitor Experience*
- Continue multi-year plan and budget for deferred maintenance and capital renewal projects. *Finance and Facilities*
- Purchase a four-wheel drive, heavy-duty cart for departmental use. *Facilities*
- Advocate for Three Bay garage with dry storage and additional parking on Bloomfield Farm (for equipment currently housed in barn). *Horticulture*

## 2. Develop Compelling Visitor Experiences

### 2.1 Goal: Continue Enhancements to Garden Railway as an Attraction for Family Audiences

#### Actions:

- Continue Garden Railway programming with regular enhancements. *Horticulture*
  - Refurbish exhibit regularly by replacing older structures in the exhibit incrementally. Site upgrades needed include installing new track configuration in FY19 and rebuilding the upper waterfall and pond in FY20. *Horticulture*
  - Develop and implement succession and mentoring plans for Garden Railway Coordinator position. *Horticulture*
  - Build endowment for exhibit. *Horticulture and Development*

### 2.2 Goal: Continue Excellence in Living Collections Maintenance and Enhance Horticultural Displays

#### Actions:

- Continue design review process to enhance seasonal displays throughout the Arboretum. *Horticulture*
- Create dedicated budget for plant purchases. *Horticulture*
- Continue enhancements to the Pennock/Maloney/Orange Balustrade Axis. *Horticulture*
- Continue enhancements to the landscape at the Horticulture Center on Bloomfield Farm. *Horticulture*

### 2.3 Goal: Assess and Adapt Public Events to Enhance Earned Revenue and Membership Acquisition, and Optimize Resources

#### Actions:

- Plan and market events consistent with parking and admission capacities. *Marketing with Education & Visitor Experience*
- Explore feasibility of public programs access to Bloomfield Barn center bay. *Education & Visitor Experience and Horticulture*
- Explore cost and feasibility of extending lighting at Garden Railway site to the Oak Allée for evening events like Scarecrows Walk. *Education & Visitor Experience, Horticulture and Marketing*

## 2.4 Goal: Improve Customer Service Arboretum-Wide

### Actions:

- Develop goals for visitor service standards, including a training and evaluation plan for all Arboretum staff. *Cross-departmental with Education & Visitor Experience*
- Improve professionalism of attire for “public facing” staff in the garden. *Finance*
  - Develop a plan and budget for Arboretum logo clothing for staff.

## 2.5 Goal: Engage Under-Represented Audiences in Developing New Initiatives

### Actions

- Work with diverse partners to develop programming and event planning. *Education & Visitor Experience, Marketing and Membership*
- Identify best practices used by similar institutions.

# 3. Nurture, Grow and Develop the Arboretum’s People

## 3.1 Goal: Encourage All Employees to Participate in Staff Development Programs

### Actions

- Include staff development goals in every employee’s annual review. *.Cross-departmental*
- Support transformational development opportunities for staff on a rotating basis. *.Cross-departmental*
  - Implement and evaluate system for staff to submit proposals providing justification and budget for proposed project/travel.
  - Review applications twice yearly, and provide support based on income available from staff development endowments.

## 3.2 Goal: Expand Staff Positions as Budget Allows

### Actions

- Horticulture
  - Convert assistant gardener position to permanent funding.
  - Develop and implement succession and mentoring plans for Propagator, Plant Recorder and Garden Railway Coordinator positions.
  - Restore chief arborist position
- Facilities
  - Restructure staffing, including increasing supervisory roles of two full time staff
  - Add a permanent part-time position Monday-Friday, 4 to 9pm to alleviate seasonal staffing during the week

- Marketing/Finance
  - Expand role of web management, social media and electronic communications to extend the Arboretum brand overall for its programming and initiatives with full time System Administrator-Web Manager. *Direct report to Director of Finance with dotted line to Director of Marketing.*
  - Increase hours of social media strategist to expand Morris Arboretum outreach (from part-time temporary with a limit of 18 hours per week to part-time permanent with a cap of 28)
- Establish a committee to review salary and recognition for part-time staff on an annual basis. *Finance*
  - Plan response to possible minimum wage changes.

### **3.3 Goal: Onboarding of New Executive Director**

#### Actions

- Plan and implement a series of introductory meetings with staff, volunteers, members of the Advisory Board and major donors.
  - Engage members of the Board to host small gatherings for major donors.

### **3.4 Increase Ethnic and Cultural Diversity in Staff, Leadership, Volunteers and Suppliers**

#### Actions

- Establish task force to identify concrete goals and methodology. *Education & Visitor Experience and Development*
- Identify best practices used at similar institutions. *Education & Visitor Experience and Development*

## **4. Enhance, Restore, and Preserve Historic Features, Physical Facilities and Equipment**

### **4.1 Goal: Preserve, Restore and Renovate Historic Garden Features**

#### Actions

- Plan, budget and implement projects. *Horticulture and Facilities*
  - Complete Rose Garden enhancements (enclosure and planting design evolution). *Funded. Project will start July 2019*
  - Renew the heat distribution system in the Dorrance H. Hamilton Fernery. *Funding required; 115k raised as of 1/30/19*
  - Undertake other garden feature restorations as funding becomes available (e.g., Step Fountain, Seven Arches, Swan Pond)

### **4.2 Goal: Plan and Implement Next Steps for the Climate Action Plan**

#### Actions

- Install energy efficient windows in the Headhouse, and Millers Cottage. *Facilities*
- Insulate Gates Hall attic. *Facilities*
- Double glaze bay window in Gates Hall. *Facilities*
  - Compare utility expenses annually against established benchmarks as energy equipment upgrades are installed. *Facilities*

#### 4.3 Goal: Develop a Master Plan for Programming, Physical, Collections, and Organizational Needs

##### Actions

- Develop a plan and budget for the master plan process. *Administration*

### 5. Disseminate Knowledge about Plants and Their Importance to People, and Conduct Research

#### 5.1 Goal: Continue to Grow the Quality of Youth Education Programs

##### Actions

- Provide youth with impactful experiences and learning skills needed to develop as healthy individuals and effective stewards of the plant world. *Education & Visitor Experience*
  - Fund or endow Youth Education outreach to disadvantaged youth. *Education & Visitor Experience with Development*
  - Enable Title-1 school children to engage with the Arboretum by supporting bus transportation and youth tour programs, with a goal of 50 supported bus tours annually (from 10 in FY18). *Education & Visitor Experience and Development*
  - Implement and adapt tented, seasonal, youth program area near Widener. *Education & Visitor Experience, Facilities and Horticulture*
  - Identify, and adapt as necessary, a second outdoor classroom and eating area in the garden. *Education & Visitor Experience, Facilities and Horticulture*
- Continue Summer Camp expansion at Bloomfield Farm. *Education & Visitor Experience*
  - Reach 1,200 youth visits.
  - Explore feasibility of extended camp day option.
  - Explore Adventure Camp scholarships.
- Assess and adapt, as possible, Nature Play initiative. *Education & Visitor Experience and Horticulture*
  - Develop operational plan.
  - Assess multi-use, Nature Play areas for dedicated use as daily activity.

#### 5.2 Goal: Enhance Interpretation and Orientation in the Garden

##### Actions

- Continue to assess and adapt the Tree Adventure exhibit. *Education & Visitor Experience*
- Renew aging interpretive panels, and develop a 12-month ephemeral label plan. *Education & Visitor Experience*
- Evaluate and adapt the *Awakening the Senses* programs. *Education & Visitor Experience*

### 5.3 Goal: Maintain Preeminence as the Authority on Pennsylvania Flora

#### Actions

- Complete Mid-Atlantic Megalopolis (MAM) Specimen Digitization Project funded by National Science Foundation (NSF) grant (September 1, 2016 to August 31, 2019). Approximately 1,000,000 specimens digitized and made available online. *Botany*
- Develop long-term plan for the Pennsylvania Flora Project in collaboration with other institutions; phase out the PA Flora Database as MAM project develops, but maintain an emphasis on the flora of Pennsylvania. *Botany*
- Develop and implement plan to communicate the conservation values of the MAM project, and other work of the Botany Department. *Botany and Marketing*
- Develop research strategy to guide Botany department project selection within disciplinary limits. *Botany*
- Develop plan for continued updates to *The Plants of Pennsylvania* and other publications; including possibly electronic publication. Most edits and updates to be completed by 2020. *Botany*
- Develop plan for expansion of the Herbarium to document and support expanded research programming. *Botany*

### 5.4 Goal: Expand Living Collections, Research, and Curation Programs

#### Actions:

- Develop five to ten-year plan for horticultural conservation, propagation, and research goals. *Horticulture*
- Create Living Collections development plan to inform plant exploration goals (e.g., destinations, taxa). *Horticulture*
- Increase related endowments for plant exploration, propagation and evaluation. *Horticulture*

### 5.5 Goal: Sustain and Expand University Level Teaching

#### Actions

- Continue to teach three Penn classes (BIOL 400, LARP 755, LARP 756); revise and improve these classes as appropriate. *Botany and Horticulture*
- Continue to explore expanding the number of Penn classes taught by Arboretum staff. *Botany and Horticulture*

### 5.6 Goal: Conduct Botanical Research

#### Actions

- Utilize lab facilities at the Academy of Natural Sciences for research until permanent facilities can be established at the Arboretum. Laboratory space is included in the program plan for the Education and Research Center at Bloomfield Farm (long-term goal). *\$214,000 funding for laboratory equipment raised to date. Botany*
- Plans for lab work include:
  - Molecular component work on the genus *Dombeya*.
  - Similar work on species of conservation concern in Pennsylvania.
  - Work with the Horticulture department on species of interest in the Arboretum's Living Collection.

## 5.7 Goal: Improve Library, Archives and Records Programs for Conservation and Research Access

### Actions

- Develop policies and procedures for Library, Archives and Records inclusive of digital resources. *Education & Visitor Experience, Botany, Facilities, Horticulture, and Administration*
- Expand part-time Librarian position. *Education & Visitor Experience, Botany, and Horticulture*

## 5.8 Long-Term Goal: Build an Education and Research Center at Bloomfield Farm

### Actions:

Feasibility study conducted in 2018, estimates for this facility are \$25 to \$30 million with \$5 million operating endowment. This project is a future fund raising goal apart from the Ever Green Campaign

- Develop long-term budget for operating the new facility and its programs. *Finance*

# 6. Preserve Gardens and Enhance Collections

## 6.1 Goal: Natural Areas Restoration and Stormwater Management

### Actions:

Upgrade natural areas to demonstrate best stewardship and management practices, and provide opportunities for managing stormwater, reducing erosion, and enhancing water quality throughout the Arboretum. *Horticulture*

- Natural Areas/Paper Mill Run
  - Implement streambank restoration plan. *Horticulture*
  - Communicate the benefits of and methods used in the restoration (collaboration *Horticulture, Education & Visitor Experience and Marketing*)
- English Park, Hillcrest Avenue, and the East Brook.
  - Implement Streambank Restoration Plan for the East Brook. *Horticulture*
  - Develop and implement stormwater management plans for Hillcrest Avenue and English Park. *Horticulture*

## 6.3 Goal: Expand Tree Care and Preservation

### Actions:

Continue excellence in arboricultural practices, research, and education throughout the Arboretum. Maintain Arboretum's leadership in this role while sustaining and growing the Arboretum's living collection. *Horticulture*

- Develop case statement for Tree Care at the Arboretum, including a valuation of the collection that can be used to increase funding for the Tree Care endowment in support of arboriculture contractual work. *Horticulture*
- Restore chief arborist position. *Horticulture*
  - Build program highlighting significance of Living Collections and importance of this position
  - Package term-gift opportunities

- Develop and implement plan for arboriculture intervention (cabling, propping, lightning protection) for significant trees throughout the Arboretum. *Horticulture*
- Develop goals for maintaining trees of all age classes. *Horticulture*

#### **6.4 Goal: Upgrade Living Collections Management Database Programs**

Actions:

- Survey the Arboretum to create a new base map, to re-map the Living Collection and to document Facilities. *Horticulture*  
*Funding needed: \$100,000 for base map.*

### **7. Increase Visibility, Raise Attendance and Expand Educational Impact of the Arboretum**

#### **7.1 Goal: Plan Temporary Exhibits in Advance for Improved Marketing and Programming**

Actions:

- Develop a working committee to establish temporary exhibit themes, manage financial planning using available income in the Butcher Fine Arts endowment. *Cross departmental with Committee Chair from Visitor Experience*
  - Install and promote Patrick Dougherty exhibit in spring 2019; funded by Butcher endowment income
  - Develop programming and promotion for 10 year anniversary of *Out on a Limb* in 2019.
  - Develop the Around the World theme for 2020 garden-wide exhibit and programming; minimal use of Butcher endowment income
  - Investigate and plan options for next major temporary exhibit, funded by Butcher endowment income in 2021 or 2022

#### **7.2 Goal: Position the Arboretum as a Place for Fun and Learning, and an Advocate of Conservation and Sustainability**

Actions:

- Create more short videos and infographics with compelling content for use on website, social and electronic media. *Marketing*
- Communicate the work of Staff active in research, conservation efforts, horticulture and educational programming on a regular basis in the Arboretum's publications, press releases, website, and social media. *Cross Departmental with Marketing*
- Raise the Arboretum's profile as a pre-eminent public garden, a national and international center for botanical and horticultural research, and a laboratory for informal learning for visitors of all ages and abilities. *Cross Departmental with Marketing*
- Communicate the transition of the Flora of Pennsylvania website to the broader regional MAM website. *Botany with Marketing*

#### **7.3 Goal: Raise Profile of Philadelphia Gardens and their Importance to the Region**

Actions:

- Play an active role in Greater Philadelphia Gardens/America's Garden Capital to increase the visibility of Philadelphia's garden consortium. *Marketing*