



Buffalo and Erie County Botanical Gardens Society, Inc.

2016 - 2019 Strategic Plan

October 12, 2016

Goals

Goal #1: The Botanical Gardens provides an exceptional *Visitor Experience* that is customer focused and promotes meaningful visitor engagement.

Goal #2: Grow our *Team*.

Goal #3: Cultivate excellence in *Gardens*

Goal #4: Expand *Education and Research*

Goal #5: The Botanical Gardens ensures current and future sustainability through *Fiscal Viability*.

Goal #6: Integrate activities related to the *Master Plan Task Force*.

Goals Defined

Goal #1: Botanical Gardens provides an exceptional *Visitor Experience* that is customer focused and promotes meaningful visitor engagement.

Our focus is to engage visitors in a manner that provides the Botanical Gardens with a platform from which to increase attendance, encourage guest spending, expand our partnerships and effect a positive change in net assets.

Goal #2: Grow our *Team*.

Centering our attention on the process of developing and managing the team charged with the implementation of the plan will enable the Garden to grow. The Botanical Gardens' team is made up of the staff, board and volunteers.

Goal #3: Cultivate excellence in *Gardens*.

Our gardens are the heart and soul of our organization. Our focus is on the management of our botanical collection to set a standard of horticultural and artistic excellence, designed to positively effect appreciation of our gardens and increase attendance.

Goal #4: Expand *Education and Research*.

Education and research form the foundation for the communication of the art and science of our Gardens' collection across multiple demographic markets, engaging guests and partners. Our interpretation of collection components provides the opportunity for people to explore ideas and meaning in natural and cultural resources and draw their own conclusions.

Goal #5: Botanical Gardens ensures current and future sustainability through *Fiscal Viability*.

We are committed to developing a strong fiscal position. Our focus is on thoughtful analyses of our products and services using financial performance tools to determine the most efficient and effective use of our resources. We are good stewards of the funds with which we have been entrusted.

Goal #6: Integrate activities related to the *Master Plan Task Force*.

Our long-term focus to ensure our ability to sustain operations and fiscal health while preparing for the implementation of the Master Plan.

Botanical Gardens 2016-2019 Strategic & Business Plan

Goal #1: The Botanical Gardens provides an exceptional *Visitor Experience* that is customer focused and promotes meaningful visitor engagement.

Goal Champion: Associate Vice President of Marketing & Visitor Experience

Strategy #1.1: Enhance the Visitor Experience to increase guest engagement and revenue with the Botanical Gardens through analysis and innovation.

Tactic #1.1.1: Re-engineer (process improve) the current visitor experience process ensuring the Botanical Gardens is a peaceful, engaging place at all times.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience Gift Shop Manager, Director of Horticulture, Staff, Board member

Time frame: Start date - December 31, 2016

Tactic #1.1.2: Analyze current guest information (attendance habits, length of stay, spending, hours of operation) to determine events and exhibits with greatest potential to produce improvements in the visitor experience.

Resource requirements: Program & Volunteer Coordinator, Associate Vice President of Marketing & Visitor Experience, Senior Director of Operations, Directors, Board member

Time frame: Start date – January 2, 2017

Tactic #1.1.3: Develop a process to identify, research and explore successful innovative garden experiences that would be included in Gardens' visitor experience and would increase attendance and guest engagement. Includes the development of criteria and guidelines to be based on mission, finances and appropriateness to evaluate potential experiences.

Resource requirements: Program & Volunteer Coordinator, Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Education, Board member

Time frame: Start date – October 1, 2016

Tactic #1.1.3A: Test visitor experience concepts (exhibit and/or event) designed to create awareness, increase attendance, attract sponsors/donors, encourage consumer spending and provide information for future growth of the experience.

Resource requirements: Program & Volunteer Coordinator, Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Development, Director of Education, Board member

Time frame: Completion date - December 31, 2017

Tactic #1.1.3B: Build and invest in a new visitor concept, that includes upgrades and new processes, which heightens the visitor experience and is centered on creating a change in positive net assets.

Resource requirements: President/CEO, Senior Director of Operations, Program & Volunteer Coordinator, Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Board member

Time frame: Completion date - June 30, 2018

Tactic #1.1.3C: Develop evaluative criteria to align with Key Performance Indicators (KPIs), identified as part of Goal #5, for a particular experience being tested.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Senior Director of Operations, Department engaged in experience, Board member

Time frame: Completion date - June 30, 2018

Strategy #2: Develop a marketing and communications plan surrounding the established market position designed to increase awareness, attendance and contributions to the Botanical Gardens.

Tactic #1.2.1: Conduct consumer (consider including a segmentation study), competitive and collaborative research (industry associations or garden societies) to determine best practices, and determine consumer interest (mystery shop current experience).

Resource requirements: Associate Vice President of Marketing & Visitor Experience, Marketing Committee Chair

Time frame: Start date – June 30, 2017

Tactic #1.2.2: Create marketing and communications plan that promotes new brand image.

Resource requirements: Associate Vice President of Marketing & Visitor Experience, Marketing Committee Chair

Time frame: Start date – June 30, 2017

Tactic #1.2.3: Fund marketing and communications initiatives that features the new visitor experience to drive attendance and spending.

Resource requirements: Associate Vice President of Marketing & Visitor Experience, President/CEO, Marketing Committee Chair

Time frame: Start date - January 1, 2017

Tactic #1.2.4: Create an internal communications process that includes an emergency plan. The emergency plan will include weather events, damage to the facility or collection and security related events.

Resource requirements: Associate Vice President of Marketing & Visitor Experience, President/CEO, Senior Director of Operations, Director of Facilities, Education Coordinator, Board member

Time frame: Completion date - November 1, 2016

Goal #2: Grow our Team

Centering our attention on the process of developing and managing the team charged with the implementation of the plan will enable the Garden to grow. The Botanical Gardens' team is made up of the staff, board and volunteers.

Goal Champion: President/CEO

Strategy #2.1: Develop a high performing team made up of Board, executive leadership, staff and volunteers, dedicated to advancing the vision and mission of the Botanical Gardens and tied to the delivery of the Strategic and Business Plan, as well as the execution of the Master Plan.

Staff Initiatives:

Tactic #2.1.1: Define the skill set needed to support the execution of the plan, review and refine organizational chart.

Resource requirements: President/CEO, Directors

Time frame: April 1, 2017

Tactic #2.1.2: Assess current staff roles and responsibilities, individual skills and strengths to meet new requirements (gap analysis).

Resource requirements: President/CEO, Directors

Time frame: June 1, 2017

Tactic #2.1.3: Identify need to add staff or adjust roles as required to meet new organizational objectives.

Resource requirements: President/CEO, Directors

Time frame: October 1, 2016

Tactic #2.1.4: Create staff training and development programs that foster a cohesive and visitor-focused team. Include an Annual Staff Retreat as part of the plan. Training program will develop tools/skills needed to support plan.

Resource requirements: President/CEO, Directors

Time frame: October 1, 2017

Tactic #2.1.5: Tie individual performance evaluations to operational areas, organization and Strategic and Business Plan.

Resource requirements: President/CEO, Directors

Time frame: December 31, 2017

Tactic #2.1.6: Create a reward and recognition program based on team and individual performance measures, and celebrate our successes.

Resource requirements: President/CEO, Directors

Time frame: March 31, 2017

Tactic #2.1.7: Establish a “one-voice” approach so all Board, staff and volunteers are communicating the same message.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Marketing Committee Chair

Time frame: Completion date - June 30, 2017

Board Initiatives:

Tactic #2.1.8: Review make-up of the Board of Directors to determine how board positions support the Strategic and Business Plan. Identify and develop expectations and a skill set needed for Board Members. Recruit appropriate individuals with skill sets that align with the Strategic and Business Plan.

Resource requirements: Governance Committee, President/CEO

Time frame: Start date- August 30, 2016

Tactic #2.1.9: Provide Board training on “one-voice” visitor focused approach required to governing the Botanical Gardens.

See Tactic #2.1.7

Resource requirements: Governance Committee, President/CEO

Time frame: Completion date - June 30, 2017

Tactic #2.1.10: Develop a process that reviews Board roles and responsibilities, and reinforce organization expectations. Include an Annual Board Retreat as part of the plan.

Resource requirements: Governance Committee, President/CEO

Time frame: Start date – August 30, 2016

Tactic #2.1.11: Revise on-boarding program for new board members.

Resource requirements: Governance Committee, President/CEO

Time frame: Start date - January 1, 2017

Volunteer Initiatives:

Tactic #2.1.12: Identify departmental/staff roles and responsibilities as it relates to interaction with volunteers.

Resource requirements: Program & Volunteer Coordinator, Directors

Time frame: Start date - January 1, 2017

Tactic #2.1.13: Develop a plan to provide training to volunteers that communicates their roles and responsibilities, expectations and the roles and responsibilities of the department/staff in their interactions.

Resource requirements: Program & Volunteer Coordinator

Time frame: Start date - January 1, 2017

Goal #3: Cultivate excellence in *Gardens*

Our gardens are the heart and soul of our organization. Our focus is on the thoughtful management of our botanical collection setting a standard of horticultural and artistic excellence, designed to positively effect appreciation of our gardens and increase our attendance.

Goal Champion: Director of Horticulture

Strategy #3.1: Manage a botanical collection that sets a standard of excellence.

Tactics#3.1.1: Evaluate current collections and facility to support sustainability of the organization and horticultural excellence.

Resource requirements: Director of Horticulture, Director of Facility, Plant Committee Chair

Time frame: Start date – June 30, 2017

Tactic #3.1.2: Enhance specific collections creating an inspiring foundation for innovative exhibits that attract new audiences.

Resource requirements: Director of Horticulture, Director of Facility, Plant Committee Chair, Associate Vice President of Marketing & Visitor Experience

Time frame: Start date – December 31, 2017

Strategy #3.2: Develop an inspirational and artistic exhibit schedule that supports the Visitor Experience and will grow attendance and encourage investment in the Botanical Gardens.

Tactic #3.2.1: Identify organizations and businesses with which we will collaborate or partner to grow and enhance to deliver an exceptional Visitor Experience.

Resource requirements: Director of Horticulture, Director of Facility, Plant Committee Chair, Associate Vice President of Marketing & Visitor Experience, Director of Development, President/CEO

Time frame: Start date – January 2, 2017

Tactic #3.2.2: Ensure all departments create thoughtful communications and/or programming related to the exhibit.

Resource requirements: Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Education, Plant Committee Chair, Education Committee Chair

Time frame: Start date – August 1, 2016

Strategy #3.3: Develop and communicate a *Green* program with initiatives that span all departments of the Botanical Gardens.

Tactic #3.3.1: Identify current environmentally friendly initiatives in place throughout the Botanical Gardens, including use of good-bugs in place of pesticides and the handling of plastic and paper products in facilities rentals.

Resource requirements:

Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Facility, President/CEO, Program & Volunteer Coordinator, Director of Education.

Time frame: Start date - March 2017

Tactic #3.3.2: Identify best *Green* practices and determine new initiatives to explore and incorporate into Gardens.

Resource requirements: Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Facility, President/CEO, Program & Volunteer Coordinator, Director of Education.

Time frame: Start date - September 2017

Tactic #3.2.3: Develop marketing, education and development plans to communicate *Green* initiatives at the Botanical Gardens and encourage support and investment.

Resource requirements: Director of Horticulture, Associate Vice President of Marketing & Visitor Experience, Director of Facility, President/CEO, Program & Volunteer Coordinator, Director of Education.

Time frame: Start date – June 2018

Goal #4: Expand *Education and Research*

Education and research form the foundation for the communication of the art and science of our Gardens' collection across multiple demographic markets, engaging guests and partners. Our interpretation of collection components provides the opportunity for people to explore ideas and meaning in natural/cultural resources and draw their own conclusions.

Goal Champion: Director of Education

Strategy #4.1: Develop a plan to expand the Botanical Gardens' educational impact and research through collaborations, relationships, partnerships and sponsorships.

Tactic #4.1.1: Review current endeavors, prioritize based on the need of the organization and determine prospective collaborators and partners to which Gardens will reach out.

Resource requirements: Director of Education, Associate Vice President of Marketing & Visitor Experience, Education Coordinator, Director of Development, Senior Director of Operations, Education Assistant, Board member

Time frame: Start date – August 1, 2016

Tactic #4.1.2: Research prospective collaborators and partners and determine approach that enhances the science aspect of the Botanical Gardens and encourages attendance and supporter investment.

Resource requirements: Director of Education, Associate Vice President of Marketing & Visitor Experience, Education Coordinator, Director of Development, Senior Director of Operations, Education Assistant, Board member

Time frame: Start date - June 1, 2016

Strategy #4.2: Imbue our botanical collection with a voice that engages visitors through meaningful interpretation.

Tactic #4.2.1: Explore, identify and prioritize the collections that have the highest visitor engagement potential.

Resource requirements: Director of Education, Associate Vice President of Marketing & Visitor Experience, Program & Volunteer Coordinator Education Coordinator

Time frame: TBD

Tactic #4.2.2: Create a plan to market and communicate the interpretation of the Botanical Gardens' collection to visitors internally and externally, and encourages supporter investment.

Resource requirements: Director of Education, Associate Vice President of Marketing & Visitor Experience, Director of Development

Time frame: TBD

Goal #5: Botanical Gardens ensures future sustainability through *Fiscal Viability*.

We are committed to developing a strong fiscal position. Our focus is on thoughtful analyses of our products and services using financial performance tools to determine the most efficient and effective use of our resources. We are good stewards of the funds with which we have been entrusted.

Goal Champion: President/CEO, Director of Development

Strategy #5.1: Achieve positive change in net assets during the timeframe of this Strategic Plan (October 1, 2016 – December 2019 in each calendar year).

Tactic #5.1.1: Determine additional revenue and positive change in net assets needed for each revenue-generating department for each budget cycle.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Senior Director of Operations, Finance Committee

Time frame: Start date - November 30, 2016

Tactic #5.1.2: Create an internal process to refine the overhead allocation methodology.

Resource requirements: Senior Director of Operations, Associate Vice President of Marketing & Visitor Experience, Finance Committee

Time frame: Start date - September 30, 2016

Tactic #5.1.3: Assess the need to reclassify revenue-generating activities in the general ledger for consistency in planning and reporting.

Resource requirements: President/CEO, Senior Director of Operations, Finance Committee

Time frame: Start date - December 31, 2017

Tactic #5.1.3A: Refine the allocation methodology of the Operations P & L to match the Statement of Functional Expenses that is part of the audited financial statement.

Resource requirements: President/CEO, Senior Director of Operations, Finance Committee

Time frame: December 31, 2017

Tactic #5.1.4: Assess pricing structure for all offered programming, rental fees, membership dues and admissions.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, relevant Department heads, Finance Committee

Time frame: September 30, 2016

Tactic #5.1.5: Identify and develop Key Performance Indicators (KPIs) for relevant functional areas.

Resource requirements: President/CEO, Senior Director of Operations, Department heads, Board member

Time frame: Start date - December 31, 2017

Tactic #5.1.6: Assess IT infrastructure and ensure tools meet the needs of the organization (admission, finance, Altru, horticulture database, website, gift shop, devices).

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Board member

Time frame: Start date - October 31, 2016

Strategy #5.2: Manage the operations of the Botanical Gardens during the build-out period.

Tactic #5.2.1: Obtain Build-out timeline and determine how the operations of the Botanical Gardens will be impacted.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Senior Director of Operations, Facilities Director, Director of Horticulture, Finance Committee

Time frame: Start date - December 31, 2018

Strategy #5.3: Grow Development and fundraising efforts through the cultivation of relationships, expanding of grants, individual giving and sponsorships.

Tactics #5.3.1: Evaluate fundraising efforts, time spent researching, writing and reporting grant requirements and examine best practices to achieve desired results.

Resource requirements: President/CEO, Director of Development, Board member

Time frame: Completion date - November 1, 2016

Tactic #5.3.2: Increase prospects and build strategic relationships. Identify development/sales cycle.

Resource requirements: President/CEO, Director of Development, Development Committee, Board of Directors, Board member

Time frame: Start date - December 31, 2016

Tactic #5.3.3: Develop a long range government relations plan that expands advocacy efforts and provides for staff development.

Resource requirements: President/CEO, Director of Development, Board member

Time frame: Start date - December 30, 2017

Tactic #5.3.4: Provide board member training to create a focused fundraising effort that communicates expectations and emphasizes the importance of their role in development.

Resource requirements: President/CEO, Director of Development, Board Chair, Development Chair

Time frame: Completion date - July 31, 2017

Tactic #5.3.5: Create a plan to cultivate visitors, members and volunteers to become donors.

Resource requirements: Director of Development, Program & Volunteer Coordinator, Board Chair

Time frame: Completion date - June 30, 2017

Tactic #5.3.6: Expand Gardens' grant portfolio through the identification of local, regional and national grants and opportunities.

Resource requirements: Director of Development, Development Chair

Time frame: Start date – October 1, 2016

Tactic #5.3.7: Create a Planned Giving program.

Resource requirements: President/CEO, Director of Development, Development Chair

Time frame: June 2017

Tactic #5.3.8: Develop sponsorship partnerships focusing on identifying and meeting the needs of corporations. Provide training to maximize development opportunities

Resource requirements: Director of Development, Board of Directors, Development Chair

Time frame: TBD

Strategy #5.4: Increase revenues on current, repeat facility rentals and attract new rentals.

Tactic #5.4.1: Assess current rental space options, pricing and expand rental space offered. Reassess yearly.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Director of Weddings & Events, Board member

Time frame: Start date - September 30, 2016

Tactic# 5.4.2: Create and train a *sales* focused team to engage new clients and cultivate current clients.

Resource requirements: President/CEO, Associate Vice President of Marketing & Visitor Experience, Director of Weddings & Events, Board member

Time frame: Completion date - March 1, 2017

Tactic 5.4.3: Expand awareness of rental space availability at the Botanical Gardens.

Resource requirements: Associate Vice President of Marketing & Visitor Experience, Director of Weddings & Events, Board member

Time frame: Start date - September 30, 2016

Tactic #5.4.4: Evaluate rental packages enhancements and identify new revenue opportunities.

Resource requirements: Director of Weddings & Events

Time frame: Completion date - December 31, 2016

Goal #6: Integrate activities related to the *Master Plan Task Force*.

Our long-term focus to ensure our ability to sustain operations and fiscal health while preparing for the implementation of the Master Plan.

Goal Champion: President/CEO, Board or Task Force Chair

Strategy #6.1: Develop a plan for government relations

Tactic #6.1.1: Understand all governing relationships and determine need to redefine their roles.

Resource requirements & Time Frame: TBD

Strategy #6.2: Determine fiscal support requirements (feasibility) of Master Plan.

Tactic #6.2.1: Determine scope, fund and conduct a feasibility study to determine support for the Master Plan.

Resource requirements & Time Frame: TBD

Strategy #6.3: Evaluate new revenue generating opportunities that Master Plan has to offer – buy or build.

Tactic #6.3.1: Assess Master Plan phasing to capitalize on potential revenue streams.

Resource requirements & Time Frame: TBD

Strategy #6.4: Engage in a Capital Campaign to support the implementation of the Master Plan.

Tactic #6.4.1: Define scope of capital campaign, including phasing of private and public segments, and timeline.

Resource requirements & Time Frame: TBD

Strategy #6.5: Develop and implement a marketing plan to support initiatives related to the Master Plan.

Tactic #6.5.1: Identify and develop collateral materials and public relations support for Master Plan initiatives.

Resource requirements & Time Frame: TBD