To Welcome, Inform and Inspire

Strategic Goals and Objectives

2017-2022
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2017-2022 Arboretum Strategic Planning Committee:

Gordie Bailey  Linda Cutler  Megan Dayton
Tim Kenny  Jim Luby  Tom Martin, Chair
David Matteson, Co-Chair  David Maiser  Pete Moe
Frank Molek  Todd Wagner
The Minnesota Landscape Arboretum’s roots reach back to 1908, when its Horticultural Research Center (HRC) began developing apple varieties that could survive in the state's subzero temperatures. Today, the Arboretum is a leading northern landscape arboretum, featuring more than 1,215 acres of magnificent gardens, model landscapes, and Natural areas - from woodlands and wetlands to prairie – with extensive collections of northern-hardy plants.

Over the past ten years the number of guests visiting Arboretum each year has more than doubled. Over 460,000 people visited the Arboretum in 2016 and the number is expected to grow. This growth, combined with the successful completion of a multi-year capital campaign, made 2017 an ideal time to revisit and renew our strategic plan. The following document outlines core goals and objectives for 2017 – 2022.

The outcome of this strategic plan: In 2022, the Arboretum will be the premier northern landscape arboretum.

The planning process started in December of 2016, Arboretum leadership and the Arboretum Foundation Board established a strategic planning subcommittee to begin the thorough refresh of our strategic plan. Over 1,000 volunteers, members and staff reviewed and reconfirmed our Mission, Vision and Core Values and participated in surveys and focus groups designed to assess Arboretum strengths and opportunities. This work served to guide the committee in further defining strategic goals for the next five years and objectives for delivery within that time.

This strategic plan is not a business plan. It does not spell out specific tactics. Rather it is the strategic guide for the Arboretum as each individual department evolves their five year strategy and annual operating plans. The five core departments of the Arboretum are: Buildings and Grounds Operations, Development and Membership, Commercial Operations and Guest Services, Education, and Research. Their 5 year plans are shared later in this document, following the Arboretum Strategic Plan’s goals and supporting objectives.

The appendix of this document includes charts of key benchmarks, how department goals align in support the overarching Arboretum strategic goals as well as an overview of the planning process.
Our Mission

To welcome, inform and inspire all through outstanding displays, protected natural areas, horticultural research and education.
Our Vision

We are the premier northern landscape arboretum, welcoming all to enjoy, learn from and connect with nature.
Our Core Operating Values

Stewardship
We are dedicated to conservation, the protection of plants, and deeper public understanding of the value, beauty & critical nature of plants in human life.

Community
We are a meaningful and core part of the community, reaching out to the world around us, accessible and welcoming to all.

Fiscal Responsibility
We are committed to sound financial and governance practices that support our shared mission and vision…Ensuring the Arboretum’s ability to welcome, inform and inspire visitors for generations to come.

Excellence
We are dedicated to excellence through innovation, inspiration, creativity, research and professional development.

Teamwork
We are one Arboretum team, supportive and respectful of each other.
Our Strategic Goals: 2017 - 2022

Goal 1. Develop an evergreen financial platform for generating resources that will help us achieve our mission for generations to come.

Goal 2. Deliver an extraordinary guest experience.

Goal 3. Nurture, evolve, conserve and protect our gardens and natural areas.

Goal 4. Evolve a clear vision and master plan for buildings and grounds.

Goal 5. Reach out, share and deepen our relationship with the community.

Goal 6. Evolve and deepen research based knowledge, new discovery, access and outreach opportunities.
Goal 1.
Develop an evergreen financial platform for generating resources that will help us achieve our mission for generations to come.

Objective A: Deepen engagement, relationship management and contribution of guests, members, and donors.

Objective B: Develop both current and long-range resource demand assessments to inform financial planning process.

Objective C: Strengthen relationships, synergy and leverage of University, MLAF Board and Auxiliary Board time and talent.

Objective D: Expand capability for increasing corporate, grant and other external organization funding.

Objective E: Expand revenue streams.

Objective F: Actively communicate and engage the heart of the community as a valued and vital part of our shared mission.
Goal 2.
Deliver an extraordinary guest experience.

**Objective A:** Welcome all. Assure physical accessibility, improve financial accessibility and community outreach.

**Objective B:** Be a Best Place to Work. Support, develop, connect with, sustain and retain extraordinary staff.

**Objective C:** Offer innovative displays, services and educational programs that connect people of all ages with plants and the natural world.

**Objective D:** Plan and execute year round, engaging, innovative and dynamic displays, exhibits and events.

**Objective E:** Assess, plan and deliver a leading digital platform.

**Objective F:** Deliver a comprehensive safety and security program.

**Objective G:** Measure and exceed guest expectations.
Goal 3.
Nurture, evolve, conserve and protect our gardens and natural areas.

Objective A: Ensure diversity and aesthetics of garden displays and collections.

Objective B: Develop a curatorial voice and cohesive experience throughout gardens and grounds.

Objective C: Evolve a conservancy plan to dedicate and protect open natural areas, limiting future physical structure encroachment.
Goal 4.
Evolve a clear vision and master plan for buildings and grounds.

**Objective A:** Confirm and Complete 5 Year Capital Project Priorities.

**Objective B:** Conduct an assessment to define overall capacity and anticipated growth in guests to inform current and future physical space, circulation and guest accommodation needs.

**Objective C:** Evolve and deliver annual physical space assessment to identify and schedule repair, maintenance needs and isolate underutilized assets for improvement, re-purposing or removal.

**Objective D:** Assess, plan and begin increased public ease of access to grounds, parking and safety on trails, paths, roadways.

**Objective E:** Deliver renewed 10 year vision and updated master plan.
Goal 5.
Reach out, share and deepen our relationship with the community.

Objective A: Deliver a renewed Arboretum story. Share our rich history, special mission, relationship with community, the University of Minnesota and generations to come.

Objective B: Bring Research & Conservation into the light. Assess, evolve and deepen integration of HRC history, progress and breakthroughs by sharing knowledge, inclusion in Arboretum displays, communications platform, education programs and public offerings.

Objective C: Deepen relationships and make new friends. Engage and inspire greater numbers of new and diverse guests while deepening our relationships among current volunteers, members and professional peers.

Objective D: Engage in joint ventures and collaborations with community groups and other institutions.

Objective E: Assess, plan and implement expanded social media capability and reach.
Goal 6.
Evolve and deepen research based knowledge, new discovery, access and outreach Opportunities.

Objective A: Continue research and innovation in (1) plant breeding, (2) habitat restoration and (3) rare plant conservation.

Objective B: Assess inventory of Arboretum knowledge. Identify and prioritize opportunities to better connect (1) the public with plants and the natural world and (2) the academic and scientific community to our mission and resources.

Objective C: Share our knowledge (1) as a go to resource and (2) by broadcasting news, updates and historical research findings.

Objective D: Collaborate with other institutions to deliver on site and offsite Arboretum programs.
Department Strategic Plans

A. Development

B. Building and Grounds Operations

C. Commercial Operations and Guest Services

D. Education

E. Research
Development and Membership 2017-2022

Mission: Generate resources to advance the Arboretum’s mission and vision.

Vision: We are a leader in philanthropic, sponsorship and membership support among non-profit organizations in Minnesota.

Goals Summary:

1. Increase the Arboretum’s general endowment from $34 million to $50 million.

2. Increase the individual Annual Fund donor base by 5% per year and increase the pool of $500 and above donors and the dollars they represent by 5% per year.

3. Fund high priority capital projects.

4. Launch, expand, and maintain program resources in high priority areas.

5. Expand and diversify the Arboretum’s member base.
Goal 1.
Increase the Arboretum’s general endowment from $34 million to $50 million.

Objective A: Adopt an internal, planned-giving marketing plan.

Objective B: Develop an endowment campaign strategy to increase the general endowment.

Objective C: Develop a Leon Snyder Heritage Society Stewardship Plan.

Objective D: Develop benchmarking goals for reaching a $50 million goal in the next five years.
Development and Membership 2017-2022

Goal 2.
Increase the individual Annual Fund donor base by 5% per year and increase the pool of $500 & above donors and the dollars they represent by 5% per year.

Objective A: Increase Trustee involvement for thanking donors from 4 Trustees to 12 or more.

Objective B: Identify 5-8 special budget underwriting initiatives which could be used as a sell for Other Philanthropic Income (OPI).

Objective C: Work with Digital Programs/Web to improve presence and awareness of annual giving.
Development and Membership 2017-2022

Goal 3.
Fund high priority capital projects.

Objective A: Update one-pagers on Red Barn Farm campus (i.e., Red Barn and Master Gardener Home), Operations HQ and Chinese Garden to include specific information on naming opportunities and gift levels.

Objective B: Convene bi-weekly major gift meetings with select Development staff to discuss matching donors with prioritized giving opportunities. Identify key donors for presentations on benefits of blended gift strategies.

Objective C: Work with previously identified prospects to finalize funding structure for Red Barn refurbishment and creation of demonstration plots at Red Barn Farm campus.

Objective D: Identify lead donor for Operations HQ. Supplement funding with identification of others needed to complete funding.

Objective E: Communicate Phase II Chinese Garden progress to key donor prospects.

Objective F: Develop and submit gift acceptance policy for trustee approval.
Development and Membership 2017-2022

Goal 4.
Launch, expand, and maintain program resources in high priority areas.

Objective A: Expand the pool of potential foundation and corporate supporters through research, networking, and referrals. Revisit/analyze/update prospect list on a monthly basis.

Objective B: Build and sustain strong working relationships with staff and leadership across the Arboretum.

Objective C: Create, continuously review and update collateral to support fundraising efforts. Ensure that materials are of the highest quality and available in a timely fashion to be used to meet deadlines.

Objective D: Ensure timely and customized stewardship for foundation and corporate supporters.
Goal 5.
Expand and diversify the Arboretum’s member base.

Objective A: Promote Membership team training to increase staff awareness of different cultures, with the intent to learn and better understand how to create inclusiveness in communication and promotion of membership to diverse communities.

Objective B: Increase outreach, encourage membership to under-served communities through targeted events such as PRIDE, Somali Independence Day, etc., and promoting what membership in the Arboretum has to offer to these communities.

Objective C: Create membership scholarship program to offer under-served families membership opportunities and transportation so they are able to visit and enjoy nature.

Objective D: Promote the importance of membership advocacy to all Arboretum staff to improve customer service and overall member and non-member guest experience.

Objective E: Promote family-friendly membership activity to retain family membership and encourage non-member guests conversion to members.
Mission: To welcome, inform and inspire all through outstanding displays, protected natural areas, and premier horticulture, unique collections, outstanding facilities and up-to-date information technology.

Vision: We provide the premier northern landscape arboretum, welcoming all to enjoy, learn from and connect with nature.

Goals Summary

1. Provide beautiful, inviting and safe buildings and grounds for the visitor.

2. Maintain facilities, plant collections and displays to the highest quality standards.

3. Invite/enable/promote the talent and expertise of the operations staff to fulfill visitor expectations.

4. Initiate/maintain/complete projects within fiscal budget parameters and on schedule.

5. Seek sustainable methods for maintaining grounds and facilities that contribute to a healthy environment.

6. Conserve and protect the site’s natural and cultural resources.
Goal 1.
Provide beautiful, inviting and safe buildings and grounds for the guests.

Objective A: Provide quality visitor experiences in all seasons: beautiful gardens, trails, and architecture to encourage guest satisfaction and ongoing philanthropy.

Objective B: Be cognizant of how all buildings, grounds, and collections can be interpreted by the visitor and can enhance guest experience.

Objective C: Accommodate and showcase seasonal exhibits, special events, and rentals to enhance guest services and accommodate a wide audience.

Objective D: Engage an increasingly tech demanding audience with appropriate I.T. based experiences.

Objective E: Provide safe and secure experiences for guests, safeguard and secure collections, grounds, and facilities.
Goal 2.
Maintain facilities, plant collections and displays to the highest quality standards.

Objective A: Institute improved preventative maintenance program so infrastructure doesn’t deteriorate.

Objective B: Require all operations staff to abide by the highest quality maintenance standards for their assigned areas.

Objective C: Curate collections to meet (AAM, APGA) standards following approved accessions and collections management plans.

Objective D: Maintain collections in accordance with high aesthetic and curatorial standards.

Objective E: Enhance and enrich plant labeling, interpretive signage, and I.T. based information about facilities and collections.
Goal 3. 
Invite/enable/promote talent and expertise of the Operations staff to fulfill visitor expectations.

Objective A: Require all staff to greet visitors in a friendly/welcoming manner.

Objective B: Empower operations staff to get the job done.

Objective C: Promote ongoing learning opportunities for operations staff.

Objective D: Hire staff that can help fulfill in-house project needs.
Goal 4.
Initiate/maintain/complete projects within the fiscal budget parameters and on schedule.

Objective A: Finish “Minnesota Landscape Arboretum FY17 Capital Project Management” As listed in priority order.

Objective B: Identify next phase of capital projects.

Objective C: Finish deferred maintenance projects including Garden Structures, Garden Paving Projects, and Irrigation Pump House.

Objective D: Identify and update list of facilities in need of repair.

Objective E: Complete integration of I.T. systems and software programs.

Objective F: Conduct an assessment to define overall capacity and anticipated growth in guests to inform current and future physical space, circulation and guest accommodation needs.
Goal 5.
Seek sustainable methods for maintaining grounds and facilities that contribute to a healthy environment for all.

Objective A: Follow PHC (Plant Health Care): put the right plant in the right place: water and fertilize properly so that plants will be healthier and resist pests.

Objective B: Follow IPM (Integrated Pest Management).

Objective C: Work with Mother Nature’s web of life (beneficial insects, birds, etc.) to control any pest outbreaks.

Objective D: Control larger “garden incompatible” species (deer, Canadian Geese), following all governing rules and regulations.

Objective E: Conserve energy resources: reduce fossil fuel usage.

Objective F: Assess the environmental impact of all operations.
Goal 6.
Conserve, protect, and respect the inherent beauty of the site’s natural and cultural resources.

Objective A: Maintain the site’s open spaces (15% garden opportunity).

Objective B: Enhance and update the Arboretum’s plant collections.

Objective C: Embrace the Big Woods (the site’s dominant natural community) and wetland natural communities.

Objective D: Add native and naturalized plant species to the plant database and accession key individual native plants.

Objective E: Control invasive species and monitor the invasiveness of all plant collections.

Objective F: Assess the site’s fauna as a resource and visceral component to a healthy garden.
Commercial Operations and Guest Services 2017-2022

Mission: To deepen community engagement and deliver experiences that deepen relationships and provide critical revenue support to the Arboretum.

Vision: We lead all gardens in engagement and in the delivery of extraordinary Arboretum based guest experiences.

Goals Summary:

1. Develop a motivated, skilled and collaborative team.
2. Deliver Four Seasons of authentic, inspiring experiences.
3. Expand and deliver a delightful and diverse retail experience.
4. Provide excellent guest services and support.
5. Become the area’s leading nature-based destination for meetings and events.
6. Achieve excellence in Arboretum external and internal communications.
7. Deliver a leading digital platform.
8. Achieve marketing excellence.
Goal 1.
Develop a motivated, skilled and collaborative team.

Objective A: Build, nurture and reward a multidisciplinary team environment.

Objective B: Deliver excellence in inter-team communications and collaboration.

Objective C: Develop team business planning and project management skills.

Objective D: Implement a staff career development planning and support program.

Objective E: Build and introduce team Values in Practice (VIP) award program.
Commercial Operations and Guest Services 2017-2022

Goal 2.
Deliver Four Seasons of authentic, inspiring experiences.

Objective A: Introduce five year seasonal exhibit plan.

Objective B: Introduce integrated 24 month rolling seasonal event and display planning.

Objective C: Expand Winter experience offering.

Objective D: Improve dining experience.

Objective E: Further improve and expand signature events.

Objective E: Develop and introduce new music & seasonal concert program.
Goal 3.
Expand and deliver a delightful and diverse retail experience

Objective A: Assess retail operations and develop a 5 year business plan that will define markets, improve offerings, establish growth targets, and explore new revenue streams and related resource needs.

Objective B: Further explore new, and improve existing retail points of distribution (PODS).

Objective C: Enhance retail staff impact through new training, technology and merchandising support.

Objective D: Expand retail art gallery offering and access to regional and national artists.

Objective E: Become a must destination tour group shopping.
Commercial Operations and Guest Services 2017-2022

Goal 4.
Excellence in guest services and support.

Objective A: Assess, improve and expand Bee-Line Shuttle Service.

Objective B: Improve call center service capacity and technology.

Objective C: Introduce integrated guest service and gate staff customer service training.

Objective D: Assess opportunity and expand licensing, permit and rental revenue.

Objective E: Assess and improve technology and process for ticketed events.
Goal 5.
Become the area’s leading nature based destination for meetings and events.

Objective A: Evaluate and improve private and corporate events/meeting organization.

Objective B: Assess vital statistics for rental revenue growth, identify methodology for consistent and accurate data collection, reporting and performance management.

Objective C: Create a unique, inspirational meeting/event story based on the Arboretum’s unique eco-environment.

Objective D: Introduce experiential offerings that leverage what takes place behind the scenes at the Arboretum.

Objective E: Establish a robust lead generation, management and conversion program.
Goal 6.
Achieve excellence in Arboretum external and internal Communications.

Objective A: Evaluate and improve Communications organization structure, talent readiness and succession planning.

Objective B: Assess vital statistics (KPIs) for communications effectiveness.

Objective C: Benchmark, assess, and introduced new Arboretum magazine and annual report: Modernize and improve reader engagement, and support of strategic objectives/business plans.

Objective D: Introduce an input and editorial review approval process for all internal and external communications.

Objective E: Design, propose and introduce a new robust internal communications platform to connect, inform and inspire Arboretum staff and volunteers.

Objective F: Establish a segment strategy to expand engagement to minority, millennial, out state and out of state audiences.
Commercial Operations and Guest Services
2017-2022

Goal 7.
Deliver a leading digital platform.

Objective A: Build a dedicated web and digital programs team.

Objective B: Assess, design, propose and deliver new web site.

Objective C: Assess vital statistics (KPIs) for digital effectiveness, identify methodology for setting success targets.

Objective D: Establish Digital Strategies Committee leveraging MLAF board, University and community resources.

Objective E: Move to fast follow the front of the digital adoption curve by continually assessing the digital eco-system and making ongoing improvements to the Arboretum’s digital capability.
Goal 8.
Achieve marketing excellence.

Objective A: Evaluate and improve Marketing organization structure and talent readiness to meet Arboretum wide needs.

Objective B: Assess, design, propose and deliver refreshed and University aligned Arboretum Brand Platform.

Objective C: Assess and implement vital statistics (KPIs) for Marketing effectiveness.

Objective D: Assess consumer/market information needs. Build a platform and resource for consistent annual data collection and reporting.

Objective E: Install Arboretum wide identity and style guide for all Arboretum print and electronic representations and communications.

Objective F: Introduce a marketing support, planning and approval process for all internal and external marketing project requests.
Mission: The Arboretum Education Department creates rich and diverse experiences that connect people of all ages with the living world and with each other.

Vision: The Arboretum Education Department’s work is rooted in our communities, guided by their needs and strives to support greater wellbeing for plants, for people and for the planet

Goals Summary

1. Grow adult education sustainably to broaden audience reach and capitalize on Arboretum and University resources and expertise.

2. Deliver exceptional hands-on plant experiences for age PreK-25.

3. Increase access to exceptional hands-on plants experiences.

4. Reach more visitors with expanded informal learning opportunities.

5. Provide evidence-informed best practices in the healing powers of nature to stakeholders, practitioners and academics.

6. Broaden and enrich the volunteer experience by improving access and operational systems.

7. Discover and deepen connections to plants and the earth through art.

8. Provide research-based horticulture information to people throughout Minnesota via the statewide Extension Master Gardener volunteer program.
Goal 1.  
Grow adult education sustainably to broaden audience reach and capitalize on Arboretum and University resources and expertise.

Objective A: Continue to offer quality, uniquely Arboretum education while increasing the overall return on investment.

Objective B: Vision, design and implement a strategy to become a renowned online source of horticulture education.

Objective C: Spread adult education beyond the Arboretum property through community outreach, supported by partnerships and multiple revenue sources.

Objective D: Deepen educational content through creation of a framework for certificate programs.

Objective E: Leverage new educational facilities, including the Red Barn campus and Horticulture Headquarters, to enhance adult education.

Objective F: Plan and implement a transition of tram revenue into travel programs from behind-the-scenes and custom tours to regional trips.

Objective G: Nurture current and grow new partnerships within the Arboretum, Extension, University, local communities, non-profit organizations and other stakeholder groups.
Goal 2.
Deliver exceptional hands-on plant experiences for young people age PreK-25

Objective A: Define, measure, and celebrate exceptional hands-on plant experiences.

Objective B: Recruit, train, and support a growing corps of effective and caring hands-on plant science educators (paid staff and volunteers) to facilitate Arboretum program experiences for young people.

Objective C: Create and Maintain Exceptional Learning Environments for Youth Education Programs.

Objective D: Develop New Programming to address identified needs and opportunities.

Objective E: Develop complimentary educational materials to support teachers, parents and families in their efforts to enhance the Arboretum learning experience for young people.
Goal 3.
Expand opportunities for new and underserved audiences.

Objective A: Transition Urban Garden program to year round program model.

Objective B: Perform needs and opportunities assessment with current urban garden partners to guide school year programming.

Objective C: Work with Extension and University partners to expand reach and quality of outreach program, begin with the Grocery Garden curriculum training and dissemination model.

Objective D: Build fieldtrip, family, and college scholarship programs that create access for new and underserved audiences to experience Arboretum programming.
Goal 4.
Reach more visitors with expanded ‘free & friendly’ informal learning opportunities.

Objective A: Develop a new stream of informal interpretive activities about how to grow, enjoy and keep food at the new Red Barn Farm Campus.

Objective B: Build the recently rebranded “Let’s Talk Plants” programming to increase value-added experiences that engage guests to return, join and attend paid programs.

Objective C: Infuse “Let’s Talk Plants” programming with a hallmark approach that invites visitors to unplug, slow down, connect with nature’s rhythms and feel restored.

Objective D: Work with other teams (e.g. visitor circulation, exhibits, events, other education staff) to integrate informal learning that kindles visitor curiosity and supports nature experiences.
Goal 5.
Provide evidence-informed best practices in the healing powers of Nature-Based Therapeutics to stakeholders, practitioners and academics.

Objective A: Provide state-of-the art delivery services for a variety of users with a wide range of abilities.

Objective B: Provide evidence-informed practitioner training for therapeutic horticulture and animal assisted intervention practitioners.

Objective C: Build core-competencies in Nature-Based Therapy academic courses.

Objective D: Explore future roles in Nature-Based Therapy research.

Objective E: Continue innovative outreach to Nature-Based Therapeutic stakeholders.
Goal 6.
Broaden and enrich the volunteer experience by improving access and operational systems.

Objective A: Formalize a culture of philanthropy among volunteers.

Objective B: Align volunteer skills and abilities with the needs of both the MN Landscape Arboretum and the volunteer.

Objective C: Maximize volunteer opportunities by fostering an Arboretum-wide culture of acceptance, exploration, equity, diversity, and inclusion.
Education 2017 - 2022

Goal 7.
Discover and deepen connections to plants and the earth through art.

Objective A: Expand art innovative educational opportunities for our stakeholders.

Objective B: Diversify and expand art educational experiences to underrepresented communities.

Objective C: Increase depth of volunteer programs.

Objective D: Expanding appropriate use of technology in art experiences.

Objective E: Build core competencies in certificate programs.

Objective F: Increase use of best management practices in curation of Arboretum sculpture and art collections.
Goal 8.
Provide research-based horticulture information to people throughout Minnesota through the statewide Extension Master Gardener volunteer program.

Objective A: Develop, deliver and evaluate research-based horticulture education programs for volunteers that align with the program priorities.

Objective B: Create community-engagement tools and resources across the continuum of learning for volunteers to implement at the local level throughout Minnesota.

Objective C: Provide programmatic support to trained volunteers.

Objective D: Build program support and sustainability by creating and distributing program impact materials in multiple formats appropriate for intended audience(s).
Mission: To inform, inspire and effect change through horticultural and conservation research, innovation and practices.

Vision: We are a main source of applied research on horticulture and plant conservation, regionally based and nationally recognized.

Goals Summary

1. Evolve and utilize highly effective management structure and processes.
2. Establish platform for ongoing research funding.
3. Improve outdoor and indoor research infrastructure.
4. Increase connection to Arboretum community.
Goal 1.
Evolve and utilize highly effective management structure and processes.

Objective A: Appoint a Director of Research

Objective B: Assess, evaluate and improve administration and financial management of the Arboretum research enterprise.

Objective C: Integrate management of research resources with Arboretum resource management structure and processes.

Objective D: Establish platform to prioritize research goals and projects.

Objective E: Define partnership of U of M CFANS, MAES, Arboretum and other relevant parties that enable successful Arboretum research enterprise.
Research 2017 - 2022

Goal 2.
Establish platform for ongoing research funding

Objective A: Assess and define Arboretum Development support of Research.

Objective B: Assess, plan for and further leverage licensing, product sales opportunities.

Objective C: Assess new opportunity and further develop grants for research.
Goal 3.
Improve outdoor and indoor research infrastructure

Objective A: Inventory and prioritize needed physical improvements for lab, field, landscape, office, and storage capacity.

Objective B: Establish appropriate funding plans for prioritized infrastructure improvements and ongoing repair and maintenance.

Objective C: Plan and deliver comprehensive landscape improvements.

Objective D: Plan for and deliver safer and more efficient physical connection between HRC and Arboretum campuses.
Research 2017 - 2022

Goal 4.
Increase connection to the internal and external Arboretum community.

Objective A: Define research brand and relevant audiences in greater Arboretum community.

Objective B: Identify and implement communication platforms appropriate to audiences and to availability of staff resources.

Objective C: Increase access and impact of research products through communication platforms and display in Arboretum public areas.
### Strategic Benchmarks

<table>
<thead>
<tr>
<th><strong>Development</strong></th>
<th><strong>2018</strong></th>
<th><strong>2019</strong></th>
<th><strong>2020</strong></th>
<th><strong>2021</strong></th>
<th><strong>2022</strong></th>
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</thead>
<tbody>
<tr>
<td>• Internal planned giving marketing plan adopted</td>
<td>• Begin Endowment Campaign</td>
<td>• Red Barn Campus prospect conversations complete</td>
<td>• Trustee “Stewardship Effort”</td>
<td>• Endowment Campaign</td>
<td>• 3 Year Endowment Campaign Finalized</td>
</tr>
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<tr>
<th><strong>Buildings and Grounds</strong></th>
<th><strong>2018</strong></th>
<th><strong>2019</strong></th>
<th><strong>2020</strong></th>
<th><strong>2021</strong></th>
<th><strong>2022</strong></th>
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<tbody>
<tr>
<td>• Phase 2 of the Chinese Garden by Aug.</td>
<td>• Red Barn Farm design</td>
<td>• Hort Operations Hqrs construction</td>
<td>• Red Barn Farm completed</td>
<td>• Hort Operations Hqrs completed</td>
<td>• Horticulture and Operations Hqrs. complete</td>
</tr>
<tr>
<td>• Finish design Hort Operations Hqrs</td>
<td>• Finish Conservatory feasibility study Update Collections Review</td>
<td>• Regional Bike Trail open</td>
<td>• Red Barn Farm completed</td>
<td>• Parking lot / entrance renovations</td>
<td>• Red Barn Farm completed</td>
</tr>
<tr>
<td>• Finish Conservatory</td>
<td>• Initiate Natural Resource Committee</td>
<td>• Irrigation System upgrade and standardization</td>
<td>• Eastern Drive Collections and potential Russian Garden plan</td>
<td>• Maple Collection review</td>
<td>• Plant Eastern Drive collections and Russian Garden</td>
</tr>
<tr>
<td>• Tamarack Lake Public Access</td>
<td>• Tamarack Lake Public Access</td>
<td>• Review Pine Collection</td>
<td>• Hillside Garden renovation</td>
<td>• Complete Resource Mgmt Plan</td>
<td>• Instigate propagation/nursery of MN and regional plants for collections enhancement</td>
</tr>
<tr>
<td>• Bike Tunnel Landscaping</td>
<td>• Tree Tunnel Landscaping</td>
<td>• Review Crabapple Collection</td>
<td>• Maple Collection review</td>
<td>• Submit APGA collection accreditation for Hosta, Lilac, Shrub Roses and Peonies</td>
<td>• Chinese Garden Complete</td>
</tr>
<tr>
<td>• Bavaria Road/Tamarack Lake trials</td>
<td>• Irrigation Pump House</td>
<td>• Review Azalea collection</td>
<td>• Complete Resource Mgmt Plan</td>
<td>• • Plan for MN ex-situ conservation</td>
<td>• Complete Resource Mgmt Plan</td>
</tr>
<tr>
<td>• Grass Arbor Deck reconstruction</td>
<td>• Nice Rides bike shelter and rental</td>
<td>• Improve Lilac Collection access</td>
<td>• Improving ticketing and tracking</td>
<td>• Winter Garden plan in tandem with Conservatory</td>
<td>• Winter Garden plan in tandem with Conservatory</td>
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<tr>
<th><strong>Commercial Operations</strong></th>
<th><strong>2018</strong></th>
<th><strong>2019</strong></th>
<th><strong>2020</strong></th>
<th><strong>2021</strong></th>
<th><strong>2022</strong></th>
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<tbody>
<tr>
<td>• Introduce Project Planning Model</td>
<td>• Introduce PMP Training and Support</td>
<td>• New Dining Experience Introduced</td>
<td>• New Dining Experience Introduced</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
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<tr>
<td>• Support 5 Year Seasonal Exhibit Plan</td>
<td>• New Website Launched</td>
<td>• New Cross Country Skiing and Snow Shoe program</td>
<td>• In Garden Dining &amp; Retail Expansion</td>
<td>• Enhanced AppleHouse Experience</td>
<td>• Enhanced AppleHouse Experience</td>
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<tr>
<td>• New Website Launched</td>
<td>• Expand AppleHouse Retail</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
<td>• Chinese Garden Expansion</td>
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<tr>
<td>• Expand AppleHouse Retail</td>
<td>• Group Lead Generation</td>
<td>• Expanded Red Barn Farm events</td>
<td>• Expanded Red Barn Farm events</td>
<td>• Chinese Garden Expansion</td>
<td>• Chinese Garden Expansion</td>
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<tr>
<td>• Group Lead Generation</td>
<td>• Enhanced Consumer Research begins</td>
<td>• New Call Center Tracking</td>
<td>• New Call Center Tracking</td>
<td>• New Call Center Tracking</td>
<td>• New Call Center Tracking</td>
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<tr>
<td>• Enhanced Consumer Research begins</td>
<td>• Digital Strategies Committee</td>
<td>• Integrated Guest Services and Gate</td>
<td>• Improved ticketing and tracking</td>
<td>• Improved ticketing and tracking</td>
<td>• Improved ticketing and tracking</td>
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<tr>
<td>• Digital Strategies Committee</td>
<td>• Expand Shuttle Service</td>
<td>• New Dining Experience Introduced</td>
<td>• New Dining Experience Introduced</td>
<td>• New Dining Experience Introduced</td>
<td>• New Dining Experience Introduced</td>
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<tr>
<td>• Expand Shuttle Service</td>
<td>• Improve photo licensing program</td>
<td>• New Music and Concert Series</td>
<td>• New Music and Concert Series</td>
<td>• New Music and Concert Series</td>
<td>• New Music and Concert Series</td>
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<tr>
<td>• Improve photo licensing program</td>
<td>• New, robust brand, print standards</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
<td>• Expanded Shuttle Service</td>
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<tr>
<td>• New, robust brand, print standards</td>
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<tr>
<th><strong>Education</strong></th>
<th><strong>2018</strong></th>
<th><strong>2019</strong></th>
<th><strong>2020</strong></th>
<th><strong>2021</strong></th>
<th><strong>2022</strong></th>
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<tbody>
<tr>
<td>• Launch endowed adult education series</td>
<td>• Begin sales of online horticultural modules</td>
<td>• Solidify adult education team structure</td>
<td>• Solidify adult education team structure</td>
<td>• Solidify adult education team structure</td>
<td>• Solidify adult education team structure</td>
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<tr>
<td>• Master Gardener Regional Conf.</td>
<td>• Launch revised MG Core Course</td>
<td>• Launch of Regional Core Course cohort program</td>
<td>• Launch of Regional Core Course cohort program</td>
<td>• Launch of Regional Core Course cohort program</td>
<td>• Launch of Regional Core Course cohort program</td>
</tr>
<tr>
<td>• Grocery Garden Program Evaluation and curriculum training</td>
<td>• Start implementation of Red Barn Farm interpretation &amp; programming</td>
<td>• Plan Red Barn Farm distance learning</td>
<td>• Plan Red Barn Farm distance learning</td>
<td>• Plan Red Barn Farm distance learning</td>
<td>• Plan Red Barn Farm distance learning</td>
</tr>
<tr>
<td>• Master Gardener – Food Focus</td>
<td>• Launch Flowers for Pollinators outreach statewide</td>
<td>• Launch new Nature Based Therapeutics on-line learning courses</td>
<td>• Launch new Nature Based Therapeutics on-line learning courses</td>
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<td>• Launch new Nature Based Therapeutics on-line learning courses</td>
</tr>
<tr>
<td>• Plan Red Barn Farm interpretation &amp; programming</td>
<td>• Conduct international Nature Based Therapeutics research collaboration</td>
<td>• Explore Arboretum Nature Based Therapeutics HQ building</td>
<td>• Explore Arboretum Nature Based Therapeutics HQ building</td>
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<td>• Explore Arboretum Nature Based Therapeutics HQ building</td>
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<tr>
<td>• Implement new volunteer database</td>
<td>• Launch Green Health Nature Based Therapeutics initiative</td>
<td>• Curate Chinese Garden Built Environment</td>
<td>• Curate Chinese Garden Built Environment</td>
<td>• Curate Chinese Garden Built Environment</td>
<td>• Curate Chinese Garden Built Environment</td>
</tr>
<tr>
<td>• Shift Growing Good to year around</td>
<td>• Create Nature Based Therapeutics staff transition plan</td>
<td>• Trial an adult education certificate program</td>
<td>• Trial an adult education certificate program</td>
<td>• Trial an adult education certificate program</td>
<td>• Trial an adult education certificate program</td>
</tr>
<tr>
<td>• Create Nature Based Therapeutics staff transition plan</td>
<td>• Launch Nature Based Therapeutics Veterans programs at Arb</td>
<td>• Reduce Nature Based Therapeutics conference; City Greening &amp; Wellbeing</td>
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<td>• Launch Nature Based Therapeutics Veterans programs at Arb</td>
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<tr>
<th><strong>Research</strong></th>
<th><strong>2018</strong></th>
<th><strong>2019</strong></th>
<th><strong>2020</strong></th>
<th><strong>2021</strong></th>
<th><strong>2022</strong></th>
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<tbody>
<tr>
<td>• Dir of Research Appointed</td>
<td>• Approved funding plans for physical improvements</td>
<td>• Complete safer, more efficient HRC-Arb physical connection</td>
<td>• Complete safer, more efficient HRC-Arb physical connection</td>
<td>• Complete safer, more efficient HRC-Arb physical connection</td>
<td>• Complete safer, more efficient HRC-Arb physical connection</td>
</tr>
<tr>
<td>• Plan for improved administration and financial management developed</td>
<td>• Approved plan to partner with Development on research funding</td>
<td>• Complete landscape improvements</td>
<td>• Complete landscape improvements</td>
<td>• Complete landscape improvements</td>
<td>• Complete landscape improvements</td>
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<tr>
<td>• Prioritized inventory of needed physical improvements developed</td>
<td>• Approved plan for communication platforms</td>
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</tbody>
</table>
### Strategic Alignment 2017-2022

<table>
<thead>
<tr>
<th>Arboretum</th>
<th>Development</th>
<th>Building and Grounds</th>
<th>Commercial Operations</th>
<th>Education</th>
<th>Research</th>
</tr>
</thead>
</table>
| **Goal 1** Develop an Evergreen financial platform | **G1A** Planned Giving Marketing Plan  
**G1B** Develop Endowment Campaign  
**G1D** Benchmarking to reach 2020 $50M goal established  
**G50** Membership Advocacy  
**G5E** Family Membership Activity | **G4** Initiate/maintain/complete projects within the fiscal budget parameters and on schedule. | **G2** Deliver four seasons of authentic, inspiring, experiences.  
**G3** Expand and deliver a delightful diverse retail experience  
**G5** Leading meeting and events  
**G6** Communications excellence  
**G7** Leading digital platform  
**G8** Achieve marketing excellence | **G1** Adult Education revenue  
**G2** Youth Education revenue + grants  
**G3** Expand Outreach; grants  
**G5** Nature Based Therapeutics contracts + grants  
**G6** Broaden the volunteer experience; improve access and systems | **G2** Establish platform for ongoing research funding  
**G3** Improve outdoor and indoor research infrastructure |
| **Goal 2** Deliver an extraordinary guest experience | **G3** Fund high priority capital projects  
**G50** Membership Advocacy  
**G4** Launch, expand and maintain program resources in high priority areas.  
**G5E** Family Membership Activity | **G1** Provide beautiful, inviting and safe buildings and grounds for the guests.  
**G3** Invite/enable/promote talent and expertise of the Operations staff to fulfill visitor expectations. | **G1** Develop a motivated, skilled and collaborative team  
**G2** Four Seasons of experiences  
**G3** Expand and deliver a delightful diverse retail experience  
**G4** Excellence in Guest Service  
**G5** Leading meeting and events  
**G6** Communications excellence  
**G7** Leading digital platform | **G1** Adult Education  
**G4** Expand informal learning opportunities  
**G6** Broaden the volunteer experience; improve access and systems  
**G7** Deepen connection to plants & the earth through art | **G4** Increase connection to the internal and external Arboretum community |
| **Goal 3** Nurture, evolve, conserve and protect our gardens and natural areas | **G4** Launch, expand and maintain program resources in high priority areas. | **G5** Seek sustainable methods for maintaining grounds and facilities that contribute to a healthy environment for all.  
**G6** Conserve, protect, and respect the inherent beauty of the site’s natural and cultural resources. | **G6** Communications excellence  
**G7** Leading digital platform | **G3** Increase access to  
**G4** Expand informal learning experiences  
**G8** Master Gardener | **G4** Increase connection to the community. |
| **Goal 4** Evolve a clear vision and master plan for buildings and grounds | | | | **G1** Develop an endowment to $50 million  
**G50** Membership team training to increase awareness of different cultures  
**G5B** Membership outreach to under-served communities  
**G5D** Membership Advocacy | **G1** Adult Education  
**G2** Youth Education  
**G3** Increase access to  
**G4** Expand informal learning opportunities  
**G5** Provide evidence-based horticulture to people throughout Minnesota through statewide Extension master Gardener volunteer program. | **G1** Evolve and utilize highly effective management structure and processes.  
**G3** Improve outdoor and indoor research infrastructure |
| **Goal 5** Reach out, share and deepen our relationship with the community | **G1** Increase general endowment to $50 million  
**G50** Membership team training to increase awareness of different cultures  
**G5B** Membership outreach to under-served communities  
**G5D** Membership Advocacy | **G3** Invite/enable/promote talent and expertise of the Operations staff to fulfill visitor expectations. | **G2** Deliver four seasons of authentic, inspiring, experiences.  
**G4** Excellence in Guest Service  
**G5** Leading meeting and events  
**G6** Communications excellence  
**G7** Leading digital platform  
**G8** Achieve marketing excellence | **G1** Adult Education  
**G2** Youth Education  
**G3** Increase access to experiences  
**G4** Expand informal learning opportunities  
**G5** Provide evidence-based Nature Based Therapeutics programs  
**G6** Broaden the volunteer experience; improve access and systems  
**G7** Connections to plants through art  
**G8** Master Gardener Program | **G4** Increase connection to the internal and external Arboretum community |
| **Goals 6** Evolve and deepen research based knowledge, new discovery, access and outreach | | | | | |
Strategic Planning Process

• Process Overview
• Cross Arboretum Integration
• Project Timeline
Objective:
Review, refine, build and implement a 2017 - 2022 Strategic Plan.
This plan will serve as a the roadmap toward our common vision and a guide for synergy in planning & excellence in execution.

Core Process Leadership Team

Arboretum Directors:
- Process Leadership
- Draft & Final Recommendation
- Final Approval

ASPC:
- Process Support, Review & Recommendations
- Knowledge, Ideation and Recommendations
- Final Plan Support

THE PLAN

Pete Moe, Executive Director/CEO
Frank Molek, Exec Development
Tim Kenny, Exec Education
David Matteson, Exec Business Ops, Process Leader

Tom Martin, Chair ASPC
Todd Wagner, Board President
Bridget Levin, Board
David Maiser, Board
Megan Dayton, Board
Linda Cutler, Board
Gordon Bailey, Board
Strategic Plan Integration

- One Shared Mission & Vision
- One Set of Shared Strategic Goals
- Department Plans That Support Arboretum Strategic Goals

Planning Process Overview

1 Mission & Vision
## Planning Process Overview

### Time Line

<table>
<thead>
<tr>
<th><strong>CFANS Strategic Planning Awareness, David and Pete Review</strong></th>
<th><strong>Planning Model Created</strong></th>
<th><strong>Process Review with ASPC Chair, Agree to Outline</strong></th>
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<tbody>
<tr>
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<td><strong>Process Review with DEXDirector, Agree to Plan</strong></td>
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<td><strong>Process Timeline Review</strong></td>
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<td><strong>Process Review with Directors and Approval</strong></td>
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<td><strong>Process Review with Arboretum Strategic Planning Committee (ASPC)</strong></td>
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<td><strong>Dir &amp; ASPC Pre-Work: Review Plan, Timeline, Best in Class Plans</strong></td>
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<td><strong>Mission &amp; Vision Homework to Board, Staff, Members</strong></td>
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<td><strong>Directors and ASPC Distill and Refine Mission &amp; Vision; Final Draft</strong></td>
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<td><strong>Mission &amp; Vision Defined, Approved by Directors</strong></td>
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<td><strong>Mission &amp; Vision Review by EC</strong></td>
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<td><strong>SWOT Analysis</strong></td>
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<td><strong>SWOT Vision</strong></td>
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<td><strong>SWOT Business Operations</strong></td>
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<td><strong>SWOT Development</strong></td>
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<td><strong>SWOT Physical Operations</strong></td>
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<td><strong>SWOT Education</strong></td>
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<td><strong>SWOT Vision Report to Directors &amp; ASPC</strong></td>
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<td><strong>Long-Term Strategic Objective Summit: Directors, ASPC</strong></td>
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<td><strong>Directors Refine &amp; Approve Recommended 5 Year Strategic Objectives</strong></td>
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<td><strong>ASPC and Director Update Long-Term Strategic Objectives to EC</strong></td>
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<td><strong>Long-Term Objectives Final: Directors and ASPC</strong></td>
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<td><strong>Long-Term Objectives Final Presentation to Board</strong></td>
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<td><strong>Directors Build 5 Year Strategic Plans for their Units</strong></td>
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<td><strong>CEO/Executive Director Approves Plans</strong></td>
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<td><strong>5 Year Plans Integrated Under Master Plan</strong></td>
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<td><strong>CEO/Executive Director Approves Plan</strong></td>
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<td><strong>Directors Make Final Revisions</strong></td>
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<td><strong>Directors Approve Plan</strong></td>
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<td><strong>Directors Present Final to EC</strong></td>
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<td><strong>Plan Complete</strong></td>
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<td><strong>Plan Celebrated &amp; Introduced to Board</strong></td>
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<td><strong>Plan Celebrated &amp; Introduced to Staff</strong></td>
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<td><strong>Plan Core Elements Communicated to Public</strong></td>
</tr>
</tbody>
</table>
What does the Arboretum do best?
Top Two Responses:

1. Beautiful gardens and natural areas.
2. Seasonal displays

1,000 + survey responses, 2017
What can the Arboretum do better?  
Top Two Responses:

1. Better entry and parking.  
2. Better dining.

1,000 + survey responses, 2017