



Strategic Plan 2017-2020

A Garden of Discovery



# INTRODUCTION



This Strategic Plan is intended to set the framework for success and there is no document more important to a non-profit. It helps keep the organization focused and determines short to midterm achievable goals. This Plan was developed collaboratively by the Board of Directors of the Friends of the Water Conservation Garden, Garden staff, docents, and stakeholders.

A small group of dedicated Garden enthusiasts formed a committee which completed much of the background work provided in this document. Interviews and a stakeholder workshop were conducted to determine the path of The Garden over the next three years. Stakeholders at the workshop represented a cross section of supporters and users of The Garden.

The Garden's strategic focus for the next three years is to **be an essential partner in environmental and conservation education by 2020**. To achieve this goal, focused objectives were defined in four core areas: Governance; Financial Stability and Development; Facilities; and Education.

Implementing the Strategic Goals listed below will help The Garden reach its strategic mission.

**Governance:** Strengthen internal governance and external relationships with Cuyamaca College and other JPA Members,

**Finances and Development:** Develop revenue sources that will provide growth and economic stability,

**Facilities:** Optimize The Garden exhibits and facilities to support education programs of The Garden for the community, and

**Education:** Become an important educational resource for environmental and conservation programs throughout the county.

Initiatives, schedules, responsible parties, and other resources are specified in the detailed plan. Implementation of these strategic initiatives to achieve the strategic goals between fiscal years 2017 and 2020 gives opportunity for The Garden to achieve success.

## MISSION STATEMENT:

A Mission Statement defines the purpose of an organization. It is the primary reason for The Garden's existence, the reason people volunteer, give and support our organization. It serves as the succinct statement we relay to the public.



*To inspire positive change in the living environment through the conservation of water and other natural resources.*

A GARDEN OF DISCOVERY

# VISION STATEMENT

Unlike the Mission Statement, a Vision Statement is what an organization strives to achieve in meeting its Mission. While the Missions statement is why we exist, a Vision statement is what we hope to achieve.



*We envision a future where natural resources are universally valued in our daily lives.*

A GARDEN OF DISCOVERY

# STATEMENT OF GUIDING PRINCIPLES



*The fundamental principles that guide The Water Conservation Garden's actions and assure consistency and accountability are:*

- Education about plants, gardening, water supply, conservation, and environmental awareness in its broadest sense, is the number one priority of The Garden. Our public programs reflect the highest standards of excellence, effectiveness and accessibility.
- The Garden exists to affect positive change in people's attitudes and behaviors by promoting conservation and environmental awareness through its own efforts and in collaboration with others. Through a strong community outreach effort, we bring The Garden's conservation messages to as many individuals and organizations within the community as possible.
- While The Garden's botanical collection and facilities are the primary physical assets that are the foundations for its mission, The Garden uses these as supporting elements in its educational programs.
- The Garden develops its exhibits in accordance with the professional standards of demonstration gardens and similar public outdoor educational venues. The provenance of all additions to The Garden's plant collection is to be fully and accurately recorded.
- The Garden will be a good steward of its donors' generosity and the community's trust.
- The Garden and its operations will be managed with the highest level of professionalism and commitment to excellence in delivering its Mission to the community.
- The function of the Board of Directors is to provide oversight, set policy, engage in fundraising, and ensure financial health.

# CONSTITUENCIES

The Garden serves a great variety of customers. It is apparent that many types of people, young and old benefit from visits to The Garden. In addition, there are a variety of Stakeholders that are vital to the success of The Garden. The Garden strives to serve all members of the public from visitors, school children and public agencies.

*Adult learners (attendees of Garden education programs)*

*Board of Directors*

*Contract funders*

*Contractors*

*Cuyamaca College Ornamental Horticulture Department*

*Donors and sponsors*

*Educators and education administrators*

*Employees*

*External groups (recipients of speakers bureau)*

*Garden event attendees*

*Government agencies*

*Grossmont-Cuyamaca Community College District*

*Homeowners and homeowner associations*

*Joint Powers Authority Members*

*Landscape professionals*

*Master Gardeners*

*Media (print, broadcast)*

*Members – Corporate*

*Members – Individuals and families*

*Online community (website visitors and social media followers)*

*On-site visitors*

*Other Nonprofit conservation organizations*

*Professional organizations*

*Residents of San Diego County and Southern California*

*Retail Partners*

*Students – K-12 schoolchildren*

*Students – College & university*

*Third-party event clients*

*Vendors*

*Volunteers, docents and interns*

*Water agencies of San Diego County*



# Statement of Values



The Water Conservation Garden strives to change lives for the better through a variety of ways. The strategic planning process identified numerous internal and external values that enable The Garden leadership, staff, docents and volunteers to ensure the message of our mission is delivered.

The Garden as a whole strives to be an **inspiration** in **making a difference** in our **visitor's** lives. We do this by having **passionate** staff, providing inspirational exhibits while also providing a **fun** and relaxing environment for the community.

Additionally it is important that we not only **inspire** change in understanding the need for conservation but that we also **empower** the community with the knowledge from our **expertise** of how to conserve water. Through a **unique** setting that is **enjoyable** and makes visitors **feel welcome** we are able to be successful **stewards** of the environment.

## **CRITICAL FACTORS FOR SUCCESS:**

The following are factors deemed essential for The Water Conservation Garden to succeed in a highly competitive environment amongst nonprofits and for-profit organizations that offer similar programs and ensure its long-term viability and relevance:

**Earnings Capability** – Given a new paradigm wherein the JPA will focus on funding current and deferred maintenance of the facilities, The Garden must be able to generate significant earned income across a broad business base, particularly for education programs. Revenue sources are grants, contributions, fundraising events, membership, contracted educational services, gift shop sales, and private event facilities rentals. Ticketed attendance should also be considered as a future source of revenue.

**Financial Strength** – The Garden has established an endowment fund to ensure its long-term viability during difficult economic times and/or periods of high expenses where earned income is insufficient to meet operating needs. It must have the means to meet its capital expansion/improvement needs via effective fundraising efforts, such as a capital campaign, that secure or identify sources of funds prior to commencement of major projects.

**Facilities** – The whimsical architecture of The Garden’s facilities and exhibits is both attractive and award-winning (1999 “Orchid” recipient of San Diego Architectural Foundation’s Orchids & Onions Award). However, the structures lack space to accommodate The Garden’s dramatic programmatic growth in recent years. Additionally, the public’s demand and expectation of the facilities calls for upgrades, renovations and, in some cases, new construction.

**Presentation of Exhibits** – The Garden is unique as a public demonstration garden due to its compact size, award-winning exhibit designs, demonstration of practical application in home landscaping, diversity of plant life, and professional manner in which exhibits are maintained. After 18 years, some exhibits require upgrades and/or overhaul, while others require a reassessment of both design and continued relevance to The Garden’s programs and Mission. Opportunities to expand exhibit space must be capitalized on, when presented.

## *Critical Factors for Success.*

**Special Events** – To date, many of The Garden’s events have been free-admission, community-focused initiatives (as opposed to fundraisers), generally successful at drawing attention to The Garden and its programs and generating modest levels of income via sponsorship, vendor booths and residual sales. While such events must remain important parts of The Garden’s public outreach efforts, they can no longer be the *only* types of events. A robust, sustainable fundraising events and development program must be established that achieves the financial sustainability strategic goal in finding new sources of meaningful annual revenue and cultivating new donors for other organizational initiatives.

**Governance** – Proactive Board development has resulted in the recruitment of engaged community leaders and clear expectations. The Garden’s expanded committee structure has introduced greater and more effective participation of Board members in The Garden’s activities. Bylaws should be reviewed biennially and revised as needed. Emphasis must continue to be placed on establishing a more philanthropy-centric membership amongst Board.

**Personnel Team Integration** – This Strategic Plan provides the foundation for the three major internal stakeholders – Board of Directors, staff and volunteers – to work together to embrace a vision and body of effort that is seamless in its execution to meet the Mission of the organization. It is the responsibility of the leadership of The Garden to clearly communicate the tenets and intent of this plan in developing a learning and integrated work environment that is customer focused.

**Strategic Partnerships** – The Garden must continue to forge robust and mutually-beneficial collaborative efforts with other organizations – both for-profit and nonprofit – in order to broaden its base of support and business. Its positive relationships with its water agency partners remain essential to The Garden’s success.

**Membership** – The Garden must have a larger membership base, serving as the foundation of its donor base, reflecting its most loyal supporters and visitors, and acting as the core ambassadors for its advocacy within the community. Corporate partnerships are essential in building the donor base. Membership must not only grow by attracting new members from an expanding public but also feature a strong retention program to ensure the continued support of current members.

**Stewardship** – The Garden must maintain a highly professional process of stewardship in all facets of its management involving Board, staff and volunteers with all outside parties. Effective recognition of individual and corporate supporters institutionalizes a culture of building lifelong relationships with The Garden’s major donors and partners, ensuring The Garden is their charity of choice, discovering what donors want, and positioning to exceed their expectations.

## *Critical Factors for Success.*

**Location** – The Garden’s location adjacent to the Cuyamaca College campus is one of its greatest assets benefiting, particularly, students of the Ornamental Horticulture program. Nevertheless, The Garden’s location in East County is perceived by some as “too far” from central and northern San Diego. Directional signage from public roads to The Garden and on the Cuyamaca College campus itself is an opportunity for improvement.

**Programs** – In spite of the age and relative size of The Garden as an organization, its public programs are exemplary. The Ms. Smarty-Plants youth program is internationally-recognized and the recipient of numerous local, state and national awards. The Garden’s adult education programs, while satisfactory, should be enhanced and strengthened to attract wider appeal and participation and use modern technology and techniques. Program evaluation must be strengthened to assess quality and impact.

**Community Reputation** – The Garden enjoys an excellent reputation in the community as a public demonstration garden and authority on water-wise gardening. Frequently called upon by educators, local media, landscape architects, DIY gardeners and homeowners, The Garden must continue to provide the level of service and quality of exhibits that enhances this reputation.

**Public Relations** – The Garden has been effective in enhancing its public profile by building positive relationships with the media via newspaper, radio, television and World Wide Web presence. In recent years, this effort has gradually grown from modest yet reliable East County-centered coverage to greater County-wide, regional and even national exposure.

**Marketing** – Marketing continues to be a challenge. The JPA recently completed a study of the effectiveness of the Garden in changing their customer’s behavior. Partnering with JPA members in marketing programs is anticipated to enhance attendance. Targeted investment (i.e., paid advertising) is also key to raising The Garden’s visibility to generate greater attendance, membership, contributions, third-party special event bookings, and merchandise sales. Branding of The Garden to attract more attendees is being considered.

# A GARDEN OF DISCOVERY IN ENVIRONMENTAL EDUCATION - A Strategic Plan



# A GARDEN OF DISCOVERY IN ENVIRONMENTAL EDUCATION- A Strategic Plan

## 1.0 GOVERNANCE

**STRATEGIC FOCUS: BE AN ESSENTIAL PARTNER IN ENVIRONMENTAL AND CONSERVATION EDUCATION BY 2020**

**STRATEGIC GOAL:** Strengthen internal governance and external relationships with JPA members.

Objectives:	Strategy
<b>1. A. Expand and diversify Friends Board</b>	1.A.1 Increase the number of philanthropic Board members by 3 new members
	1.A.2 Encourage/increase board diversity of skills as Board grows
	1.A.3 Conduct a thorough review of the by laws
<b>1.B. Determine the need for an advisory or honorary committee</b>	1.B.1 Conduct a survey of past Board members and high level board members to determine if benefits would arise from having an honorary board
	1.B.2 Prepare an action plan and create Committee if the need is important
<b>1.C. Strengthen relationships with the JPA members</b>	1.C.1 Attend JPA Agency board meetings at least once per quarter to update Board members on news of The Garden
<b>1.D Form relationships with potential new JPA members</b>	1.D.1 Meet with and form new relationships with 3 new water districts

# A GARDEN OF DISCOVERY IN ENVIRONMENTAL EDUCATION- A Strategic Plan

## 2.0 FINANCES/DEVELOPMENT

*STRATEGIC FOCUS: BE AN ESSENTIAL PARTNER IN ENVIRONMENTAL AND CONSERVATION EDUCATION BY 2020*

**STRATEGIC GOAL:** Develop revenue sources that will provide for growth and economic stability.

Objectives:	Strategy
<b>2.A. Grow the endowment by \$400,000</b>	2.A.1 Partner with San Diego Foundation to increase donations to the endowment
	2.A.2 Increase awareness of the endowment through marketing campaigns
<b>2.B. Create and implement a development and marketing plan that supports The Garden in becoming a leader in environmental and conservation education</b>	2.B.1 Identify existing funding needs (including a naming opportunities program)
	2.B.2 Using completed facilities and exhibits plan, identify future funding needs
	2.B.3 Create more value in memberships
	2B.4 Develop additional revenue sources
	2.B.5 Increase third party rentals such as other organization meetings, fundraisers and weddings
	2.B.6 Increase in-kind donations
	2.B.7 Utilize marketing campaigns to support fundraising efforts
<b>2.C Develop a marketing plan to support The Garden's mission and development efforts and to brand The Garden's regional identity/significance</b>	2.C.1 Finalize marketing plan and allocate resources
	2.C.2 Arrange for ongoing marketing support
<b>2.D Apply for Grants that support or grow the exhibits and education departments</b>	2.D.1 Develop grant policy that outlines the criteria for application from The Garden.

# A GARDEN OF DISCOVERY IN ENVIRONMENTAL EDUCATION- A Strategic Plan

## 3.0 FACILITIES

**STRATEGIC FOCUS: BE AN ESSENTIAL PARTNER IN ENVIRONMENTAL AND CONSERVATION EDUCATION BY 2020**

**STRATEGIC GOAL:** Provide for the maintenance and expansion of botanic and physical assets to support the objectives of the JPA, education programs of The Garden, and be a resource to the community.

Objectives:	Strategy
<b>3.A. Restoration of current resources, maintenance and deferred maintenance</b>	3.A.1 Conduct an annual assessment of needs
	3.A.2 Assess and prioritize maintenance tasks
	3.A.3 Establish plan to work toward Botanic Garden status if feasible
<b>3.B. Review and update Facilities Master Plan</b>	3.B.1 Assess the visitor experience and include any needs in plan
	3.B.2 Prepare an Exhibits Plan that integrates education, conservation and sustainability in all exhibits
	3.B.3 Prepare a feasibility study of building satellite gardens
<b>3.C. Incorporate innovative educational resources throughout Garden</b>	3.C.1 Interactive displays that exhibit state of the art information integrating all topics of conservation including energy.
	3.C.2 Update demonstration gardens with current, pertinent and forward thinking information signage
<b>3.D Create a facility that teaches inspiration and innovation by example.</b>	3.D.1 Implement zero carbon footprint, zero storm water runoff, and other conservation measures
	3.D.2 Establish aesthetic standards that exceed other successful public demonstration gardens
	3.D.3 Conduct an annual innovation review to gauge our programs with state of the art practices including future needs

# A GARDEN OF DISCOVERY IN ENVIRONMENTAL EDUCATION- A Strategic Plan

## 4·0 EDUCATION

*STRATEGIC FOCUS: Be an essential partner in environmental and conservation education by 2020*

**Strategic Goal:** Become a leading educational resource for environmental and conservation programs throughout the County

Objectives:	Strategy
4.A Children K- 8 Education: Maintain the high quality and momentum of the Ms. Smarty Plants™ program and focus on expansion past 2020	4.A.1: Enhance the presence of MSP in The Garden
	4.A.2: Research and apply for curriculum trademark
	4.A.3: Be a leader at the state level on STEM, STEAM and NGSS
	4.A.4: Provide printed materials for teachers
4.B High School Student Education: Adapt young adult curriculum for high school students through onsite learning and technology to bridge from high school to extended learning	4.B.1: Provide curriculum for high school learning on horticulture and conservation industry
	4.B.2: Interact with high schools for conservation education in the classroom
	4.B.3: Hold teacher workshops
4.C College Students: Increase college level programs so that there is opportunity for research, work experience and internships	4.C.1 Increase relations with 3 universities and colleges
	4.C.2: Enhance internship program
	4.C.3: Course work accreditation
4.D. Expand Adult Education program to become “go-to” source for expertise knowledge for conservation in the landscape	4.D.1: Expand Adult classes by 5% per year to include a wide variety of topics taught by experts in the field. For a total of 15% increase by 2020

# Strategic Planning Committee

Harold Bailey, Ph.D. Chair  
Patrick Pilz, Vice Chair  
Eric Lund – Workshop Facilitator  
Jan Tubiolo  
Richard Wright Ph.D.  
DeAna Verbeke  
Elyssa Robertson  
Clayton Tschudy  
Pam Meisner  
Diane Owens

2016 - 2017

# Strategic Planning Workshop

## Attendees:

Harold Bailey, Ph.D. Chair

Patrick Pilz, Vice Chair

Eric Lund – Workshop Facilitator

Jan Tubiolo

Richard Wright Ph.D.

DeAna Verbeke

Elyssa Robertson

Clayton Tschudy

Pam Meisner

Diane Owens

Jeri Deneen

JoEllen Jacoby

Vince McGrath

Ed Woodruff

Princess Norman

Jon Powell

Cindy Miles, Ph.D

Bonnie Scott

Peggy Matarese M.D.

# Board of Directors and Staff:

## **Board of Directors:**

Harold Bailey, Ph.D, President  
Peggy Matarese, M.D. Vice President  
Mora de Murguia, Treasurer  
Bonnie Scott, Ph.D. Secretary

Tom Allingham  
Joel Cloud  
Cheryl Minshew  
Cindy Miles, Ph.D.  
Patrick Pilz  
Jan Tubiolo

DeAna Verbeke, JPA Representative  
Ellie Aitken, Docent President 2016  
Ed Woodruff, Docent President 2017

## **Staff:**

Elyssa Robertson, Executive Director  
Diane Owens, Development Director  
Clayton Tschudy Director of Horticulture  
Pam Meisner Director of Education

Daniel Mayorga  
Jillian Quint  
Lauren Magnusan  
Lauren Gagliano Saline  
Elena Gomez  
Megan McCurdy  
Abel Macias  
Mannah Gbeh  
Heather Carlton  
Kay McGrath  
Cherri Bailey

