

Maximizing Impact through Planning and Partnerships:
Trends and innovation in strategic, master and business planning

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FORT WORTH DALLAS

NEW HORIZONS

R I S I N G F R O M R O O T S



Trends in Master Planning: Designers' Perspectives

**Matt Nicolette, Ph.D.
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Definitions

Strategic Plan- Process that outlines the overarching **direction** of an organization, identifies allocation of resources to achieve a future state while positioning itself to meet its mission

Site Master Plan- Dynamic long-term planning document that provides a **conceptual layout** to guide future growth and development making the connection between buildings, social settings, and the surrounding environment

Business Plan- Defines an organization's **objectives** and lays out a written road map for the firm from marketing, financial, and operational standpoints

Site Design- Project is selected, designed and detailed for the purpose of **construction**

Strategic Plan



Master Plan



Site Design

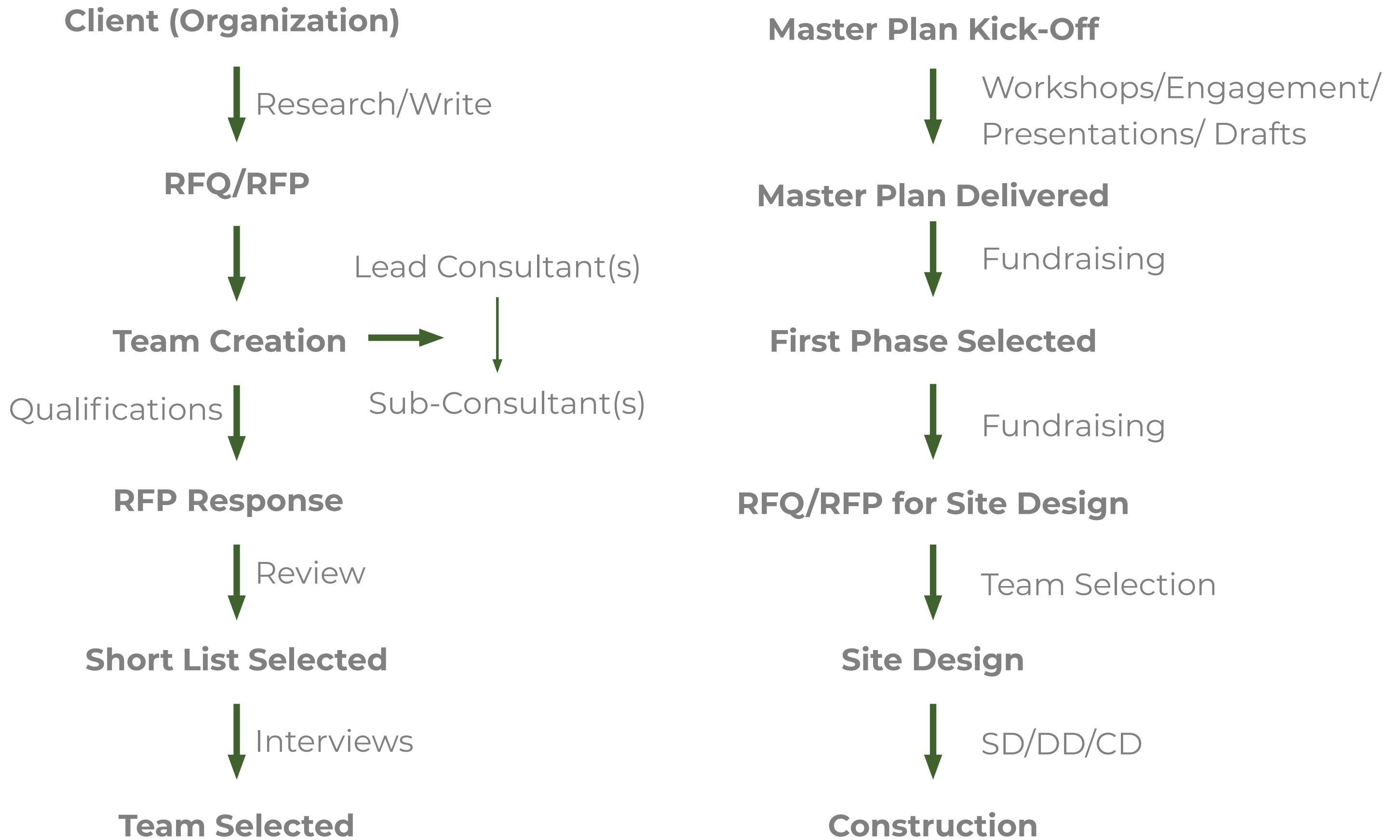


Construction



Mission Compatible Success!!!

The Processes



Presentation Methodology

- Created a questionnaire that surveyed design, planning, and garden professionals
- Focus on design and planning professions
- The questionnaire was open answer
- Analyzed to determine any interesting trends or advice for the Public Garden and Cultural Institution Master Planning process

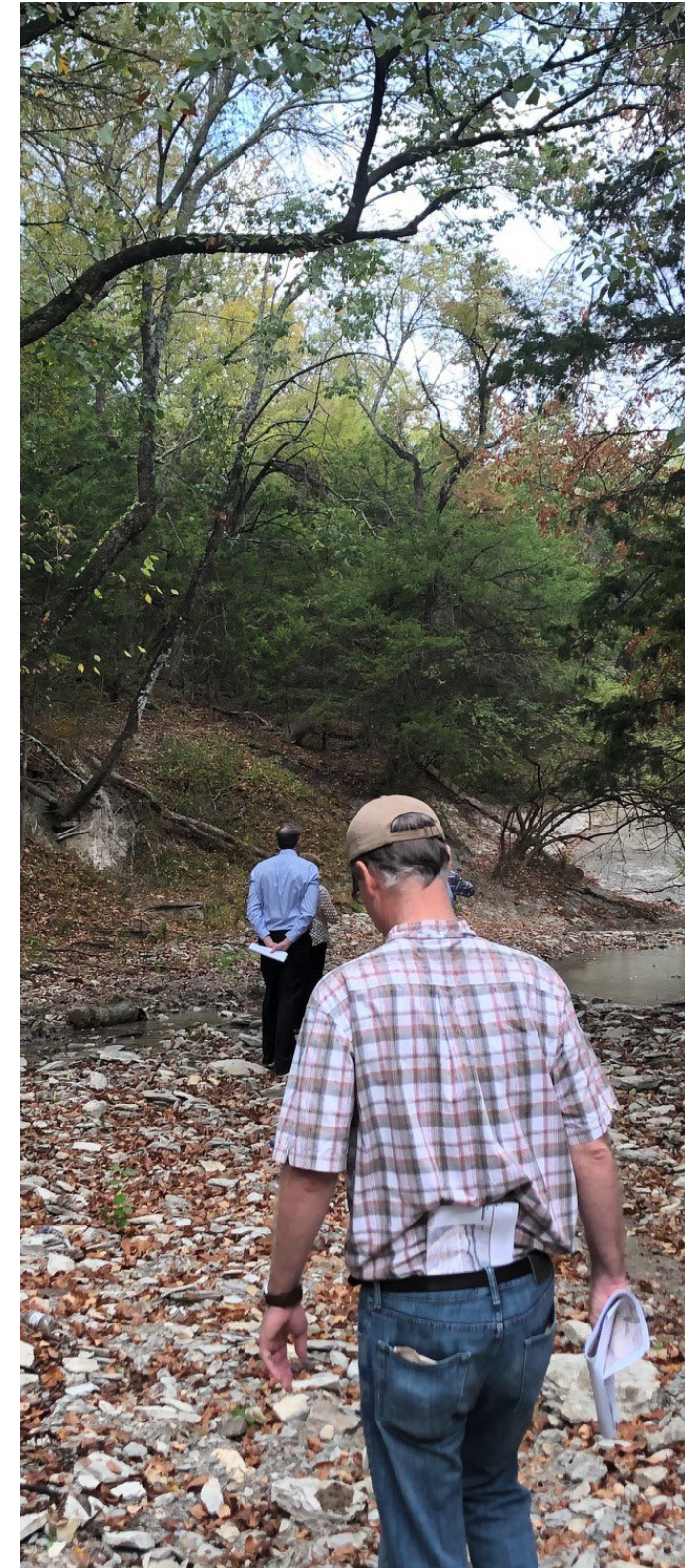
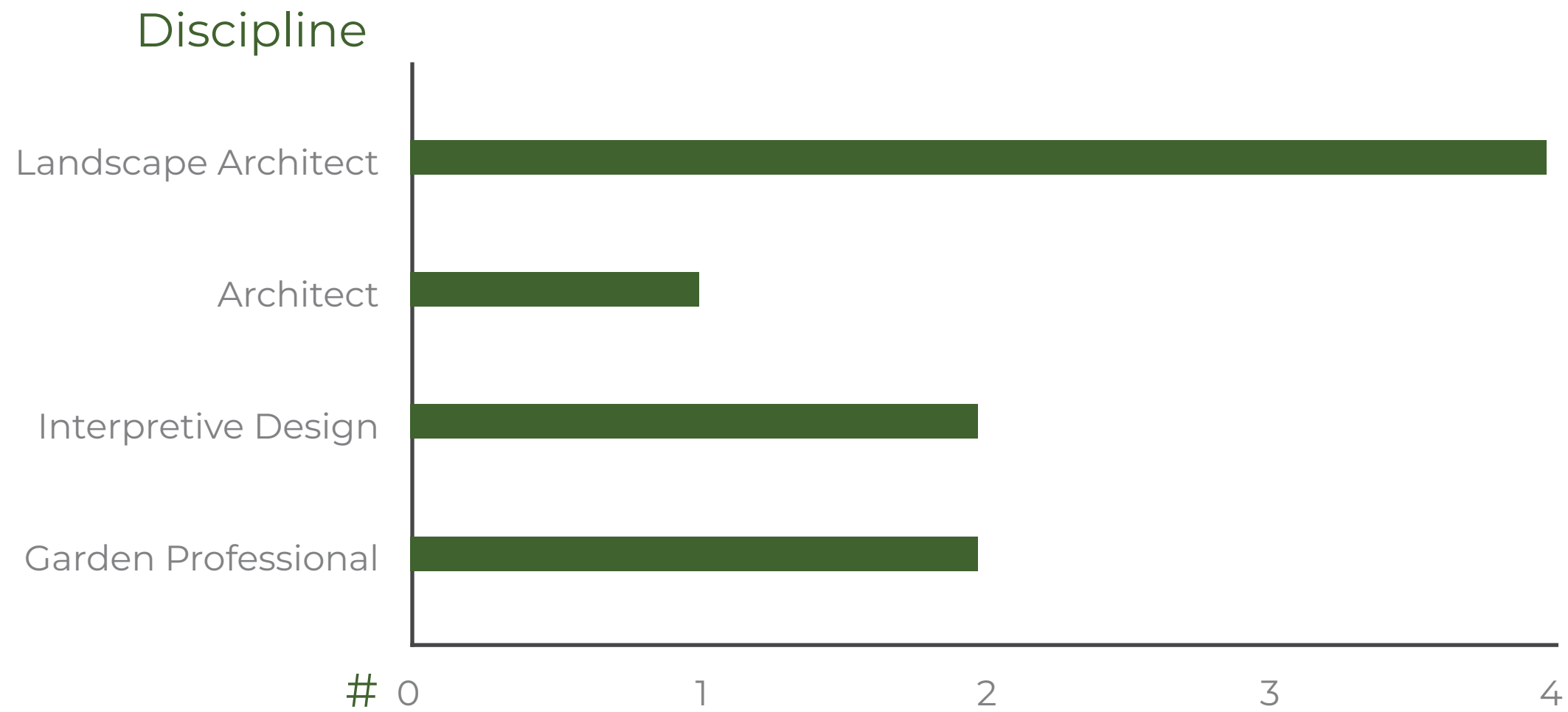


Presentation Discussion

- Participants
- Pre-Planning and Proposals
- Topics, Trends, and Themes

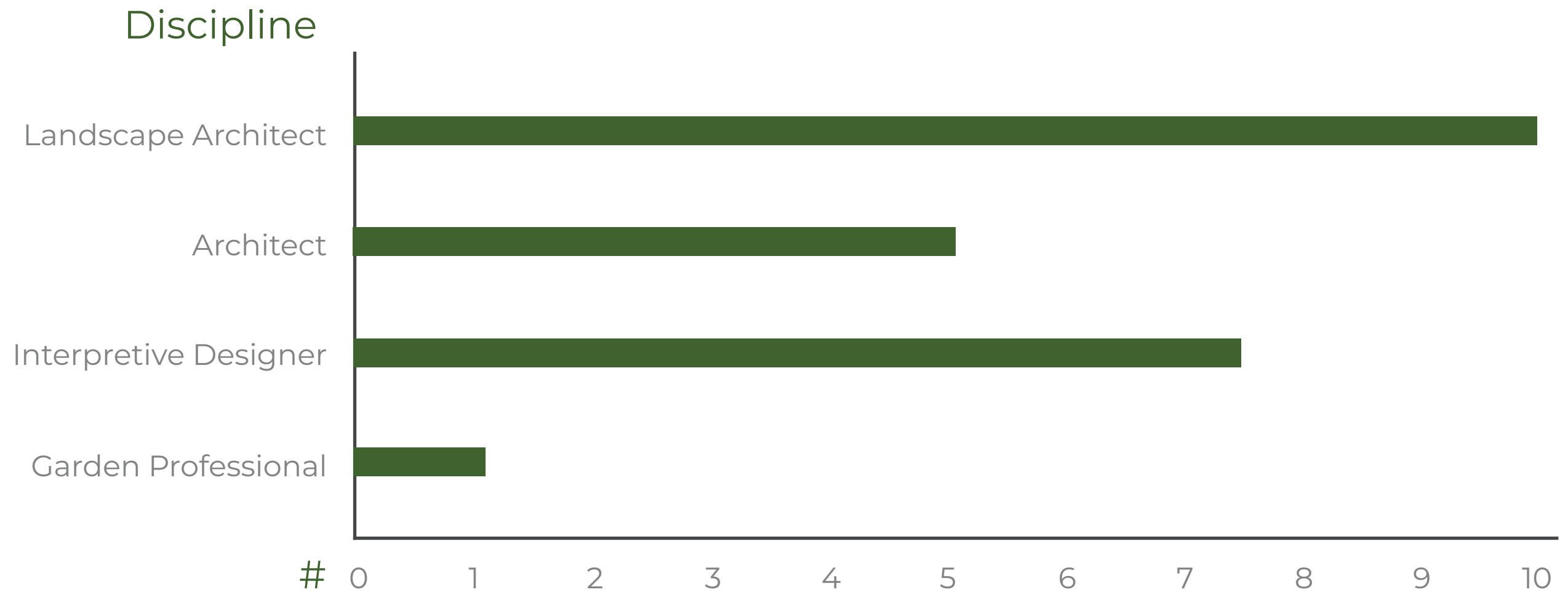


Participant's Disciplines



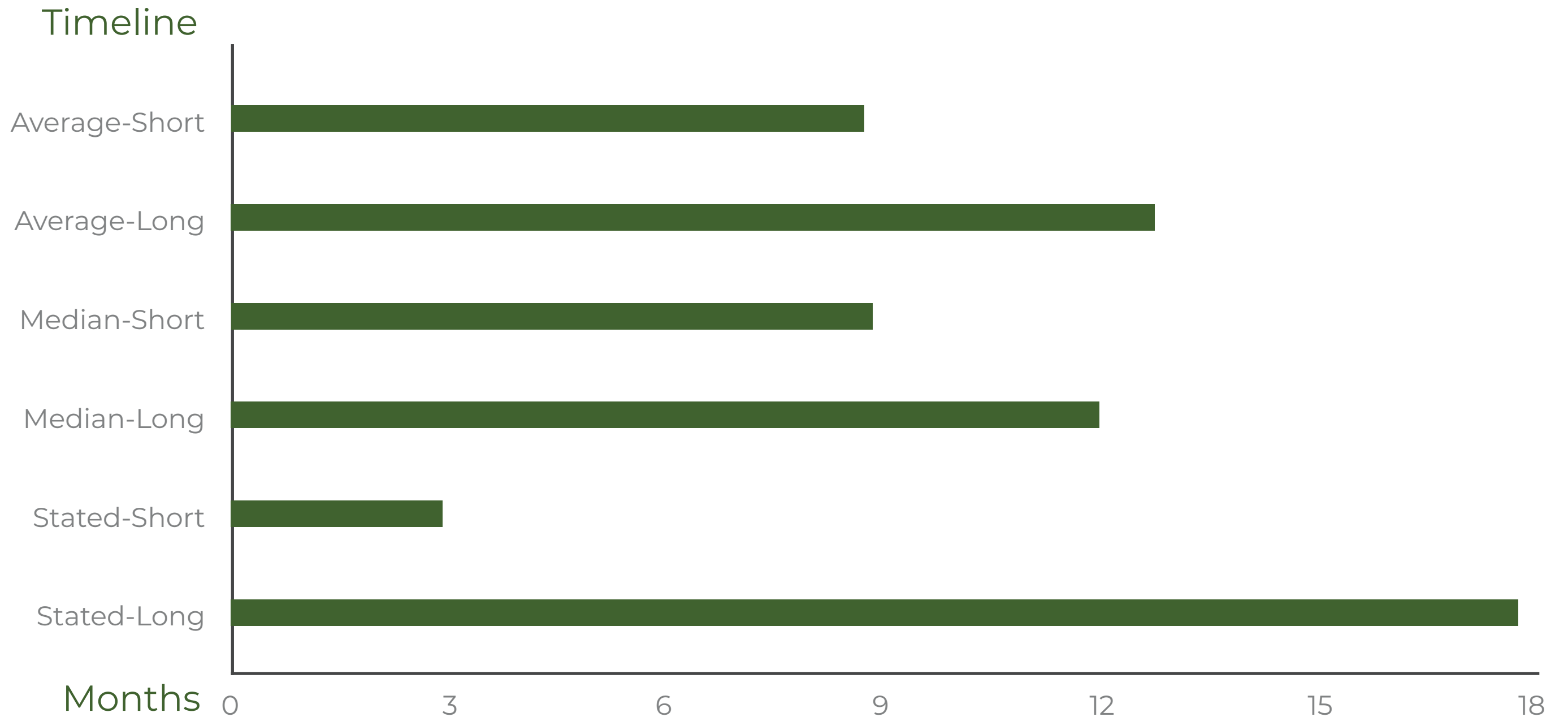
Participant's Recent Experience

“How many public gardens, arboreta, or related cultural institutions have you worked with in the past five years?”



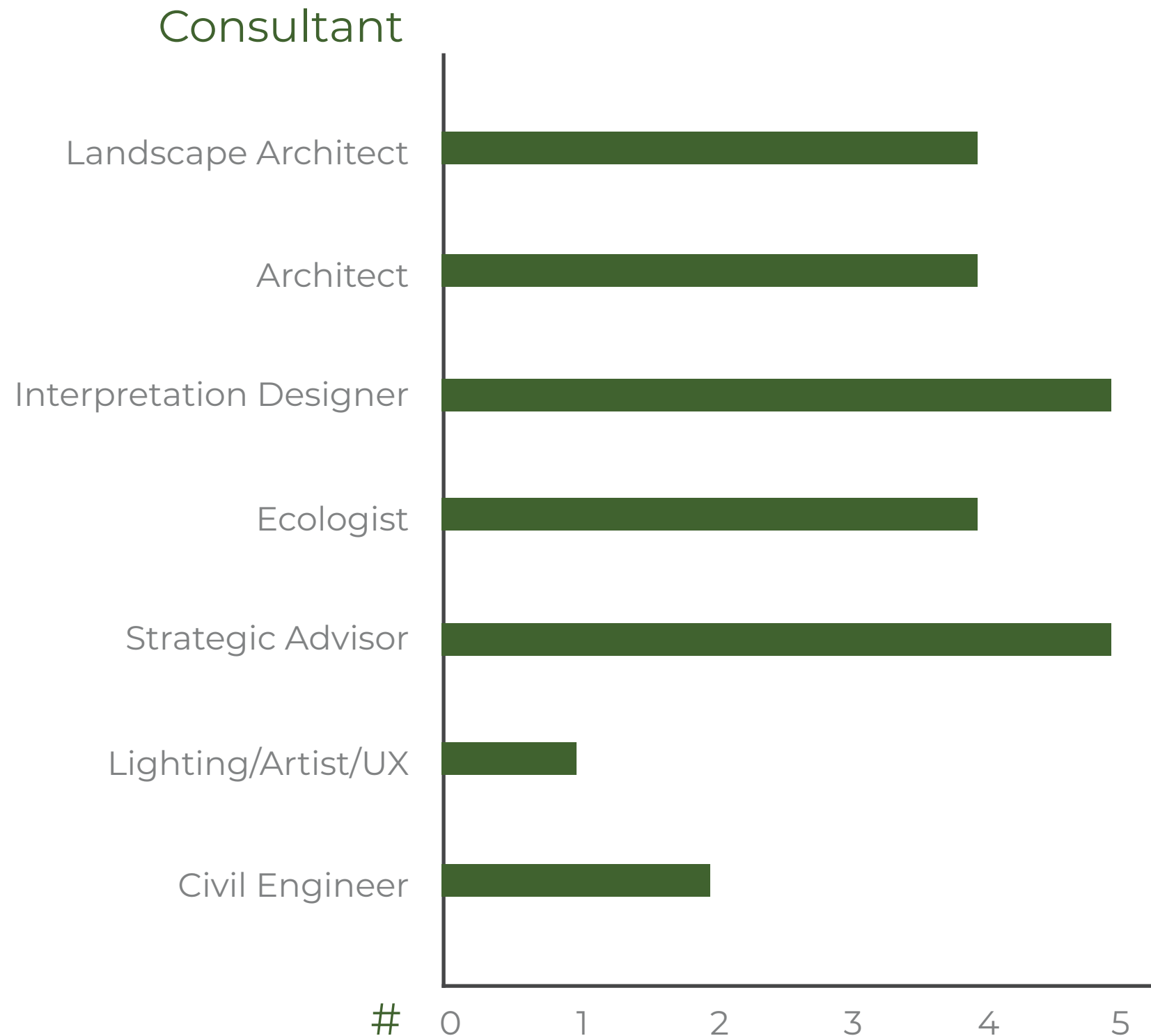
Master Planning Timeline

“What is the average length of the Master Plan process from being awarded the project to delivering the Master Plan for potential implementation?”



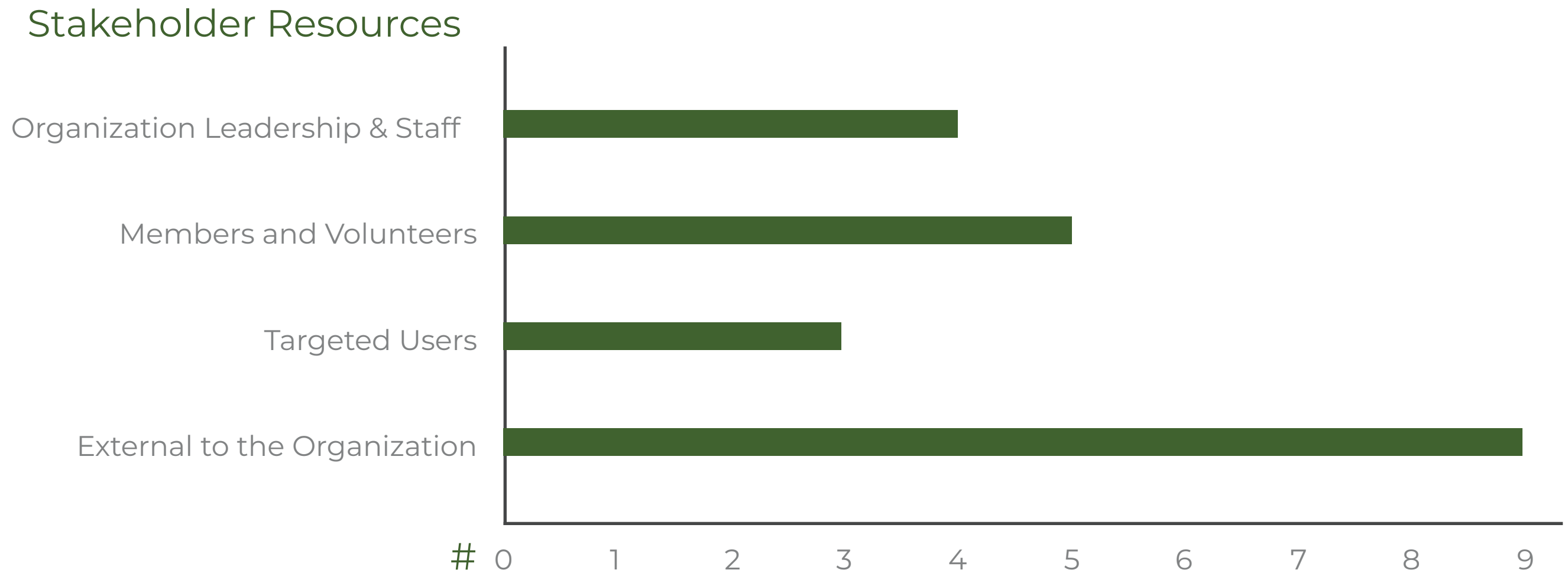
Potential Consultants

“Which consultants would you recommend public gardens consider during the Master Planning process?”



Engaging Stakeholders

“During the planning process how are gardens identifying and engaging potential stakeholders?”



Advice for Writing Requests for Proposals

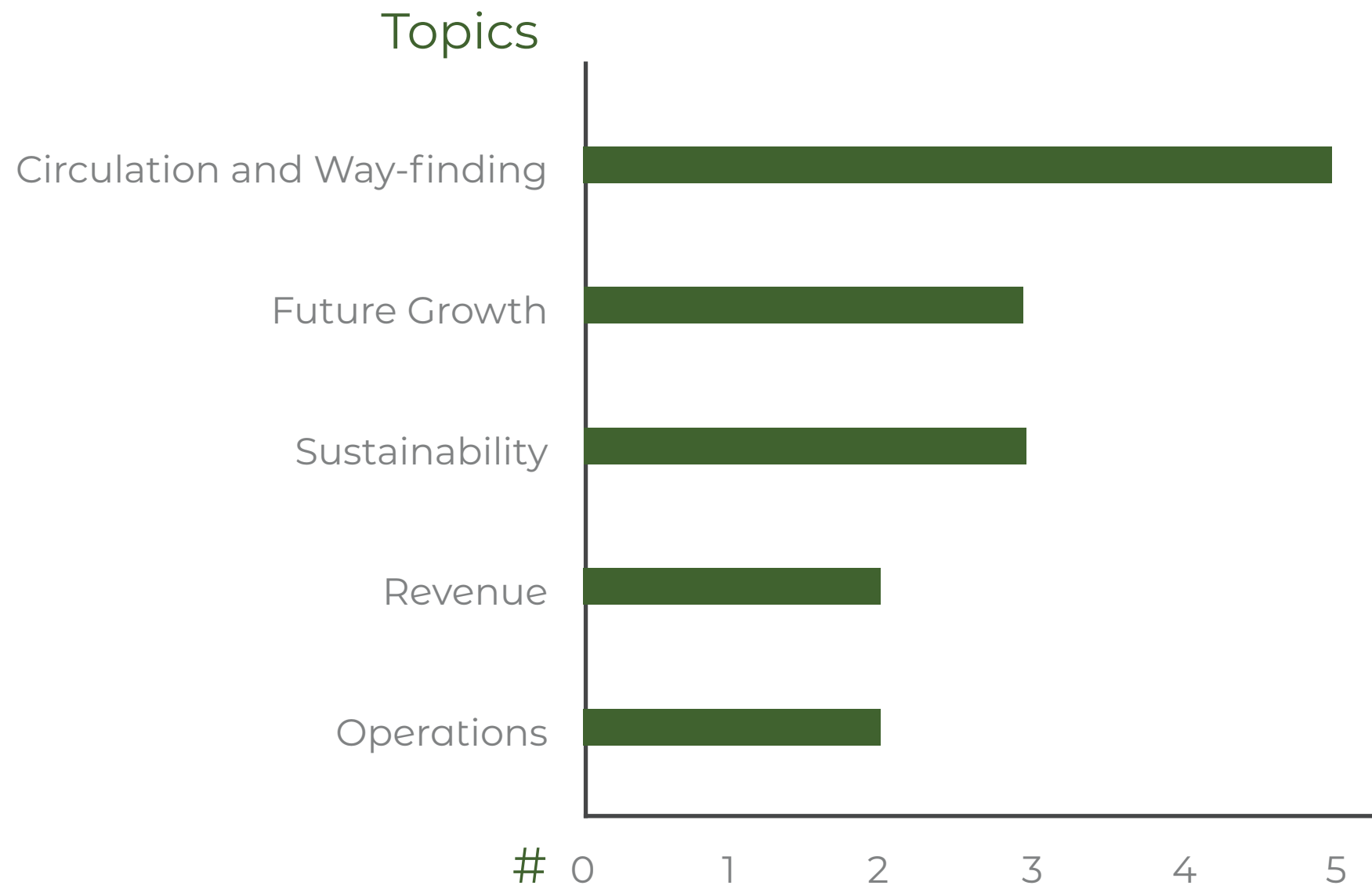
“Do you have any advice for new or established gardens that are considering writing a request for proposals for Master Planning services?”

- Know your **organization’s mission** and know your **goals**
- Be **clear** and **concise**
- Understand your projected **schedule** and **budget**
- Which **consultants** do you require for the scope?
- Do your **homework**
- Reach out to **designers** and utilize **APGA** resources
- Look at **examples** and write it yourself
- Allow for **time** for site visits and RFP response
- Consider an outside consultant for **construction budget**



Trending Topics and Themes

“Which topics are clients or potential clients asking you to address?”



First Phase/High Priority Projects

“Which projects types are high priority after completion of the Master Plan?”

- **Entry Experience**- gardens, graphics, and visitor's center
- **Revenue Generating**- family garden's, education and event spaces, seasonal display, WOW factor gardens
- **Infrastructure**- parking, accessibility, circulation, way-finding



Challenges for New(er) Gardens

“Are there any challenges that are specific to newer gardens that need to be prioritized?”

- Attracting an audience- **younger** and more **diverse**
- Differentiate from a park- **mission**, goals, and interpretation
- Circulation- **accessibility**, access, way-finding, and **experience**
- Infrastructure- drainage, garden growth, plant health
- Organizational- **board development** and funding



Potential Unrealized Topics

“Are there any topics that are not being requested that you think would be beneficial for the Public Garden client?”

- Move **beyond** sustainability to high performance landscapes
- Converting users to **stewards**
- **Wider audience** appeal and engagement
- Developing programing **partnerships**



Post-Pandemic Trends (the new normal)

“Have you identified any new trends or requests in the ‘post-covid’ Era?”


- Clients are more comfortable in **virtual meetings**
- Alternative admission processes
- More **outdoor** activities and gathering spaces
- **Outdoor/online** education- getting away from the traditional classroom
- Utilizing **hands-free** technologies
- **Diversify income** and move away from earned income



Conclusions

- Know your mission and goals
- Be creative and flexible to promote the mission and generate revenue
- Garden experience matters- select the appropriate consultants
- You're not in this alone- utilize the community of garden professionals, organizations, stakeholders, and consultants
- Be authentic and differentiate your organization

MISSION -> PLANNING -> IMPLEMENTATION -> EXPERIENCE -> EXTENSION -> MISSION



Lessons to be Learned –
Strategic, Master, & Business Planning

David Walsh
Canopy Strategic Partners



Annual Conference
June 5-8, 2023

FORT WORTH DALLAS

NEW HORIZONS

R I S I N G F R O M R O O T S



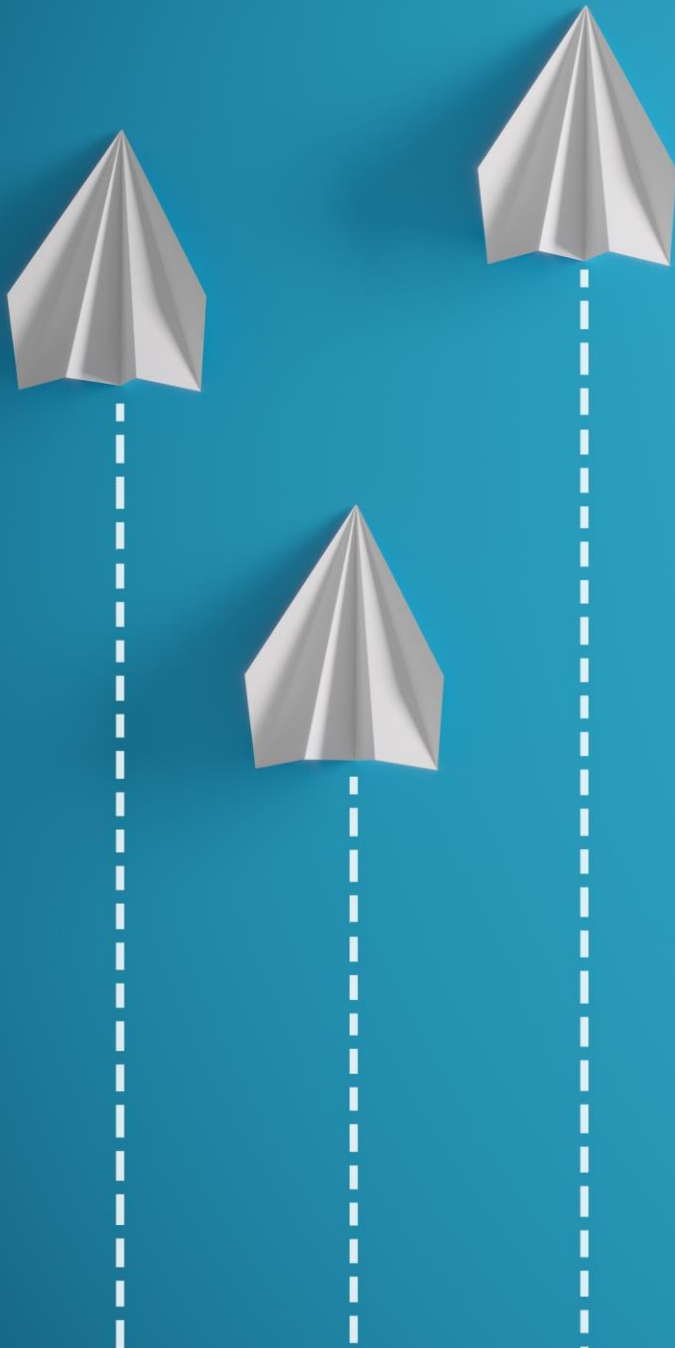
Meet Canopy

- 🌿 Planning, leadership, and economics consulting for mission-driven organizations
- 🌿 Outsider perspective with insider experience
- 🌿 250+ projects over the last decade and counting

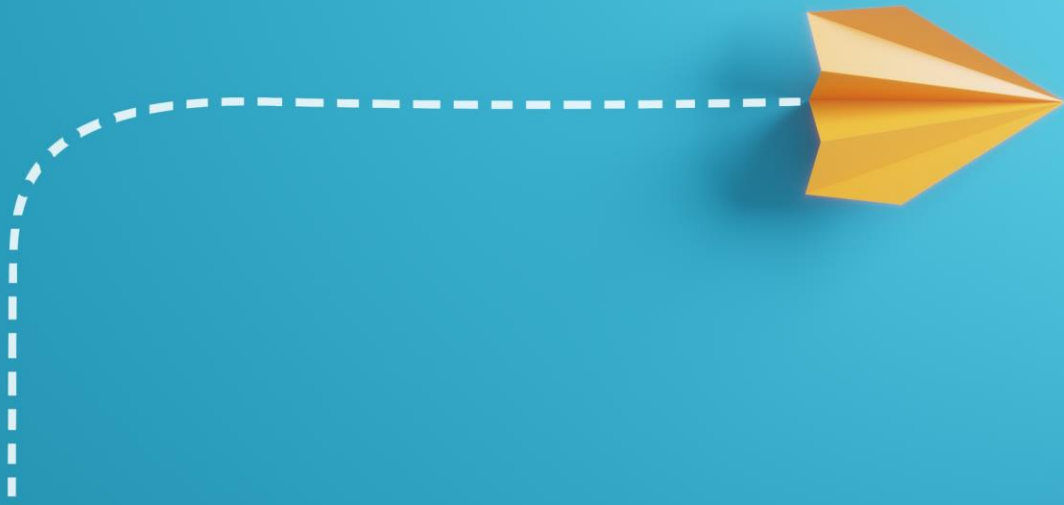


A background image showing a large number of hands of various skin tones raised in a gesture of support, agreement, or participation. The hands are spread across the frame, with some in the foreground and others in the background, creating a sense of a large group.

1. Who's in Charge?

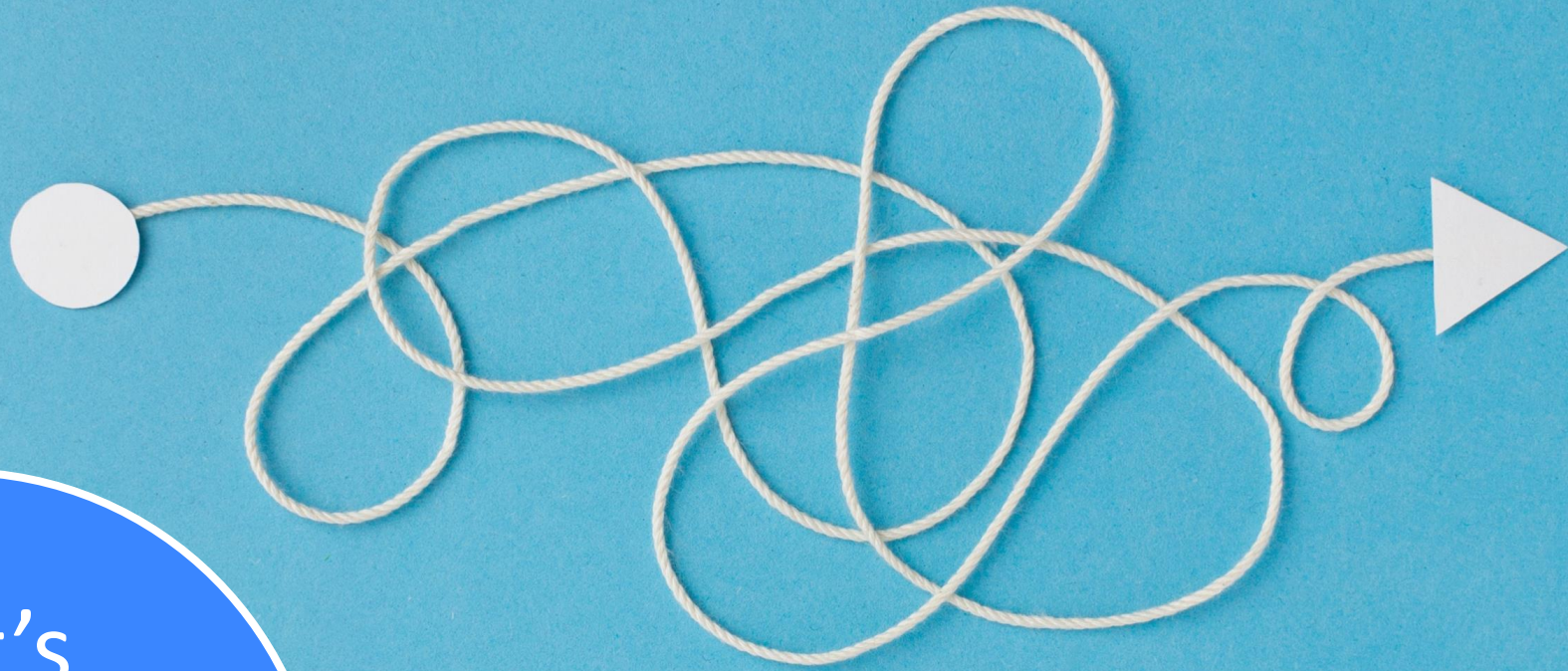


2. All Together Now





3. Listen
First



4. It's
Never
a Straight
Line





5. It Takes
Time...
Longer than
you think



4. Manage
Your
Expectations



7.
Scheduling
May Be the
Hardest Part



A photograph showing a group of diverse people from various ethnicities and ages. They are all wearing light-colored, long-sleeved sweaters. Their hands are stacked in a circle in the center of the frame, with some hands resting on top of others, symbolizing teamwork, unity, and commitment. The background is a soft, out-of-focus indoor setting.

8. It Takes Commitment



9. We're the
Facilitators –
You're the
Authors





10. One of the
Greatest
Values May Be
the Process



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Organization Planning

June 2023



All the Plans

- ❖ **Strategic Plan** - Process that outlines the overarching direction of an organization, identifies allocation of resources to achieve a future state while positioning itself to meet its mission
- ❖ **Site Master Plan** - Dynamic long-term planning document that provides a conceptual layout to guide future growth and development making the connection between buildings, social settings, and the surrounding environment
- ❖ **Business Plan** - Defines an organization's objectives and lays out a written road map for the firm from marketing, financial, and operational standpoints
- ❖ Other Plans (Interpretive, Collections Management Plan, Cyclical Maintenance Plan, etc.)

Not A Game of Chance!



Value of Plans - Filoli

- ❖ Restructured Board Governance and Bylaws
- ❖ Needed Overall Guidance
- ❖ Build Alignment and Community Support
- ❖ Requirement of National Trust for Historic Preservation



Strategic Plan - Process

- Outside Facilitator
- Data Driven from Key Stakeholders
- Staff, donors, board members, leaders at similar organizations
- Included Mission, Vision Goals and Strategies (Board Role)
- Tactics and Implementation (Staff Role)





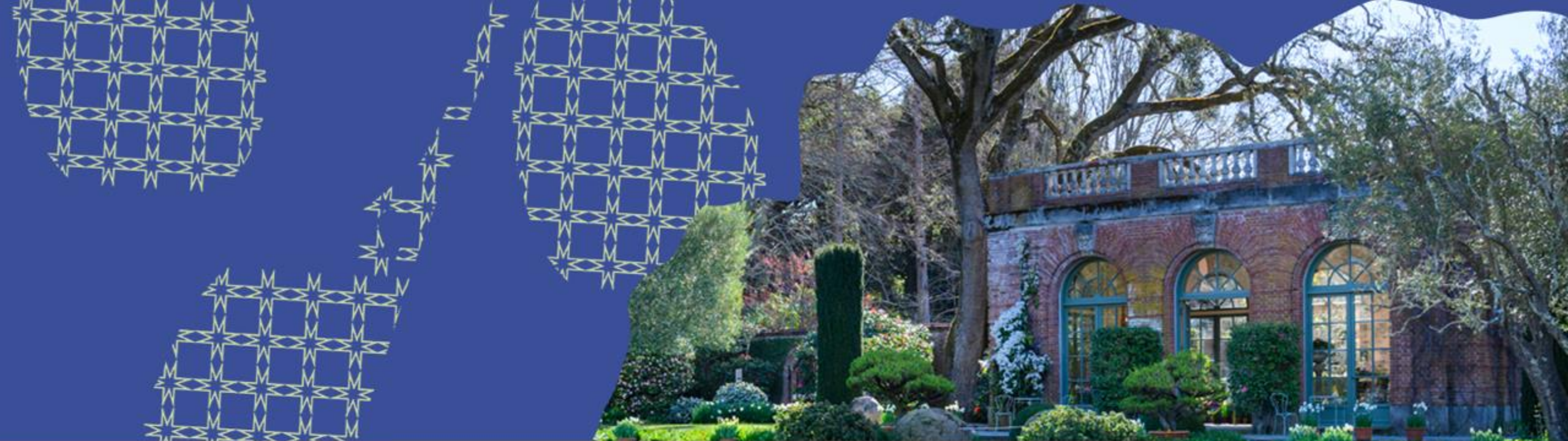
Creating a Vibrant Future

2019-2023



filoli





Our Mission

To connect our rich history with a vibrant future through beauty, nature, and shared stories.





Our Vision

We envision a time when all people honor nature, value unique experiences, and appreciate beauty in everyday life.

Cross Cutting Principles

Filoli's strategic plan builds on a century of tradition and focuses on engagement of all kinds.

- Diversity, Equity, Accessibility, and Inclusion:

Filoli is open to all and works tirelessly to create a place that welcomes and respects everyone

- Sustainability:

Filoli integrates sustainable environmental, operational and financial practices to preserve the estate for generations to come.

- Organizational Excellence:

Filoli achieves the highest standards and benchmarks in its industries and lead the nation with new programs, talent and partnerships.



People &
Culture



Visibility &
Branding



Goals

Infrastructure
Investments



Fundraising &
Financial Strength



Learning &
Engagement



People & Culture

Create and support an inclusive culture that attracts and retains exceptionally talented professional staff; engages vendors, volunteers and partners from the community; and is led by a diverse board of directors.



Fundraising & Financial Strength

Secure Filoli's financial strength and sustainability through contributed and earned revenue growth.



Infrastructure Investments

Invest in the future of the estate through master planning, industry-leading maintenance and preservation, and strategic physical upgrades.



Visibility & Branding

Share Filoli's story more widely through branding, messaging and marketing that attracts a diverse audience and draws national and international attention to the plant and museum collections.



Learning & Engagement

Redefine how visitors connect with history, beauty, and nature through innovative engagement, educational and interpretive programs.



Activating a Strategic Plan

- Focus on the Strategically Important (Can't do everything)
- Staff-driven Tactics (Board role is overall strategy, NOT tactics)
- Relentless Communication - Board, Staff, Public
- Rigorous Tracking
- Mid-plan Review



Filoli Strategic Plan - Results

- Site Master Plan
- Interpretive Plan
- Rebrand
- Pay Equity
- Volunteer Program Alignment
- Diversity and Inclusion
- Youth Programs



filoli





Master Plan Process

Board approved financial investment in Master Plan as a 2019 Project

Master Plan Task Force created Nov 2019

Request for Qualifications sent to 14 firms in March 2019

Five firms were selected and Request for Proposal sent July 2019





Scope of Work

Assess circulation and accessibility

Evaluate existing facilities and infrastructure

Evaluate sites for new features and visitor amenities

Complete critical site documentation:

- ❖ Historic Structures Report
- ❖ Cultural Landscape Report
- ❖ Natural Resources Management Plan

Integrate strategic plan goals and interpretive plan into site development

Prepare phasing plan for implementation

Firm Selection

Two Finalist were selected to present to the Master Plan Task Force:

- NBW/ARG
- MIG

Master Plan Task Force selected NBW/ARG and presented to the Board of Directors, approved Nov 2019



Naomi Miroglio

Architectural Resources Group

Thomas Woltz

NELSON
BYRD 
WOLTZ
LANDSCAPE
ARCHITECTS



Master Plan Contract

\$525,000

Phase 1 - Team assembly, Scope and Schedule

Phase 2 - Site Analysis and Data Collection

Workshops:

- Culture, History, and Historic Preservation
- Ecology and Health
- Systems, Circulation, and Performance
- Program and Economics

Phase 3 - Conceptual Design

Phase 4 - Master Plan



Priorities & Principles

Priority 1: Roadmap for Growth (expanded program offerings, broaden visitor experience, strategy for growth, integration of collections)

Priority 2: Property Access (Approach - entry drive, parking configuration, kiosk admissions location and improved ADA access, ease conflict points for events, visitor experience, programming, operations and flow and access to outer areas)

Priority 3: Infrastructure (staff works areas, support areas, storage, power and energy)

Priority 4: Expanded Narratives (amplify cultural, collections, landscape, ecological and agricultural narratives authentic to Filoli focusing on breadth and allow room for changing narratives)

Priority 5: Resiliency and Sustainability (increased climate resiliency and integrate sustainable practices)

What's Next?

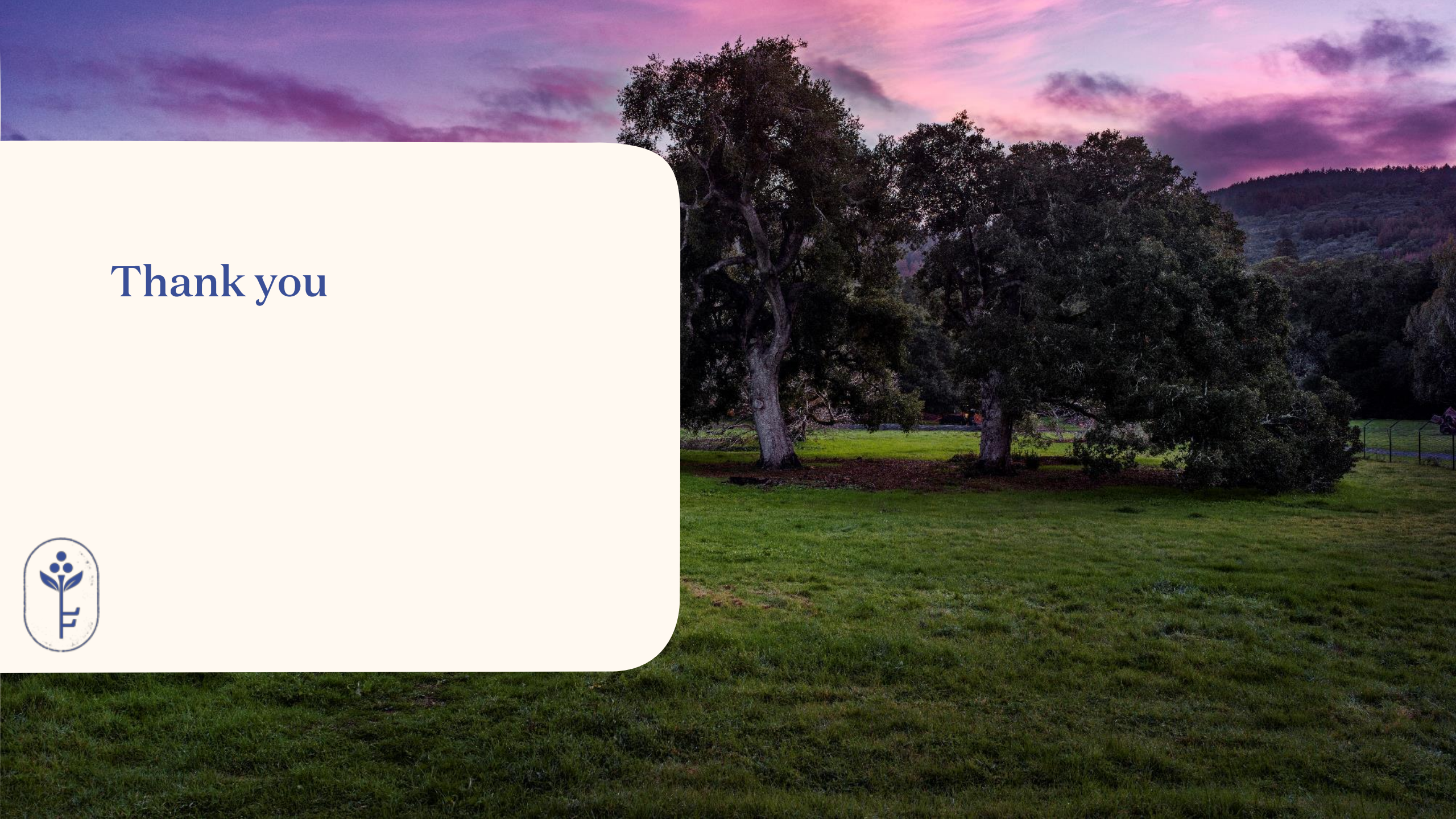
2024-2029 Strategic Plan

Predictions:

- ❖ Implementing Master Plan/
Capital Campaign
- ❖ Increased Community
Engagement
- ❖ From Diversity & Inclusion to
Belonging



Thank you



Maximizing Impact through Planning and Partnerships: Strategic, Master, and Business Planning

APGA Annual Conference

Gerald Dieleman

Assiniboine Park Conservancy

June 2023



Assiniboine Park
Conservancy



ASSINIBOINE
PARK



Assiniboine Park



THE LEAF
Canada's Diversity Gardens



Roles and Responsibilities

Pre-Strategy Planning Work:

- Introduce your organization to your consultant
- Know what you want out of this process
- Come to the table prepared with background information

ASSINIBOINE PARK CONSERVANCY

Strategic Plan

2023 - 2027



Board Role

Our Mission and Mandate

Where are we Going?

What Business Will we be in?

Leadership
Team Role

What do we need to do to
meet our mandate and
achieve our vision (*Goals*)

How will we get there?
(*Strategies*)

Senior
Management
Team Role

How will we know if we are
Successful?

Performance Management



Consultants are Gone: Now What?

Board Role

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Leadership
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How will we get there?
(*Strategies*)

How will we know if we are
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Senior
Management
Team Role

Performance Management

How Will We Know We Are Successful ?

Goals	Measures * Formula in Appendix	Targets
1 Sustain strong support and engagement of our diverse communities, donors, funders and policy makers	<ul style="list-style-type: none">• Revenue (operating)• Total capital pledged• Total capital received• Visitation• Membership	
2 Provide rich and diverse experiences	<ul style="list-style-type: none">• Net promoter score<ul style="list-style-type: none">• Zoo• Member• Visitor• Park/greenspace	
3 Meaningfully influence on visitors' attitudes and actions towards conservation	<ul style="list-style-type: none">• Percentage of visitors/ participants who indicate they had an experience that influenced them to take action	

What do We Need to Do to Meet Our Mandate and Achieve Our Vision?

Our Goals

1

Sustain strong support and engagement of our diverse communities, donors, funders and policy makers

2

Provide rich and diverse experiences

3

Meaningfully influence visitors' attitudes and actions towards conservation



Performance Measurement

GOALS

Goal	Measures/	Targets	Formula	Data Sources	Reporting Process and Frequency
Sustain strong support and engagement of our diverse communities, donors, funders and policy makers	• Revenue (operating)	% increase over 3 year average (2020, 2021, 2022)	• Revenue = City +Operating grants +Gifts & Sponsorship +Interest & other Income +net earned revenue	• Financial Statements	Quarterly
	• Total capital pledged	Total capital pledged	• RE (forecasted/pledged)	• RE (forecasted/pledged)	Quarterly
	• Total capital received	Total capital contribution = change in capital contributions (B/S)	• Balance Sheet	• Balance Sheet	Quarterly
	• Visitation	#Set target at time of budgeting.	• Total Visitation =paid+member+special events +workshops+Comp+community access+Park Café guests+Gather Guests+Event Attendance (Zoo&Leaf) • Greenspace visitation	• Galaxy • Givex • Eventpro	Quarterly
	• Membership	# Set target at time of budgeting.	• Total members (Zoo+Leaf)	• Galaxy	Quarterly
Provide rich and diverse experiences	• Net Promoter Score Zoo • Net Promoter Score Park/Greenspace	Excellent	• Zoo Net Promoter score • Member net promoter • Visitor net promoter • Park/greenspace net promoter score • Net promoter score of 70 or more is considered world class or excellent, 30-70 is great, 0-30 is good, and -100-0 needs improvement.	• Member Survey • Omnibus • Visitor Experience Survey	Annual
Meaningfully influence on visitor's attitudes and actions towards conservation	• Percentage of visitors/ participants who indicate they had an experience that influenced them to take action	%	• Baseline must be established in 2022.	• Outcome evaluation tool • Omnibus • Visitor Experience survey • Member Survey	Annual

How Will We Get There ?

Our Strategies



Performance Measurement

STRATEGIES

Measures/Indicators	Targets	Definition/Formula	Data Sources	Reporting Process and Frequency
STRATEGY 1 - ACHIEVE/MAINTAIN A SUSTAINABLE FINANCIAL MODEL				
Debt Service Coverage ratio	•	• Company's ability to make debt payments on time and demonstrates how much cash APC generates for every dollar and principal and interest owed	• EBIT/annual debt & interest payments)	• Annually
Development of Park Master Plan and corresponding capital plan	• 10 years • 2023 – Master plan and Capital plan	•	•	•
STRATEGY 2: DEVELOP, RESTORE AND STEWARD AMENITIES, ATTRACTIONS AND GREEN SPACE TO ENHANCE THE VISITOR EXPERIENCE AND AMPLIFY THE BRAND				
Development and implementation of asset management framework and strategy	• Completion of strategy - Implementation start 2023		•	
STRATEGY 3: BECOME A CANADIAN LEADER IN PUBLIC GARDEN MANAGEMENT				
Develop future state horticulture plan and Collections management plan.	• 2023			
STRATEGY 4: CREATE STRONGER CONNECTIONS (PHYSICAL AND PEOPLE) TO OUR DIVERSE COMMUNITIES				
Visitation mirrors geographic representation	Baseline to be established.	• Cross tabs on surveys, mirrored against Canada Post householder info on geography	• Omnibus survey • Galaxy	• Annual
Visitation/ participation of Indigenous, BIPOC peoples, LGBTQ*, and people with disabilities	Baseline to be established.	• Cross tabs on surveys, mirrored against source tbd	• Omnibus • Visitor Experience Survey • Census data	• Annual
Maintenance of Rainbow certification	Certified			• Annual

Accountability: Share your story



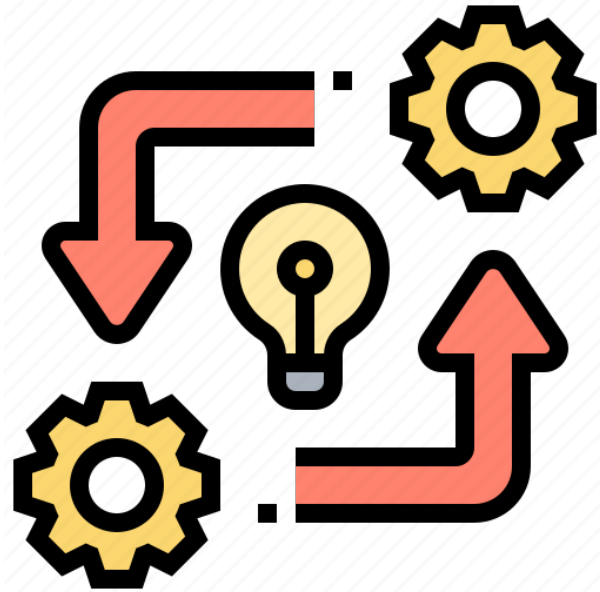
- with existing staff, new staff, so they know what their role within the organization is contributing to.
- with the wider public audience so they know what they are supporting, and what to expect from you

The Process Repeats Itself

Sometimes strategy tasks involve working with new consultants:

- Master Planning
- Capital Planning
- Data Management Planning

The Process begins again



In Summary

- Come to the table prepared
- Define how accountability is measured
- Share your story

