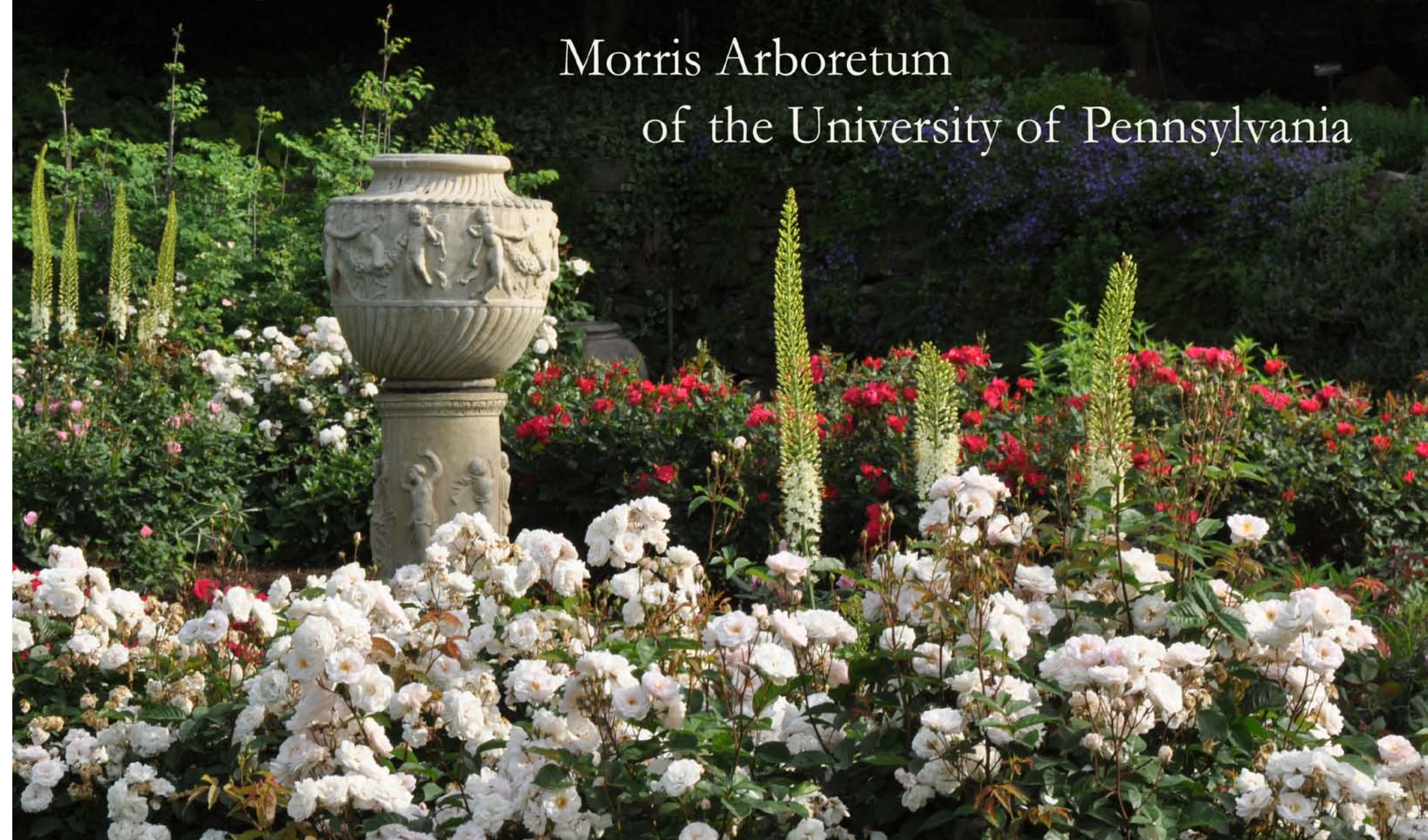


Strategic Plan 2012 - 2016 ... A Vision for the Future

Morris Arboretum
of the University of Pennsylvania



Mission

The Morris Arboretum of the University of Pennsylvania is a historic public garden and educational institution. It promotes an understanding of the relationship between plants, people and place through programs that integrate science, art and the humanities. The Arboretum conducts four major activities: education, research, outreach, and horticultural display. As the official Arboretum of the Commonwealth of Pennsylvania, the Morris Arboretum of the University of Pennsylvania provides research and outreach services to state agencies, community institutions and to citizens of Pennsylvania and beyond.



This Executive Summary is supported by an Operational Outline which identifies metrics and details for all institutional goals. The Morris Arboretum's Strategic Plan 2012-2016 was approved and adopted by the Advisory Board of Managers on June 13, 2012.

1. Sustain and Build Fiscal Stability

The unstable economy of recent years has challenged the Arboretum's ability to support its programs and keep pace with deferred maintenance needs. The Arboretum must stabilize its operating budget and secure a sound financial footing for the future by analyzing program costs, seeking ways to increase sustainable revenue streams and building endowment for long-term dedicated income.

Forty nine endowments generated approximately \$1.7 million of spendable income in FY2011, 30% of that operating budget. In FY2012 the Arboretum's endowments had a total value of over \$40 million, up from \$6 million in 1991. Establishing new endowments and building existing endowments will allow the Arboretum to continue to move forward.

Build Sustainable Income Sources to Support the Operational and Maintenance Costs of Existing and Future Programs.

Build permanent revenue streams for programs, operations and maintenance by packaging and marketing endowment opportunities.

- Raise \$10 million for endowment over the next ten years.
- Establish short- and long-term endowment priorities for specific programs such as
 - Phase I Horticulture Center: \$5,000,000
 - Historic Preservation: \$10,000,000
 - Equipment Replacement: \$2,000,000
 - Youth Education Programs: \$ 4,000,000

Build Capacity of the Development Program to Support Gardens, Facilities and Programs

In 2012 a new Major Gifts officer was hired as well as support staff for development activities. This investment in human capital ensures fundraising priorities will be met and exceeded. This initiative is funded by the University on a decreasing scale for three years. The Arboretum must meet incremental fundraising goals and internalize costs for these positions by FY2016.

- Complete \$60 million *Always Growing* Capital Campaign.
- Prepare new capital fundraising priorities.
- Complete fundraising for Phase I of the Horticulture Center including endowment.
- Advance programs providing unrestricted operating funds such as Membership and the Annual Fund.



2. Develop Compelling Visitor Experiences

Attendance and membership at the Morris Arboretum grew by 33% in 2010 with the opening of the *Out on a Limb – A Tree Adventure* exhibit. Visitation has stayed consistent and did not drop after the first year as often happens after a blockbuster exhibit opens. Higher levels of visitation mean that the Arboretum must address its visitors' needs if it is to continue to provide a positive experience.

Renovate the George D. Widener Education and Visitor Center to Better Accommodate Programs and Visitors' Needs

With increased visitation the facilities at the Widener Center including the restrooms and catering have exceeded their capacities. The building's accessible facilities also need to be upgraded.

Key areas of improvements are:

- Additional accessible bathrooms, estimate \$350,000
- Café and catering kitchen facilities, fully equipped, estimate \$300,000
- Replacement of HVAC system, estimate \$350,000
- An accessible main entrance, preliminary estimate \$415,000

Timeline/Budget: In phases, as funding is secured.
/ Total project cost estimated at \$1,970,000.

Upgrade Visitor Services/Membership Technology

With increases in attendance and membership, the Arboretum's membership card and admission systems are in need of technological upgrades. This would include bar-coded membership cards and electronic scanners at the gate to speed the entry process. The system would also provide information about how members use the Arboretum and analysis of Shop and Café sales.

Timeline/Budget: Funding needed. / Costs to be determined.



Renew and Enhance the Garden Railway

The Garden Railway exhibit has played a key role since 1998 in attracting families to the Arboretum. The exhibit's reproductions of Philadelphia's historic buildings have deteriorated and need restoration. The shabby tent at the exhibit's entrance for the trainmaster and docents needs to be replaced with a small, permanent structure.

Timeline/Budget: As funding is secured. / Planning need is \$25,000. Project costs are estimated at \$275,000, endowment goal is \$1,500,000.

3. Nurture, Grow and Develop the Arboretum's People

To maintain its position as a public garden leader, the Morris Arboretum must attract, build, and retain a talented and highly-educated staff, an involved and committed Advisory Board of Managers and a cadre of dedicated volunteers.

Develop Succession Plan for Key Positions

Over the next five to ten years, key Arboretum staff will begin to retire. The Arboretum must make sure that these positions are filled and that valuable institutional knowledge is passed along to the successors.

Develop Funding Strategies for Additional Staffing Needs

To plan for both immediate and long-term staffing needs, the Arboretum has prioritized its current and long-term staffing needs with estimated budgets. Funding strategies will need to be developed.

Establish Staff Compensation to Reward Innovation and Productivity, and Support Transformational Staff Development

Building the Staff Compensation Endowment will provide the Arboretum with funds to reward innovative and/or very productive staff. Endowment revenue will also provide funding for staff development opportunities.

Timeline/budget: As funded / \$1 million endowment goal.



4. Enhance, Restore, and Preserve Historic Features, Facilities and Equipment

As the official Arboretum of the Commonwealth of Pennsylvania and a site on the National Register of Historic Places, the Morris Arboretum is committed to preserving the integrity and beauty of its historic garden, facilities and infrastructure.

Complete Phase I of the Horticulture Center

Elements of the Arboretum's Phase I plan for the Horticulture Center have not been completed due to budget limitations. The highest priority is to complete the interior renovations of the Mechanic's Shop which is used to repair and service the Arboretum's fleet of equipment and vehicles (\$800,000 value). These are essential for maintaining the gardens and programs.

- Renovate and equip the interior of the Mechanic's Shop. *Budget:* \$540,000
- Equip Carpentry Shop; replace outdated gear with equipment that meets OSHA standards. *Budget:* \$125,000
- Build Three Bay Garage with dry material storage and parking for 6 vehicles. *Budget:* \$400,000

Timeline/Budget: As funded/ Total project estimate \$1,065,000; \$5 million endowment goal.



Renew the Heat Distribution System in the Dorrance H. Hamilton Fernery

The Arboretum's historic Victorian Fernery was completed in 1899 and underwent a comprehensive restoration in 1994. Unexpected deterioration in the Fernery's heat distribution system was recently discovered. A short-term solution has been implemented and a feasibility study is underway to determine the best way to address this problem and develop cost estimates for a permanent solution.

Timeline/Budget: To be determined.



4. Continued

Preserve, Restore and Renovate Historic Garden Features

- Overlook Garden: A renewal plan for this garden is funded and work is underway. *Timeline:* 2012 to 2017.
- Rose Garden Perimeter: Design and implement a permanent and attractive enclosure to protect this garden from deer. *Timeline/Budget:* Planning is funded and underway / Project funding needed; preliminary estimate \$250,000 - \$300,000.
- Step Fountain: Constructed in 1915 and restored in 1988, major portions of this feature's carved limestone need to be replaced, and the water systems rebuilt. *Timeline/Budget:* As funded / Project estimate \$350,000, endowment \$450,000.
- Seven Arches: This historic stone structure needs a major rebuild of its stone walls. *Timeline/Budget:* As funds are secured / Planning money is needed, endowment \$500,000.

Develop Storm Water Management Strategies

Increasingly extreme weather patterns, major storm events and flooding have caused extensive damage to the Arboretum stream corridors in the last five years. Developing preventative storm water management systems and partnerships with neighbors and the Philadelphia Water Department are crucial.

Timeline/Budget: 5 to 7 years / Project scope and budget to be determined.



The Haas Oak Allee replaced the original Morris installation when those trees were destroyed by a tornado in 1991. This well used area needs to be renovated to address ongoing drainage issues

Develop a New Long-Term Master Plan

For the last thirty years the Arboretum has incrementally implemented and completed its Master Plan. Adhering to an overarching vision has enabled the Arboretum to transform itself from a sleepy, overgrown private estate to a first class botanical institution. The Arboretum continues to work internally to define future needs for a new Master Plan.

- Conduct an aerial mapping survey of the Arboretum's property. This new base map will also inform an upgrade of the Arboretum's Collections Management database programs. *Timeline/Budget:* As funded / \$50,000.
- Develop a plan and budget for hiring a planning consultant. *Timeline/Budget:* To be determined.

Springfield Grist Mill Renewal

The Arboretum's Grist Mill on Bloomfield Farm is an important historical and educational resource as it contains one of the most complete, original 19th century mill works in the region. While currently accessible for scheduled programs for youth and adults, the long-term goal is to fully restore the mill and the mill race to operating condition and provide interpretation.

Timeline/Budget: As funded / \$985,000 project estimate, \$1 million endowment goal

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

Education and outreach are key components of the Arboretum's mission. As an outdoor center for education and a historic public garden, the Arboretum offers rich opportunities for people of all ages and abilities to interact with nature and learn about the important role that plants play in the environment.

As the Arboretum looks to the future it must improve the educational impact of its offerings by facilitating a deeper engagement with its collections, landscape, research and mission.

Maintain Preeminence as the Authority on Pennsylvania Flora

The Arboretum will build upon the Botany staff's field work and reputation as the "go to" experts on the flora of the Commonwealth.

- Develop a new book on Pennsylvania's endangered plant species.
- Raise the profile of the Flora of Pennsylvania program and herbarium as biological outreach resources.
- Secure new lines of sponsored research while continuing to engage Commonwealth partners.

Develop and Sustain Dynamic Education Programs

- Program Assessment: Engage an outside consultant to review and evaluate education and public outreach programs.
Timeline/Budget: As funded/\$40,000 estimate.
- Youth Education: Deepen relationships with selected schools with the *Partners in Education* program, encourage a cadre of teachers to use the Arboretum as a place for field study instead of just field trips, and develop the *Growing Minds* program.
- Continuing Education: Enhance classes with botanical offerings, and collaborate with a local university to offer college credit for the Arboretum's arborist training.
- Visitor Education: Provide effective web-based garden interpretation and curricula aids, new exhibits in the Widener Visitor Center, and make the Living Collections catalog and maps accessible to visitors via technology.

Secure Funding and Advance Planning for Education Center at Bloomfield Farm

The Arboretum's efforts to establish and maintain a dynamic education program reinforce the need for a new Education Center on Bloomfield Farm.

Timeline/Budget: As funds are secured / \$25 to \$30 million with \$5 million endowment goal.



6. Preserve Gardens and Enhance Collections

The Arboretum's 92-acre public garden offers visitors an ever-changing horticultural display within a spectacular collection of rare and mature trees in a Victorian landscape. The living collections are the foundation of the Arboretum's status as an accredited museum and contain over 12,000 labeled and scientifically documented trees and three nationally recognized plant collections. Renewing garden areas and managing the health of the living collections are essential if the Arboretum's beauty and vitality are to be maintained for future generations.

Restore, Renovate and Enhance Living Collections

Areas of concentration in the next five years will include the Hillcrest Conifer collection, institutionalizing the Arboretum's views and vistas, and participating in a national multi-site collection for *Hammamelis* (witch hazel).

Upgrade Collections Management Database Programs

Upgrading the Arboretum's BG-Base/BG-Map database programs will increase effective management of the living collections. It will also provide the structure to offer electronic access to the database to members and visitors.

Develop and Implement a Plan for the Natural Areas

- Establish a linking trail system with programming and signage.
- Install bold, seasonal horticultural displays around the Arboretum entrance.

Enhance Seasonal Color and Renew Plantings at Key Locations in the Garden

Work will take place in the following areas: the east quadrant of the Rose Garden, the Orange Balustrade lower axis, the Meadow Garden, the Rose Berm Garden and the Summer Border.



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

The Arboretum must continually develop programs and effective means of communications to build attendance and support membership, in addition to providing beautiful gardens within a historic landscape.

It is vital that the Arboretum brand itself with a strong and consistent message that reflects its education and research mission. At the same time it must convey that learning through fun is integral to the Arboretum experience.

Design and Maintain a Website that Sets the Standard for Arts and Culture at Penn and in the Region

The Arboretum's website provides dynamic content such as slideshows, how-to videos, outreach through social media outlets and E-news as well as on-line registration for classes and events.

Maintaining an attractive, interactive, up-to-date and user-friendly website requires a qualified, full-time webmaster. A key goal is to bring the Arboretum's part-time webmaster on full-time to further expand the scope of this important marketing tool.

Timeline/Budget: Immediate / \$15,000 incremental annual funding needed.



Develop and Evaluate Outdoor Evening Programming

The Arboretum will investigate developing additional themed activities for summer evening hours in conjunction with its popular concert series. Winter evening events built around the Holiday Garden Railway exhibit will also be explored.

Expand Visitation with Compelling Temporary Art Exhibits

- Install *Take A Seat!* Adirondack Chairs Re-interpreted in collaboration with Woodmere Museum.
- Design and implement a new temporary exhibit in the Butcher sculpture garden.

Timeline/Budget: 2012, 2014 / Funded by the Madeleine K. Butcher Fine Arts Endowment.

Build Partnerships with the University of Pennsylvania

This will involve continuing to actively seek connections between University students, staff and alumni, and the Arboretums' programming and research.

Sustain Visitation at 125,000 with Cost Effective Strategies

- Develop weather oriented marketing strategies.
- Establish techniques to increase attendance in slower months.
- Design a financial model that makes the Summer Concert series sustainable.
- Create new programming around *Out on a Limb* – A Tree Adventure exhibit.