



# Strategic Plan

2023-2025

# Olbrich Botanical Gardens

## Strategic Plan 2023-2025

### Olbrich Botanical Gardens History and Organization

#### WHERE WE STARTED

Olbrich Botanical Gardens exists because of the vision of Madison attorney Michael B. Olbrich, who purchased land next to Lake Monona for the development of a park after noticing that almost all the lakeshore in Madison was being developed. He felt that a park on the east side of Lake Monona would benefit the largely working-class residents of the area.

Mr. Olbrich envisioned a flower garden as part of this new park. In 1921, in partnership with the Madison Park and Pleasure Drive Association, the City of Madison took title to its newest park; it was named "Olbrich Park," in 1929 in honor of its founder. In 1952, work on the parkland was largely complete and development began on the botanical gardens.

Michael Olbrich's vision continues to guide Olbrich Botanical Gardens. Consistently ranked as a top tourist destination, Olbrich attracted more than 340,000 visitors in 2022, enhancing the economic and cultural vitality of its neighbors and the region. Olbrich's strong sense of place, designed to inspire serenity and comfort, appeals to both everyday visitors and garden aficionados alike.

The tropical Bolz Conservatory and Visitor Center opened in 1991. A gift shop, gardening library, and meeting rooms offer additional amenities in the Visitor Center. In late 2019, construction was completed on Olbrich's largest facility building project in 20 years - state-of-the-art greenhouses and the Frautschi Family Learning Center, Olbrich's first dedicated education space.

#### WHO WE ARE

Olbrich Botanical Gardens features 16 acres of free outdoor display gardens and the year-round tropical Bolz Conservatory. The outdoor gardens feature the beauty of Midwestern hardy plants in a setting of prairie style architecture, providing enjoyment for the visitor and

inspiration for the home gardener. The Royal Thai Pavilion and Garden is unique in the continental United States, and features an innovative Midwestern tropical garden.

The Bolz Conservatory, a sunny glass pyramid, houses a diverse collection of tropical plants growing in a naturalized setting. Programs, exhibits, concerts, and classes are offered year-round. Membership in the Olbrich Botanical Society offers free or reduced admission to programs and exhibitions, class and gift shop discounts, reciprocal benefits at botanical gardens across the country, and more.

## Introduction to the Strategic Plan

The strategic plan's purpose is to set the overall direction of Olbrich Botanical Gardens and be a touchstone for all major decisions. The Plan articulates the mission, vision, guiding principles, financial strategy, over-arching goals, strategies, and priorities. These are supplemented by specific objectives. The objectives are reviewed annually and revised while the guiding principles remain the key guideposts.

The strategic plan was developed by a Core Planning Team comprised of the Gardens' Executive Director and several key staff and board members, with input from the entire Olbrich Botanical Society Board, Olbrich staff, the Madison Parks Division, volunteers, and community involvement. The Plan was facilitated by EMD Consulting Group with community involvement assistance from Findorff Strategic Insights and The People Company.

### Mission:

*To enrich lives and inspire people to live in harmony with the natural world.*

### Vision:

*We will be a locally treasured and globally renowned source of beauty and knowledge celebrating the importance of plants to foster a sustainable world.*

### Guiding Principles:

We are committed to:

- Accessibility – being easily accessible and welcoming to all
- Responsible Stewardship – responsible stewards of finances and resources
- Climate & Environment Advocacy– environmental sustainability, including our commitment to slow climate change, are critical drivers for our success

- Partnerships – our partnerships are vital to Olbrich Botanical Gardens including our association with the Madison Parks Division, the Olbrich Botanical Society, and numerous community organizations
- Life-long Learning – we believe in touching people’s lives with the importance of plants and nature at all stages of life

#### Inclusion Statement:

Olbrich Botanical Gardens aspires to be a destination where all visitors, volunteers, and staff are valued and feel they belong. With conscious intent and continuous learning, Olbrich Botanical Gardens' staff, volunteers, and board will address barriers to inclusion through education, operational changes, and partnerships with the community.

#### Land Acknowledgement Statement:

Ho-Chunk oral tradition states “we have always been here.” Despite colonial invasion, genocide, and forced removal, the Ho-Chunk have since time immemorial been the gardeners and protectors of this sacred land, Teejop (day-JOPE), on which Olbrich Botanical Gardens now resides. Olbrich acknowledges the sovereignty of all people who have a historic connection to this land, who have and will always be here, and honors their legacy of sustainably cultivating the land so that it can be enjoyed and gardened for generations to come.

#### Partnership Statement:

Olbrich Botanical Gardens is operated as a public-private partnership between the City of Madison Parks Division and the non-profit Olbrich Botanical Society.

#### Financial Strategy Statement:

To ensure continued stability and growth, Olbrich Botanical Gardens must intentionally and boldly increase its available financial resources. This includes sustaining the City of Madison’s operating and capital commitments, while substantially increasing earned revenues and philanthropic support through the non-profit Olbrich Botanical Society.

#### Transformative Goals:

- I. Present exceptional, diverse gardens, landscapes, and collections as a model of sustainable horticulture.

*Strategy: Continuously improve our horticultural and landscape displays for public enjoyment, appreciation, and understanding, ensuring they demonstrate best sustainable practices.*

*Priorities:*

- Ensure that our plant collections advance our commitment to environmental sustainability
- Evaluate the quality of our horticulture and landscape displays by using visiting committees
- Increase native plants in the collections and decrease use of non-natives
- Label all species in the Conservatory

- II. Enhance Olbrich Botanical Gardens' programming and learning experiences to foster connections with the natural world.

*Strategy: Develop an integrative interpretive experience for our guests, create new targeting programming for intentional audiences, and strengthen learning opportunities.*

*Priorities:*

- Develop a robust interpretive program for the gardens and Conservatory
- Focus on providing programming and learning opportunities for new audiences
- Expand the use of Olbrich Botanical Gardens' information services to enhance all programs and engagement experiences for all guests

- III. Create exceptional, inclusive experiences at and with Olbrich Botanical Gardens.

*Strategy: Improve the overall experience by implementing a comprehensive guest services program*

*Priorities:*

- Develop a new Guest Experience Department and a comprehensive guest services plan
- Conduct a comprehensive guest survey
- Expand Olbrich's community impact with targeted programs and partnerships

- IV. Optimize and invest in human, financial, infrastructure, and support resources to meet Olbrich Botanical Gardens' aspirations.

*Strategy: Increase our capacity to serve our guests, members, donors, and the community by building all our revenue streams, developing our staff, board, and volunteers, and improving our infrastructure*

*Priorities:*

- Develop and implement a long-term plan for financial growth and sustainability
- Focus on building membership and contributed revenues
- Begin process of American Alliance of Museum accreditation
- Complete maintenance projects identified in the building assessment
- Complete a new site Master Plan
- Conduct a board evaluation and restructure accordingly

## Three Year Objectives

Goal I: Present exceptional, diverse gardens, landscapes, and collections as a model of sustainable horticulture.

*Strategy: Continuously improve our horticultural and landscape displays for public enjoyment, appreciation, and understanding, ensuring they demonstrate best sustainable practices.*

Priorities:

- Ensure that our plant collections advance our commitment to environmental sustainability
- Evaluate the quality of our horticulture and landscape displays by using visiting committees
- Increase native plants in the collections and decrease use of non-natives
- Label all species in the Conservatory

Objectives:

I-1. Join phenology network(s) and begin a monitoring phenology program by the end of the 1<sup>st</sup> quarter of 2023.

Responsibility: Sunken Garden Horticulturist  
Assisted by: Plant Recorder

I-2. Inventory all plants in the Conservatory and add to plant records database by the end of the 2<sup>nd</sup> quarter of 2023.

Responsibility: Conservatory Curator  
Assisted by: Orchid Horticulturist

I-3. Partner with Madison Park Division on a model conservation garden/park by the end of the 2<sup>nd</sup> quarter of 2023.

Responsibility: Director of Horticulture  
Assisted by: Executive Director

I-4. Inventory and identify plants of conservation concern by the end of the 3<sup>rd</sup> quarter of 2023.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: Gravel Gardens & Meadows Horticulturist & Plant Recorder

I-5. Reduce the annuals and non-hardy plants in the gardens by 15% by the end of the 3<sup>rd</sup> quarter of each year.

Responsibility: Director of Horticulture  
Assisted by: Nursery Manager

I-6. Create Olbrich Botanical Gardens climate change policies and plans for horticulture by end of 3<sup>rd</sup> quarter 2023; Implement all high priority changes by the end of the 3<sup>rd</sup> quarter of 2025.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: All Horticulturists

I-7. Review and revise plant collection policies and plans to align with our commitment to sustainability practices and demonstrations by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: Plant Recorder, Herb Garden Horticulturist & Executive Director

I-8. Increase native plants in the collections by 10% by the end of each year.

Responsibility: Director of Horticulture  
Assisted by: Production Horticulturist

I-9. Label 25% of the taxa in the Conservatory by the end of the 4<sup>th</sup> quarter of 2023; 25% more by the end of the 4<sup>th</sup> quarter of 2024; complete label of all taxa by the end of the 4<sup>th</sup> quarter of 2025.

Responsibility: Conservatory Curator  
Assisted by: Orchid Horticulturist

I-10. Identify and join key regional and national plant conservation programs to affiliate with by the end of the 2<sup>nd</sup> quarter of 2024.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: Orchid Horticulturist & Perennial Garden Horticulturist



I-11. Develop action plans for each plant of conservation concern by the end of the 3<sup>rd</sup> quarter of 2024.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: Gravel Gardens & Meadows Horticulturist

I-12. Explore partnerships on native plant introductions for the public by the end of the 3<sup>rd</sup> quarter of 2025.

Responsibility: Plant Sale Team  
Assisted by: Perennial Garden Horticulturist

I-13. Have a visiting committee of professionals evaluate collections and displays by the end of the 4<sup>th</sup> quarter of 2025.

Responsibility: Conservatory Curator & Director of Horticulture  
Assisted by: Executive Director

Goal II. Enhance programming and learning experiences to foster connections with the natural world.

*Strategy: Develop an integrative interpretive experience for our guests, create new targeting programming for intentional audiences, and strengthen learning opportunities.*

Priorities:

- Develop a robust interpretive program for the gardens and Conservatory
- Focus on providing educational programs for targeted audiences now underserved by Olbrich Botanical Gardens
- Expand the use of Olbrich Botanical Gardens' information services to enhance all programs and engagement experiences for all guests

Objectives:

II-1. Outline the breadth of opportunities for information services:

- A. Document the current services and accountabilities of information services, including the library, by the end of the 1<sup>st</sup> quarter of 2023
- B. Assemble an information services committee and complete a gap analysis to identify needs and opportunities by the end of the 2<sup>nd</sup> quarter of 2023
- C. Outline the strategic growth of information services across Olbrich Botanical Gardens, including defining required resources for realizing strategic growth, by the end of the 3<sup>rd</sup> quarter of 2023

Responsibility: Horticulture Librarian  
Assisted by: Director of Education

II-2. Create a cohesive interpretive operational plan across the organization and implement highest priority items:

- A. Assemble a cross-departmental interpretation committee by the end of the 2<sup>nd</sup> quarter of 2023
- B. Develop an annual interpretation program timeline by the end of the 3<sup>rd</sup> quarter of 2023

- C. Complete a formal Interpretative Plan by the end of the 4<sup>th</sup> quarter of 2024

Responsibility: Director of Education  
Assisted by: Public Relations & Marketing Manager

II-3. Increase out-of-school time support for families and children at Olbrich Botanical Gardens.

- A. Complete a feasibility study for an afterschool program and no school days at Olbrich Botanical Gardens by the end of the 2<sup>nd</sup> quarter of 2023

Responsibility: Youth & Family Program Manager  
Assisted by: Director of Education

- B. Develop needed partnerships to implement viable out-of-school time support programs by the end of the 1<sup>st</sup> quarter of 2024

Responsibility: Youth & Family Program Manager  
Assisted by: Director of Education

II-4. Increase engagement for youth 10-18 years old:

- A. Create summer camps for 16 students by the end of the 3<sup>rd</sup> quarter of 2023; for 32 students by the end of the 3<sup>rd</sup> quarter of 2024; for 48 students by the end of the 3<sup>rd</sup> quarter of 2025

Responsibility: Youth and Family Program Manager  
Assisted by: Youth Program Coordinator

- B. Develop a junior master garden program or similar program by the end of the 2<sup>nd</sup> quarter of 2025

Responsibility: Youth & Family Program Manager  
Assisted by: Youth Program Coordinator

- C. Develop a paid youth horticulture mentorship program or become a host site for an existing youth employment program by the end of the 4<sup>th</sup> quarter of 2025

Responsibility: Youth & Family Program Manager  
Assisted by: Director of Education & Tower Garden Horticulturist

II-5. Develop guidelines for use of Olbrich Botanical Gardens' art endowment by the end of the 2<sup>nd</sup> quarter of 2023.

Responsibility: Special Projects Manager  
Assisted by: Programming Committee

II-6. Complete audience and accessibility assessment guidelines for programs and exhibits by the end of the 2<sup>nd</sup> quarter of 2024.

Responsibility: Program Specialist  
Assisted by: Youth and Family Programs Manager

II-7. Develop a plan for community outreach programs by the end of the 2<sup>nd</sup> quarter of 2025.

Responsibility: Special Projects Manager  
Assisted by: Public Relations & Marketing Manager

II-8. Create an Olbrich Botanical Gardens Certification for green industry professionals in sustainable horticulture by the end of the 3<sup>rd</sup> quarter of 2025.

Responsibility: Director of Education  
Assisted by: Director of Horticulture

II-9. Develop a plan and raise money for an Artist in Residence Program by the end of the 4<sup>th</sup> quarter of 2025.

Responsibility: Special Projects Manager  
Assisted by: Programming Committee

Goal III: Create exceptional, inclusive experiences at and with Olbrich Botanical Gardens.

*Strategy: Improve the overall experience by implementing a comprehensive guest program.*

Priorities:

- Develop a new Guest Services Department and a comprehensive guest services plan
- Conduct a comprehensive guest survey
- Expand Olbrich's community impact with targeted programs and partnerships

Objectives:

III-1. Create a guest services department by the end of the 1<sup>st</sup> quarter of 2023.

Responsibility: Executive Director  
Assisted by: Assistant Parks Superintendent

III-2. Evaluate and increase on-site tour program (self-guided; staff led; docent led) by the end of the 1<sup>st</sup> quarter of 2023.

Responsibility: Director of Education  
Assisted by: Volunteer Manager

III-3. Develop a comprehensive plan for guest services by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Director of Guest Experience  
Assisted by: Executive Director

III-4. Develop a plan for Olbrich Botanical Gardens' participation in state and national celebrations (e.g., Earth Day, Arbor Day) by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Public Relations & Marketing Manager  
Assisted by: Special Projects Manager & Director of Education

III-5. Finalize the action plan to accompany the land acknowledgement by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Membership & Development Associate  
Assisted by: Community, Engagement, & Inclusion Committee

III-6. Develop multi-year comprehensive event plan for public programming by the end of the 1<sup>st</sup> quarter of 2024.

Responsibility: Special Projects Manager & Director of Education  
Assisted by: Programming Committee

III-7. Complete and implement a plan for improving the on-site guest experience by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Director of Guest Experience  
Assisted by: Executive Director

III-8. Create and Implement a Wayfinding & Interpretive Plan by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Director of Education  
Assisted by: Public Relations & Marketing Manager

III-9. Develop plans for major milestones at Olbrich Botanical Gardens:

A. Assemble a formal Anniversary Committee for the 25<sup>th</sup> Thai Pavilion Anniversary (2026) by the end of the 4<sup>th</sup> quarter of 2024

Responsibility: Executive Director  
Assisted by: Olbrich Botanical Society Board

B. Complete a plan to celebrate the 25<sup>th</sup> Royal Thai Pavilion Anniversary (2026) by the end of the 4<sup>th</sup> quarter of 2025

Responsibility: Executive Director  
Assisted by: Royal Thai Pavilion Anniversary Committee

C. Assemble a formal Anniversary Committee for the 75<sup>th</sup> Olbrich Botanical Gardens Anniversary (2027) by the end of the 4<sup>th</sup> quarter of 2025

Responsibility: Executive Director  
Assisted by: Olbrich Botanical Society Board

III-10. Conduct guest survey (via cell information or visitor intercepts) by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Public Relations & Marketing Manager  
Assisted by: Executive Director

Goal IV. Optimize and invest in human, financial, infrastructure, and support resources to meet Olbrich Botanical Garden's aspirations.

*Strategy: Increase our capacity to serve our guests, members, donors, and the community by building all our revenue streams, developing our staff, board, and volunteers, and improving our infrastructure.*

Priorities:

- Develop and implement a long-term plan for financial growth and sustainability
- Focus on building membership and contributed revenues
- Begin process of American Alliance of Museum accreditation
- Complete a new site Master Plan
- Conduct a board evaluation and restructure appropriately

Objectives:

IV-1. Develop a long-term financial sustainability plan (including earned, contributed, endowment, and public funding needs and Olbrich Botanical Gardens' expenses) by the end of the 3<sup>rd</sup> quarter of 2023.

Responsibility: Director of Development

Assisted by: Executive Director & Olbrich Botanical Society Board

IV-2. Begin the formal process for American Alliance of Museums (AAM) accreditation by the end of the 4<sup>th</sup> quarter of 2025.

Responsibility: Executive Director

Assisted by: Director of Education

Membership:

IV-3. Evaluate membership rates and benefits and implement changes by the end of the 3<sup>rd</sup> quarter of 2023.

Responsibility: Membership Associate

Assisted by: Director of Development



IV-4. Increase household memberships from 8000 households (2022) by 10 % by the end of the 4<sup>th</sup> quarter each year.

Responsibility: Membership & Development Associate  
Assisted by: Director of Development

IV-5. Increase revenue from memberships from \$500,000 by 10% by the end of the 4<sup>th</sup> quarter each year.

Responsibility: Membership & Development Associate  
Assisted by: Director of Development, Public Relations & Marketing Manager & Director of Guest Experience

Development:

IV-6. Increase contributed revenues for operations (see Financial chart, page 23):

- Unrestricted Operating
- Restricted Operating
- Restricted Capital
- Grants
- Planned Giving

Responsibility: Director of Development  
Assisted by: Donor Engagement Manager

Marketing/PR

IV-7. Complete the new website implementation by the end of the 1<sup>st</sup> quarter of 2023.

Responsibility: Public Relations & Marketing Coordinator  
Assisted by: Public Relations & Marketing Manager

IV-8. Complete integration of Salesforce and VeeVart by the end of the 3<sup>rd</sup> quarter of 2023.

Responsibility: Director of Development  
Assisted by: Membership & Development Associate

IV-9. Evaluate print/ digital publications (e.g., newsletter /annual report / education catalog) by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Public Relations & Marketing Manager  
Assisted by: Public Relations & Marketing Coordinator

IV-10. Develop an overarching technology plan for Olbrich Botanical Gardens including a specific plan for guest experience technology needs by the end of the 1<sup>st</sup> quarter of 2024.

Responsibility: Programming Committee  
Assisted by: Director of Guest Services

IV-11. Complete a branding study and update the Style Guide by the end of the 3<sup>rd</sup> quarter of 2024.

Responsibility: Public Relations & Marketing Manager  
Assisted by: Public Relations & Marketing Coordinator

IV-12. Implement a Digital Asset Management System (DAM) for photography by the end of the 3<sup>rd</sup> quarter of 2024.

Responsibility: Public Relations & Marketing Coordinator  
Assisted by: Public Relations & Marketing Manager

IV-13. Create a marketing plan that includes specifics on how to reach targeted audiences by the end of the 2<sup>nd</sup> quarter of 2025.

Responsibility: Public Relations & Marketing Manager  
Assisted by: Public Relations & Marketing Coordinator

#### Facility/Maintenance

IV-14. Prioritize and implement the site assessment plan by the end of the 2<sup>nd</sup> quarter of 2023.

Responsibility: Facility Mechanic 2  
Assisted by: Executive Director

IV-15. Complete roof restoration of the Thai Pavilion by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Thai Garden Curator  
Assisted by: Executive Director

IV-16. Complete the tourism grant projects by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Facility Mechanic 2 & Donor Engagement & Grants  
Manager  
Assisted by: Director of Development

IV-17. Develop a preventative maintenance plan by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Facility Mechanic 2  
Assisted by: Director of Horticulture & Conservatory Curator

IV-18. Identify at least one project for accessibility upgrades and improve them by the end of each year.

Responsibility: Facility Mechanic 2  
Assisted by: Director of Horticulture

#### Human Resources

IV-19. Improve both internal and external communication methods.

- A. Create internal communication standards and improve methods by which information is communicated by the end of the 2<sup>nd</sup> quarter of 2023
- B. Review current board reports and update to a more effective method to convey information to both the Olbrich Botanical Society Board and the Board of Park Commissioners by the end of the 4<sup>th</sup> quarter of 2023

Responsibility: Executive Director  
Assisted by: Leadership Team

IV-20. Reorganize the staff structure to meet the strategic plan needs by the end of the 3<sup>rd</sup> quarter of 2023.

Responsibility: Executive Director

Assisted by: Assistant Parks Superintendent & Olbrich Botanical Society Board President

IV-21. Create a professional development plan by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Executive Director

Assisted by: Director of Education

IV-22. Improve and implement human resource programs, policies, hiring, and plan for both Parks and OBS staff.

A. Update both the OBS and Parks employee handbooks to match updated policies and work environments by the end of the 4<sup>th</sup> quarter of 2023.

B. Create a comparable performance review program that matches the City's Check-In system for OBS employees by the end of the 4<sup>th</sup> quarter of 2023.

C. Create a comparable equity hiring tool for OBS by the end of the 4<sup>th</sup> quarter of 2024.

D. Conduct a salary compensation study by the end of the 4<sup>th</sup> quarter of 2025.

Responsibility: Executive Director

Assisted by: Administrative Assistant & Olbrich Botanical Society Board

IV-23. Evaluate both internal and external processes and complete a process inventory by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Executive Director

Assisted by: Leadership Team

## Olbrich Botanical Society Board of Directors

IV-24. Evaluate and restructure the Olbrich Botanical Society and the OBS Foundation boards to meet the needs of the strategic plan by the end of the 2<sup>nd</sup> quarter of 2024.

Responsibility: Olbrich Botanical Society Executive Committee & Executive Director  
Assisted by: Director of Development

IV-25. Evaluate and update Olbrich Botanical Society by-laws and policies by the end of the 2<sup>nd</sup> quarter of 2024.

Responsibility: Olbrich Botanical Society Executive Committee & Executive Director  
Assisted by: Director of Development

## Volunteers

IV-26. Update volunteer onboarding and training processes to include prohibited harassment and unconscious bias training for all forward-facing volunteers by the end of the 4<sup>th</sup> quarter of 2023.

Responsibility: Volunteer Manager  
Assisted by: Director of Education

IV-27. Select and implement a volunteer software program that integrates with Salesforce by the end of the 1<sup>st</sup> quarter of 2024.

Responsibility: Volunteer Manager  
Assisted by: Executive Director

IV-28. Create a Bolz Conservatory tour program and recruit and train volunteer docents by the end of the 4<sup>th</sup> quarter of 2024.

Responsibility: Director of Education & Conservatory Curator  
Assisted by: Volunteer Manager

City of Madison and OBS

IV- 29. Study and review the Olbrich Botanical Society and City of Madison Cooperation and Coordination Agreement for possible revisions by the end of the 3<sup>rd</sup> quarter of 2024.

Responsibility: Olbrich Botanical Society Executive Committee & Executive Director  
Assisted by: Director of Development & Assistant Parks Superintendent

Infrastructure

IV -30. Begin a new site Master Plan by the end of the 1<sup>st</sup> quarter of 2024.

Responsibility: Executive Director & Olbrich Botanical Society Board  
Assisted by: Director of Development & Assistant Parks Superintendent

Resources

Staff Growth

Staff Growth				
Staff	2023	2024	2025	Funding Source
Professional Development & Training	\$20,000	\$30,000	\$40,000	OBS & Parks
Plant Recorder (0.5 to 1.0)		\$22,000		OBS
Meadow & Gravel Garden Horticulturist (0.7 to 1.0)		\$21,000		OBS
Development Specialist			\$80,000	OBS
Graphic Designer (NEW)		\$80,000		OBS
Youth & Family Program Coordinator (0.8 to 1.0)		\$8,000		OBS
Outreach Specialist (NEW)			\$80,000	OBS
Guest Experience Coordinator (0.8 to 1.0)			\$12,000	Parks
Knowledge Management Specialist (NEW)			\$80,000	OBS
<b>TOTALS</b>	<b>\$20,000</b>	<b>\$161,000</b>	<b>\$292,000</b>	

## Financial Goals

		Increase from base/previous year			
Source	Base \$	2023	2024	2025	3 Year Change
<b>Contributed</b>					
Annual Fund	\$245,000	\$245,000	\$270,000	\$310,000	\$65,000
Major Gifts	\$50,000	\$50,000	\$70,000	\$90,000	\$40,000
Sponsorships	\$40,000	\$40,000	\$60,000	\$80,000	\$40,000
Grants – General	\$10,000	\$10,000	\$15,000	\$20,000	\$10,000
Grants – Interpretative Plan			\$100,000	\$100,000	\$200,000
<b>Subtotal Contributed</b>	<b>\$345,000</b>	<b>\$345,000</b>	<b>\$515,000</b>	<b>\$600,000</b>	<b>\$355,000</b>
<b>Earned</b>					
Admissions	\$172,630	\$172,630	\$181,262	\$190,325	\$17,695
Flower Shows	\$152,500	\$152,500	\$160,000	\$168,000	\$15,500
Education	\$112,600	\$112,600	\$129,490	\$142,439	\$29,839
Gift Shop	\$630,000	\$630,000	\$730,000	\$766,500	\$136,500
Memberships	\$540,000	\$540,000	\$594,000	\$653,400	\$113,400
Programs	\$609,352	\$609,352	\$639,820	\$671,811	\$62,459
Rentals	\$152,000	\$152,000	\$162,000	\$172,000	\$20,000
<b>Subtotal Earned</b>	<b>\$2,369,082</b>	<b>\$2,369,082</b>	<b>\$2,596,572</b>	<b>\$2,764,475</b>	<b>\$405,393</b>
<b>TOTAL</b>	<b>\$2,714,082</b>	<b>\$2,714,082</b>	<b>\$3,111,572</b>	<b>\$3,364,475</b>	<b>\$760,393</b>
<b>Endowment</b>					
Olbrich Botanical Society Foundation	\$325,651	\$343,061	\$360,471	\$377,881	\$52,230

Responsibilities: Departmental Directors  
 Assisted by: Executive Director



## Large Projects

Project	2023	2024	2025	Funding Source
Interpretive Plan		\$200,000		OBS & IMLS Grant
New Website	\$100,000			OBS & IMLS Grant (Funded in 2022)
Wayfinding Signage			\$50,000	OBS & IMLS
Interpretive Signage			\$150,000	OBS & IMLS
Lobby Upgrades	\$20,000	\$50,000		OBS
Guest Survey (3-year contract, paid in 2023)	\$45,000			OBS
Branding/Marketing Study		\$50,000		OBS
Technology & Software Upgrades	\$65,000	\$25,000	\$25,000	OBS & Parks
<b>TOTALS</b>	<b>\$230,000</b>	<b>\$325,000</b>	<b>\$225,000</b>	

Responsibilities: Executive Director  
 Assisted by: Departmental Directors

Infrastructure

Capital Improvement Projects (CIP)				
Project	2023	2024	2025	Funding Source
Garver Cottage Tuckpointing	\$325,000			CIP (2019 & 2022)
Lobby Door Replacement	\$40,000			CIP (2020)
Hardening Off Area	\$12,000			CIP (2021)
Royal Thai Pavilion Roof Replacement	\$1,600,000	\$50,000		CIP (2023) & UW-Madison
Cistern Study	\$35,000*			Capital Project - Engineering
Fog Line Removal & Replacement	\$45,000			CIP (2022)
Walkway Repairs		\$33,000		CIP (2023)
Tram Circle Shade Structure	\$20,000			WI Department of Tourism Grant (2023)
Exit Turnstile Replacement	\$90,000			WI Department of Tourism Grant & (2023)
Herb Garden Pathway Improvements	\$160,000			CIP (2023)
New Bridge Study & Design		\$60,000		CIP (2024)
Security System Improvements		\$75,000		CIP (2024)
Accessibility Upgrades		\$50,000	\$50,000	CIP (TBD)
Master Plan		\$200,000		CIP (2024)
Evjue Commons Renovation			\$75,000	CIP
<b>TOTALS</b>	<b>\$2,327,000</b>	<b>\$468,000</b>	<b>\$125,000</b>	

Responsibilities: Executive Director  
 Assisted by: Departmental Directors

## Facility Assessment Results

Facility	Item	Condition Rating	Area	Anticipated Costs			
				Rec. 1	Rec. 1a	Rec. 1b	Rec. 2
Atrium	Observation Deck	Life Safety	Structural	\$8,000	\$50,000	\$150,000	
Bolz Conservatory	Primary Framing	Life Safety	Structural	\$30,000	\$70,000	\$150,000	
Bolz Conservatory	Cupola	Life Safety	Structural	\$20,000	\$55,000	\$100,000	
Bolz Conservatory	Upper Planting Beds	Business Interruption	Structural	\$100,000			
Bolz Conservatory	Glazing	Scheduled Replacement	Structural	\$15,000			
Facility Systems	Furnace Naming	Scheduled Replacement	Mechanical	\$2,000			
Facility Systems	Condensing Unit Refrigerant Type	Business Interruption	Mechanical	\$80,000			
Facility Systems	Air Handling Equipment Past Useful Life	Business Interruption	Mechanical	\$300,000			\$400,000
Facility Systems	Air Returned Through Egress Corridor	Former Codes	Mechanical	\$10,000			
Facility Systems	No Ventilation Air to Fan Coil Units	Scheduled Replacement	Mechanical	\$20,000			\$30,000
Atrium	Atrium Zoning	Business Interruption	Mechanical	\$2,000	\$6,000		
Bolz Conservatory	Conservatory Piping and Radiation	Business Interruption	Mechanical	\$125,000			\$175,000
Bolz Conservatory	Conservatory Ventilation	Business Interruption	Mechanical	\$150,000			\$210,000
Facility Systems	Plumbing Fixtures	Scheduled Replacement	Mechanical	\$2,000			
Facility Systems	Electrical Deficiencies & Recommendations	Former Codes	Electrical				\$40,000
Facility Systems	Separation of Emergency Circuits	Former Codes	Electrical	\$18,000			\$25,000

Facility Systems	Arc Flash Labeling Missing	Life Safety	Electrical	\$10,000			
Atrium	Panelboards End of Life	Business Interruption	Electrical	\$35,000			
Facility Systems	Generator	Scheduled Replacement	Electrical				\$70,000
Totals:				\$927,000	\$181,000	\$400,000	\$950,000

Responsibilities: Executive Director  
 Assisted by: Departmental Directors

## Appendix

### Strategic Plan Process

The last strategic plan completed at Olbrich Botanical Gardens was in the late 1990s. In January 2022, Olbrich Botanical Gardens began the search for a consultant to lead the organization through a strategic planning process. A request for proposals was created and sent to strategic planning experts both locally and nationally. Four proposals were received from firms in Madison and outside Wisconsin. The expertise of the firms included previous work with local non-profits, conservation organizations, and public gardens. Director of Horticulture Jeff Epping, Director of Development Joe Vande Slunt, Olbrich Botanical Society Board Director Matt Cornwell, and Executive Director Tanya Zastrow reviewed the proposals, scored them, and interviewed the top two firms. The firm selected was EMD Consulting, led by Rick Daley. Rick has extensive experience not only working in and leading botanic gardens, but also working with numerous public gardens to complete their strategic plans. In addition, Rick assembled a team that included Tim Prince from Findorff Insights to lead community engagement, and Debbie Biddle from The People Company to lead the diversity and inclusion research for the plan. The strategic plan kicked off with the full team in place the week of August 8, 2022.

A core team of staff and board of directors was formed to work on the details of the strategic plan. Members of the core team included:

- Board of Directors
  - Susan Goodwin
  - Bill Patek
- Olbrich Botanical Garden Staff
  - Executive Director Tanya Zastrow
  - Director of Horticulture Jeff Epping
  - Director of Development Joe Vande Slunt
  - Director of Education Kim North
  - Special Programs Manager Missy Jeanne
  - Financial Coordinator Elizabeth Parker
  - PR/Marketing Manager Katy Nodolf
  - Conservatory Curator Colten Blackburn
  - Horticulturist Erin Presley
- Ad-Hoc Contributors
  - PR/Marketing Coordinator Tom Fullmer
  - Youth & Family Programs Coordinator Sarah Ellis

It was important to Olbrich Botanical Gardens to ensure that stakeholders, volunteers, and staff had a voice in the future of Olbrich Botanical Gardens. Rick met individually with each department at Olbrich Botanical Gardens. During these meetings he focused on learning

about their work, priorities, future vision, and pain points. Rick, Tim, and Debbie met with the Olbrich Botanical Society Board of Directors and also the Olbrich Botanical Society Foundation. Rick met with the Madison Parks Division Management Team to learn about the vision of Madison Parks and Olbrich Botanical Gardens' role within the larger park system. Rick presented on the strategic plan to a gathering of Olbrich Botanical Society's lifetime members at the Circle Reception.

Tim led the community engagement sessions. He hosted two sessions with volunteers. Community leaders, Board of Park Commissioners, neighborhood associations, travel organizations, and area environmental organizations were invited to share their thoughts with Tim. He also conducted one-on-one interviews with individuals that were not able to attend the input sessions.

Debbie conducted one-on-one interviews with individuals from diverse backgrounds. These included leaders of organizations, former staff, OBS Board Members, and volunteers that are from diverse communities that may not be involved with Olbrich Botanical Gardens.

Internally, staff participated in brainstorming and planning meetings in all-staff meetings and department meetings. Input from these meetings was compiled and reviewed by the core team to ensure feedback received was included in the plan as feasible.

Drafts of the plans were shared with staff, Olbrich Botanical Society Board of Directors, and members of Parks Management. Edits and feedback from these meetings were incorporated into the updated drafts. This process resulted in the final strategic plan.

The final strategic plan was approved by the Olbrich Botanical Society Board of Directors on March 21, 2023.