



MISSOURI BOTANICAL GARDEN
STRATEGIC PLAN 2008-2014
Conservation and Sustainability

*Adopted by the Board of Trustees
December 19, 2007*

EXECUTIVE SUMMARY

The Missouri Botanical Garden, established a century and a half ago by Henry Shaw, a visionary St. Louisan, has grown over the years into an institution uniquely suited to play a vital mission in the modern world. People depend on plants for every aspect of their lives, from food and medicine to the protection of watersheds and the maintenance of soil fertility, and yet plants and every other element in the living world are threatened by the explosive growth of human populations, our growing consumption rates, and the uses of technologies that are often unsustainable. In other words, we are exhausting the Earth's resources more rapidly than natural processes can replenish them and the rate at which we are doing so is increasing with every passing year. Because of the situation we face, we unwittingly have become modern counterparts of Noah, the legendary Biblical patriarch who protected life in his day by constructing an Ark. How much of the natural environment that we enjoy today remains to serve and enrich our own lives and the lives of those who follow us depends directly on the actions we take. The Missouri Botanical Garden, by virtue of its history and the loyal support it has received over the course of its long history, has accumulated rich scientific resources for the study of plants and educating people about them. The institution now has an urgent role to play that its founder could not have imagined, but one that he certainly would have appreciated and embraced.

To sustain a healthy environment for people and other living organisms in St. Louis and around the world will require bold planning and an extraordinary effort that must extend into the indefinite future. In this context, the Missouri Botanical Garden's mission – to discover and share information about plants to preserve and enrich life – is both freshly relevant and increasingly significant. Fortunately, the Garden's sustained record of scientific achievement, physical and programmatic expansion, and stability combined with financial growth create the conditions for it to make even more valuable contributions to scientific knowledge, public education, and the civic life of St. Louis, the nation, and the world in the decades ahead.

The central theme of the Garden's new Strategic Plan is *building sustainability*. With this Plan, the Garden commits itself anew to discovering and transmitting information about plants and ecosystems; this knowledge will help us to sustain ecosystems locally, nationally, and globally. To accomplish this goal, the Garden will work to increase the information that is available concerning plants and will use that knowledge to promote effective and sustainable living practices that will preserve biodiversity throughout the world. Genomics and molecular comparisons between plants, increasingly commonplace, will become standard in the future, and the Garden, with its unparalleled access to comprehensive information about the diversity of plants, will remain a global leader no matter what sort of botanical information is desired for a particular purpose. In addition, the Garden will engage an expanding and diverse group of people at home and abroad in learning about

plants and the interdependence of people, plants, and the environment, and it will nurture human and financial elements that are essential to make these activities possible. Thus we will secure our continued success and viability as an outstanding, knowledge-based institution that contributes to the vitality of its community, the nation, and the world.

This Plan calls for the Garden to quicken the pace at which it generates knowledge about plants and applies that knowledge to conserve ecosystems, increase human wellbeing, and achieve sustainability everywhere. Enhanced cooperation with the major botanical institutions of the world and other key partners is essential to achieving this goal.

To protect plants and ecosystems and thus enhance life for people and all living things, the Garden will elevate sustainability as a core principle in all its work – its programs of research and conservation, horticulture, and education and ongoing operations – and make the relevance of sustainability evident to all its visitors, both at its physical facilities and on the World Wide Web. Going forward, everything the Garden undertakes will emphasize conservation, restoration, and green living, three fundamental aspects of sustainability.

To accomplish the important goals just outlined, the Garden will strengthen its internal core, creating a workplace that attracts and retains outstanding talent, nurturing a workforce that is strongly committed and diverse, and implementing a business model that ensures its healthy fiscal future.

Staying focused on these themes and pursuing the goals and objectives outlined in the Plan, the Garden will achieve a new level of international leadership in generating knowledge about plants, enabling people around the globe to apply that knowledge in pursuit of a sustainable world, and strengthening its institutional capacity to remain a leader among the botanical institutions well into the 21st century. Henry Shaw could not have wished for more.

BACKGROUND

The mission of the Missouri Botanical Garden, which was established by Henry Shaw in 1859, is to discover and share knowledge about plants and their environment in order to preserve and enrich life. Over the past century and a half, the Garden has become one of the world's most esteemed centers of botanical research and conservation. We are recognized internationally for the caliber and impact of our work in generating and organizing information about plants and for putting that information to work to protect plants and the ecosystems in which they live. In addition, we are celebrated locally and nationally for our exemplary horticultural presentations and enriching educational programs.

In the past 36 years, inspired by Dr. Peter Raven's leadership and propelled by our exceptionally committed and talented Board of Trustees, staff, and volunteers, the Garden has achieved extraordinary success on multiple fronts – groundbreaking achievements in science and conservation; dramatic improvements to our physical facilities at the Garden on Tower Grove Avenue; expansion to three additional satellite sites in the St. Louis area; significant additions to our unique herbarium and library; and substantial growth in our endowment, funding sources, and membership base. We succeeded in the creation of a Botanical Garden Subdistrict in the Zoo-Museum District in 1981, and this tax-supported body now contributes approximately a quarter of our budget on an ongoing, dependable basis. In addition, we have initiated an extensive neighborhood improvement effort that is still underway, and our visitation topped one million people in the year 2006. This success results from our passionate interest in plants, our entrepreneurial ability to seize emerging opportunities, our sustained partnerships with Washington University, University of Missouri-St. Louis, St. Louis University and other institutions, and our faithful stewardship of assets.

CURRENT CONTEXT

On most dimensions, the Garden is stronger today than it has ever been. Numerous shifts in our operating environment, however, pose new challenges even as they offer new opportunities. The times demand that we refresh our vision and be increasingly strategic in the ways that we plan and conduct business in the future.

The most pressing external change is presented by the rapidly accelerating destruction of natural habitats around the world and other changes that are driving the alarming loss of plant species and the ecosystems that they inhabit. These developments give immediacy to the Garden's fundamental purpose – discovering, documenting, and disseminating information about plants and conserving plant species in their natural habitats as well as in gardens and seed banks. To deal with the threats, we must significantly quicken the pace of our basic research, in alliance with partners around the globe, and we must hasten the application of research-based knowledge for cultural, medical, economic, and other purposes. We must also effectively communicate useful information about plants to both scholarly and lay audiences and encourage them to apply that knowledge for these purposes. To accomplish these aims, we must expand and strengthen our partnerships and collaborations with diverse scientific and conservation-oriented organizations. The overall goal of these activities is to foster the sound management of natural resources, in order to help build a sustainable world.

Other significant external changes also critically affect the Garden's ability to realize its potential. On the opportunity side, the growing public awareness of and concern about environmental issues (an awareness that the Garden's own work has helped create) suggests a new receptivity to the Garden's vision and mission. The popularity of gardening has never been higher, and growing numbers of people realize the important role that plants play in enriching their lives. On the challenge side, we now compete for audiences' and patrons' support with numerous market-savvy cultural attractions and a dizzying array of electronically-mediated forms of entertainment. Moreover, inexorably rising business costs and an increasingly competitive, global labor market put pressure on every aspect of our work.

Internal challenges also loom for us. Although the Garden has been able to balance its operating budget each year, income is not growing rapidly enough to keep pace with inflation, especially in view of the urgency of the challenges to the natural world. We project operating deficits within the next several years unless we can identify new sources of revenue or increase current ones on an ongoing basis. In addition, to keep the Garden at the forefront of our sector, we need to invest more intensively in the continuous training and development of our employees and volunteer base. We must identify a dynamic new president capable of leading the Garden after Dr. Raven's retirement.

PLANNING PROCESS

In the past eight months, we have engaged in a planning process involving diverse stakeholders. We have consulted with more than 80 people – board members, peer institutions in St Louis and around the world, opinion leaders in St Louis, funders, volunteers, staff members, and others. We have reviewed recent organizational successes and disappointments. We have articulated our vision and core values. We have assessed our ability to carry out our mission effectively in the light of our strengths and weaknesses, and have identified the most important obstacles to our future vitality.

The planning process resoundingly confirmed the importance of the Garden's mission – to sustain and enrich life by discovering and sharing knowledge about plants and their environment. In current parlance, the Garden's fundamental purpose is to build sustainability, primarily through the conservation of plants and the ecosystems they inhabit, both locally and around the globe. We are uniquely suited to exert leadership because the quality and scope of the Garden's globally-important contributions to plant science and conservation distinguish it from all but a few other institutions in the world. Locally, our unique constellation of visitor sites – the original garden on Tower Grove Avenue, the Shaw Nature Reserve, the EarthWays Center, the Litzinger Road Ecology Center, and the Sophia M. Sachs Butterfly House – provide a rare combination of opportunities for visitors to connect with plants and their environment. In addition, we have a strong track record of using the World Wide Web to interactively reach publics who rarely or never visit our sites, and we are well positioned to exploit the potential of the Web even more fully in the years to come.

Going forward, fostering sustainability, including the conservation of natural resources, will frame all that we do. To help achieve this aim, the Garden will emphasize themes of conservation, restoration, and green living at all our sites. We will link our research and conservation work worldwide with our horticultural displays and educational programs in St. Louis in ways that make the Garden a dynamic learning center and a preferred destination for audiences of all kinds. In addition, we will sharpen the focus of our work throughout the world to support and attain sustainability in the regions where we are active. To achieve these purposes, the Garden will also attend to its own sustainability – enhancing our ability to attract and retain exceptionally qualified people in paid and volunteer positions, fortifying our capital base, diversifying revenue and support streams, and operating with improved effectiveness and efficiency.

The seven strategic goals detailed below are organized into three categories: 1) our core purpose: developing and applying knowledge about plants to help achieve sustainability everywhere; 2) connecting people to plants with enticing programs of horticulture, education, and interpretation; and 3) strengthening institutional capacity. This Plan presents our major priorities for the next seven years, building on our strengths and advancing our aspirations. The goals also address issues that could jeopardize our future viability.

Having implemented this plan, by 2014 the Garden will have enhanced its position as one of the world's most important leaders in promoting and advancing sustainability worldwide. We will have significantly added to human knowledge about plants and substantially enhanced people's access to that knowledge. We will have helped people around the world apply botanical knowledge in their daily lives in ways that slow the depletion of the Earth's resources. We will have educated many millions of people and delighted them with the mystery and beauty of plants, spurring efforts to protect and preserve the remarkable diversity of species. And by 2014, the Garden will be on a firm financial footing that ensures our leadership well into the future. Capitalizing on our history and seizing opportunities to make our vision and operating model compellingly contemporary, the plan will re-energize the Garden and propel us to significant new achievements in the years beyond.

MISSION, VISION, VALUES

MISSION

The mission of the Missouri Botanical Garden is to discover and share knowledge about plants and their environment in order to preserve and enrich life.

VISION

The Missouri Botanical Garden is a global leader in plant science and conservation, an innovative cultural attraction that engages diverse audiences in learning about plants as the foundation of life, and an exemplary practitioner of sustainability. We conduct our own business in keeping with principles of sustainability, including conservation and restoration of natural communities, and the responsible use of natural resources, and strive to inspire others to act accordingly. We promote practices that will lead to sustainability around the world because this is the only proper course for the human race – the only one that makes sense in attempting to build a sound, healthy, diverse, and beautiful world for ourselves and for the future.

VALUES

These core values guide our daily work:

- **Stewardship**—Demonstrating environmental stewardship, a strong conservation ethic, and sustainable practices.
- **Leadership**—Anticipating the future and being “ahead of the curve” in botanical research, conservation and sustainability, education, horticulture, and visitor engagement.
- **Honesty**—Upholding accuracy and objectivity in all our endeavors and presentations.
- **Collaboration**—Working with partners and alliances to speed our common goals and increase the impact of our work.
- **Diversity**—Actively engaging people of all ages, races, nationalities, and abilities with enriching experiences at all our sites and on the Web.
- **Staff Development**—Fostering a workplace that supports, engages, and educates a talented and diverse staff and volunteer corps.
- **Integrity**—Standing for excellence, ethical conduct, sound management, and fiscal responsibility.
- **Quality of Life**—Promoting the quality of life throughout the St Louis region.
- **Good Neighbor**—Supporting the improvement and sustainability of the neighborhoods surrounding our sites.
- **Accountability**—Being reliable stewards of the gifts that we receive.

I. OUR CORE PURPOSE: PROMOTING SUSTAINABILITY

GOAL I

Be a global leader in developing accurate scientific information about plants, disseminating that information around the world for diverse purposes, and using it to help manage ecosystems sustainably everywhere.

Rationale: “Discovering knowledge about plants and their environments” – conducting research and sharing research findings – is the Garden’s fundamental reason for being. Scientists estimate that approximately 400,000 plant species may exist, of which 50,000 to 100,000 species still await discovery. For most of those species of plants that already have been found, named, and described, we still have only a limited amount of information. It is difficult to retrieve even established information about these plants, but we are building effective data bases for that purpose, with our partner the Royal Botanic Gardens, Kew, which holds the largest store of such information. It is our intention to bring other institutions such as The New York Botanical Garden and the Smithsonian Institution, among many others, into this partnership as soon as possible. The species that await discovery are almost all relatively rare and thus, remarkably, in danger of extinction even though we have not yet detected their presence!

In the context of widespread environmental destruction and loss of species, the Garden’s responsibility for discovering, documenting, and disseminating information about plants and their ecosystems has become imperative. We need plants and ecosystems for their intrinsic value to us as food, medicine, and for other purposes; because they constitute the systems that support us; and because they are beautiful. Preserving them is therefore essential to the quality of our continued life on Earth. This work includes research in the field to discover new information about plants; building up the representation of dried plant specimens, the primary basis for further study, in our world-class herbarium (the fourth largest in the world); publication and electronic dissemination of findings and analyses through our comprehensive flora projects and Tropicos2 Information System; and the continuous exchange of data and information with partners around the world. To reduce the alarming threat to plant species and sustainable habitats, especially in the developing countries of the tropics and subtropics, we also must continue to help build institutions and to train and support the people that are working to sustain biodiversity in their own countries. As a part of this effort, our work with graduate students at our partner institutions, especially our three major university partners in St. Louis, becomes increasingly vital. Our growing partnership with the St. Louis Zoo, emerging as a strong, conservation-oriented organization, bodes well for the future.

By 2014, the Garden will have:

- Completed the Checklist of Plants of the World, an interactive data base that will speed the application of information about plants for all purposes, in cooperation with the Royal Botanic Gardens, Kew, and other partners.
- Developed Web pages for all known species of plants as part of the Encyclopedia of Life, also in partnership with leading botanical institutions around the world.
- Completed projects to document plant species comprehensively in selected regions (including the Flora of Missouri, Flora of China, Catalog of the Plants of Madagascar, Manual de Plantas de Costa Rica, Flora Mesoamericana, and Flora of North America).
- Strengthened and expanded access to the Garden's globally significant herbarium, Tropicos2 Information System, and library, both physically and electronically.
- Acquired, analyzed, and disseminated widely new data from four selected geographic areas where plant species are unusually diverse and poorly known, and enhanced our cooperative programs in each of these regions – the tropical Andes of South America, Madagascar, Indo-China, and the Midwestern United States.
- Enhanced our programs in plant systematics and evolution, leading to a deeper understanding of selected groups of plants throughout the world.
- Developed and refined the Center for Conservation and Sustainable Development's work throughout the world, bolstered its innovative analysis unit, and integrated key features and methods of the CCSD into programs in St Louis and our sites abroad.
- Expanded and improved our efforts to document the relationships between people and plants in different cultures, and applied the lessons learned to improving sustainability in multiple locales.
- Supported the goals of the Global Strategy for Plant Conservation and developed recovery plans for as many plant species as possible.
- Deepened and extended the research program at the Shaw Nature Reserve in cooperation with Washington University's Tyson Valley facility.
- Refined and improved the Garden's graduate training program in plant systematics and conservation, working with relevant partners to add emphasis on ecology and the environment.
- Focused and expanded the programs of the William L. Brown Center for Economic Botany in investigating and providing models for understanding the relationships between people and plants in diverse societies throughout the world.
- Enhanced the involvement of Garden scientists in the development and communication of clear messages about botanical science and sustainability to diverse audiences.
- Effectively promoted our leadership position in plant science and its importance to all stakeholders.

GOAL 2

Be a global leader in developing a sustainable world, emphasizing conservation, restoration, and the responsible use of resources.

Rationale: Plants are fundamental to life on Earth, and the Garden’s mission calls for it to play a leadership role in making their importance evident to audiences around the world and developing the capacity of people to conserve plants and the ecosystems they inhabit. Recognition of the need to understand, preserve and protect natural ecosystems is growing in the St. Louis area, in the nation, and around the world numerous groups have appealed to the Garden to assume greater leadership in advancing sustainability both regionally and globally. The Garden’s intellectual capital, pioneering conservation work, exemplary horticultural displays, and innovative education programs in St. Louis and overseas provide a firm foundation on which we can build, strengthening and widening our successful training programs to achieve conservation and sustainability, and assertively promoting these themes at all our physical locations and on our websites. Our sustainability strategies will emphasize conservation – identifying, protecting, preserving, and soundly managing populations of species and the ecosystems they inhabit; restoration – restoring and nurturing diverse ecosystems; and green living – using resources in ways that are environmentally-responsible and promote human health and welfare.

By 2014, the Garden will have:

- Strengthened and widened our international capacity-building programs and created a cadre of people with the professional skills to conserve and manage ecosystems sustainably.
- Effectively educated people about sustainability and ways they can protect ecosystems.
- Leveraged the distinct attributes of our multiple sites (real and virtual) to engage and educate people about conservation, restoration, and green living.
- Strengthened our cooperative efforts in the areas we have selected for long-term concentration in South America, Africa, and Asia and greatly enhanced the quality, quantity, and accessibility of information about plants and the ecosystems they inhabit in order to help build sustainability in these regions.
- Expanded the Shaw Nature Reserve’s programs to restore natural habitats and exhibit sustainable land use in the Ozarks and, by example, in other parts of the world.
- Instituted systems to ensure we carry out all of our activities in an environmentally-responsible way.
- Maintained our buildings and constructed new facilities in accordance with principles of universal design and the Leadership in Energy and Environmental Design (LEED) Green Building Rating System®.

II. CONNECTING PEOPLE WITH PLANTS THROUGH HORTICULTURE, EDUCATION, INTERPRETATION, AND VISITOR EXPERIENCES

To effectively transmit current and evolving knowledge about plants and ecosystems to a broad public, we must exert leadership in horticulture, education, and interpretation, and enhance visitors' experiences at our live and virtual sites. We must increase the appeal of plant science to diverse audiences, and touch people in ways that will stimulate them to become more responsible stewards of the Earth. Three goals address these Garden imperatives.

GOAL 3

Exemplify excellence in our horticultural presentations, continuously developing more beautiful horticultural displays that are sustainable and provide excellent examples for others.

Rationale: Visiting the Garden on Tower Grove Avenue, the Butterfly House and the Shaw Nature Reserve is the way most people come to know the Missouri Botanical Garden. Providing sites of beauty and reflection is an essential part of the Garden's mission, and a primary means by which we make connections between people, plants, and the environment. Presenting gardens and landscapes that are beautiful, restorative, and educational is essential to ensure our relevance to and impact on the public.

By 2014, the Garden will have:

- Maintained and rejuvenated individual garden displays to ensure that they illustrate different gardening styles in ways that are faithful to their original designs.
- Tested a wide range of plants for their suitability to the St. Louis area, as global warming changes the growing conditions for many species.
- To the extent possible, replaced plants of unknown origin with those of known native origin to promote the conservation of plant species and increase the usefulness of our living collections for diverse purposes.
- Demonstrated sustainable horticulture with low-input maintenance in all appropriate aspects of our planting.
- Expanded our Plants of Merit program to strengthen linkages with the nursery industry and home gardeners, jointly advanced sustainable practices, and worked to develop commercial applications of our findings.
- Determined which cultivated plant species are potential invasives and worked actively with the horticultural and landscape industries to discourage their use.
- Increased display possibilities at our public sites, and – funds permitting – expanded greenhouse and propagation space by moving the greenhouses at the Tower Grove Avenue/Shaw Boulevard site outside of the Garden itself.

GOAL 4

Provide exemplary education programs about plants and their role in sustainability and develop exemplary interpretation that promotes understanding of the connections among people, plants, and the environment.

Rationale: Plants form the basis of life on Earth, and humans must live in ways that moderate their impact on plants and the ecosystems they comprise. Sustainable living requires a fundamental knowledge of plants, as well as an understanding of the web of life, the cycles of nature, the flow of energy, and the interdependence of all living things. Educational programming and interpretative experiences are two of the most important ways through which the Garden informs and inspires that understanding, and encourages environmentally responsible behavior among people of all ages. The Garden's education and interpretation programs, grounded in the best scientific research, will provide high caliber, sequential learning experiences that stimulate people's learning and provide them with practical strategies for responsible use of natural resources.

By 2014, the Garden will have:

- Developed a repertoire of outstanding educational and interpretive programs and experiences that engage people of all ages in exploring plant science and learning about ways to protect and conserve plants and their ecosystems.
- Implemented sequential learning experiences, courses, and other educational offerings that integrate appropriately with K-12 school activities and make the Garden an appealing learning center for children.
- Redesigned and enhanced adult education programs in gardening and horticulture, integrating principles of sustainability throughout.
- Implemented for each of our sites a comprehensive and inspiring master interpretation plan that demonstrates what we know about plants and ecosystems and features the Garden's ongoing research and conservation efforts.
- Relocated the EarthWays Center closer to the Tower Grove Avenue/Shaw Boulevard campus, expanded and broadened its program offerings, and increased its importance as a resource for learning about sustainability in the built environment.

GOAL 5

Be a premier cultural attraction, offering outstanding experiences to diverse visitors at all our sites.

Rationale: To disseminate knowledge about plants and encourage diverse people to apply that knowledge in their daily lives, we must first attract them to our sites and engage them with plants in compelling ways. Today, cultural institutions of all kinds face multiple challenges as they compete for the public's time and attention. To win that attention, the Garden must be well-informed about what current and potential audiences want and expect, and ever more energetic and inventive in serving visitors of all kinds. By providing sites of beauty and reflection, and offering audiences new ways to see the Garden and plant science each time they connect with us, we will animate both live and virtual modes of "visiting" the Garden and tapping our rich stores of knowledge.

By 2014, we will have:

- Clarified and communicated our brand of conservation and sustainability to internal and external audiences.
- Implemented a comprehensive marketing plan for each of our public sites, using market research, innovative public programs, and audience tracking to monitor progress in achieving our targets.
- Upgraded all communications technology, an essential strategy in a rapidly-changing environment.
- Designed and made physical improvements at our various sites to enhance the experience of our visitors.
- Effectively improved wayfinding and directional signs at our various sites.
- Trained staff in best practices for serving visitors and improved our effectiveness in conveying conservation and sustainability messages at each of our physical sites and on the Web.

III. STRENGTHENING INSTITUTIONAL CAPACITY

The Garden will be able to achieve its scientific, horticultural and educational goals in advancing botanical knowledge, applying that knowledge effectively, and promoting sustainability widely only if we effectively develop our staff and volunteers and strengthen our financial base. We must attract and retain an exceptional workforce and volunteer corps, and provide adequate monetary support for our diverse and critically-important programs. Two goals define the path forward.

GOAL 6

Create an exemplary 21st-century workforce and volunteer corps.

Rationale: The Garden has a powerful and relevant mission. Our ability to fulfill that mission depends on the vision, knowledge and drive of our employees, and the volunteer corps of Board leaders, friends, and partners who generously donate their time and talents to our endeavors. To remain a leadership institution and smoothly navigate the period of transition to a new president, we must continue to attract and retain highly qualified people, motivate them, and stimulate their continuous skill development. Bolstering staff leadership and teamwork skills is particularly important to the Garden's healthy future. We must also ensure that our human resource systems operate fairly, competently, and efficiently. Bringing the Garden's pay scale into alignment with relevant markets and local benchmarks is imperative, as is achieving greater diversity in our workforce and volunteer groups, including the Garden's Board of Trustees. We will maintain the Garden's reputation as an outstanding place to work and to volunteer.

By 2014, we will have:

- Implemented a compensation philosophy and pay system that makes us competitive with comparable institutions in relevant labor markets.
- Conducted an audit of our human resources, ensuring the most strategic deployment of staff to achieve our goals.
- Enhanced diversity among our staff at all levels, our volunteers, and our Board members.
- Established an ongoing, comprehensive training program that propels superior job performance, including the effective use of technology throughout the Garden, both for managers and the staff as a whole.
- Improved our ability to offer meaningful opportunities for professional development to staff members, including new challenges throughout their careers in the Garden.
- Improved internal communications among and between employees and volunteers, including the Garden's Board of Trustees.
- Integrated a new president fully in the operation of the institution and created succession plans for all key positions.
- Aligned the structure and activities of the Board of Trustees with the Garden's varied programs in St. Louis and throughout the world.

GOAL 7

Create and achieve a plan for comprehensive capitalization.

Rationale: Nonprofit organizations of all kinds are facing new economic realities, as government and philanthropic contributions do not keep pace with rising costs; the worlds of education and entertainment are transformed by technology and electronic communication; the demographics of our communities shift; and the competition for audience time, attention, and loyalty intensifies. At the Garden, this new reality is manifest in a growing gap between our revenues and expenses, a compensation structure being outpaced by local norms, and the challenge of finding ways to increase revenue. The country's most progressive nonprofit cultural and educational organizations are responding to changing conditions by seriously re-thinking their business models and developing plans for comprehensive, sustainable capitalization. The Garden must develop and implement plans to expand its endowment, control operating costs, increase the number of bequests, expand and diversify unrestricted income, and strengthen the engagement of our members and patrons in supporting our strategic improvements.

The Garden will undertake a thorough review of current operations and programs in 2008 to identify potential savings and to redirect resources to support the initiatives in the strategic plan. While we will pursue fundraising and potential income-generating programs aggressively, it is possible the Garden will need to use its fund balance (approximately \$3.5 million) to support operations in 2008 and 2009. If the fund balance is depleted, the Garden will need to reduce operating expenses to achieve a balanced budget in 2010.

We expect to launch a capital campaign in 2008, which will focus on raising funds for endowment. Increasing our annual operating revenue from investments is critically important to offset increases in annual operating costs. Currently, the Garden's endowment is approximately \$90 million. If the endowment is increased to \$180 million by 2014, investment income for operations will reach \$9 million, \$4.5 million greater than today. Furthermore, our endowment fund will likely increase over time if we maintain our spend rate at 5% or less. Our spend rate for 2008 is 5.3% and our plan is to lower the spend rate to 5% in 2009.

Since it will take a number of years to realize our goal of increasing endowment-related income, several of the initiatives will require targeted fundraising efforts. This includes upgrading our technology infrastructure, certain research projects and major capital improvements. Spending for these initiatives will be paced with the commitment of new revenues.

The most significant funding challenge during the term of the plan will be to increase compensation in order to attract and to retain a high quality workforce. The gap between the Garden's pay scale and the market has widened in recent years, especially in certain job categories. We must commit to diminish this gap over time. While annual compensation increases should be in the range of 4.5% to significantly reduce the difference between the Garden's pay scale and our market, we have built our forecasts on a more conservative assumption of 4% annual increases. The Garden's 2008 budget for compensation is \$23,475,000, which comprises approximately two-thirds of the Garden's operating expenses. A 4% increase in compensation in 2009 would increase operating expenses by \$939,000 over 2008. The cumulative effect of increasing compensation by 4% per year over the course of the Strategic Plan would cause the Garden's FY 2014 budget to be \$6.2 million greater than the 2008 budget. We will have to moderate our forecasts to fit the available resources.

The development of a detailed financial plan is underway. The Garden's three-year financial model will expand to cover the seven-year term of the Strategic Plan. The model will include plans for increasing revenue, as well as estimates for funding the initiatives in the Plan and ongoing Garden operations. This financial plan will be presented to the Executive Committee for its review during the first quarter of 2008.

By 2014, we will have:

- Completed a review of operations to increase productivity and effectiveness and re-allocated resources to support the implementation of the Strategic Plan.
- Increased our capital base through:
 - Expand endowment
(tentatively to a goal of \$180 million, approximately double the present amount);
 - Build an operating reserve equal to 15% of our annual budget;
 - Manage more effectively the ways in which bequests, always unpredictable in amount from year to year, are used as a source of operating income;
 - Secure substantial designated funding for ongoing capital improvements to technology and facilities and necessary new facilities.
 - Successfully completing the capital campaign.
- Expanded unrestricted income through:
 - Secure new sources of one-time and recurring revenue, identifying and developing new markets and clients that need and can utilize the Garden's unique combination of knowledge, expertise, resources, and vision;
 - Expand our base of members and patrons;
 - Explore and, if feasible and desirable, implementing income-generating strategies in real estate, e-commerce and use of intellectual property.

IMPLEMENTATION

We recognize that this Plan is very ambitious. It will require sustained and challenging work from all those who currently care about the Garden, and countless others whom we must enlist in the cause of sustainability. While ambitious, the Plan is conceived as a blueprint and not a straightjacket. Like the plants we study and conserve, the Garden must adapt and adjust to changing conditions, including those that thwart our ability to realize our goals. However, the spirit of cooperation that exists in the Garden has been enhanced appreciably by our planning process, and we are resolved to plan and operate in ways that emphasize strategic decision-making, collaboration and the most effective use of human, capital and botanic resources. Our progress will be monitored through annual goal-setting and performance reviews managed by the president and senior staff. The Executive Committee will continue to serve as the Board of Trustees' planning committee, and will report no less than annually to the whole Board regarding the implementation of the Plan.

CONCLUSION

Imagine the Missouri Botanical Garden in 2014. As a result of the implementation of its Strategic Plan, the institution and the world around it are changed for the better.

In cooperation with the Royal Botanic Gardens, Kew, and a number of additional partners, the Garden has created the Checklist of Plants of the World, a global data base on all plant species, providing basic information in a highly accessible way to users around the world.

In cooperation with many academic and philanthropic partners, the Garden has posted Web pages on all 350,000 of the world's plant species as part of the Encyclopedia of Life, and contributed to the digitization of all literature about plants in ways that advance conservation, genomics, medicine, horticulture, and other fields.

The Garden has published the Flora of North America, the Flora of China, Flora Mesoamericana, Manual de las Plantas de Costa Rica, Flora of Missouri, Catalog of the Plants of Madagascar, and Moss Flora of China, which together with previous efforts means that the Garden has published comprehensive information concerning 40 percent of the world's plants.

The Garden has applied the extensive knowledge of plants it has accumulated over decades of work to help formulate practical decisions for the conservation of plants and ecosystems and achieved important conservation goals in a number of regions.

In each of the countries where we work internationally, the Garden has built a cadre of well trained, committed biologists and conservationists who are engaged in plant research, conservation, and sustainability activities.

The Garden has become a global leader in educating the public about conservation and sustainability, recognized at home and abroad for the imaginative and effective ways we link research to application in our displays and exhibits, interpretation and education programs, media messages, and operations.

Through its William L. Brown Center for Economic Botany, the Garden has become a global leader in discovering, explaining, and disseminating information about the diverse and dynamic relationships between people and plants throughout the world.

Engaging and dynamic programs in the Garden's audience-friendly facilities are attracting at least a million people a year, including growing numbers of local and national audiences.

Our Web site is prized throughout the world as an authoritative and accessible source of information about plants, the ecosystems they inhabit, and sustainable practices.

Our horticultural displays – creative, beautiful and informative – are employing sustainable practices and demonstrating ways to preserve and protect native species and avoid invasives.

Our staff, volunteer corps, and Board of Trustees uphold the Garden's standards of excellence and visitor service, and we attract and retain the talent required to maintain our first-class international botanical research operation and our complex of outstanding natural environments and learning centers.

Our balance sheet is healthy, with a significantly expanded endowment, growing membership revenue and earned income, and increased support from grants and contracts to enable us to realize our mission as fully as possible throughout the world.

By 2014, the Garden will have contributed in new and important ways to the world's storehouse of knowledge about plants, and everyone who touches the Garden – physically or electronically – will come away with a vivid understanding of the importance of plants to human lives and ways they can personally advance conservation and sustainability. Henry Shaw's vision will be vitally alive in the 21st century context, and the Garden's trustees and guardians will be confident that the institution can thrive and make significant contributions to the discovery and sharing of knowledge well into the future.

ACKNOWLEDGMENTS

The development of the Garden's strategic plan is the result of the dedication and contributions of many individuals. AEA Consulting of New York served as the Garden's consultant and provided the Garden wise counsel during the year long planning process. AEA's work included interviews with more than 80 stakeholders, a thorough review of Garden materials (financial, program, marketing, etc.), extensive financial analysis and facilitating numerous meetings involving members of the board of trustees and staff. The Executive Committee served as the strategic planning committee on behalf of the Board of Trustees. Dr. Peter Raven and the Garden's management team provided important leadership and devoted long hours to develop the plan. The year culminated with the presentation of the new strategic vision to the Board of Trustees on December 19, 2007. This bold and ambitious strategic plan, *Missouri Botanical Garden: Conservation and Sustainability 2008 – 2014* was adopted unanimously, marking an important milestone in the Garden's long and distinguished history.

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