# Introducing

## Building a Botanical Garden

*Creating a new garden is a noble effort, and one that could make a dramatic and lasting impact on a community. This project proposal is created in support of those who strive to make such a difference in their own communities.*

There is no single approach to starting a Botanical Garden. It is an iterative and evolving process— some steps may occur simultaneously, while others may take time. This toolkit is not prescriptive; rather, it is intended to be inspirational; inclusive of the major steps involved. So we invite Halifax to get creative and blaze your own trail!

# Starting a Botanical Garden?

A **botanical garden** or **botanic garden** is a garden dedicated to the collection, cultivation, preservation and display of a wide range of plants labelled with their botanical names. It may contain specialist plant collections such as cacti and other succulent plants, herb gardens, plants from particular parts of the world, and so on; there may be greenhouses, shadehouses, again with special collections such as tropical plants, alpine plants, or other exotic plants. Visitor services at a botanical garden might include tours, educational displays, art exhibitions, book rooms, open-air theatrical and musical performances, and other entertainment.

Botanical gardens are often run by universities or other scientific research organizations, and often have associated herbaria and research programmes in plant taxonomy or some other aspect of botanical science. In principle, their role is to maintain documented collections of living plants for the purposes of scientific research, conservation, display, and education, although this will depend on the resources available and the special interests pursued at each particular garden.

The origin of modern botanical gardens is generally traced to the appointment of professors of botany to the medical faculties of universities in 16th century Renaissance Italy, which also entailed the curation of a medicinal garden. However, the objectives, content, and audience of today's botanic gardens more closely resembles that of the grandiose gardens of antiquity and the educational garden of Theophrastus in the Lyceum of ancient Athens.[1]

The early concern with medicinal plants changed in the 17th century to an interest in the new plant imports from explorations outside Europe as botany gradually established its independence from medicine. In the 18th century, systems of nomenclature and classification were devised by botanists working in the herbaria and universities associated with the gardens, these systems often being displayed in the gardens as educational "order beds". With the rapid rise of European imperialism in the late 18th century, botanic gardens were established in the tropics, and economic botany became a focus with the hub at the Royal Botanic Gardens, Kew, near London.

Over the years, botanical gardens, as cultural and scientific organisations, have responded to the interests of botany and horticulture. Nowadays, most botanical gardens display a mix of the themes mentioned and more; having a strong connection with the general public, there is the opportunity to provide visitors with information relating to the environmental issues being faced at the start of the 21st century, especially those relating to plant conservation and sustainability. In recent times, the focus has been on creating an awareness of the threat to the Earth's ecosystems from human overpopulation and its consequent need for biological and physical resources. Botanical gardens provide an excellent medium for communication between the world of botanical science and the general public. Education programs can help the public develop greater environmental awareness by understanding the meaning and importance of ideas like conservation and sustainability.

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GLASSHOUSE GARDENS are used to extend the growing seasons and variety of possible plants in places where the climate is more extreme and seasonal. They allow year-round access and opening to the public.

## Getting Started

Start-up Team and Process

# A Beginners Guide

This roadmap charts the general sequence of steps required to create a Botanical garden. Seeing the big picture is useful for communicating with stakeholders, creating alignment among team members, and benchmarking progress.

The companion Business Plan provides a more detailed document to use along the way.

**Considerations at Every Step**

1. Focus on Mission, Vision, and Values
2. Outreach, Listen, and Share Information
3. Form Strong Partnerships and Build Relationships
4. Uphold the Highest Ethical Standards
5. Prioritize Diversity, Equity, and Inclusion
6. Develop Leadership
7. Emphasize Organizational, Environmental, and Social Sustainability
8. Consult with the Experts

Document your Process,

# A Garden For Every Season
# The Case for Botanical Garden

*Botanical gardens are invaluable assets to the communities they serve. Gardens, parks, and other public green spaces have always been places of respite and solitude; places where people reconnect with beauty and experience nature; places of education and discovery.*

Our world is full of extraordinary gardens that provide immeasurable benefits. Whether they are small gardens that offer access to green space in underserved communities, world-renowned repositories for botanical diversity, or outstanding examples of horticultural design, gardens are a resource worthy of our support.

We live in an era of increasing interest in the development of botanical gardens. Botanic Gardens Conservation International, the world's largest plant conservation organization, is an advocate for the global network of botanic gardens. The public, too, has shown great interest in the advancement of parks and gardens. In many cases attendance is rising, memberships are increasing, and the educational offerings of public gardens are in strong demand.

As technology and other external forces influence how people spend their time and money, gardens have an opportunity to adapt and advance their missions to meet changing needs and desires. Gardens are anything but a relic— gardens are thriving, and we have the chance to meet the challenges of our time with innovation, relevance, and excitement.

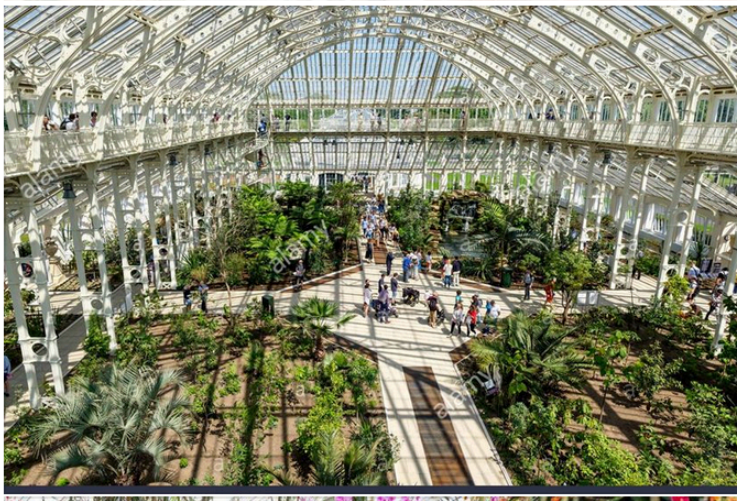
> **Gardens are leaders in environmental education, ecological awareness, horticultural technique, and design. But even as they strive to serve an ever-increasing diversity of audiences and communities, gardens will remain cherished spaces of respite and beauty.**

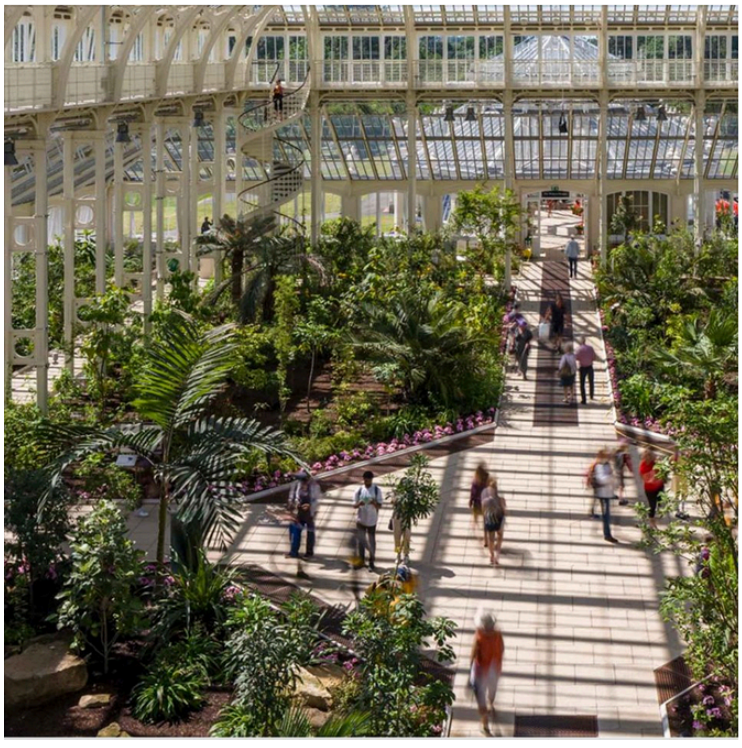
Gardens are wonderfully diverse. While larger gardens may employ career horticulturists, some small gardens are staffed entirely by dedicated volunteers. Many gardens have formal education programs, while others simply offer the experience of being in a space with living plants. Some gardens conduct innovative scientific research and work around the globe to preserve and protect plant diversity. Others tell the stories of their own local histories and preserve the legacy of their founders. Some gardens grow in response to the needs of their communities, while others lend their communities a sense of their own special character. Most Botanical gardens operate as private nonprofits or public-private partnerships, though governance models vary. Some are highly sophisticated organizations, while others are at much earlier phases of their evolution.

> **Every garden serves great purpose—to individuals, to communities, to the local and regional environment, to collective human knowledge, and to global ecology. Each garden's reason for being is a story that develops as the garden takes shape, and each story—with its challenges and bene- fits—deserves to be shared.**

# 2024 VISION PLAN

## HALIFAX BOTANICAL GARDEN





# HALIFAX BOTANICAL GARDEN
## MISSION, VISION AND VALUES

### MISSION

Halifax Botanical Garden connects people to plants, inspiring us to live in harmony with nature.

### VISION

Halifax Botanical Garden will be year-round Glass House Garden renowned for its display of nature's beauty and as a dynamic hub for plant-centred culture, learning, conservation and research.

### VALUES

- Innovation
- Diversity, collaboration and inclusiveness
- Sustainability

These objectives can be fully realized with a new botanic garden, sufficient in size, with effective governance, and programming that is created to attract visitors and revenue sources, which in turn sustains its long-term operation.

### LOCATION

Halifax Botanical Garden will be located centrally in the city on the greenhouse grounds across Sackville Street as a open all year compliment to the world class Public Garden.

### TIMELINE

Halifax Botanical Garden will be developed as a celebration of the Halifax Public Garden's 150$^{th}$ anniversary coming up in the summer of 2024.

# EXECUTIVE SUMMARY

## 2019: SETTING A FOUNDATION TO BECOME A GREAT BOTANIC GARDEN

Botanic gardens play an increasingly important role in the 21st century. They are the public institutions best positioned to provide knowledge and understanding of the world of plants and the importance of plants and healthy ecosystems to all other life on earth.

In a world where the environment, the conservation of flora and fauna, and the loss of biodiversity are major global issues, public access to science-based expertise is increasingly useful and necessary. At the same time, affective landscapes, botanic gardens provide a beneficial restorative and recreational environment. They afford an experience of beauty, inspiration and quiet repose that is greatly desired and needed, especially in urban areas. Botanic gardens are important cultural institutions, “living museums”, that stimulate, educate, inspire and provide pleasure to visitors of all ages and interests. In addition to these societal benefits, botanic gardens are significant generators of economic activity. They are venues for cultural events of interest to local and far-flung visitors.

While the need and demand for botanic garden services across North America is high, Halifax does not have a fully-functioning botanic garden. Halifax’s greenhouses lacks the public access, the gardens and the financial resources enjoyed by the vast majority of the world’s glasshouse gardens. In such straightened circumstances, Halifax Botanical Garden (HBG) concept has yet to fully realize the societal and economic benefits that botanic gardens deliver to their cities across North America.

The City of Halifax, through its recently approved city plans and highrise development, has presented HBG with the opportunity to build for the future. For 2019, the Halifax Botanical Garden will focus on foundation-setting initiatives to help position itself for the long-term future.

## GOALS FOR 2019

With no budget for 2019, HBG will take a community-wide organizing approach to improving its long-term potential through the following efforts that encompass people, programs, and platforms:

- Advancing the Vision Project with the City of Halifax and other government and community partners, with the realization of a new Consultation Process Agreement between HBG and the City of Halifax, to support the vision and long-term visioning plan for HBG.

- Organizational Readiness of HBG: enhancing organizational capacity and performance such as formalizing annual business planning, renewing HR planning and procedures, and supporting strong Board governance including policy development.

- Supporting the continuity of program delivery, in horticulture and education programs.

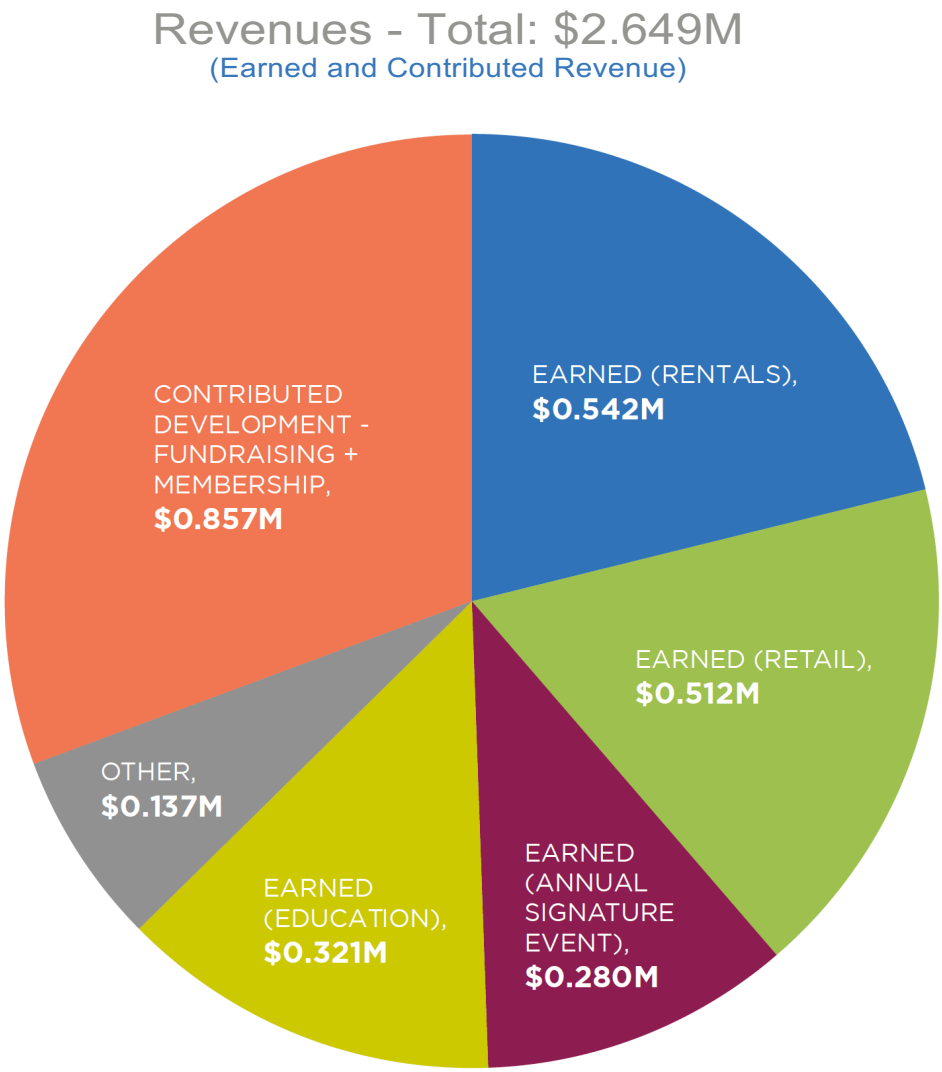
- Developing audiences through key events and social media, including piloting an annual signature event, and enhancing partnerships and accessibility.

- Furthering the support of our philanthropic and corporate community through ongoing efforts in major gifts, annual campaign, development events and membership acquisition and stewardship, in tandem with efforts to advance the expansion project.

As 2019 concludes, HBG will have the foundation in place to support the future vision of HBG, facilitated by the Expansion Project milestones planned for the coming years.

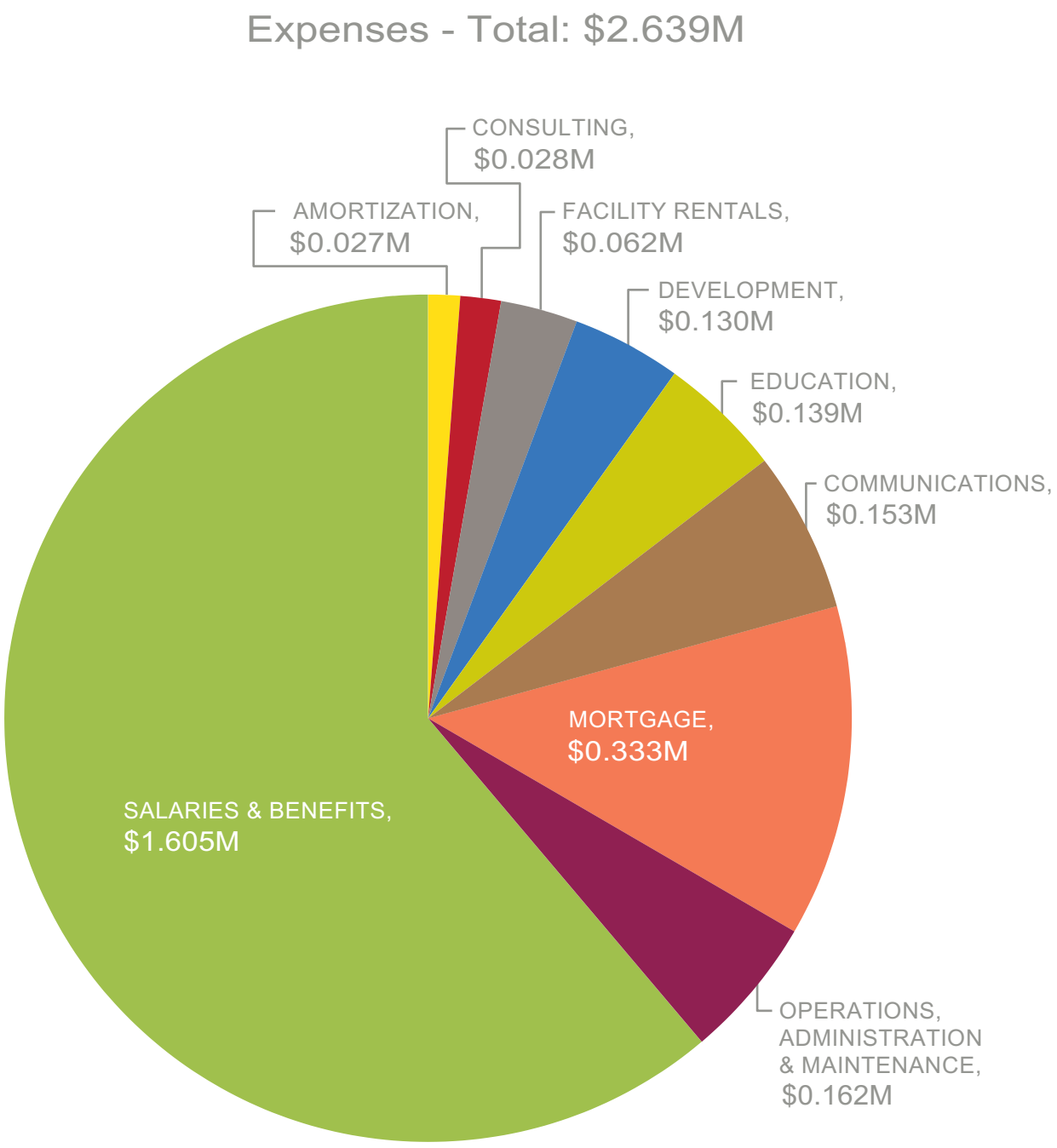
# 2024 BUDGET PROJECTIONS:

The 2024 Operating Budget is projected to be $2.649M:
Total revenue: $2.649M; total expenditures: $2.639M; and total net income: $10.704K.




Notes:

1. Total Contributed Revenues of $0.857M are comprised of Fundraising, $0.775M, and Membership, $0.082




Notes:

1. Development comprises of: Overhead: $0.022M; Events: $0.101M; and Membership: $0.007M. Mortgage represents the annual cost of the development of the property and construction of the Glasshouse Greenhouse complex.

# 2019 START-UP BUSINESS STRATEGIES

| DEPARTMENT | STRATEGIES |
|---|---|
| VISION PROJECT | Begin plans and agreement with the City of Halifax, complete with supporting implementation plan. |
| HORTICULTURE: GARDEN | Begin collections and garden management.<br><br>Enhance support capacity.<br><br>Visualize client and visitor experience through consultation.<br><br>Apply sustainability lens to horticulture portfolio. |
| HORTICULTURE: SHOP | Develop management and retail support capacity.<br><br>Develop Shop net revenue.<br><br>Enhance visitor experience; examples: merchandising, member rewards, and POS software.<br><br>Enhance HBG's commitment to sustainability by reviewing procurement with a sustainability lens. |
| EDUCATION: ADULTS | Deliver adult education programming (courses, lectures, symposia, tours) that results in increased awareness of, and participation in, key course offerings and symposia central to HBG's mandate, including sustainable and therapeutic horticulture, local food production, and local conservation projects. |
| EDUCATION: CHILDREN | Deliver children's education programming that fuels curiosity and a desire to get involved in gardening and conservation.<br><br>Increase accessibility of programs by identifying and addressing barriers to participation. |

TORONTO BOTANICAL GARDEN

| DEPARTMENT | STRATEGIES |
| --- | --- |
| EDUCATION: CONSERVATION | Drive HBG-wide environmental sustainability targets.<br><br>Contribute to the ecological restoration of Halifax's degraded ravines, with a focus on Wilket Creek.<br><br>Establish and maintain partnerships/working relationships with ecology and plant-focused scientists/ academia and indigenous communities. |
| EDUCATION: VOLUNTEERS | Ongoing recruitment, training, deployment of volunteer community.<br><br>Enhance the organization of the volunteer program with a governance model that drives operating efficiencies and organizes the community into skills and interests-based communities of practice. |
| LIBRARY | Continue researching ways in which the library will support the HBG Expansion including the focus on science and conservation. |
| COLLECTIONS POLICY; INTEPRETATION PLAN | Develop an interpretation plan, with new tools, programs and trained volunteers for ravine interpretation. |

# 2019 DEPARTMENTAL BUSINESS STRATEGIES (Cont'd)

| DEPARTMENT | STRATEGIES |
|---|---|
| DEVELOPMENT | 2019 will be a significant shift towards enhancing the level and number of gifts from the HBG donor community:<br><br>Ongoing implementation of expert Consultants' advice (Development on-site analysis).<br><br>Focus on Major Gifts and building Grants and Event Sponsorship Revenue, with emphasis on recurring gifts, and aligning strategies to support the Expansion Project.<br><br>Growing Grants revenue and sponsorship.<br><br>Increase the quality of the donor experience to impact annual giving revenue through Donations, Tributes/Bequests, Planned Giving, Hearts and Flowers campaign.<br><br>Continue to grow membership, increase the conversion of members to donors.<br><br>Sustain conservative Tributes goal in light of expansion.<br><br>Profile Planned Giving.<br><br>Refresh the case for support for the Hearts and Flowers Campaign.<br><br>Sustain donor participation for cultivation and stewardship events.<br><br>Cross-department revenue: expansion project and Campaign; begin focused conversion of rental clients to donors through marketing/post-sales.<br><br>Incorporate a sustainability lens across Development initiatives. |

TORONTO BOTANICAL GARDEN

| DEPARTMENT | STRATEGIES |
|---|---|
| COMMUNICATIONS | Build brand awareness. |
| | Audience development. |
| | Launch first art exhibition in the garden. |
| | Deliver integrated strategic counsel across HBG departments. |
| | Advance sustainability focus in communications and marketing material. |
| RENTALS | Define offerings with pricing, packages. |
| | Enhance outreach (sales and marketing) to existing and new market segments. |
| | Support cross-selling opportunities across HBG and retail community. |
| | Incorporate a sustainability lens. |
| BUSINESS ADMINISTRATION | Standardize multi-year business planning and budget planning. |
| | Enhance Governance Policies and Practices. |
| | Enhance Partnerships. |
| | Driving organizational sustainabilty-related practices and attitudes. |

# ABOUT HALIFAX BOTANICAL GARDEN

## ORGANIZATION OVERVIEW

Halifax Botanical Garden will be registered charitable organization with an Executive Director, and a six-person (including the ED) senior management team, governed by a 12-person Board of Directors. HBG has a projected annual operating budget by 2024 of under $3 million, supporting approximately 250,000 visitors annually primarily through the support of public, corporate and private donors. Starting in 2019, HBG will be undergoing a multi-year visioning project that will notably define its operating model and visitor experience.

4 x 4 Plan

Halifax Botanical Garden has been challenged to find sufficient earned and contributed revenue to deliver the Vision and define a sustainable operating model, within a four-acre garden site within four years.

By 2020 plans will be underway for the Public Garden 150 and opening of HBG's gardens with a dramatic year-round glasshouse facility square-footage to support, in its future end-state, over 1 million visitors on an annual basis.

Halifax Botanical Garden will be founded through 2019, formalized as a not-for-profit corporation and officially became the Halifax Botanical Garden in 2024, when the city will open the new year-round garden in celebration of the Public Garden's 150th. The name might also add the term WINTER GARDEN to have a positive influence on the organizational image, the marketability of the year-round public operation, services and the ability to attract donations and sponsorship. The name will also reflect the intention of creating gardens in support of the long-standing education programs goal. Perhaps more strategically, the name is both a promise and a challenge to Halifax, that our city needs a year round botanic garden.

## MEMBERSHIP & VOLUNTEERS PROJECTION

Household membership is projected to reach 2,000+ (representing approximately 2,700 individuals). This number reflects the passion Nova Scotians have for gardens in a free-admission environment. The active volunteer community will approach nearly 500 volunteer members. Significant functions such as operation of the Garden Shop and the Library, as well as Reception, will be carried out by community volunteers.

## VISITORS/ATTENDANCE PLAN

In comparing HBG to any other botanic garden or cultural attraction, it is easy to see HBG's current opportunity. The purpose of the Concept Attendance Plan is to conceive a common vision for the garden and to share and test the concept with stakeholders. The outcome of this process is to frame a preliminary vision, mission, and values statement, and to generate ideas for existing or potential site options, possible governance models, and the potential business model for the new garden.

## PROGRAMS & SERVICES

HBG will provide many programs and services, including interpretation of its gardens, guided tours, curriculum-based school programs (both on-site and off-site), a seed and cultivar library/bank, interesting and varied educational programs for adults, a lecture series, a concert series and a first-class horticultural library. Event programming will be organized for a narrowly-focused audience prepared to pay in advance for events that are understood to be about generating resources for HBG's use. "Development Events" are distinguished from the special events organized by other gardens and cultural organizations to generate revenue.

## ENVIRONMENTAL SCAN

### Beyond 2019 - (E-scan of industry trends)

Numerous new botanic gardens are springing up in North America. These start-ups have the benefit of studying the established practice of successful botanic gardens and of working with master planning firms that provide both design and business model basics. New and existing botanic gardens are realizing that their communities value them as social enterprises and that individuals will participate as visitors, members, students, volunteers and donors in the appreciation, defense and advancement of nature. Botanic gardens view the increasing public concern with climate change, environmental degradation and species loss as an opportunity to explain and fulfill their mandate. We also realize that our primary mandate of plant conservation can only be achieved if the world adopts a sustainability ethic in both the landscape and the built environment. To this end, botanic gardens collect and display appropriate and interesting plants, at the same time as they model sustainable behaviours, for purposes of public education.

Economic Impact

Increasingly, botanic gardens are analyzing the economic impact of their activities on their communities and on the tourism sector. The societal benefits of botanic gardens have always been easy to articulate. Reams of new data on economic benefit are making the botanical garden case for relevancy even more compelling. (See Richard Benfield, Central Connecticut State University, Garden Tourism, 2013).

Botanic gardens are also establishing scientific and educational institutes to further studies in conservation, biodiversity and sustainability. Proposed or newly-created botanic garden bodies include Center for Sustainable Gardening (San Francisco Botanical Garden), Center for Sustainable Landscapes (Phipps Conservatory) and Sustainable Horticulture Center (Morris Arboretum, Philadelphia). A botanic garden in Halifax will have the opportunity to aspire to a similar leadership role as it expands its garden offerings, facilities and educational and conservation programs.

# Establishing a Start-up Team and Process

*Gathering a strong start-up team is the first step on the journey toward creating a Botanical Garden. This team drives and coordinates the early phases of the start-up process, including conducting context research and creating consensus around an initial vision for what the garden will one day become.*

The team handles communications and outreach, develops stakeholder relationships, manages finances and other resources, and coordinates volunteers until formal governance and staff are in place. The start-up team must raise funds to support the planning process, while laying the groundwork for later fundraising for capital campaigns and operations.

The team should consist of early advocates and champions—people with diverse backgrounds and skill sets who are passionate about the idea, and who are willing to invest their time and expertise to transform the dream into reality. The start-up team requires both a broad collective background and the ability to achieve consensus in order to move the process forward: to raise money, acquire land, navigate bureaucracies, and negotiate relationships in the community. Individuals on this team should contribute a valuable perspective, and must commit to full participation in this crucial early development phase.

The start-up team may be an independent entity, or it may be a component or a partner of an existing organization. This team may or may not evolve into a governing body or a board of directors with fiduciary responsibility for the operations of the garden. In the beginning, the team exists to drive the visioning process, make expert early decisions, and move the process forward.

From the outset, the team must establish an operational process, determining how it will make decisions and manage communications. All members should become familiar with the entire start-up process to understand the significance and general order of the major steps involved, as well as the interconnections between them. The team should set goals and milestones for the planning process, establishing a timeline and meeting schedule to move the process along.

The start-up team must set a budget for the planning process that is tied to specific objectives. For example, they may want to hire consultants to assist with feasibility studies; strategic, master, and business planning; legal advice; or other processes. The team should research the costs associated with those services and set a reasonable budget that they can adjust along the way.

They are also responsible for funding the planning budget. They may seek planning grants or other sources of funding; they should establish protocols for soliciting donations and recording contributions and expenditures; they may need to set up a fiscal sponsorship agreement so they can accept charitable donations. Resourcefulness is key. The team should consider the role of volunteers and in-kind contributions, and determine how to best manage those resources.

# START UP TEAM TIPS

*Creating a Start-up Team*

- Other possible names for “start-up team” might include steering committee, advisory group, core team, founding team, or planning team.
- Start small (3–7 people) and consider adding people as planning progresses.
- Seek allies with strengths other than your own—a diversity of perspective, knowledge, backgrounds, skills, and networks; people who will roll up their sleeves and work well together in a team; people who are passionate about the concept; people with project management skills.
- Consider including key supporters with a substantial stake in the project, such as a major benefactor or partner (e.g., the donor of a private estate, to be transformed into a public garden); or people connected to critical players (e.g., those with ties to local government when public land is involved).

*Early Start-up Financial Management*

- For organizations that are unincorporated and/or without tax-exempt status, getting a fiscal sponsor is helpful. The sponsor can legally accept charitable donations, assist with financial management, and provide guidance and support to a young organization. Fiscal sponsor agreements should be time bound, with clear definition of roles, and an appropriate amount charged for services. Get the agreement in writing. Legal review is advisable for all contracts and written agreements.
- For start-ups that will be managing resources, with or without a fiscal sponsor, set up appropriate financial policies and practices as soon as possible. Who will approve expenditures? What checks and balances will be put in place?
- Clarify and honor donor intent for funds received for start-up.

### *Early Start-up Communications*

- Educating and building awareness, gathering ideas and feedback, building relationships with stakeholders and potential partners, and garnering help and support are the primary goals of early start-up communications.
- Based on the conceptual planning process (Section 1.03), the start-up team should agree upon a provisional name for the garden. Test it out among key stakeholders and continue to collect feedback as planning progresses. Refine it as needed until the point of incorporation.
- Determine brand components and key themes derived from conceptual planning that should be conveyed in start-up communications and early fundraising.
- Establish a common set of talking points about the proposed garden and planning process. Make sure these are consistently used by the start-up team and other advocates. Update the talking points frequently.
- Establish general communications to broad audiences, which might include a simple webpage. Set up press relations and other communication strategies for the duration of the start-up period.
- Identify tailored strategies and vehicles of communication for major stakeholders. Consider, for example, putting up a sign at the entrance, even before the garden is open, to create anticipation.
- Assign responsibilities and begin implementing tasks; evaluate results as you go; make improvements.

### *Inspiration - Pittsburgh Botanic Garden*

"Don't get too hung up on completing all of your initial processes before opening up to the public. Opening even a small initial area provides an important connection with your community which gets them excited about your project and can even encourage necessary funds. Once you open to the public you may find a need to refocus your initial efforts, maybe even rewriting something as core to your institution as your mission statement, as the Pittsburgh Botanic Garden did relatively shortly after its opening. In our case, major restoration work on our property (which was formally coal mines) meant that we had to rethink how to access the site, ultimately leading to a change in the order of development on the property. However, this opening allowed us to connect with our local community in ways that we never could have, had we remained solely in planning mode."

—Keith Kaiser, Executive Director