

UC DAVIS ARBORETUM TEN-YEAR PLAN 2002-2012

Much of the work of the Arboretum during 2001-02 was focused on planning for future growth and development. We began with an extensive self-assessment process, surveyed more than 4,000 customers, and worked with a group of campus and community leaders to identify long-range goals and objectives. We then developed a draft Ten-Year Plan, which is presented for the first time in this report. We think it creates an exciting vision for the future, in which the Arboretum serves the campus, the region and beyond as a living museum.

DRUCKER PROCESS

We used a planning process developed by Peter F. Drucker, a prominent management theorist, which applies business principles to non-profit organizations. Gary Stern, an international consultant and author of The Drucker Foundation Self-Assessment Tool Process Guide, led us through the process.

The Arboretum's long-range planning began with a meeting in June, 2001 attended by more than 70 campus and community leaders, representing a range of groups with an interest in the future of the Arboretum. The group discussed some of the Arboretum's most significant challenges and opportunities, and identified "customer groups" that should be included in the assessment process.

ENVIRONMENTAL SCAN

Following the June meeting, a team of Arboretum staff and volunteers was convened to lead the self-assessment process. This group collected information about internal and external conditions and trends that may affect future growth, such as changing demographics, environmental issues, plans for major campus growth, facilities issues, and economic conditions.

CUSTOMER RESEARCH

To learn what our visitors really want and expect from the Arboretum, and how they feel about our current performance, we conducted more than 60 in-depth interviews and ten focus groups, and surveyed more than 4,000 people through the mail, in person, and on the internet. Respondents included UC Davis faculty, students and staff, members of the Friends of the Davis Arboretum, horticulture professionals, and residents of the region. Respondents were asked how they used the Arboretum (for relaxation, for exercise, to learn about plants, for a class assignment, etc.) They were asked to rate the importance of ten Arboretum program areas, and then to rate our current performance in the same areas. We also collected demographic data on the respondents.

RESEARCH RESULTS: WHAT WE LEARNED FROM OUR CUSTOMERS

- Our campus and community are passionate about the UC Davis Arboretum: we received more than 4,000 responses to our customer survey and more than 100 campus and community representatives were active planning participants.
- Our customers are deeply appreciative of our work and their support crosses "customer group" lines: it includes students, faculty, staff, townspeople, and business and political leaders.
- The Arboretum is important to all customer groups as a place to connect with and learn about nature. It is highly valued as a place to reflect or exercise to balance the stress of a high-performance, fast-paced University environment.
- The Arboretum's problems are clearly visible to our visitors: along with the plants, they see and worry about the eroding banks, the

waterway, the run-down appearance of some areas, the lack of interpretive signs in the collection.

- There are clear and compelling expectations for the Arboretum across all customer groups: improve the appearance of the Arboretum, strengthen its value as a learning resource with

largest gaps—those where performance falls most short of expectations—are “design, open views, water quality, general beauty”, followed by “directional and educational signs, exhibits, and interpretive materials”, and “amenities for visitors such as parking, restrooms, shade areas and seating”. There was remarkable convergence across all customer groups in identifying these as the top priorities for action.



Grounds Supervisor Robert Bohn, Director of Horticulture Ellen Zagory, and Director Kathleen Socolofsky at a staff planning retreat.

interpretive labels, signs and exhibits; enhance visitor access and amenities; maintain and improve the health of the ecosystem.

- Our customers enthusiastically believe the UC Davis Arboretum has the potential to be a truly great University garden and teaching facility.

GAP ANALYSIS

One of the most useful results of the customer research was the “gap”—the difference between ratings of the importance of a program area and ratings of our current performance. This gap analysis points to the areas with the greatest perceived need for improvement. The program areas with the

PLANNING RETREAT

The self-assessment, environmental scan, and customer research provided the basis for an all-day planning retreat on December 1, 2001, attended by many of the same people who had launched the process six months earlier. Participants reviewed the Arboretum’s mission statement; determined which programs areas should be strengthened, which should be abandoned, and which need further study; identified key enhancements that would improve customer satisfaction for each customer group; and proposed a series of long-term goals for the Arboretum.

THE TEN-YEAR PLAN

Following the self-assessment process, Director Kathleen Socolofsky convened a Leadership Team of senior staff. The team met weekly over several months to expand the work of the retreat participants into a draft Ten-Year Plan, complete with goals, objectives, and cost estimates. Campus leaders’ responses to the draft Ten-Year Plan have been overwhelmingly positive.

On the following pages, the draft Ten-Year Plan is presented to our members and supporters for the first time. We look forward to your response and invite you to help us make this exciting vision a reality.

UC DAVIS ARBORETUM TEN-YEAR PLAN 2002-2012

Vision

In the year 2012, the University of California Davis Arboretum shines as a crown jewel for UC Davis and surrounding Davis and regional communities. The Arboretum joins with UC Davis to draw visitors into deep connections with the natural world, teach the irreplaceable value of plants, and convey a sense of place within the sweeping history of California's Great Central Valley. As a major outreach arm of UC Davis, the Arboretum inspires an ethic of environmental stewardship that is expressed through the work of knowledgeable staff and alumni and through the responsible actions of regional citizens at their homes and in their communities.

Mission

To be a living museum connecting people with the beauty and value of plants.

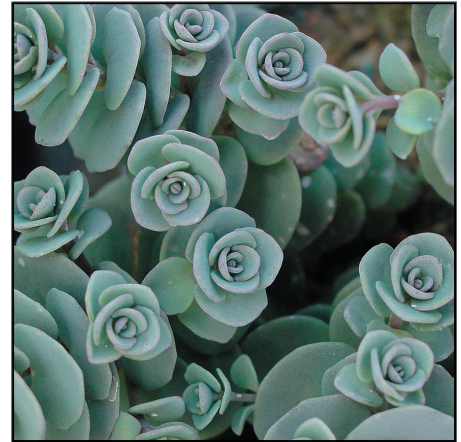
Goals and Objectives

1. **Provide an exemplary place of beauty, learning, and environmental stewardship as a UC Davis campus emblem.**
 - A. In partnership with UC Davis Grounds and Facilities, create and maintain beautiful horticultural displays and collections featuring plants native to California and others adapted to our Mediterranean climate.
 - 1) Prioritize areas of the garden that need enhancement and install attractive and appropriate plantings for display and beauty.
 - 2) Establish and maintain high standards of landscape/garden design and collection care.
 - 3) Design and install a comprehensive irrigation system in order to support new and existing plantings.
 - 4) Demonstrate ecologically-sound horticultural practices.
 - B. In partnership with UC Davis Grounds and Facilities, improve water quality and the visual beauty of the Arboretum Waterway.
 - 1) Support implementation of the waterway circulation improvement plans.
 - 2) Create and sustain plantings that achieve ecologically-effective bank stabilization and contribute to improved water quality and general appearance.
 - 3) Take the lead in identifying and addressing factors contributing to poor water quality.
 - C. Integrate Arboretum site planning with the campus Long Range Development Plan (LRDP), campus open space, and city greenbelt system, applying sound development and environmental principles.
 - 1) Confirm Arboretum boundaries, major landscape features, Arboretum headquarters site, visitor welcoming and orientation centers, visitor comfort stations, and sites of core collections.
 - 2) Design linkages to campus and city circulation patterns.
 - 3) Participate in the development of Campus "Garden Walks" that link pedestrians with the Arboretum, as outlined in the LRDP.
 - D. Develop site and infrastructure to support visitor learning, enjoyment, comfort and safety.
 - 1) Establish an Arboretum headquarters with visitor center, classrooms, volunteer and staff offices, proximity to propagation areas and parking.

- 2) Establish at least three major visitor welcoming and orientation centers (one may be linked with Arboretum headquarters) near accessible visitor parking.
- 3) Establish at least five "comfort stations" (may be linked with orientation centers) with restrooms, shaded seating, water fountains, etc.
- 4) Identify needs for event and gathering areas and develop appropriate spaces and facilities.
- 5) Address overall needs for parking and transportation.
- 6) Assess circulation patterns, accessibility, and safety issues and upgrade pedestrian and bike pathways and lighting as needed.

2. Inspire and educate visitors about the natural world and appropriate horticulture in California's Central Valley and beyond.

- A. Develop and interpret collections with a Central Valley regional focus and with plants adapted to or native to Mediterranean-climate regions.
- B. Identify and maintain strengths of existing collections to showcase and interpret plant diversity, biology, and conservation.
- C. Interpret the living collections to enhance the visitor learning experience.
 - 1) Define key educational messages with input from academic programs.
 - 2) Develop and implement a comprehensive collections and interpretive plan that is based on key educational messages.
 - a. Implement a plant accessions policy that reflects and supports the key educational messages.
 - b. Convey educational messages via an integrated program of:
 - (1) Plant identification labels.
 - (2) Interpretive signage and exhibits.
 - (3) Interpretive materials/handouts.
 - (4) Interpretive programs, including docent and school programs.
 - c. Ensure ability to update educational messages to convey most current information and research.
- D. Adopt best practices of museum education, informal science education, and visitor studies.
 - 1) Assess interpretive programs and redesign as needed.
 - 2) Provide volunteer, intern, and staff training in educational best practices.



3. Strengthen the Arboretum's museum function and scientific and academic value.

- A. Build strong partnerships with academic programs at UC Davis and regional educational institutions.
 - 1) Develop and implement an in-depth partnership with the Department of Environmental Horticulture in the arenas of research, teaching, and public service.
 - 2) Explore partnerships between the Arboretum and other academic units to strengthen the campus' teaching and research programs.
 - 3) In collaboration with academic departments, define and provide learning opportunities, from single class visits to in-depth internships and student employment.
 - 3) In collaboration with the College of Agriculture and Environmental Sciences, explore and develop partnerships with its Extension program and with area community colleges.
 - 4) Explore the potential to develop and offer a graduate program in museum studies and botanical garden management.

- B. In collaboration with academic programs, strengthen UC Davis Arboretum collections for scientific and academic purposes.
 - 1) Ensure that existing and future plantings are appropriately accessioned, mapped, and labeled.
 - 2) Develop explicit criteria for acquiring specimens that will enhance the research and academic value of the Arboretum.
 - 3) Identify collections within the Arboretum that have the most importance regionally, nationally and internationally, e.g. Shields Oak Grove collection, and strengthen for research, teaching and conservation purposes.
 - 4) Explore partnerships with the National Plant Collections Consortium, the Center for Plant Conservation, and other collaborative ventures with botanical gardens and museums.
- C. Enhance the curatorial program to support teaching, research, and collections care
 - 1) Meet contemporary standards of excellence in plant identification, nomenclature and taxonomy.
 - 1) Create and maintain an integrated relational plant records database linked to accurate collection maps.
 - 2) In collaboration with UC Davis faculty, identify and develop academic resources to make the Arboretum collections more accessible for teaching and research, e.g. web access to plant catalog, collection maps, etc.
 - 4) Document the Arboretum's curatorial and institutional history and important information regarding key plant specimens and collections.

4. Disseminate the expertise of UC Davis to the regional community and promote environmental responsibility as a major outreach arm of UC Davis.

- A. In partnership with the Dept. of Environmental Horticulture, develop a "UC Davis Center for Urban Horticulture" to advance environmentally-sound approaches to all aspects of horticulture, including gardening, landscaping, restoration, and urban forestry.
- B. Develop and implement a multi-faceted gardening and landscaping education program by partnering with and building on the strengths of other UC Davis and community groups.
 - 1) Programs to reach large regional audience, e.g. gardening column, TV show, books, etc.
 - 2) High-profile projects demonstrating environmental best practices.
 - 3) Public workshops.
 - 4) Plant introduction and sales program with local nurseries.
 - 5) Semi-annual Plant Faire.
 - 6) Marketing partnerships with related businesses.
- C. Collaborate with College of Agricultural and Environmental Sciences to communicate scientific research results related to the Arboretum's key messages to diverse audiences.
- D. Assess and enhance the Friends of the Davis Arboretum membership program as a major "friend-raising" arm to engage the region and UC Davis alumni with the Arboretum and UC Davis.
- E. In collaboration with College of Agricultural and Environmental Sciences, University Outreach, and the UC Davis Division of Education, assess potential integration of Arboretum school programs with overall UC Davis outreach to K-12.
- F. Assess and enhance the Arboretum's educational outreach programs to meet the needs of the region's culturally diverse communities.
- G. Develop and implement a comprehensive plan for Arboretum marketing and visibility.

- 1) Improve regional signage directing people to the Arboretum.
- 2) Develop and implement an "identity" program that clearly positions the Arboretum as an important outreach arm of UC Davis, e.g. logo and graphic standards, key messages, identity materials.
- 3) Publicize Arboretum programs and events in the regional media.
- 4) Upgrade and maintain the Arboretum website.
- 5) Enhance links with campus outreach and marketing departments and initiatives.
- 6) Co-market the Arboretum with the Davis Convention and Visitors Bureau and other regional marketing organizations.
- 7) Participate in existing campus and community events.
- 8) Maintain active relationships with community and civic organizations, e.g., area Chambers of Commerce, service clubs, etc.
- 9) Assess customer service practices (e.g. phone answering, on-site visitor services, weekend and holiday staffing) and upgrade as warranted.

5. Fund capital and operating needs through extensive partnerships within and beyond the university.

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| <p>A. In collaboration with campus administrators, confirm Arboretum capital and operating needs within UC Davis funding priorities.</p> <p>B. Develop a funding strategy for the Arboretum that provides for the operating and capital costs of the ten-year plan implementation.</p> <p>C. Seek additional capital and operating funds within special UC Davis fundraising initiatives, including the Comprehensive Capital Campaign, and through an Arboretum capital campaign if necessary.</p> <p>D. Create a resource development team with volunteers and staff to identify and cultivate individual donors, to ensure effective donor stewardship, and to develop a full list of donor opportunities, including naming opportunities.</p> <p>E. Develop comprehensive resource development program with government, foundations, and corporations.</p> <p>F. Develop fundraising infrastructure that connects with UC Davis financial and development systems.</p> | <p>through rolling three-year operating plans, including updates to the long-range plan.</p> <p>B. Phase in new staff positions on an ongoing basis as needed to accomplish objectives.</p> <p>C. Develop short- and long-range plans for office facilities and equipment.</p> <p>D. Assess and enhance the role of the Board of Directors of the Friends of the Davis Arboretum and Arboretum volunteer programs to support the UC Davis Arboretum's mission, goals, and ten-year plan.</p> <p>E. Invest in a comprehensive program to increase the number and impact of volunteers.</p> <p>F. Develop and implement an internal communication plan appropriate to a growing, high-performance staff and volunteer corps.</p> <p>G. Evaluate staff compensation and job classifications and make adjustments as appropriate to retain highly qualified staff.</p> <p>H. Encourage and enhance ongoing training and professional development for staff and volunteers.</p> |
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6. Build a high-performance volunteer and staff corps dedicated to leadership, teamwork, and service.

- A. Coordinate staff and volunteer work

SPECIAL THANKS

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