This plan is designed to be a living document guiding continual strategic alignment across mission, goals, longer-term investments, and annual operating plans to achieve the overarching goal of financial self-sustainability specifically by building the endowment and reducing or eliminating the draw on the Board Designated Fund. The plan for sustainability starts with strengthening current operational and leadership “systems,” and establishing or integrating new systems to build a foundation that will foster success in accomplishing the long-term goals.

Reaching Sustainability Through Engagement - Strategies:
- Nurture a commitment to Lotusland as a place of importance.
- Cultivate an inclusive community among supporters.
- Build the Lotusland Endowment.
- Develop Board leadership in fundraising.
- Mitigate the burden of the Conditional Use Permit.

Engagement Through Action: Implementation Plan

1. Guest/Member Services
Goal:
Lotusland provides concierge service to guests and members, inspiring them to return, bring friends and family, and (in time) make Lotusland a top philanthropic priority.

Milestones/Objectives:
- As part of the concierge model and “gold star” service, all people in the Lotusland organization are trained to connect guests to philanthropy for Lotusland.
- Lotusland’s data management systems are upgraded to support the highest level of service for guests and members and to integrate visitor services with development so that they can communicate and coordinate service and philanthropy.
- Create an organization-wide process whereby the entire Lotusland organization is focused on moving guests, members and donors to higher levels of engagement and support.

2. Messaging, Marketing and Communications
Goal:
Lotusland’s messaging builds clear understanding; conveys the creativity, beauty, and magic of the garden; and inspires people to visit, to join and to support.

Milestones/Objectives:
- A proactive, strategic, comprehensive, messaging plan that uses all media technologies to their fullest capacity will be developed and deployed to inspire an understanding of, and support for, Lotusland.
- Dispelling the myth that LL is financially secure and needs no additional funding is a messaging priority, (without being dull or negative) and enlightened neighbors engage as partners in preparation of future CUP efforts. This is a ‘hearts and minds’ campaign.
- All staff, trustees, volunteers and docents effectively use consistent and convincing message points to give accurate information about Lotusland’s operations, and a compelling, personal story about their experience with Lotusland.
e. Lotusland will be reaching a larger, broader, more diverse audience, especially in the local market.

3. Philanthropy – Friend Making and Fund Raising
   Goals:
   1) Lotusland’s annual revenue (earned and contributed revenue combined with minimal draw from endowment earnings) is sufficient to cover operating expenses and support organizational growth, and provide capital for infrastructure, and support growth without using Board Designated Fund reserves for annual operations.
   2) Lotusland’s endowment is ample in size – and growing – to provide sufficient support to avoid using Board Designated Fund reserves and sustain the garden in perpetuity.

   Milestones/Objectives:
   a. The Development Plan in alignment with the Strategic Plan to support increased giving from individuals, foundations and corporations.

   b. Lotusland is fully staffed and has effective technology and systems infrastructure to enable expanded development outreach (cultivation, solicitation and stewardship of donors and prospective contributors), so that Lotusland is reaching annual and long-term fundraising goals.

   c. Development collateral and marketing/campaign initiatives attract donors with clear and compelling communications about philanthropic needs and opportunities.

   d. All Lotusland employees, volunteers and Trustees understand their role in - and fully participate in - supporting a Culture of Philanthropy.

   e. An Honorary Council (to nurture friends/ambassadors/advocates of the garden and alumni trustees for lifelong engagement) support Lotusland’s strategic plan and philanthropic goals.

4. Leadership
   Goals:
   1) Board members are the leaders for Lotusland’s long-term financial sustainability.
   2) Board members have a plan for the succession of future leadership both at the Board and CEO level, and continually partner with senior staff to lead the charge in building sustainable support for Lotusland.

5. Investing in People and Facilities
   Goal:
   Lotusland’s physical assets are stewarded, maintained, enhanced and preserved at the highest level of quality excellence and for the best delivery of contemporary use.

6. Conditional Use Permit (CUP)
   Goal:
   The Conditional Use Permit (CUP) is revised to enable more people to experience the magic of Lotusland firsthand and give Lotusland more flexibility to do more public programs.