<table>
<thead>
<tr>
<th>Work modules</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
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<td>1. Establish a baseline</td>
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<td>2. Assess demographic and economic trends</td>
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<td>3. Provide support for staff engagement</td>
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<td>4. Learn from local leaders and current and potential partners</td>
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<td>5. Conduct focus groups</td>
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<td>6. Administer a short survey</td>
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<td>7. Learn from other organizations</td>
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<td>8. Establish a long-term mission and vision, and a medium-term strategy</td>
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<td>9. Define requirements for success</td>
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<td>10. Create an implementation plan</td>
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**Meetings**

- Planning Team
- Board
Many HF&G stakeholders were involved in crafting the mission, vision and institutional goals.

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<th>Stakeholders</th>
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<tr>
<td>President &amp; CEO and Chief of Education &amp; Guest Experience</td>
<td>Weekly calls</td>
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<td>Planning Team</td>
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<td>12 members of Board and staff who contributed in interviews</td>
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<td>Volunteers and stakeholders</td>
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Data Sources

- 37 interviews with members of the staff and Board; partners, funders and community leaders; and gardens and other organizations grappling with similar challenges to HF&G
- A survey of households in our database, with a 13% response rate and 2,887 responses
- 4 focus groups with members, donors and affiliates (23 total attendees)
- 11 field trips to botanical gardens and arboreta around the country
- Feedback from the Board and staff throughout meetings and facilitated discussion
- Input from the Planning Team—a mix of Board and staff members
Strategic Questions

1. What should be the mission and vision of Holden Forests & Gardens to guide the organization going forward?

2. As a regional environmental and cultural resource, how can we deliver the greatest possible value to residents of Cleveland and of Northeast Ohio over the next several years?
   • What partnerships will we need to deliver this value effectively and how will we get a seat at those tables?

3. What do we need to put in place operationally and in our governance structure to deliver this value?
Key Learnings & Opportunities

HF&G has the capabilities to build on its strengths to increase its impact, audience, reputation and financial position

• HF&G’s campuses are important places of learning, rejuvenation and beauty for many people
• Since the combining, HF&G has been viewed by community groups as insular and not well connected to the community
• The staff, Board, volunteer and visitor bases are not demographically reflective of the wider community

The research made clear the high volume of exciting opportunities to:

• Attract new visitors and supporters by raising awareness of HF&G
• Elevate the horticulture and guest experience on both campuses
• Become an organization that welcomes the wider community
• Make a true environmental impact through HF&G’s own organizational practices and the inspiration of others
Mission
Holden Forests & Gardens connects people with the wonder, beauty, and value of trees and plants, to inspire action for healthy communities

Vision
All communities transformed into vibrant places where trees, plants, and people thrive
5-Year Institutional Goals

1. Build a more engaged, connected, collaborative community presence

2. Deliver a visitor experience that inspires wonder and highlights the beauty and value of trees and plants

3. Catalyze action and model solutions for environmental stewardship and climate change

4. Increase diversity, equity, accessibility and inclusiveness at every level within HF&G

5. Consistently achieve sustainable financial results that enable growth and capital investment
What do we hope HF&G will look like in five years?

Well known in and deeply connected to the community

Financially healthy, with a balanced budget

A diverse organization that is welcoming to all

Operating world class, environmentally conscious campuses
What do we hope to observe in the world in five years?

- Communities are healthier and more vibrant as a result of HF&G’s programming
- Communities are following paths modeled by HF&G and its partners to have a positive environmental impact
- Those who come to HF&G’s campuses and programs leave knowledgeable and inspired to act
- Plants and trees are plentiful and resilient to a changing environment
Goal 1 Strategic Initiatives
Goal Owner: Joel Alpern, Chief of Education & Guest Experience / Deputy Director

1. Build a more engaged, connected, collaborative community presence

A. Adopt a philosophy on our role in the community and what assets we bring to partnerships
B. Define and grow relationships with key community groups and influencers, specifically groups in HF&G’s focus communities
C. Through a branding and outreach campaign and related efforts, position HF&G as a leader, expert, and destination of choice in the community
D. Assess HF&G’s institutional “body language” and identify ways its campuses and programs can be more appealing and accessible to the community
E. Distill HF&G’s research into digestible, accessible insights and disseminate it widely through HF&G’s media channels
F. Develop, pilot, and implement educational programs serving underrepresented audiences
Goal 1: build a more engaged, connected, collaborative community presence

Aspirational headlines in 2024

- “Regional public schools in Northeast Ohio have initiated science classes that include regular streaming with HF&G staff”
- “Thanks to HF&G, Cleveland voted the most plant knowledgeable city in the country”

Metrics for success

- Increase in # of meaningful community partnerships
- # of mission-centered media stories published
- % of BIPOC in attendance and program participation
Goal 2 Strategic Initiatives
Goal Owner: Caroline Tait, Vice President, Horticulture & Collections

2. Deliver a visitor experience that inspires wonder and highlights the beauty and value of trees and plants

A. For each HF&G campus, specifically define the value proposition; develop and execute a plan to maximize the value HF&G delivers to visitors
B. Develop an integrated plan for exhibitions, events and seasonal displays
C. Develop a master site plan for HF&G’s campuses and facilities
D. Develop and execute a garden and landscape design protocol to ensure ongoing excellence in new and existing gardens
E. Develop and execute a collections master plan to elevate the visitor experience in alignment with the mission
Goal 2: deliver a visitor experience that inspires wonder and highlights the beauty and value of trees and plants

Aspirational headlines in 2024
- “Cleveland votes HF&G destination of choice”
- “Most families in Northeast Ohio cite HF&G as igniting their love of nature”

Metrics for success
- Increase in attendance
- High visitor satisfaction rating, per post-visit surveys
- High “learned something new” rating, per post-visit surveys
Goal 3 Strategic Initiatives
Goal Owner: David Burke, Vice President, Science & Conservation

3. Catalyze action and model solutions for environmental stewardship and climate change

A. Implement actions that advance progress in environmental sustainability using the APGA Sustainability Index and the Phipps Climate Change Toolkit
B. Initiate actions that model good environmental stewardship through organizational programs and facilities management
C. Through education and other channels, engage new audiences and inspire them to become environmental stewards
D. Use HF&G’s collections to advance scientific research on the value of trees and plants
E. Conduct research to advance understanding of ecological and evolutionary climate impacts
F. Generate new knowledge and increase efficacy of environmental stewardship practices
G. Increase understanding of the factors that maintain or increase biodiversity
Goal 3: catalyze action and model solutions for environmental stewardship and climate change

Aspirational headlines in 2024

- “HF&G is a leader in educating Northeast Ohio to use the best sustainability practices”
- “HF&G delivers innovative research saving the Maple Tree from the Asian Longhorn Beetle”

Metrics for success

- Meet or exceed x% of Phipps Climate Toolkit sustainability indices by FY24
- # of scientific papers published, presentations given, and # of grant awards
- Increase in # of research- and conservation-focused media stories published
Goal 4 Strategic Initiatives
Goal Owner: Jill Koski, President and CEO

4. Increase diversity, equity, accessibility and inclusiveness (DEAI) at every level within HF&G

A. Conduct internal audit and annual staff survey to identify DEAI priorities and to develop a workplan to advance DEAI commitment at HF&G

B. Develop and facilitate staff engagement and education opportunities to increase fluency in DEAI topics and foster a culture of inclusiveness

C. Implement practices to attract, develop, and retain an increased number of staff of color and other underrepresented groups at all levels of the organization

D. Develop a board recruitment strategy to welcome more people of color and other underrepresented groups to the Board of Directors
Goal 4: increase diversity, equity, accessibility and inclusiveness (DEAI) at every level within HF&G

Aspirational headlines in 2024
- “HF&G’s growing and diverse membership ... has found engaging experiences, health benefits, and beauty on the two unique campuses”
- "HF&G brings diverse voices to the table in the discussion of natural resources and development"

Metrics for success
- # of BIPOC representation on Board of Directors
- Increased % of BIPOC representation within staff
Goal 5 Strategic Initiatives
Goal Owner: Kathy Heflin, Chief Financial Officer / Deputy Director

5. Consistently achieve sustainable financial results that enable growth and capital investment

A. Achieve a balanced budget by FY22
B. Achieve an annual growth rate of 3 – 5% on contributed revenue by the end of FY24
C. Achieve an annual growth rate of 3 – 5% on earned revenue by the end of FY24
D. Implement policies that create a staff wide culture of financial discipline
E. Build and execute a capital maintenance and improvements schedule
F. Build a comprehensive fundraising program to support a future campaign
G. Evaluate HF&G’s strategic assets to determine mission alignment and appropriate long-term management
Goal 5: Consistently achieve sustainable financial results that enable growth and capital investment

Aspirational headlines in 2024
- “HF&G has surpassed all expectations this writer had when he witnessed the combination of Cleveland Botanical Garden and Holden Arboretum 14 years ago”

Metrics for success
- Consistently achieve a net operating surplus
- Achieve 3-5% growth rate on earned and contributed revenue by FY24
- Position all assets for long-term sustainability
Holden Forests & Gardens

**Our mission:** Holden Forests & Gardens connects people with the wonder, beauty, and value of trees and plants, to inspire action for healthy communities.

**Our Vision:** All communities transformed into vibrant places where trees, plants, and people thrive.