MANAGING
RESOURCES

Planning for Small Public Gardens

Missouri Botanical Garden

by Patricia E. Rich

It is not unusual to hear that planning is for big public gardens, those with staff and time to devote to it. Large gardens with a lot of resources need to plan how to use them. Why, with resources scarce at the outset, should a small public garden spend some of its valuable time, money and energy in a planning process when there are so many other things to do, not enough time to do them, and not enough staff to do everything that should be done? Besides, with a small staff, everyone talks to everyone else with some frequency . . . so why the need for formal planning?

The essential purpose of planning is to make sure that a garden knows where it is going and how it is going to get there. It is a way to make certain that its resources, scarce or not, are used in the best ways. It is a way to make certain that the entire staff—whether it be three people or 10 or 20—have the same vision as the leadership. Public gardens, particularly small ones, cannot be all things to all people, nor should they be. A plan provides the direction for the future so that everyone understands what the garden is all about. Decisions can be made on the basis of that direction rather than on the expediency of the moment.

A plan becomes a measuring stick, an evaluation tool against which progress can be noted and accomplishment acknowledged. The planning process is one in which communication among various components of the garden is enhanced and creativity fostered by having different viewpoints and minds working on garden issues and problems.

Planning has fostered many buzzwords . . . short-term, long-range, strategic. Definitions are fuzzy at best, and different authors use the terms in different ways.

One dimension of a plan is time. Will the plan be for one year, two or five? Short-term and long-range are often defined by the time frame for which the plan is written. While short-term may be a year or two, long-range is more often three to five years. The time frame depends on the organization, its history, what is "comfortable" considering its resources.

A short-term plan, for a year or two, may be what is needed in order for a garden to get its "feet on the ground," to add a sense of organization to what is currently happening. This may also be the way to set in motion addressing large issues; for example, those of funding or physical development, that are often put off in the press of day-to-day needs.

Another dimension of a plan is what is considered in developing it. For some, a long-range plan consists of taking current programs and activities and planning them for the agreed upon length of time, perhaps incorporating growth, but not necessarily variables other than those concerning the garden itself. For example, if a program grows, are there physical facilities to handle it?

A strategic plan takes into consideration, in addition to the internal workings of the organization, external trends, competition and an understanding of the market in which the public garden operates. A plan with this basis works to assure that not only does the garden know where it is going, but that it also knows how it fits into its local environment.

For a small public garden that wants to prosper and has not used a planning process, a short-term plan may be the

best way to start. In the long run, a garden of any size wants to work toward strategic planning as it is an important management tool, but that is not necessarily the most appropriate way to start.

How does a small garden begin a planning process? There is no one way to plan, no-off-the-shelf kit. Each public garden needs to tailor the process to its own needs, staff, board and style.

There are, however, several factors that all planning processes need to have. First and foremost is that top management, and without question the director, must be committed to a planning process and to using the plan. Everyone involved with the garden must understand the purpose of planning, and as many levels of the organization as possible should be involved in the process. In a small public garden this may mean all professional staff, with board involvement as appropriate. Staff involved must be given the time to work on the plan and the plan must be written, with some standardization if parts of it are written by separate staff members.

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A small public garden begins its planning process with the director's decision that planning is an important management tool and that time, energy and money will be devoted to it. In a small public garden, the person devoting most of the time and energy will be the director. The board and staff must also understand its importance and the commitment that is being made. While sometimes this is not a problem, it can be, and the director must be prepared to articulate the reasons for doing it.

The first step is often a lengthy meeting, one or two days, during which someone (often a consultant) leads the group in a structured discussion. The discussion will focus on the garden's mission or purpose, its goals and objectives, its strengths and weaknesses and on identifying issues and areas that need further work. This is a tremendous amount of material and may well take more than one session. Most often the consultant will have spent time studying the organization, identifying areas for discussion and developing the planning session to address those issues that need attention. A consultant can also determine the kind of written plan that is most appropriate for a particular garden's situation.

This first meeting or series of meetings is most often best handled by an outside consultant particularly if the director has not been involved in planning or if the issues are such that a neutral party would be helpful. An outside person has no vested interest in the garden and can be objective, ask questions that a staff member might be uncomfortable asking, and can summarize the information while making certain that all viewpoints are heard. Once the process is begun, if the director is comfortable leading these meetings, then a consultant may no longer be necessary.

Greg Armstrong, Director of the University of Wisconsin Arboretum (staff of 15), used this method to begin. The consultant he hired helped devise the planning program and conduct an initial retreat. Armstrong will lead a second session—a little more than a year and a half later—himself. His first session included his board's Arboretum Committee and his professional staff. The end result was a planning document consisting of a list of activities perceived as priorities, in order, with dates for completion and responsibilities assigned. As he says, "It really is a 'plan for planning' and contains eight items that we needed to work on." Included are such diverse items as "develop a biotic master plan," and "develop a comprehensive funding plan." A list of priority items such as Armstrong's is often a significant first step in developing the programmatic and administrative underpinnings that a small public garden needs. Plans need not be fancy; the important thing is to start. Armstrong has become convinced that planning is essential. As he put it, "That's what administration is all about."

Richard H. Daley, Executive Director of the Massachusetts Horticultural Society (MHS), had worked at the Missouri

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Patricia Rich and Donna MacBride, Development Assistant, are shown in a planning meeting.

Botanical Garden and participated in its planning process before assuming his current position. He took a process designed for 20 departments and 200 employees and simplified it for a public horticultural institution with five departments and 10 employees. He began the process by writing a plan for the MHS library which at the time was without a librarian. After an initial meeting, he asked each professional on the staff to write a comparable plan for his or her department. He runs the meetings at MHS and includes his department heads. He finds it a way to bring about a creative atmosphere and for the department heads to challenge each other to be creative. He also finds having a plan a big help in judging opportunities as they come; it has given him reason to accept or reject proposed activities.

Both Armstrong and Daley use a format similar to the Missouri Botanical Garden's, stating goals (accomplishments that support the mission) and writing objectives (measurable results with a time frame and responsibility assigned) for each goal. While Armstrong's is written in outline form and Daley's is a complete document, both serve the same purpose for their internal organizations. Daley, who has now been through three planning cycles at MHS, finds that he changes the format some each year and that, too, is appropriate.

As stated earlier, there is no one way to put a plan to paper. The important thing is to put it to paper so that it can be used, referred to, handed out. Daley uses his with new board members so that they can quickly learn about the many and varied activities at the society. Daley also uses his with potential funders, particularly corporate ones, who are familiar with planning as a management tool.

One thing that is important to note is that while it is imperative to put the plan to paper, the process is as important. During the process each staff person involved is made to think ahead, and hopefully, creatively, about his or her area. It is a good opportunity for a director to learn how his or her staff think about issues and programs, strengths and weaknesses of the staff, and how his or her leadership and guidance can best be used.

While planning gives direction and help, be aware that there are obstacles and traps. The first may be that the garden's board sees no reason to spend staff time on it or some staff may consider it a true waste of time. For these reasons, the director must be committed to the process and able to articulate the benefits of planning to both board and staff. For the board, planning is a sign of a well-managed organization where the resources of time, money and staff are used to their best advantages. For staff members, planning can be a way to manage their programs and departments and make a case for their share of resources. In a small garden where resources may be scarce, the process can be confrontational in that difficult decisions may have to be made about resources. Planning can be a rational way to make those decisions.

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Planning does not necessarily solve problems. More likely, planning will identify problems and issues, but it also establishes a framework for addressing problems and formulating solutions.

With the planning process there are some universals for a small garden. First, start small. Pages and pages of plans and fancy planning systems just aren't necessary. Remember to involve as many people as possible. With a small staff, err on the side of all professional staff rather than one or two—or, worse yet, the director or the consultant, writing the entire plan. The plan, once written, is not carved in stone. Plans should be subject to change if the cause is strong enough, but not by whim. Planning should not be tacked on as an added chore; it needs to be an integral part of the director's leadership and administrative style. The plan needs to be used as a guide, not put on a shelf and looked at once a year. It is a working document developed to keep activities focused and on track.

In a large garden, planning does become more complicated. Usually there are more departments, and more diverse activities are taking place. The person in charge may be someone other than the director, someone on staff with an institutional perspective, but with the full support of the director. Because a plan for a large garden is usually long, a summary version may be very helpful for the board and others. At the Missouri Botanical Garden, the summary plan is attached to many proposals for funding and used as a public relations tool for those who need to know about the Garden's activities in depth. It is also used with new staff so that they can gain a quick understanding of the variety and diversity of programs. In a garden with a large staff, the planning process also serves to educate the "second tier" of management so that a group of managers knows the full scope and range of the garden's activities. It can also serve to foster interdepartmental cooperation among the managers when, in fact, they may do very little together and may rarely even see each other—not often the case in a small garden.

Perhaps the real key to instituting a planning process in a small garden, or a large one for that matter, is patience. It takes years to institutionalize the process and it must be recognized that the process will be continually evolving. Planning is not something that is done and then it is finished; it is a management tool that should be used on a continual basis for directing the garden, making decisions, evaluating programs and reaching for the future. Good planning is just good management.

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