



Business Planning & Management Attribute



Garden Workbook:



**Climate &
Sustainability
Alliance**

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Introduction

The Business Planning & Management attribute focuses on how to sustain a garden financially, be good environmental stewards, and promote a positive brand for your garden. An effective business plan needs a strategic approach that assures that the values and mission of your garden align with profitable new growth. For most public gardens, financial strategies are paramount in planning their futures. These strategies can be integrated into strategic plans, but can also be far more detailed than is usual in a strategic plan. An institution’s values and mission will help guide financial strategies focused on fundraising, earned revenue, membership, or on the financial impact of capital projects.

Good strategic financial planning is focused on strategy, vision, and priorities for the future. A key element of financial strategic planning is the identification and framing of critical issues. An organization should examine where it currently is strategically positioned, how it compares to others in its sphere, and what is on the horizon. The first step is framing the right questions and determining what needs to be answered in order to establish financial strategic direction.

This document lists the goals and key performance indicators that have been identified as standards for gardens to better address this attribute in their policy and practice. Please refer to this document as a workbook for what items gardens should try to prioritize (as it makes sense for your gardens needs).

United Nations Sustainable Development Goals

The Public Gardens Sustainability Index is intended to share examples of how gardens are contributing to specific SDG goals and to inspire gardens to advance their own garden programs to further the mission of their institution while connecting to local, national, and global sustainability efforts. This Index is a first step guide on how to “get started” with implementing the Sustainable Development Goals (SDGs) from 2015. It aims to help gardens of all sizes and governance models understand the SDG Agenda, to start an inclusive dialogue on SDG implementation, and to prepare SDG-based local or national development strategies (or align existing plans and strategies with the goals).



As many countries move to more efficient and less energy-intensive industries, their emissions of carbon dioxide per unit of manufacturing value added are generally declining. Such promising trends are not reflected in the global emissions intensity level, however, since a significant share of global manufacturing value added has moved to countries with generally higher intensity levels.



Business Goal 1: Implement plans and policies to integrate sustainability into financial planning, investments (i.e. socially responsible investment options), employee saving plans (401k), and business management decisions.

Key Performance Indicator (KPI)

- a. Garden commits to divestment from fossil fuel dependent services, practices, and activities.
- b. Garden RFPs/contracts are sent to Minority Business Enterprises (MBE) and Women-Owned Business Enterprises (WBE) to diversify portfolio and offer equal economic opportunities.
- c. Garden's board of directors/trustees support sustainability initiatives. .

Outcomes

- a. Garden divests from coal, oil, and gas including non-gas fueled equipment and transportation and invests in fossil free options, invests in renewable energy, no longer sponsors/partners/spends any of its budget on companies listed on the 200 largest holders of fossil fuel reserves, divests from the top 50 companies that own coal-fired power plants, banking/credit cards are not associated with conventional mega-banks that invest in fossil fuels, invests in green loan programs, and divests from unsustainable and harmful agricultural/livestock production.
- b. Garden has a percentage of RFPs/contracts with MBE/WBE.
- c. Garden board of directors/trustees contribute financially to sustainability projects/programs, cultivate and solicit donors for the purposes of sustainability projects/programs, or use their personal networks and influence to provide/connect garden to resources and peers for sustainability initiatives.

Suggested Strategies



Plan for contingencies; prepare budgets for best and worst case scenarios. Begin creating a financial reserve as soon as possible, a "rainy day fund." A typical target for many nonprofits is to maintain at least 6 months of operating budget in reserves (Business.1.a).



Conduct a GHG annual emissions analysis by metric tonnes CO₂e (CO₂ equivalent), for example measurements include direct GHG emissions, indirect GHG emissions, GHG emissions from water supply and treatment, GHG emissions from energy supply and use, and GHG emissions from employee commuting (Business.1.a).



Regularly review operating expenses to ensure purchases and maintenance demonstrate sustainable business practices. Evaluate maintenance requirements on a regular basis in addition to initial capital requirements to determine cost for restoration, retrofitting, design, etc. (Business.1.a).



Business Goal 1: Implement plans and policies to integrate sustainability into financial planning, investments (i.e. socially responsible investment options), employee saving plans (401k), and business management decisions.

Suggested Strategies Continued



Evaluate financial viability of both the initial expense and the lifetime costs/benefits for all materials and construction projects (Business.1.a).



Develop and implement stakeholder specific communications plans to report regularly on your garden's performance and progress in financial sustainability aspects relevant to each stakeholder group. This should include your board if your garden has one, especially if connections to board members have pledged investments. Commit to discussing development progress at every board meeting (Business.1.c).



Implement a business model where all indoor and outdoor sales transactions from outsourced or external companies (catering companies for events, café, restaurant, etc.) are not given autonomy for all business decisions. Decide what materials and food are used, purchased, and sold throughout your garden. For example, if your garden advocates sustainable agriculture, health and nutrition, and sustainable waste management, evaluate whether your restaurant and café offer guests food and drinks that are unhealthy (soda), materials (plastic, Styrofoam, etc.) that are unsustainable, and waste streams with no recycling option (Business.1.b).



Consider your operational norms supplier chain and try to include a percentage of MBEs (Certified Minority Business Enterprise), WBEs (Certified Women's Business Enterprise) and businesses that are transparent and certified in sustainable best practices (Business.1.c).



Business Goal 2: Address both short-term and long-term sustainability within funding sources.

Key Performance Indicator (KPI)

a. Garden develops multiple sources and objectives to fund sustainability focused programmatic and operational needs.

Outcomes

a. Garden financial plans include multiple revenue streams and separates objectives focused on sustainability in operations, earned revenue, development, and capital.

Suggested Strategies



Implement a targeted donor solicitation campaign that focuses on the programmatic areas/assets your garden wants to improve. Make appeals to previous and new donors about programs and projects that your garden envisions will give you more exposure and be a beacon for best sustainable business practices. Be transparent with the public, members, and donors about how an action, for example, building a state of the art green roof, could provide more income in the long run. It may lead to a stronger connection with your community, a partnership with other businesses, and save you money (Business.2.a).



Garden program leaders should identify like-minded organizations that may serve as partners in program design and delivery. Gardens can leverage their impact by collaborating with institutions in ways that achieve mission objectives for all partners. Among other benefits, partners can contribute expertise, equipment or facilities, financial resources, and access to diverse audiences. Partners can include nonprofits, government agencies, educational institutions, and business entities (Business.2.a).



Business Goal 3: Garden commits to triple bottom line as a standard for measuring, reporting, and evaluating financial and business management decisions.

Key Performance Indicator (KPI)

- a. Garden performs (internally or externally) a cost-benefit analysis and ROI (Return on Investment) using the triple bottom line concept for internal operations and business management decisions factoring in externalities.
- b. Garden standardizes project/program budget request template for entire workforce to include environmental and social components factored into overall cost (including KPIs and hidden costs).
- c. Garden uses the triple bottom line framework when deciding on discontinuing or agreeing to new long-term and finite project/program investments.
- d. Garden tracks and evaluates social and financial viability of different membership types and fee-based events.
- e. Garden uses social and environmental business performance assessment tools.
- f. Garden plant procurement/contract/policy with others specify ethical and transparent processes for acquiring plants/genetic material including research accreditation, provenance, distribution rights, and commercialization.
- g. Garden is transparent with its business operations, management practices, and partnerships.

Outcomes

- a. Garden focuses analysis on products/materials from regional sources, food supply chain, future plans for new/old green infrastructure, program related investments, insurance, planned expansion, operations/construction costs, number/acres of garden of natural areas, and partnerships with external institutions.
- b. Standardization occurs now or in the future, if appropriate for the garden.
- c. Garden prioritizes/categorizes financial resource allocation for new projects based on mission and strategic plan, regularly reviews/tracks money on and off site, analyzes membership demographics/attendance for events, reports progress on program related investments (budget, time, staff, volunteers, participants).
- d. Track participants in events/programs per year, financial comparison of membership types paying fees at entrance, visitation numbers/demographics when there is no gate fee, visitation numbers/demographics for holidays/special events with no gate fee.
- e. Could include the B Impact Assessment, Association Benchmarking, IMPLAN, Lifecycle Cost Analysis, EPA Energy Star/WaterSense, Triple Bottom Line Tool, etc.
- f. Garden understands that there are laws and ethical considerations and conservation staff have complied and been transparent about their practices.
- g. Garden shares publicly yearly financial/membership reports, has advocacy policy that clearly states how it makes decisions to support external issues, and has business plan updated/reviewed yearly, Garden also determines if partners, donors, sponsors, or investors meet certain standards of transparency, accountability, and performance that align with mission, values, and goals (donor solicitation policy for accepting funds and cultivating donor relations) and invests in sustainable certification programs, chains, and products.



Business Goal 3: Garden commits to triple bottom line as a standard for measuring, reporting, and evaluating financial and business management decisions.

Suggested Strategies



Evaluate the garden’s sustainability performance/business plan on an annual basis to ensure that it is relevant. Consistently input financial outcomes to benchmark and understand the business performance of your garden. Use tools and online resources like the Triple Bottom Line Tool, Global Reporting Initiative (GRI), B-Impact Assessment to assess performance. These will give your garden a greater understanding of key business drivers. The GRI offers a few helpful metrics for measuring and reporting your environmental triple bottom line including renewable energy use/consumption, recycling, water use, and emissions (Business.3.a).



Adopt a regular business plan review process, cycle, and metrics to evaluate progress with respect to financial, environmental, and social sustainability. Annually review and evaluate contracts you have with external businesses, particularly as you acquire new land and add facilities (consider the number of years outlined in these contracts and weigh them against industry standards). Ensure monthly reforecasting. The flexibility to re-forecast and revise processes is important, especially in today’s market conditions. Frequent re-forecasting continually gauges’ garden performance to crucial aspects (Business.3.b and 3.c).



Standardize budgeting requests and forms for all departments ensuring it is aligned with what leadership staff and your board expect. This should include budget priorities and externalities (e.g., products from distant sources/abroad) (Business.3.b).

Strategy
In Action

The St. Louis Green Business Challenge was launched in 2010 by the St. Louis Regional Chamber of Commerce working with the Missouri Botanical Garden. The Garden continues to deliver the program today with the Chamber's continued support as a sponsor. The Challenge delivers "triple-bottom" line results (financial, social, and environmental) to businesses of all types and sizes across the St. Louis region. The Challenge supports integration of sustainability measures into the kinds of everyday operational practices common to every business. Participants identify and adapt the strategies that improve financial performance and engage employees in voluntary measures to reduce environmental impacts. To date, 194 companies representing more than 150,000 employees have "taken the Challenge." Ongoing evolution of program tools and services meet the needs of current and new participants, contributing to a strong continuity in the professional network the Challenge has established. Over 40% of companies have participated in the Challenge for three or more years, with 13 companies engaged through all eight program years.



Business Goal 3: Garden commits to triple bottom line as a standard for measuring, reporting, and evaluating financial and business management decisions.

Suggested Strategies Continued



Monitor the business performance of products, and those of suppliers, to develop better sustainable practices and invest in more innovative technologies and services. Supply chains for plant material, food products, clothing/gift shop items, and garden equipment such as vehicles and tools to maintain should be reviewed monthly. As a best practice identify more fuel efficient and less reliant fossil fuel products and services (Business.3.d).



Raise public awareness: As a garden committed to conservation, you can also help to increase public awareness about the efforts that local businesses are making to operate sustainably. Purchasing materials, products, equipment, and supplies from sustainably certified sources can help to spread the word about the businesses that have committed to being green. The more that the public knows, the more educated they become about sustainability issues. They can then choose between businesses that are aligned with their values and those that aren't.

Be open and transparent in communicating business performance, including annual public environmental and social reports on garden projects, operations, and activities. Anticipate, acknowledge, and respond to community concerns, aspirations, and values regarding financial business decisions through social media, your online website, email, or magazine/newsletter. (Climate.3.f).



The strategy behind the North Carolina Arboretum's economic development efforts is place-based: It seeks to utilize the region's unique assets to build elite research clusters. The Bent Creek Institute works to leverage the region's unique biodiversity, while the National Oceanic and Atmospheric Administration's National Climatic Data Center has the potential to anchor Asheville as the center of the country's climatic research operations. Both efforts are young and the full extent of their economic impact on the region will not be apparent for some time. However, by building an infrastructure through which the region can leverage its assets, the Arboretum is taking an active role in setting Southern Appalachia's economic course. Located on-site at the North Carolina Arboretum, Bent Creek Institute, Inc. is a nonprofit affiliate of the Arboretum working in tandem with the Arboretum's Bent Creek Germplasm Repository. Bent Creek is dedicated to the economic development of the western North Carolina region, through the creation of complementary partnerships to share knowledge and resources that utilize the region's unique plant biodiversity for the advancement of biotechnology.



Communicate to the public any awards or certifications you've achieved where you took extra steps and spent more money to demonstrate your commitment to sustainability (e.g., World Architecture News award, LEED certified, etc.) (Business.3.e).





Business Goal 3: Garden commits to triple bottom line as a standard for measuring, reporting, and evaluating financial and business management decisions.

Suggested Strategies Continued



Gardens that are on city owned property can develop a partnership with their city/municipality in order to expand operational facilities for programs, acquire land, and implement infrastructure that fulfills your vision and mission, but also enhances the profile of the city when it comes to achieving sustainable initiatives and being perceived as a "green city." Examples include a living building challenge or innovative green infrastructure that makes your garden both a local and national tourist destination but also a leader in sustainability that can be emulated locally (Business.3.g).



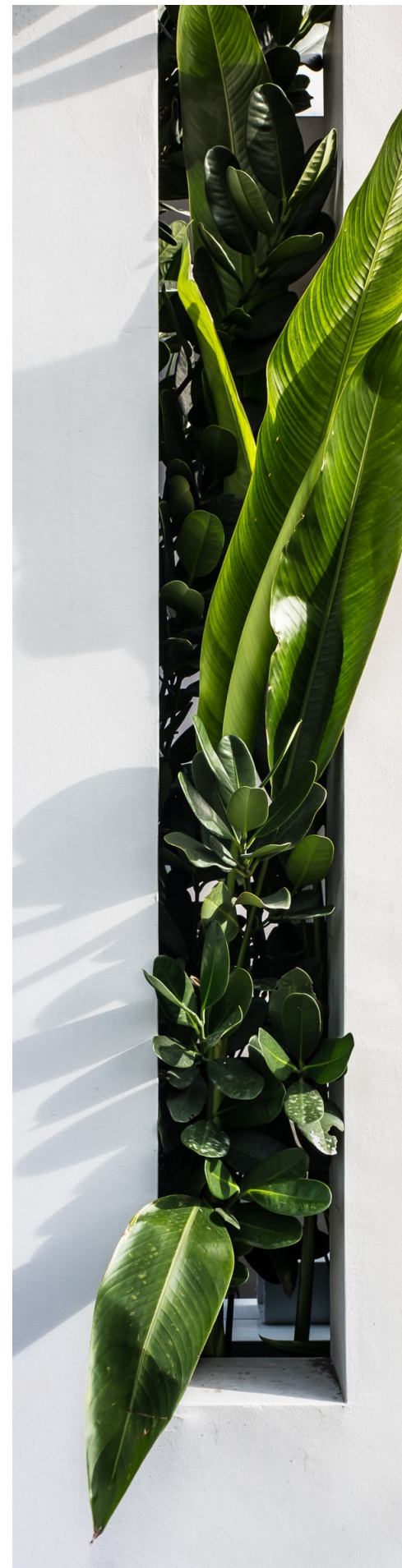
Communicate to city officials and local government agencies your future business plan and how they might be able to assist in funding. These could be future projects that are mutually beneficial. The city may be willing to put more money into a project in order to achieve a certain designation or receive recognition (Business.3.g).



The garden needs to consider physical, socioeconomic, and cultural barriers. Accessibility by public transportation, for example, may help the garden to reach audiences without access to private vehicles. Gardens can work with local government officials and apply for permits to install signage with mileage distance to garden near key bus stops, train stops, or bike paths. This can help further market and expose your garden to surrounding communities. Implement a plan to make your garden more accessible and inclusive by working with the city or other stakeholders to see if there are ways to connect garden walking paths/bike paths to other existing infrastructure (See Bartram's Garden Case Study in Goals in Action). (Business.3.g).



In March 2017, the Board of the John Bartram Association for Bartaram's Garden approved River Garden Vision 2025, an ambitious strategic and master site plan. Program design flows from that plan, and the organization is building programs with effective partnerships and meaningful connections to the local community. Programming ranges from historical and horticultural tours to community gardens and a food resource center at the Farm at Bartram's. There are youth leadership development efforts, children's programs, adult education, and volunteer programs. Major new developments include the construction of a riverfront biking/walking trail, called Bartram's Mile, which will soon link to other trails leading to and from City Center; and the establishment of waterfront docks and boat storage for community use.





Triple Bottom Line

What is it?

The triple bottom line concept is a way for gardens to view their business as a social, environmental, and economic entity and measure it along these parameters. Public gardens should strive to use the triple bottom line method for Business Planning and Management, as all three factors play a major role in determining if your garden can stay in business and generate a profit and impact the larger institution or community you are part of.

For example, the business model for university and public gardens is typically more focused on education and research, not about return on investment and analyzing every action. If your garden is part of a larger institution, such as a college and university garden, whose primary purpose is education of undergraduates and graduate students, demonstrate your relevance and what you can bring to the table in regards to research and enhancing the student body culture and experience. For instance, students that are stressed can find refuge at events or trails that your garden provides. Have a political strategy for demonstrating that relevance to the provost, faculty members, specific departments, and president. Because the solicitation of donors has to be approved by central development and you compete with other departments for funding, finding ways to show why you are important to the mission of the academic institution you belong to is critical.

No single bottom line can sustain a business alone. The following are just a few important reasons to implement the triple bottom line into your business models:

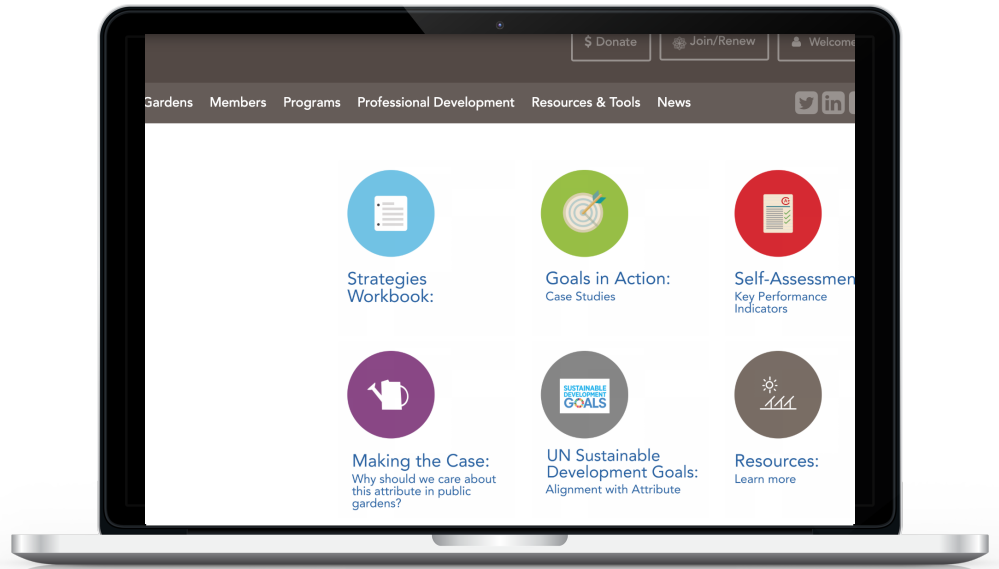
- Your garden needs a healthy workforce with diverse skills, different perspectives, and an inclusive philosophy to ensure equitable social benefits.
- Your garden can only operate in an economic situation where local businesses thrive. If your city or region becomes a dead zone economically, your own garden won't have access to people or resources in the long term (See Local/Regional Economic Health Attribute).
- Your garden needs to promote good stewardship of natural resources to ensure they are available 10 years down the road and beyond. Environmental health is interconnected to the social and economic well-being of a garden and often leads to long-term financial savings as opposed to hidden costs.





FOR MORE INFORMATION

Visit the sustainability index attribute pages for more case studies, resources, and a self-assessment!



<https://www.publicgardens.org/sustainability-index/attributes/business-planning-management>