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Fort Worth Botanic Garden

Strategic Planning Reports

September 20, 2016

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Chapter 1. Introduction

Fort Worth Botanic Garden, founded in 1933, is the oldest botanic garden in Texas and encompasses 110 acres in Fort Worth's renowned cultural district. The Garden includes 22 gardens, a tropical conservatory, specialty collections including its nationally recognized begonia collection, education programs, cultural programs, and other festivals and activities.

The Garden is owned and operated by the City of Fort Worth through the City's Park and Recreation Department with support from two primary organizations: the Fort Worth Botanical Society and the Fort Worth Garden Club's Deborah Beggs Moncrief Garden Center Committee (Garden Center Committee). The Botanical Society is dedicated exclusively to supporting the Fort Worth Botanic Garden. The Garden Center Committee's sole focus is on the Botanic Garden while the Garden Club as a whole has multiple other activities independent of the Botanic Garden.

Purpose and Scope of Study

The Park and Recreation Department determined that a comprehensive look at the Garden and its future was needed to provide guidance on its long-term direction, needs, financial support, standing within the botanic garden world, and the relevance of its 2010 master plan. In order to develop this broad study, the City engaged an outside, independent consulting firm with expertise in botanic garden planning and management, EMD Consulting Group, LLC. EMD was assisted by Studio Outside, a Dallas-based landscape architecture firm with a specialty in botanic garden site planning and design in the review of the Garden's master plan.

This report contains four parts:

- *Strategic Plan*, developed collaboratively with Garden and Botanical Society staff in consultation with key organizational stakeholders (i.e. representatives of the Garden Center Committee, Botanical Society board members, Botanical Research Institute of Texas, Texas Garden Clubs, etc.). The strategic plan includes the mission and vision of the organization, guiding principles, strategic advantage and specific action steps with timelines toward accomplishing its vision
- *Financial Analysis*, including benchmarking the Garden against its peer institutions, needs assessment (capital and operational), and recommendations for financial sustainability going forward
- *Organizational Analysis*, including an assessment of the costs and benefits of the current complex, fragmented organizational structure, consideration of four options for more efficient and effective organizational structures and a recommendation for a preferred option, based on extensive input from the stakeholders noted above

- *Master Plan Review*, including recommended adjustments to the plan in the context of the Garden's vision for the future

Chapter 2. Fort Worth Botanic Garden Strategic Plan FY2017-2020

Mission Statement:

The mission of an institution describes its over-arching purpose. The mission of the Fort Worth Botanic Garden is to:

Engage, inform and inspire with plants, landscapes and nature.

Financial Strategy:

An institution's financial strategy succinctly describes the way in which it will be sustained in the future. FWBG's financial strategy is:

To build on the support of the City of Fort Worth, the strategy is to increase private support substantially through increased earned revenue and contributions and to build the endowment.

Strategic Competitive Advantage:

An institution's strategic competitive advantage describes what distinguishes it most importantly from others in similar endeavors, locally, regionally, and nationally. FWBG's competitive advantage is:

Fort Worth Botanic Garden is a major public garden offering a unique combination of ornamental gardens, specialty plant collections, and naturalistic landscapes. These displays are complemented by education programs and cultural programs such as concerts. Research and conservation programs are being developed in collaboration with the Botanical Research Institute of Texas.

Guiding Principles:

An institution's guiding principles are the key principles that guide its decisions and its operations. FWBG has established five such principles:

- *Create a culture of collaboration.*
- *Create a culture of accountability.*
- *Create a culture of creativity and innovation.*

- *Reach our full potential as a botanic garden.*
- *Be affordable to all our citizens.*

Transformative Goals

The transformative goals are the broad, institution-wide goals that drive the institution. Within each of the transformative goals, major priorities are established to focus resources where they can make the greatest difference.

FWBG has established five transformative goals:

Goal #1 Transform the guest experience

Priority #1 Establish better wayfinding and intuitive routes

Priority #2 Improve the entrance experience

Goal #2 Establish FWBG as a leader in public programs

Priority #1 Create a comprehensive, prioritized plan based on good management information and a market assessment

Priority #2 Launch new and better programs and exhibits

Goal #3 Implement key parts of the Master Plan

Priority #1 Address pedestrian and vehicle circulation and parking issues

Priority #2 Add major new features

Goal #4 Repair, renovate and improve facilities and operations

Priority #1 Solve operational issues

Priority #2 Repair and renovate existing facilities, natural areas and gardens

Goal #5 Increase private support

Priority #1 Establish a broad base of support with robust marketing, membership and volunteer programs

Priority #2 Establish private support for ongoing operations and new initiatives with a major gift and endowment program

The botanic garden staff members have established specific, measureable and time-sensitive objectives to meet each of the goals. The objectives will be updated and the timeline of the strategic plan will be extended annually.

Chapter 3. Financial Analysis and Recommendations

Financial Analysis

Introduction

The purpose of this financial analysis is to examine how the Fort Worth Botanic Garden (FWBG) is supported financially, to benchmark the levels of support with comparable major botanic gardens, and make recommendations on sustaining FWBG in the future so it may continue to serve the people of Fort Worth and beyond.

In order for FWBG to be financially successful, several recommendations are made. One of those is a reorganization of the two support groups which is briefly described in this chapter with the full analysis of the options and proposed change in Chapter 4.

Financial Support for FWBG

The City of Fort Worth provides a stable base of operating support for the Garden; this financial support has been relatively flat for many years. The City of Fort Worth's base allocation is supplemented by support from two affiliated non-profit support groups: the Fort Worth Botanical Society (Botanical Society) and the Garden Center Committee.

The City of Fort Worth provides about three-fifths of the direct operating support for the Garden. If in-kind support from the City is included, the support from the City for the Garden represents about two-thirds of its total operating costs. The other third is provided through the Botanical Society and Garden Center Committee, of which almost all is earned income from admission fees, gift shop, concessions, and facility rentals. This earned income technically belongs to the City although it is managed by the two affiliated non-profits and, in the case of the Botanical Society, collected by them as well. The Botanical Society also receives some in-kind donations which are highly variable year-to-year averaging about \$15,000 per year over the past six years.

Figure 3-1. FWBG Revenues by Source FY2007-2015

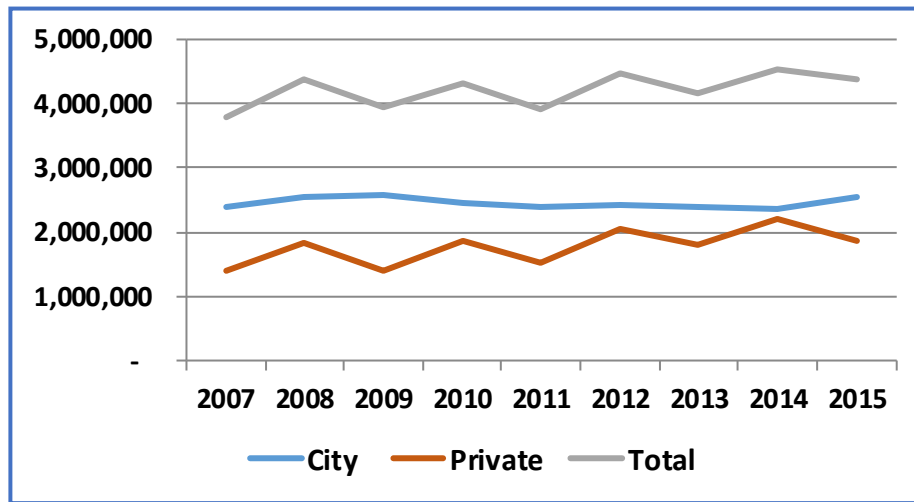


Table 3-1. FWBG Revenues by Source, FY2007-2015

| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| City | 2,375,448 | 2,556,506 | 2,568,734 | 2,447,581 | 2,375,646 | 2,413,061 | 2,375,686 | 2,345,736 | 2,538,462 |
| Private | 1,410,165 | 1,820,174 | 1,387,544 | 1,861,024 | 1,528,844 | 2,055,951 | 1,787,727 | 2,197,300 | 1,854,209 |
| Total | \$ 3,785,613 | \$ 4,376,680 | \$ 3,956,278 | \$ 4,308,605 | \$ 3,904,490 | \$ 4,469,012 | \$ 4,163,413 | \$ 4,543,036 | \$ 4,392,671 |

The operating budget has changed only a small amount since 2007 and is less today than it has been in past years. At the same time, Fort Worth has been the fastest growing city of its size in the United States according to the Census Bureau.

Net Revenues/Expenses

We noted a difference between revenues and expenses for FWBG’s three main funding sources. In the case of the City of Fort Worth, expenses exceeded General Fund allocations many years. The difference was offset by a reallocation of funds to make up the difference. In the case of the Botanical Society and the Garden Center Committee, revenues have exceeded expenses. For the Botanical Society, the total surplus over nine years exceeded \$2M. For the Garden Center Committee, the total surplus was almost \$900K over the nine year period. According to FWBG, the surplus funds have typically been spent for capital improvements and significant funds held as unspent reserves. This project did not include a comprehensive financial audit of past expenditures nor a study of all potential future expenditures for operations or capital improvements. We were unable within the scope of the project to reconcile the cost of capital and maintenance projects with the revenue surpluses over time.

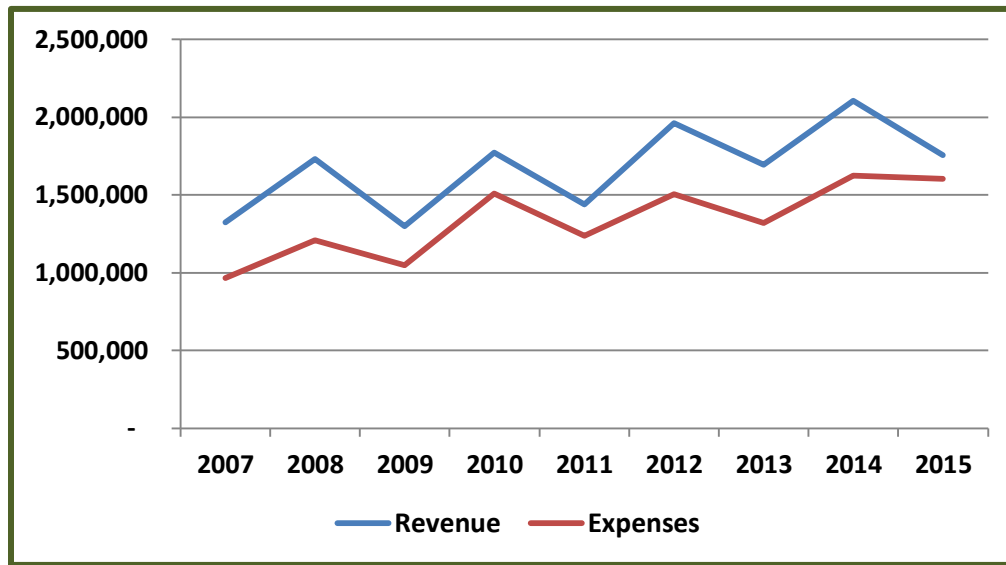
The time and effort required to understand the overall financial picture is further evidence that the fragmented organizational structure makes it difficult – even impossible – for the FWBG director to make strategic decisions. In light of FWBG’s urgent financial needs – such as the

estimated \$7 million in deferred maintenance, \$8 million in capital needs (see Tables 3-10 and 3-11) and the many missing staff functions – it is not clear that the surplus revenue has been spent for the highest and best purpose in the absence of a consolidated strategic financial plan.

Table 3-2. Difference between Revenues and Expenses by Funding Organization FY2007-2015

| | | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------------|--------------------------------|------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| | City of Fort Worth | | | | | | | | |
| City of Fort Worth | Revenue | 2,375,448 | 2,556,506 | 2,568,734 | 2,447,581 | 2,375,646 | 2,413,061 | 2,375,686 | 2,345,736 |
| | Expense | <u>2,373,208</u> | <u>2,478,040</u> | <u>2,557,117</u> | <u>2,510,302</u> | <u>2,260,883</u> | <u>2,266,685</u> | <u>2,489,493</u> | <u>2,590,095</u> |
| | Change in fund balance | <i>Difference</i> \$ 2,240 | \$ 78,466 | \$ 11,617 | \$ (62,721) | \$ 114,763 | \$ 146,376 | \$ (113,807) | \$ (244,359) |
| | Botanical Society | | | | | | | | |
| Botanical Society | Revenue | 898,865 | 1,273,155 | 940,930 | 1,413,069 | 1,106,244 | 1,416,388 | 1,119,107 | 1,463,688 |
| | Expense | <u>677,498</u> | <u>857,243</u> | <u>703,459</u> | <u>1,094,208</u> | <u>919,739</u> | <u>1,163,654</u> | <u>956,609</u> | <u>1,238,739</u> |
| | Change in fund balance | <i>Difference</i> 221,367 | 415,911 | 237,471 | 318,861 | 186,505 | 252,734 | 162,497 | 224,949 |
| | Garden Center Committee | | | | | | | | |
| Fort Worth Garden Club | Revenue | 422,597 | 458,316 | 357,911 | 359,252 | 333,897 | 545,860 | 574,918 | 639,909 |
| | Expense | <u>286,510</u> | <u>349,160</u> | <u>342,826</u> | <u>412,194</u> | <u>317,534</u> | <u>341,368</u> | <u>363,757</u> | <u>382,553</u> |
| | Change in fund balance | <i>Difference</i> \$ 136,087 | \$ 109,156 | \$ 15,085 | \$ (52,942) | \$ 16,363 | \$ 204,492 | \$ 211,160 | \$ 257,356 |

Figure 3-2. Revenue and Expense Trends for Support Groups, FY2007-2015



Sources of Funds

Botanic gardens use four broad categories to group their revenues:

- Public Funds
- Earned Revenues
- Contributions
- Endowment

Public funds for operations usually come through city's general fund appropriations as they do in Fort Worth. Particularly for city-owned botanic gardens, the city appropriation is an understatement of the support since municipalities - including Fort Worth - also provide in-kind services. In the case of Fort Worth Botanic Garden, in-kind services include the human resource function, most financial services and forestry services through the Park and Recreation Departments. Other in-kind city services include utility costs (water and electric), police services (security and parking enforcement) and facilities maintenance. The total of these services varies by years, but is on the order of \$175,000 per year.

Earned revenues include funds from memberships, admission fees, facility rental fees, gift shop sales, restaurant and catering income, plant sales, program fees and similar services.

Contributions are philanthropic contributions from individuals, business, charitable foundations and from fundraising events such as benefit galas.

Endowment funds include donor-restricted funds (true endowment) and other funds treated as endowments by policy ("quasi-endowment" funds). The endowment itself is not available to spend; only the earnings from endowments and quasi-endowments are available for operations or capital investments. Spending of the earnings is set by policy and normally is 4.5-5% of a rolling three year average of total return.

The percentages of support by category for Fort Worth Botanic Garden are shown in the Figure and Table below:

Figure 3-3. FWBG Revenue Percentage by Category of Support

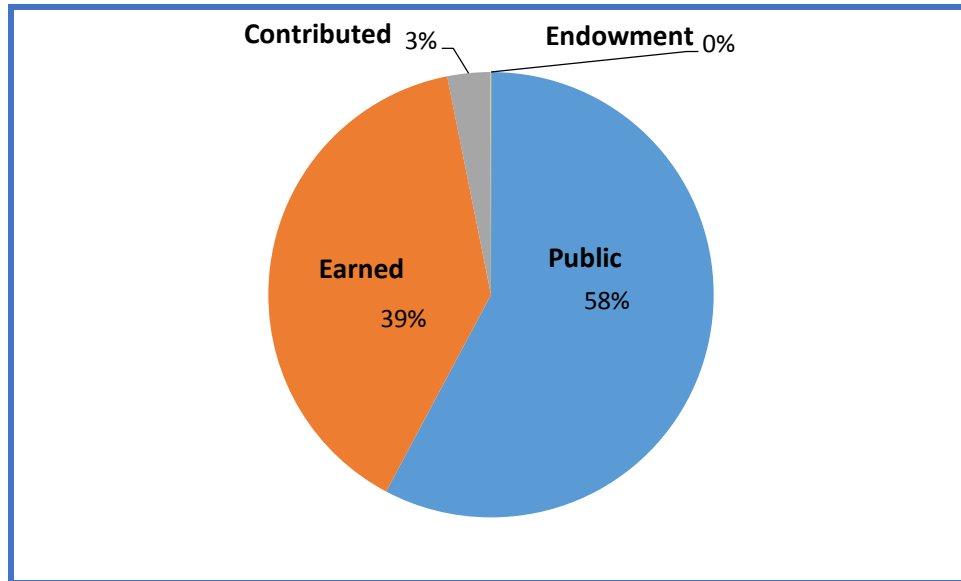


Table 3-3. FWBG Revenue Percentage by Category of Support, FY2007-2015*

| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|--------------------|------|------|------|------|------|------|------|------|------|
| Public | 63 | 58 | 65 | 57 | 61 | 54 | 57 | 52 | 58 |
| Earned | 34 | 39 | 32 | 39 | 35 | 42 | 39 | 45 | 39 |
| Contributed | 4 | 3 | 3 | 3 | 3 | 3 | 4 | 3 | 3 |
| Endowment | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |

**Numbers may not add up to 100% due to rounding*

Cash Flow and Use of Funds from Support Groups

The **Garden Center Committee** funds come from renting the Garden Center and other areas of the Garden (except the Japanese Garden) for private events and from admission fees to the Conservatory. All funds that flow to the Garden Center Committee are collected by City of Fort Worth Botanic Garden employees. The funds are deposited in a Special Account at the City, and then transferred to the Fort Worth Garden Club where they are held in a Special Account. (Some funds are used directly by the Committee to pay out-of-pocket expenses as they incur.) The funds are then disbursed back to the City for reimbursement of salaries of some designated Garden positions and for other purposes agreed on by the Director of the Garden and approved by the Park and Recreation Department Director.

The **Botanical Society** funds come from admission fees to the Japanese Garden, from rental fees for private events at the Japanese Garden, from the Gift Shop, from the restaurant and catering vendor, and from plant sales and public events. All funds that flow to the Botanical Society are

collected by employees of the Botanical Society and managed by the Society in restricted accounts in accordance with annual budgets approved by the Park and Recreation Department Director. Some of the funds are used to pay wages, salaries and benefits for Botanical Society employees and for expenses for the Society in the performance of these duties on behalf of the city. The funds are then disbursed to the City for the Garden to be used for reimbursement of salaries of some designated FWBG positions and for other purposes agreed on by the Director of the Gardens and approved by the Park and Recreation Department Director.

Benchmarking Finances

Fort Worth Botanic Garden is a member of the Directors of Large Gardens (DLG), an organization of the botanic gardens with operating budgets of at least \$3 million annually. This group is used for comparative purposes to FWBG because it is restricted to gardens that are most like FWBG in scope and quality, diversity of programs and facilities, staff size and other metrics as well as in budget size.

Revenues

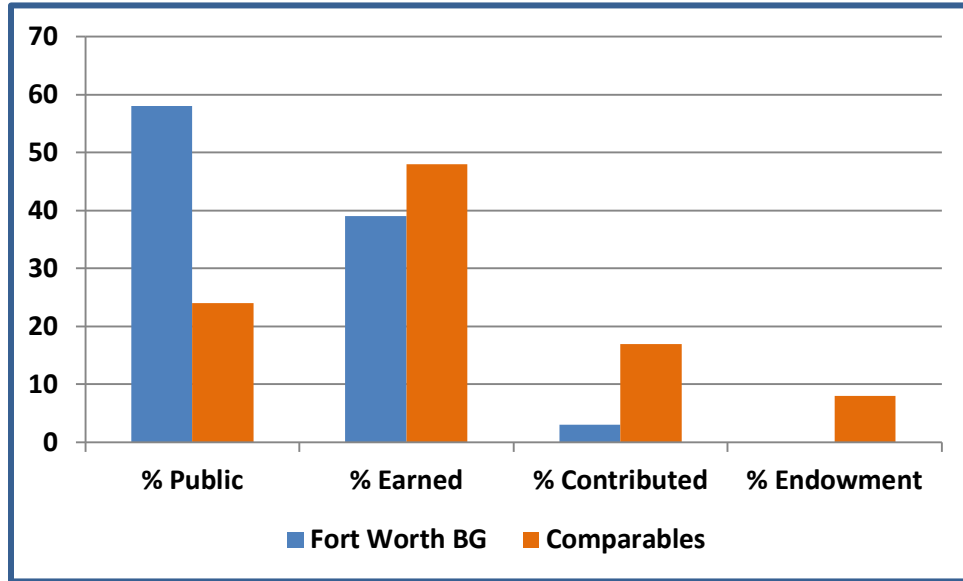
The first comparison is of those DLG gardens that receive at least 5% of their total operating revenues from local government (excluding university gardens and federal gardens). The gardens included are: Atlanta Botanical Garden, Bok Tower Garden, Brooklyn Botanic Garden, Chicago Botanic Garden, Dallas Arboretum, Denver Botanic Gardens, Descanso Botanic Garden, Franklin Park Conservatory, LA County Arboretum, New York Botanic Garden, San Antonio Botanic Garden, and San Francisco Botanical Garden.

Table 3-4. Comparisons of Revenue Percentages by Category of Support*

| | % Public | % Earned | % Contributed | % Endowment |
|----------------------------|-----------------|-----------------|----------------------|--------------------|
| Fort Worth BG | 58 | 39 | 3 | 0 |
| Comparables (means) | 24 | 48 | 17 | 8 |

**Does not include in-kind services*

Figure 3-4. Comparisons of Revenue Percentages by Category of Support



This comparison shows that Fort Worth Botanic Garden receives a significantly higher proportion of its support from public monies and a correspondingly small percent of support from other sources, with a particularly low percent received from contributions or endowment income.

To explore this further, six gardens were looked at (also in the Directors of Large Gardens group) that receive at least \$2.5 million from their local government.

**Table 3-5. Comparison with Gardens Receiving \$2.5 Million or More from State and Local Government
 FY2014***

| Institution | Public \$ | Total Revenue | % Public Support |
|----------------------|----------------|----------------|------------------|
| Fort Worth BG | \$2.5 million | \$4.4 million | 58% |
| Brooklyn BG | \$5.1 million | \$15.9 million | 32% |
| Chicago BG | \$13.8 million | \$32 million | 32% |
| Denver BG | \$4.9 million | \$15.2 million | 32% |
| Missouri BG | \$12.8 million | \$39 million | 33% |
| New York BG | \$13.2 million | \$68 million | 19% |

FWBG is the only one of these institutions that receives more than one-third of its revenues from local government. The nearly 60% support from the City of Fort Worth is effectively twice the percentage of support of the other five peer gardens (which average 30%).

Admission Fees

Every one of the gardens in the benchmarking studies described above has a general admission or parking fee. FWBG charges admission for its Japanese Garden and Conservatory, but not for other gardens, whereas all the others charge a general admission (or parking) fee. San Francisco’s Botanical Garden charges only non-residents: its location in Golden Gate Park means that a high percentage of its visitation is from non-resident tourism.

The lowest admission fee is San Francisco’s non-resident fee of \$7.00. The average fee is \$12.00, with most charging \$9.00 to \$12.00. By comparison, FWBG charges \$7.00 for the Japanese Garden and \$2.00 for the Conservatory, so visitors who want to see all the features pay \$9.00.

Members and Donors

FWBG lags dramatically behind the comparable gardens in both number of members and number of donors.

Table 3-6. Comparisons of Number of Members and Number of Donors, FY2015

| | Memberships | Donors \$500+ |
|------------------------------|--------------------|----------------------|
| Fort Worth BG | 1,425 | 12 |
| Comparables (means) | 17,000 | 390 |
| Comparables (medians) | 9,600 | 300 |

Note: These represent annual memberships and contributions for operating purposes (not contributions for capital projects).

Both members and donors are critical to private support at gardens. With FWBG’s dependence on City funds and the lack of a general admission fee, the result is a noted lack of private philanthropic support for operations. There has been important support for capital projects, just as at all major botanic gardens, although the City of Fort Worth has been the most consistent supporter of capital projects. A bequest of approximately \$3M in 2014 provided critical capital that is being put toward renovation in the Rock Springs area. The revenue from membership spiked in 2015 due to a Groupon promotion, from an average of \$56K from 2009-2014 (with \$58K in 2014), to \$78K in 2015. Experience at FWBG and in other botanic gardens predicts that these members renew at exceedingly low rates. Consequently, many botanic gardens have dropped Groupon promotions.

The number of donors at or above \$500 has averaged about 18 per year between 2007 and 2015, and has ranged from a low of ten in 2009 to a high of 22 in 2007, all handled by the Botanical Society. There is no upward trend in the number of gifts greater than \$500 in part because there is no dedicated development director or major gift officer to steward existing small donors to higher levels. Although Botanical Society staff and board members have stewarded these gifts as they arise, neither FWBG nor its affiliated support groups have staff members who are both accredited development professionals and whose primary job is on fundraising.

The fundamental reason for the great disparity in the number of members and donors at FWBG compared to peer gardens around the country is the lack of a general admission (or parking) fee at FWBG. Generally in peer gardens and other cultural institutions people become members because they receive “free” admission and can come as often as they want without paying for each separate visit (higher level members receive additional benefits). The current feature-based admission fees at the Garden (for the Japanese Garden and the Conservatory) do not drive membership in the same way. Donors are low also because membership is low. Most donors come from being members who become deeply engaged and raise their level of support to donor levels over time. The feature-based admission fees have the additional disadvantage of elevating certain features for greater attention and undervaluing other high quality features.

City’s “Return on Investment” from Leveraging Private Support

One measure of the value of the City’s support is to compare it to the amount of private support (\$1.9 million in private funds compared to \$2.5 million in public funds) or 73 cents which compares to an average of \$2.42 for the comparable peer gardens. In other words, the City of Fort Worth by this measure is receiving about 30% as much for its investment.

As noted elsewhere in this report, there have been significant revenues over the years applied to deferred maintenance projects by support groups such as sidewalk upgrades in the Japanese Garden (by the Botanical Society) and floor and ceiling repairs in the Garden Center (by the Garden Center Committee) that are not included. In terms of overall trends, though, these are largely offset by other deferred maintenance expenses from public funds such as the Conservatory environmental systems and theatrical lighting which are also not included.

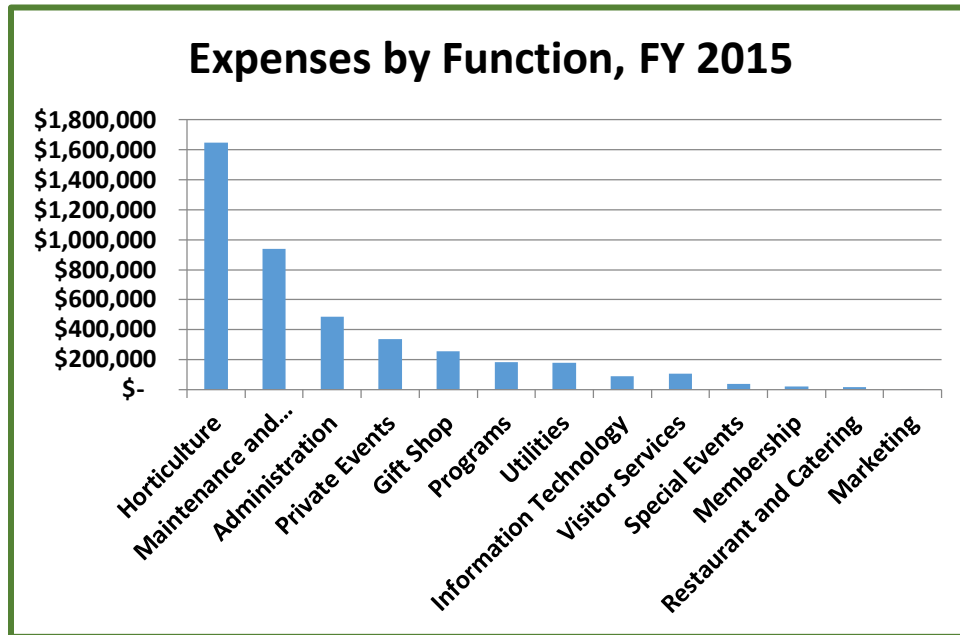
Expenses

Financial records were examined to determine how funds are spent at FWBG. The table and figure below indicate the use of funds.

Table 3-7. Expenses by Function, FY2015

| | <u>\$</u> | <u>%</u> |
|-----------------------------------|--------------------|--------------|
| Horticulture | \$1,647,704 | 37.3 |
| Maintenance and Operations | 939,647 | 21.3 |
| Administration | 533,515 | 12.1 |
| Private Events | 338,806 | 7.7 |
| Gift Shop | 255,097 | 5.8 |
| Programs | 188,756 | 4.3 |
| Utilities | 178,188 | 4.0 |
| Information Technology | 95,571 | 4.0 |
| Visitor Services | 146,860 | 3.3 |
| Special Events | 36,892 | 0.8 |
| Membership | 22,068 | 0.5 |
| Restaurant and Catering | 14,811 | 0.3 |
| Science and Conservation | 13,694 | 0.3 |
| Marketing | 3,900 | 0.1 |
| Totals | \$4,415,508 | 100.0 |

Figure 3-5. FWBG Expenses by Function, 2015



For the comparative group, the DLG institutions with budgets of \$3-\$5 million were used. Because many gardens classify expenses differently, the comparisons in the DLG study were for the most common functions.

Table 3-8. Expenses of Common Functions, Comparable Gardens

| | Comparables | FWBG |
|-----------------------------------|-------------|------|
| | % | % |
| Horticulture | 23 | 38 |
| Administration | 15 | 11 |
| Facility Maintenance | 8 | 22 |
| Programs | 7 | 4 |
| Membership and Development | 7 | >1 |
| Science and Conservation | 3 | 0 |

By rank order, the comparison shows many similarities between expenditures at FWBG and its counterparts with horticulture receiving the greatest percentage of the budgets in both cases. The largest differences are in the Membership and Development budget in which FWBG spends less than one percent compared to more than seven percent at comparable gardens. FWBG spends almost no funds on science and conservation today whereas most comparable gardens spend several percent of their budgets on these activities.

Needs

Although FWBG along with the Botanical Society have dedicated and competent staffing, certain key functions are missing, and it appears that some reorganization of staff would reduce duplication and increase effectiveness. These needs are described below.

Operations

Visitor Services

The Executive Director of the Botanical Society operates in part as a rental coordinator, managing weddings and other special events for the Japanese Gardens. FWBG has a Customer Services Supervisor who schedules weddings and other events for the Garden Center and Fuller Garden. The Society uses staff and board members to staff its events. One or two city employees, depending on the number of guests, are assigned to the events to comply with city requirements. Setup and cleanup are the responsibility of the clients and most use rental services and caterers for those services. City employees are responsible for addressing any issues with facilities. The City has three event attendees as well as a stagehand that does audio-visual set-up, but these employees are not active participants in the events scheduled by the Botanical Society.

The Botanical Society employs seven part time and two full time employees who report to the Botanical Society Executive Director and are cross trained as greeters/ticket sellers in the Japanese Garden and retail clerks. FWBG employs five customer service representatives who work at the reception desk in the Garden Center. It would be more efficient for all visitor operations staff to report to a single manager. The need for ticket sellers and ticket takers may increase if all visitors instead of a subset must pay admission, although this effect would be mitigated by the fact that fees would only be collected at one location.

Development and Membership

The Botanical Society has one part time, entry level employee who is responsible for memberships, managing donations and scheduling tours. The Botanical Society Executive Director has been responsible for fundraising and donor relations as one part of her job. The organization as a whole, though, should have at least one dedicated fundraising professional (probably two) responsible for creating an overall fundraising strategy, establishing a campaign and campaign goals, and raising contributions for both operations and capital needs. There should also be a membership coordinator who works with the development director to establish and implement membership goals and priorities.

Education Programs and Volunteers

FWBG has one education program coordinator and an educational specialist who is also the volunteer coordinator. When measured in terms of contacts, FWBG is performing at or above the median for the benchmark organizations in terms of number of tours, and schoolchildren who visit, yet it is underperforming in terms of the educational content for the tours. Volunteers participate in limited ways throughout the gardens. FWBG volunteers are either affiliated with formal collections and plant societies (such as the nationally recognized begonia collection), or they are master gardeners primarily focused on the children's and perennial garden areas. Docents in the Japanese Garden are volunteers for the Botanical Society. A full-time volunteer coordinator would be able to recruit volunteers for many more functions (such as ambassadors and docents, natural areas, garden aids, events and so on), track volunteer participation, train volunteers and supervisors, and organize appreciation activities. Greater volunteer participation is itself an educational program, accomplishing the core mission while at the same time assisting with needed work.

Marketing

The Botanical Society has a single person who is responsible for facilitating events, acting as web master, and performing marketing activities. Members of the Botanical Society Board chair major events (Butterflies in the Garden, spring and fall plant sales, the Japanese Festival, and concessions for the Concerts in the Garden) and those duties include marketing those events. If FWBG implements a single admission fee (as discussed in greater detail below), focused marketing activities would result in greater net revenues, because all guests would pay for admission (provisions would be made for lower income residents to still have access) whereas now many visitors do not visit the Japanese Garden or Conservatory so these visitors do not pay any admission fees. Marketing would result in greater participation in all FWBG's programs, activities and amenities.

Curation

FWBG has no curatorial function whatsoever. As a living museum, FWBG cannot accomplish its core collections management and research function without a curator. As a result of this

deficit, plant records are sketchy and unsystematic; the nationally recognized Plant Collections Network (PCN) certification of the begonia collection will be provisional until this is addressed.

Research and Conservation

Major botanic gardens incorporate research and conservation programs. These activities have received very little attention from FWBG in the past. Discussions are underway with the Botanical Research Institute of Texas that should lead to complementary and cooperative programs in research and conservation as well as education and public programs. FWBG will need to add staff to meet these needs and opportunities.

Table 3-9. Estimated Cost of Unfunded Staff and Operational Needs

| | | | |
|-------------------------------------|------------|------|---------------------|
| Maintenance and Grounds | | | |
| Gardeners | \$ 45,138 | 2.0 | \$ 90,276 |
| Sr. Maintenance Workers | \$ 41,902 | 2.0 | 83,803 |
| Sr. Gardener | \$ 56,415 | 1.0 | 56,415 |
| Arborist | \$ 41,901 | 1.0 | 41,901 |
| Administration | | | |
| Office Assistant (shop) | \$ 36,112 | 1.0 | 36,112 |
| Administrative Asst. (Admin) | \$ 56,415 | 1.0 | 56,415 |
| Volunteer Coordinator | \$ 62,453 | 1.0 | 62,453 |
| Business Manager (upgrade) | \$ 16,625 | 1.0 | 16,625 |
| Support | | | |
| Public Event Attendants | \$ 38,900 | 1.0 | 38,900 |
| Housekeeping (Custodian) | \$ 36,112 | 1.0 | 36,112 |
| Development | | | |
| Development Director | \$ 84,875 | 1.0 | 84,875 |
| Marketing and Membership | \$ 74,611 | 1.0 | 74,611 |
| Education | | | |
| Public Education Specialist | \$ 62,453 | 3.0 | 187,359 |
| Operating | | | |
| Startup Supplies for new Positions | \$ 13,000 | 15.0 | 195,000 |
| Outside Contractors (Repair/Maint.) | \$ 100,000 | 1.0 | 100,000 |
| Ag & Bot Support/Supplies | \$ 75,000 | 1.0 | 75,000 |
| Total | | | \$ 1,235,858 |
| | | | |
| | | | |

Capital

In-Kind Support from City of Fort Worth

According to the DLG benchmark surveys submitted by FWBG between 2010 and 2014, FWBG received in-kind support from the City of Fort Worth ranging in value from \$253K to \$437K (average of \$327K). FWBG staff report that these services included annual maintenance, planned replacement, emergency tree removal, special projects and police services. Documentation for this support is not available because much of it was negotiated informally between City of Fort Worth staff and the FWBG director. FWBG staff report that Transportation/Public Works (T/PW) services and routine maintenance decreased over the past several years as budgets were cut and positions lost. At present, FWBG receives regular repairs for the HVAC system through Property Management (formerly T/PW). Most other annual maintenance, planned repairs and special projects are the responsibility of FWBG, although there is no budget line to support this cost.

Deferred Maintenance and Capital Needs

Over the years both support groups have provided considerable support with capital replacement projects in Rock Springs, the Japanese Garden, the Backyard Vegetable Garden and the Garden Center. Despite these contributions and as a result of the loss of in-kind maintenance and repair services, deferred maintenance at FWBG has become an acute need. The Conservatory alone has \$700K in deferred maintenance, and the Conservatory represents only a small fraction of the Botanic Garden overall facilities' needs. FWBG estimates that the deferred maintenance needs under its direct control are valued at an estimated \$5.8M-\$7.1M, including repair and maintenance to roads, lighting, irrigation and water systems, Rock Springs and Garden Center building infrastructure, greenhouses, and drainage, as well as ADA upgrades. Also needed are \$6.6M to \$8.6M in capital improvements including addressing structural design flaws in the Conservatory and replacing the glasshouse and fiberglass houses. The City of Fort Worth could authorize a bond issuance to address the FWBG's major capital and deferred maintenance needs.

Table 3-10 summarizes FWBG's deferred maintenance needs. Deferred maintenance is defined as routine maintenance and repair required to keep existing equipment and infrastructure in good working order, but that has been put off for budgetary reasons. Table 3-11 summarizes FWBG's capital needs to keep levels of service constant. These capital improvements are required because of design flaws, aging infrastructure, regulatory compliance issues (ADA), and/or irreparable infrastructure declines resulting from deferred maintenance. (Note that the dollar amounts in these tables are general estimates provided by FWBG staff and local vendors; an engineering consultant could provide more substantive estimates.)

None of the costs summarized in Table 3-10 or Table 3-11 represents an increase in service levels. Any service level improvements, such as moving the maintenance facility out of the center of the Garden to accommodate a single point of entry and the new children's garden, would be separately costed and integrated into a capital campaign.

Table 3-10. Estimated Deferred Maintenance Needs

| Facility/Improvement | Example Items | Low Est. | High Est. |
|-------------------------------|-------------------------------------|---------------------|---------------------|
| Conservatory and Greenhouses | Boiler, mist system, fan repair | \$ 292,380 | \$ 332,870 |
| Garden Center | Roof, skylight, generator repairs | 1,434,820 | 1,784,480 |
| Rock Springs Building | Roof, HVAC, plumbing repairs | 300,400 | 353,900 |
| Repair/Replace Water Features | Leak and filtration repairs thruout | 71,460 | 87,340 |
| Irrigation Updates | Throughout gardens | 450,000 | 550,000 |
| Lighting Repairs/Upgrades | Various gardens | 835,849 | 1,021,593 |
| Fencing/Wall Repairs | Perimeter fencing, south entrance | 230,625 | 281,875 |
| Fragrance Garden | Restoration fr intensive use | 225,000 | 275,000 |
| Japanese Garden | Drainage repair, garden deck repair | 187,000 | 228,000 |
| Street Repairs | Potholes & degradation thruout | 691,200 | 844,800 |
| Restrooms and Site Amenities | Drinking fountain repairs | 34,830 | 42,570 |
| ADA | Replace doors, improve ramps | 314,100 | 383,900 |
| Events/Education | Repair AV technology Garden Ctr | 80,320 | 98,168 |
| Grading and Drainage | S Vista, lower Rock Springs, Rose | 662,184 | 809,336 |
| Totals | | \$ 5,810,168 | \$ 7,093,833 |

Table 3-11. Estimated Capital Project Needs

| Facility/Improvement | Example Items | Low Est. | High Est. |
|------------------------------|------------------------------------|--------------------|--------------------|
| Conservatory and Greenhouses | Replace fiberglass & glass houses | \$4,175,000 | \$5,575,000 |
| Garden Center | Bathroom & kitchen renovation | \$ 534,000 | \$ 751,000 |
| Rock Springs Building | Floor & awning replacement | 22,750 | 29,950 |
| Lighting Repairs/Upgrades | Various gardens | 104,954 | 128,277 |
| Fencing | Grove fence replacement | 18,000 | 22,000 |
| Site Amenities | South, Fragrance Garden & GH | 1,035,000 | 1,265,000 |
| ADA | Accessible ramps & pathways | 126,000 | 146,500 |
| Events/Education | AV technology | 13,387 | 16,361 |
| Grading and Drainage | N Vista landscaping & improvements | 547,884 | 669,636 |
| Totals | | \$6,576,974 | \$8,603,724 |

FWBG is badly in need of a comprehensive facility study to provide more information and analysis than is possible within the scope of this study.

Parking

There is routinely insufficient parking at FWBG to accommodate weekend visitors. Some of the recommendations in this report will help with this problem: (1) eliminating the fragmented organizational structure will allow for greater coordination of private rental events and (2) instituting an admission fee (depending on how this is handled logistically) could reduce the issue of free-riders who park at the Garden but do not use the facility.

On the other hand, closing the interior roads to vehicular traffic will reduce the number of spaces and offset the gains from these operational improvements. The master plan review that is the final chapter of this report indicates some possibilities for additional parking spaces.

Meanwhile, FWBG is situated in the Cultural District, a neighborhood with a very high number of parking spaces all around, although it is not within the scope of authority of the FWBG director to negotiate with neighbors for parking. Ultimately additional parking will need to be developed on-site, a capital project that is not typically of interest to major donors.

Maintenance Facilities

A key component of the master plan is moving the maintenance facilities out of the middle of the Gardens to create a seamless visitor experience. This type of capital project is not typically of interest to major donors, and may need to be funded by the City.

Summary of Findings

To summarize the most important findings on revenue sources:

1. There has been very little growth in the total budget for at least ten years
2. The City's operating support has been little changed during this ten years
3. The City's support for infrastructure repairs and replacements is much less today than it has been in some past years (about \$100,000 annually today compared to almost \$500,000 in some past years)
4. Admission fees are currently by feature (Japanese Garden and Conservatory) so some visitors pay up to \$9.00 while others do not pay any fee
5. FWBG is the only major local government owned garden that does not have a general admission or parking fee (or both)
6. Revenues come almost entirely from just two sources (public funds and earned revenues) with very little from philanthropic contributions or endowment income
7. There are very few members and very few donors and no sustained fundraising effort
8. FWBG is leveraging only 30% as much as peer gardens in private support
9. The current needs are for at least \$1.5 million in annual operating funds
10. There is a significant backlog of unmet repair and renovations needs totaling an estimated \$15 million

Strategy Options for New Revenues

Five options for increasing revenues

There are four primary options for raising additional revenues to meet the unmet needs:

1. **Increase City support**
2. **Charge for parking**
3. **Increase private contributions**
4. **Replace the feature-based admission fee with a general admission fee**

An option with no substantial changes was included:

5. **No change option**

1. **Increase City support**

The City already provides almost 60% of the operating support (plus significant in-kind support) for the Garden. The City has not increased its support for many years and is unlikely to do so on a continuing basis given the high level of support already.

The Garden is City property and increased support from the City is urgently needed for repairs and renovations of these existing facilities so additional funds from the City should be directed to these needs which are much harder to raise from private sources.

Even if the City did increase its general operating support, this would not diversify the funding streams to the Garden. It would not leverage increased private philanthropy.

2. **Charge for parking**

The Garden could develop a parking fee as is done at some other gardens. Besides the new revenue, this would help alleviate one problem: “free rider” parking, i.e., non-visitors to the Garden using its facilities as a free parking lot. A parking fee also might encourage alternative forms of transportation, such as carpooling, biking or public transportation, which are environmentally sound and might help the parking problems at the Garden.

However, the parking fee would create issues for the Botanical Research Institute of Texas and the Texas Garden Clubs, Inc., both independent organizations that share the parking lots.

A parking fee is also unlikely to bring in as much revenue as other options unless it is a very high parking fee. In most situations, a parking fee either very substantially overcharges individuals or undercharges larger groups in the same car.

A parking fee also means that the greeting and first information is provided by a parking attendant whose main job is taking the fee and moving cars as rapidly as possible into the lot and so the visitor service of greeting people, providing all the information they need, and creating an atmosphere of service is highly diminished.

3. Increase private contributions

FWBG is a wonderful garden that is seriously under supported by the private sector other than for such things as facility rentals for private events. Memberships and philanthropic contributions are notably exceptionally low by any standard for an institution of this size and quality. There are two reasons for this. There has never been a systematic membership and development program (this is not to diminish the occasional very generous gifts for capital improvements like the Rock Springs Garden or the Rose Garden, but these are different from unrestricted operating support). Even more important than the lack of a consistent development program is the lack of a general admission fee. Without this, the private sector will continue to rely on the City to support its garden.

4. Replace the feature-based admission fee with a general admission fee

A general admission fee replacing the two existing fees would provide critical revenues from the fees themselves plus leverage far more private support through memberships and donations. The next section shows the projections for increased revenues primarily based on this option would bring in from more than \$900,000 to perhaps \$2.2 million (approaching that of the City's current contribution). These funds would fill the operating gap between current funding and current funding needs.

This restructuring of the admission fees would have several advantages:

- a. It would be fairer to taxpayers as those who use the garden would pay a larger share of its operating costs
- b. It would diversify the revenue streams thus adding financial stability and sustainability
- c. It would be a key catalyst in increasing number of and revenue from members and donors
- d. It would allow the Garden to succeed and grow without putting more pressure on the City's budget which will always have compelling needs for first responders, public safety, streets, and other city services
- e. It is usual and customary for botanic gardens to charge a general admission and exceedingly rare for them to charge admission to part of their permanent displays
- f. All visitors will have access to the Japanese Garden and the Conservatory, while other very high quality features (such as Rock Springs or the Fuller Garden) will not be disadvantaged
- g. Provisions can be made to provide affordable access to low-income Fort Worth residents
- h. Charging a general fee is in keeping with other Park and Recreation Department policies for charging for such things as swimming, the Nature Center, the Log Cabin Village, and community center programs
- i. People value what they pay for and there will be a reduction in graffiti and vandalism and an increase in the perception of the value of the Garden to all visitors, as has been the case within the Japanese Garden and Conservatory

The switch to a general admission fee has challenges. The first is the perception that something is being taken away from the public just as it was with other changes in fees for the Nature Center, for example. In fact, as the Garden receives more funds to better care for its collections, landscapes, displays and programs, the public will gain rather than lose. There is a legitimate concern that low-income residents may lose access to the Garden. Other Fort Worth attractions like the Zoo and the Nature Center have met these needs, as have other City-owned and operated facilities. Other gardens around the country have met this need by offering low cost passes through community groups and churches, for example, or special priced days. Others have policies that admit low-income residents with the equivalent of the Lone Star Pass at reduced rates. The Garden will need to experiment and work with the community on different ways to meet this need, but there is no reason that all residents cannot still have affordable access to this Fort Worth treasure.

5. No change funding strategy option

There is always the option of making no change in the funding strategy from the present. The ten year trends of little or no growth in City of Fort Worth revenue would continue, there would be no diversification of revenues, the Garden would remain unusually reliant on the City's funding and not increase its financial sustainability. The unmet needs of staffing throughout the Garden would not only remain, they would almost surely worsen as resources would stay constant while compensation for existing positions increases over time, with the result that open staff positions would not be filled. On the infrastructure side, the list of unmet needs would lengthen and almost certainly some systems that could be repaired would fall further behind and fail, resulting in potential safety hazards or closing of facilities until systems could be replaced.

Overall, there would be deterioration in services to the citizens of Fort Worth from the Garden. The grounds and gardens, which are already not being cared for in some areas, would become less and less attractive to the point of some areas becoming "off limits" to the public in all probability as staff must concentrate on some areas so every area does not fall into disrepair (as the Fragrance Garden has already).

As the grounds gradually become less and less attractive, the Garden would become less attractive for weddings, resulting in a spiraling downward trend in earned revenue thus furthering the deterioration of the grounds.

Programs for the public, particularly programs for children, would suffer and be seriously curtailed.

Without new support and as the gardens become less attractive, volunteers would see that they could not make up the difference and they would move their volunteerism to other institutions exacerbating the decline of the Garden.

If the level of support remained static for long enough, the Garden would simply become another park. The special nature of the Garden, the collections, and the remaining volunteers would all gradually disappear.

In the end, the citizens of Fort Worth might insist after the Garden has seriously deteriorated in quality and services that the City return with a massive infusion of money for operations and capital repairs. By then, the damage to the City's reputation as the owner/operator of this treasure would be severe, and it would be difficult and costly to return the Garden even to the present state.

Preferred option

The strategic option which best meets the needs of the Garden is option 4 replacing the feature-based admission fees with a general admission fee. This would provide critically needed operating support both directly and indirectly. The following table summarizes the estimated potential increased revenues based on changing the admission structure and the organizational structure. It is estimated that as much as \$2.26M in additional earned and contributed income would be collected. At that level, the ratio of public/private support would flip from approximately 60/40 to approximately 40/60, much more in line with the benchmark organizations. Capturing this additional revenue would allow FWBG to fill its missing staff functions and develop a facilities maintenance plan.

**Table 3-12. Earned and Contributed Operating Revenue Forecast
after five years (select categories only)**

| Source | Status Quo (FY2014) | | Conservative | | Optimistic | |
|---|---------------------|---------------------|--------------|---------------------|------------|---------------------|
| | N | \$ | N | \$ | N | \$ |
| Earned Revenue | | | | | | |
| Admission | 100,000 | \$ 438,351 | 225,000 | \$ 1,125,000 | 350,000 | \$ 1,750,000 |
| Private Events (rentals) | | 610,697 | | \$ 600,000 | | \$ 800,000 |
| Public Events (e.g., light show) | | 101,919 | | \$ 175,000 | | \$ 250,000 |
| Memberships | 1,425 | 58,472 | 2,500 | \$ 125,000 | 3,500 | \$ 175,000 |
| Retail (gift shop/plant sales) | | 416,659 | | \$ 425,000 | | \$ 525,000 |
| Total Earned Revenues | | \$ 1,626,098 | | \$ 2,450,000 | | \$ 3,500,000 |
| Contributed Revenue | | | | | | |
| Contributions (unrestricted) | | \$ 71,230 | | \$ 100,000 | | \$ 350,000 |
| Gala Event | | 0 | | 40,000 | | 60,000 |
| Sponsorships | | 0 | | 15,000 | | 25,000 |
| Total Contributed Revenues | | \$ 71,230 | | \$ 155,000 | | \$ 435,000 |
| TOTAL Future Earned/ Contributed Revenue | | \$ 1,697,328 | | \$ 2,605,000 | | \$ 3,935,000 |
| Net Change from Status Quo | | \$0 | | \$ 907,672 | | \$ 2,237,672 |

*FY 2014 instead of FY2015 to include Butterflies in the Garden revenue; FY 2015 membership revenues were unusually high due to Groupon.

Table 3-13. Potential Changes in the Revenue Percentages from Public and Private Sources

| | Present | Future Potential | |
|-----------|---------|------------------|------------|
| | | Conservative | Optimistic |
| % City | 58 | 47 | 37 |
| % Private | 42 | 53 | 63 |

Assumptions – Earned Income

Admission

Assumes an average (adult, child, group) fee of \$5 per visitor (slightly higher than the \$4.40 average admissions revenue per visitor now; fee structure is still to be determined, but would most likely be set at \$8-\$9 per adult with discounts for children and groups and free admission for members). The current visitor average assumes a total of 100,000 paying visitors including the Conservatory and the Japanese Garden; admission revenue in FY14 from these visitors was about \$440K.

Membership

Assumes an average membership of \$50 per member household, compared with the current average of \$41, for both the conservative and optimistic estimate scenarios. A higher average per member payment was assumed because of the current relatively low number of donors above \$500 compared to peer institutions, a fundraising program is recommended that would steward some members into the higher level categories.

Assumes a gradual growth in membership of 20% (conservative) and 30% (optimistic). With an admission fee, these member levels after three years should be very attainable. Using the median population to member ratio from the DLG benchmark study as a target, FWBG should set a target of 15,850 members.

Private Events

Conservative estimate assumes that the number of private events is reduced to lessen operational impact, with any increases in fees being insufficient to support the reduced levels. This assumption was included because it is unclear how quickly FWBG will be empowered to increase rental fees. Optimistic estimate assumes modest increases including substantial fee increases, bringing rates to market levels, less reduced number of events to lessen operational impact.

Public Events

Conservative estimate assumes \$75K in net revenue from the light show, which is already in the planning stages. Optimistic estimate assumes \$150K in net revenue either from popularity of the light show or from other events.

Retail

Conservative assumes the retail store will be located within the Garden Center, and that all visitors, not just visitors to the Japanese Garden (and those who specifically visit the Treasure Tree gift shop) will have the opportunity to shop there. Conservative forecast assumes that even though overall visitors may go down with an entrance fee, at least as many will shop as under the status quo. Optimistic estimate assumes approximately 10% increase per year.

Assumptions – Contributed Income

Contributions (Unrestricted)

Contributions for operations may begin modestly because there are currently a very low number of members and there has been limited giving during the study period to support FWBG with annual contributions. Once a development program is established and as membership grows, a very substantial amount of money can be raised annually.

Sponsorships

Sponsorships are usually from businesses that see events as marketing opportunities rather than philanthropic gifts. Because there has been an inconsistent history of such sponsorships on any sustained basis for FWBG, a modest forecast between \$15K and \$25K annually is projected to support events such as the light show.

Gala Event

Once established, annual galas can become significant sources of revenue though it takes considerable organization for these to be successful. \$40K-\$60K has been forecasted as a reasonable range.

Endowment Policies and Practices

FWBG has no significant endowment at this time and no capacity to raise endowment funds. The Botanical Society has a small endowment fund and the Fort Worth Garden Club has the Moncrief Endowment for the Garden, which is governed by its own board. In total, though, the endowments for the benefit of the FWBG are relatively small compared to other major gardens. The recommendations contained in this report will create capacity for a mature fundraising program. Before this program is implemented, FWBG should establish policies and procedures for its endowment, such as:

- Consider establishing a requirement that a certain percent of capital project goals include endowment goals
- Focusing endowment fundraising on bequests
- Establishing naming opportunities for existing unnamed spaces
- Establishing sound financial management practices, such as a pay-out policy that provides both a new revenue stream for operations as well as providing long-term

growth potential for the corpus. Establish a sound investment strategy and manager, most likely working with a community foundation.

Admission Fee Restructure

The current fragmented admission fee structure, which includes one fee for the Conservatory, a separate fee for the Japanese Garden and no fee for the other installations and amenities, mirrors the FWBG fragmented organizational structure. This practice is disadvantageous for many reasons:

- It fails to communicate that the FWBG is a living museum; virtually no museums charge visitors to see one area of the museum (except occasionally for special temporary exhibits) and allow free visits in another area
- It emphasizes the Japanese Garden and Conservatory as higher value installations when in fact there are many high value (and high maintenance) areas of the Garden
- It distributes the burden of payment unfairly among a subset of visitors while others visit for free
- It leaves much-needed operating support uncollected
- It results in free-rider use of parking – e.g., some people park for free at FWBG when they are not using the FWBG – exacerbating the parking shortage

To address these problems, FWBG should move to a single, general admission fee.

Organizational Structure and Finances

FWBG has an unusually complex organization structure which is described in much greater detail in the next Chapter Organizational Analysis and Recommendations. The current structure is highly fragmented and means:

- There is no consolidated budget, no cost accounting, and no rational allocation of funds toward the highest and best purpose
- Certain functions are redundant (such as the two executive directors and certain visitor operations staff)
- Certain functions are absent or minimal (such as curation, plant records, business management overseeing all revenues and expenditures (public funds, earned and contributed funds), marketing, volunteer coordination, fundraising, etc.)
- Staff of the Botanical Society receive compensation and benefits without regard to parity with City of Fort Worth compensation and benefits levels and practices
- Space is not managed using an overall, holistic approach, resulting in some spaces being underutilized while space shortages also exist

The recommendation (see Chapter 4) is to merge most of the activities of the two existing support groups, the Botanical Society and the Garden Center Committee, into a new non-profit

organization tentatively called the Friends of the Fort Worth Botanic Garden. By consolidating the two groups into a single entity that would be an Advisory Board reporting to the Garden Director, the Garden could be managed in a comprehensive, strategic manner.

Summary of Recommendations

The analysis leads to two key recommendations related to the finances of FWBG. These recommendations are based on the review of finances for the past decade, best practices and benchmarking with other major botanic gardens, and discussions with leaders in the Park and Recreation Department, at FWBG, with the two major support groups, and from public input provided through public meetings, individual meetings and feedback from the public.

I. The first recommendation is to **change the organizational structure**, replacing the two private support groups with a single, new Friends organization. (This recommendation is discussed in more detail in the next chapter.) The current organization is not just cumbersome and inefficient, it has resulted in fragmentation of duties, division of staff and operations into multiple “camps,” and fundamentally made effective management of FWBG virtually impossible. Strategic decisions are not made.

From a financial management and control perspective, even basic financial management and control are impossible under the current structure. There is no system for full accountability and given three separate organizations, it is unrealistic to expect that this can be made functional without fundamental structural change. Another important factor is that under the current structure, there is no systematic private fundraising program which severely limits the ability of FWBG to grow and maintain high quality features and programs.

II. The second major recommendation is to **replace the existing system of charging visitors to see some gardens and features with a single entry fee**. Currently, two major features - including the single most renowned garden at FWBG, the Japanese Garden - have separate fees and there has been discussion of charging separately for more features including the future Children’s Garden.

The single admission charge for the entire property would be no more, perhaps less, than the current fees for the Japanese Garden and Conservatory, which represent just a fraction of the features.

There is no intent to disadvantage economically challenged individuals. Other major gardens have found effective ways to handle this including combinations of free times, distribution of tickets through neighborhood associations and churches, or providing free admission to those with EBT cards. Fort Worth already has mechanisms in place at other public amenities for this approach. The City can easily find ways to be sure that those without the capacity to pay still

have access to the Garden while building new revenues, new membership, new donors that will allow the Garden to achieve higher levels of quality and service on a sustainable financial model.

The lack of a fundraising program and the lack of a single admission fee means that FWBG is much more dependent on the City than is any other major botanic garden in the U.S. In fact, FWBG depends fully twice as much on the City of Fort Worth than does any other similar garden. The lack of a diversified base of support is not a long-term sustainable model and does not allow for there to be a level of excellence that should be expected at a major garden like Fort Worth's.

Organizational Structure

- (1) Restructure the organization, creating a single non-profit Friends organization to replace the two existing support organizations.
- (2) Appoint a Board of Directors for the new Friends of FWBG organization as detailed in that report.
- (3) Transfer the financial and other assets of the Botanical Society and the Garden Center Committee into the new Friends organization (the Botanical Society would retain sufficient resources to continue its operation of four major existing events).
- (4) The current functions that Botanical Society employees fulfill would still need to be filled. With some possible redefinition of duties, and assuming successful negotiations with each individual, the current Society employees would transfer to work for the Botanic Garden.
- (5) Determine future staffing needs and priorities and begin realigning redundant positions and adding new positions based on those priorities.

Earned Revenue

- (1) Implement a single admission fee to replace the two existing admission fees (one for the Conservatory and one for the Japanese Garden). Fees would be no more than the combined existing fees for the two features.
- (2) Implement master planning changes to allow for a single point of entry.
- (3) Coordinate rental program activities to adjust the number and timing of events so as to minimize impact on the physical gardens and staff. Schedule only as many events as existing parking can accommodate.
- (4) Increase fees for rental program commensurate with what the market will bear, so as to maintain consistent revenues while decreasing the number of events.

- (5) Move the concession and the gift shop to the Garden Center to capture revenue from and provide these amenities to more visitors.

Fundraising

- (1) Create a Development and Membership office specifically to build a sustained program for contributed funds from individuals, foundations and corporations to support the Garden's operations and capital needs.
- (2) Substantially build the endowment through capital fundraising and bequests.

Financial Management

- (1) Conduct a CFW internal audit of the Botanical Society, the Garden Center Committee and FWBG to determine available reserves.
- (2) Develop comprehensive financial information and a consolidated budget that will allow FWBG Director to allocate funds according to the highest and best purpose.
- (3) Develop comprehensive management information that will allow FWBG to assess the organization's progress towards its strategic planning goals, including reporting on visitors, programs, collections, fundraising and so on.

Facilities' Needs

- (1) Engage an engineering firm or other expert to conduct a needs and cost assessment for maintenance/repairs and capital needs to hold service levels constant.
- (2) With assistance from the City of Fort Worth, move the maintenance facility out of the center of the garden, a key element of the master plan.
- (3) Close the garden to vehicular traffic and establish a tram, another element of the master plan.
- (4) Develop additional parking options at FWBG including expanding the current special event use of other parking areas within the Cultural District such as negotiating for FWBG parking within the Cultural District at high use times; ultimately, expand on-site parking capacity by building more parking options with assistance from the City of Fort Worth.
- (5) With the City of Fort Worth, develop and implement maintenance plan that will address the significant deferred maintenance needs.

Chapter 4. Organizational Analysis and Recommendations

Summary of Analysis

One of the transformative goals included in the strategic plan, and a specific charge for the consulting team, was to recommend an efficient and effective organizational structure. At present, the Fort Worth Botanical Garden (FWBG) is not managed as an integrated whole. Instead, the organizational structure is fragmented, with the result that strategic priorities are not established and implemented, the organization suffers from inefficiencies and service gaps, the organization has limited ability to garner resources (such as fundraising) consistently and methodically, and there is no clear, consistent financial reporting or comprehensive management information.

To address these issues, in consultation with several stakeholder groups, the consulting team considered four alternative organizational structures:

- (1) Maintain **status quo** with minor adjustments
- (2) Create a new coordinating, **umbrella organization** that works collaboratively with the FWBG Director and the support organizations
- (3) Create a single integrated support group, **Friends**, that reports to the FWBG Director
- (4) Create an independent non-profit organization to operate FWBG, with the FWBG Director reporting to its board (i.e., **Privatization**) and with continuing financial support from the City of Fort Worth

The four alternatives were assessed using three overarching criteria:

- (1) Quality of service
- (2) Revenue generation and efficiency of operation
- (3) Feasibility

Based on stakeholder input and personal experience, the consulting team developed a scoring methodology reflecting the importance of these criteria, with quality of service and feasibility being more important than revenue and efficiency.

Detailed Analysis

Analysis is based on:

- Review of records, including the 2005 Museum Assessment Plan, the 2010 Master Plan, earlier master plans, the FY2015 CFW adopted budget, Director of Large Garden benchmark data, and others.
- Discussions with management of the Gardens (Director and senior managers), with leaders of the two support groups, with leaders in the Park and Recreation Department, with the Planning Committee established for the strategic planning process, and with Fort Worth citizens through individual and public meetings.

An evaluation process was developed with scoring of alternatives against the four organization alternatives:

- (1) Maintain **status quo** with minor adjustments
- (2) Create a new coordinating, **umbrella organization** that works collaboratively with the FWBG Garden Director with the support organizations
- (3) Create a single integrated support group, **Friends**, that reports to the Director
- (4) Create an independent non-profit organization to operate FWBG, with the Director reporting to its board (i.e., **privatization**) and with continued support from the City of Fort Worth

Evaluation Criteria and Scoring

The four alternatives were assessed using three overarching criteria, assigning a score to each of the alternatives. Each alternative is considered relative to the others for assigning scores.

Criteria 1. Quality of Service – maximum score 12

Quality of Service has three components, valued at a total of 12 points, including:

- Making progress toward the transformative goals of the strategic plan – 4 pts
- Excellence and completeness of basic existing operational activities such as garden care, visitor experience, educational programs and so on – 4 pts
- Ability to manage effectively, e.g., develop a complete overarching budget, obtain meaningful management information, coordinate/deploy/ manage staff, respond quickly to opportunities and threats, etc. – 4 pts

Criteria 2. Revenue and Efficiency of Operation – maximum score 8

Revenue and Efficiency has two components, valued at a total of 8 points, including:

- Ability to create, maximize and deploy revenue streams in support of the transformative goals of the strategic plan – 4 pts
- Ability to ensure value/control costs – 4 pts

Criteria 3. Feasibility – maximum score 16

Feasibility has two components, valued at a total of 16 points, including:

- Ease of implementation, i.e., can be fully implemented within a year with some change management effort – 8 pts
- Complies with City of Fort Worth’s regulatory, policy and process criteria – 8 pts (the most heavily weighted criteria because compliance is not optional)

Scoring

The table below summarizes the scores of the four alternatives considered as part of the analysis. The “Friends” alternative – a single support group under direction of the FWBG Director – scored the highest. Privatization also scores well, but it was determined that it would not be feasible to implement privatization at least in the short term. The status quo received a very low score because it is the lowest quality, least efficient and least compliant alternative.

Table 4-1. Summary Scores – Four Organizational Structure Alternatives

| Criteria | Category | Max Score | Status Quo | Umbrella | Friends | Privat. |
|-------------------------------|--------------------|-----------|------------|----------|----------|----------|
| Accomplish Strategic Plan | Quality | 4 | 3 | 3 | 4 | 4 |
| Operational Excellence | Quality | 4 | 1 | 2 | 3 | 4 |
| Effective Management | Quality | 4 | 1 | 2 | 3 | 4 |
| Maximize Revenue | Revenue/Efficiency | 4 | 1 | 2 | 3 | 4 |
| Maximize Efficiency | Revenue/Efficiency | 4 | 2 | 3 | 3 | 4 |
| Ability to Implement/Maintain | Feasibility | 8 | 8 | 8 | 8 | 0 |
| Compliance/Risk | Feasibility | <u>8</u> | <u>0</u> | <u>0</u> | <u>8</u> | <u>8</u> |
| <i>Total Score</i> | | 36 | 16 | 20 | 32 | 28 |

Discussion of Alternatives and Scores

This section describes the four alternatives in greater detail.

Alternative One: Status Quo with Minor Adjustments

The status quo is an unusually complex organization. FWBG is a unit of the Park and Recreation Department of the City of Fort Worth (CFW). Within FWBG, the following functions are funded by a CFW annual budget appropriation and carried out by City employees who report to the Garden Director (a city employee):

- Administration (split responsibilities with Botanical Society in particular)
- Education (split with Botanical Society)
- Visitor Services (split with Botanical Society)
- Landscape design (split with Botanical Society and Garden Center Committee)
- Horticulture and ground operations (split with Botanical Society)
- Coordination with sister organizations (e.g., Botanical Research Institute of Texas)

Additional functions are carried out by CFW employees who are funded by activity-based revenues, including garden rental/wedding fees and conservatory entrance fees associated with the Garden Center. The funding is attributed to the Fort Worth Garden Club, a subcommittee of which makes decisions as to the use of any revenues in excess of the pre-approved specific operating costs for the Garden Center.¹ Positions funded by Garden Center activity-based revenue include:

- Administration (split with CFW)
- Customer service staff
- Events staff
- Programmatic staff (education – funded by Botanical Society)

Additional functions are carried out by employees of the Botanical Society, an independent non-profit organization, and funded by activity-based revenues collected by these employees, including rental events/weddings in the Japanese Garden and other areas, admission fees for the Japanese Garden, gift shop sales, membership dues and concessions. Revenues and expenses associated with these activities are fully contained within the Botanical Society under the authority of an independent board of directors. The terms of the agreement with the Botanical

¹ This agreement arose for historical reasons relating donations from Garden Club members to build the Garden Center. As part of the original gift agreement, the Garden Club subcommittee and the City of Worth entered into an agreement whereby the subcommittee would retain some control over the use of revenues generated from the Garden Center.

Society provide that staff of the Botanical Society is accountable to the Director of the Fort Worth Park and Recreation Department, although no mechanism exists to express or enforce the director's authority.

Employees (and functions) of the Botanical Society² include:

- An executive director (separate from the FWBG director)
- Events staff
- Financial records manager
- Greeters and ticket sellers
- Volunteer coordinator (minimal)
- Marketing (minimal)
- Membership (minimal)
- Gift shop workers

A best practice in virtually all botanical gardens is for visitor operations staff, volunteer coordination and marketing all to report to the garden director with all activity-based revenue treated as unrestricted revenue under the authority of the garden director. CFW acknowledges that under its fund accounting rules, FWBG's activity-based revenue is in fact unrestricted revenue under City authority regardless of the flow of funds.

The operational fragmentation that exists at FWBG means:

- There is no consolidated budget, no unified cost accounting, and no rational allocation of funds toward the highest and best purpose
- Certain functions are redundant (such as the two executive directors and event coordinators and reservationists)
- Certain functions are absent or minimal (such as curation, plant records, business management, marketing, volunteer coordination, fundraising, etc.)
- Staff of the Botanical Society receive compensation and benefits without regard to parity with CFW compensation and benefits levels and practices
- Space is not managed using an overall, holistic approach, resulting in some spaces being underutilized while space shortages also exist
- Some parts of the garden are overfunded; others are underfunded

Some of the issues resulting from organizational fragmentation could be ameliorated with **minor adjustments** to the status quo. These adjustments include:

² Does not include horticulture staff funded by the Botanical Society but employed by CFW

- Modifying the agreements with the Botanical Society and the Garden Club to provide that these organizations report to the Director of the Botanic Gardens rather than the Director of Park and Recreation
- Botanical Society, Garden Club and Botanic Garden representatives meet regularly to solve key operational issues
- Team building among every employee who works for the botanic garden, regardless of the specific employer, including expanded all-staff meetings and project-based teams

Alternative One: Modified Status Quo received a score of 16, as follows:

Quality – 5 points

- Progress toward strategic plan – 3 of 4
Current organizational structure impedes progress toward strategic plan goals
- Excellence of basic operations – 1 of 4
Loss of efficiency through fragmentation, inability to prioritize activities, least effective for managing current organization
- Ability to respond – 1 of 4
Cumbersome structure with three primary entities compromises flexibility and responsiveness to Garden-wide issues and needs

Revenue/Efficiency – 3 points

- Maximize revenue – 1 of 4
No capacity for fundraising; no capacity for overall admission fee; no capacity for centrally located amenities under current scenario; splitting function of facility rental partly under Botanical Society, partly under Garden Center Committee along with CFW means significant conflict and confusion over revenue and other resources such as parking
- Ensure value/control costs – 2 of 4
Botanical Society is not required to provide benefits or compensation commensurate with CFW, which can minimize costs at the expense of individuals; on the other hand, fragmentation creates costly inefficiencies

Feasibility – 8 points

- Ability to implement – 8 of 8
Easiest to implement; changes are very modest
- Compliance – 0 of 8
Compliance score of “0” because the status quo does not comply with the City of Fort Worth’s fund accounting rules and personnel equity policies.

Alternative Two: Create a Coordinating Entity Chaired by the FWBG Garden Director (Umbrella Organization)

Alternative Two: Umbrella Organization is designed to improve the coordination and effectiveness of the complex FWBG organizational structure and its support organizations. This alternative would invest more authority in the FWBG garden director and provide a mechanism by which a consolidated budget and holistic decision-making could occur.

Such a coordinating entity might be comprised of:

- The FWBG Garden Director as chair
- Two members of Botanical Society
- Two members of Garden Club Committee
- A fifth member appointed by the Garden Director

This umbrella organization would not exist as an independent 501(c)3 organization. It would be tasked with specific objectives as part of the strategic planning process, such as:

- Establish an overarching budget document that encompasses all revenue sources within FWBG, specifying revenues and expense planning in service of the strategic plan
- Establish working teams of employees across the support organizations to identify redundant and understaffed functions and make recommendations to the FWBG director to address these issues within the budgetary constraints
- Work with the City of Fort Worth to ensure that flow of funds complies with its regulatory, policy and process requirements
- Create a plan for addressing key functional deficits, with raising significant contributed income the top priority

Alternative Two: Umbrella Organization received a score of 20, as follows:

Quality – 7 points

- Progress toward strategic plan – 3 of 4
Improved coordination makes it easier to move forward on strategic plan goals
- Excellence of basic operations – 2 of 4
Reduced fragmentation and stronger garden director authority improves the use of resources and is better than the status quo at managing the current organization
- Ability to respond – 2 of 4
Improved coordination makes it easier to respond to challenges and opportunities

Revenue/Efficiency – 5 points

- Maximize revenue – 2 of 4
With coordination, creates greater capacity for fundraising but not full capacity; some capacity for overall admission fee with significant coordination effort; minimizes but may not eliminate conflict and confusion over revenues
- Ensure value/Control costs – 3 of 4
Greater coordination provides more ability to control costs than the status quo; continued (though diminished) fragmentation will help contain costs

Feasibility – 8 points

- Ability to implement – 8 of 8
Could be implemented with some change management effort
- Compliance – 0 of 8
Does not comply with the City of Fort Worth’s fund accounting rules and personnel equity policies and therefore deemed infeasible

Alternative Three: Create a New FWBG Support Organization (“Friends”), Chaired by the FWBG Garden Director; Bring All Other Staff and Almost All Functions In-House

Alternative Three: Friends Organization is designed to eliminate the fragmentation of the status quo, integrate all operational functions into the City of Fort Worth organizational infrastructure, and create a mechanism for raising significant contributed revenue. This alternative would obviate the need for a Garden Center Committee to govern Garden Center operations, and would obviate the need for the Botanical Society to serve in its current capacity. The new Friends organization would be comprised of:

- The FWBG Garden Director as non-voting member and staff liaison
- Five members of Botanical Society
- Five members of Garden Club Committee
- Five members appointed by the FWBG Garden Director, most likely a well-connected philanthropist or fundraiser who could assist in helping the fundraising activities take off
- After a specific time period (such as 3 or 5 years), board membership becomes self-perpetuating with no requirements that members of the board be drawn from the Botanical Society or the Garden Club

This friends organization would exist as an independent 501(c)3 organization. It would be tasked with specific objectives as part of the strategic planning process, such as:

- Restructuring the membership program to provide a basis for other fundraising activities
- Establishing a capital campaign with financial goals and timelines
- Creating an annual appeal
- Developing fundraising events

All of the functions that are currently being performed by the Garden Center Committee and the Botanical Society Board of Directors and staff would be integrated into the City of Fort Worth Botanic Garden (with the exception of the volunteer coordination for four existing events, discussed in greater detail below). The Garden Director would then be charged with and empowered to:

- Establish an overarching budget document that encompasses all revenue sources within FWBG, specifying revenues and expense planning in service of the strategic plan
- Establish working teams of employees across the integrated organization and deploy staff efficiently and effectively
- Create a plan for addressing key functional deficits, with raising significant contributed income as the top priority

This organizational structure would meet all of the City's fund accounting and activity-based revenue requirements. All staff would be employees of the City, thereby eliminating issues around equity and lack of compliance with personnel policies.

The Garden Center Committee would cease to exist, although the larger organization of the Garden Club, with its broader mission, would remain. The Botanical Society would continue to exist, but with no paid staff and with the specific function of coordinating volunteers and producing four existing events (specifically, the plant sales, Japanese Festival, Butterflies in the Garden (collaboratively with BRIT), and Concerts in the Garden). Net proceeds from these events would remain with the Botanical Society and its board would allocate these proceeds for the benefit of FWBG with agreement of the Garden Director. CFW would allow sufficient funds to remain with the Botanical Society to fund the operation of these events.

This proposed organization model was developed collaboratively with the FWBG, the Garden Center Committee and board members and Executive Director of the Botanical Society.

Alternative Three: Friends received a score of 32 as follows:

Quality – 10 points

- Progress toward strategic plan – 4 of 4
Fully integrated organization under Garden Director's authority allows for strategic decision-making; Director's time is spent on strategy instead of coordination
- Excellence of basic operations – 3 of 4
Elimination of fragmentation allows for operational excellence; staff and other resources are used for maximum effect
- Ability to respond – 3 of 4
Integration allows for maximum responsiveness

Revenue and Efficiency – 6 points

- Maximize revenue – 3 of 4
Integration of visitor operations provides opportunities to maximize revenues overall on behalf of the garden instead of maximizing revenues for specific fragmented areas; separate Friends organization creates capacity for a mature development program
- Ensure value/control costs – 3 of 4
Diminished fragmentation allows for greater cost controls; compliance with CFW required public practices has some cost

Feasibility – 16 points

- Ability to implement – 8 of 8
This alternative was created collaboratively with Garden Club, Botanical Society representatives and other stakeholders; with significant change management effort and City support, it can be fully implemented within one year
- Compliance/Risk – 8 of 8
Maximum compliance score because it complies with the City of Fort Worth's fund accounting rules and personnel equity policies

Alternative Four: Create an Independent Fort Worth Botanical Gardens Non-Profit Organization, Privatizing All Functions, Executive Director and Staff Report to Private Board of Directors (Privatization)

Alternative Four: Privatization is designed to eliminate the fragmentation of the status quo and integrate all operational functions into an independent non-profit organizational infrastructure. All of the functions that are currently being performed by the City of Fort Worth, the Garden Center Committee and the Botanical Society (Board of Directors and staff) would be integrated into the new non-profit organization. The new organization would have greater flexibility and responsiveness because it would no longer be a public sector unit within the City of Fort Worth.

This model is the most commonly occurring model for public/city botanic gardens comparable to FWBG in size and metropolitan area. A transition to this model has occurred at botanic gardens in several jurisdictions across the country, and has occurred in other cultural organizations in Fort Worth.

As in other cities that use this model to operate their botanic gardens, the City of Fort Worth would need to continue to provide substantial support, but over time the percentage of the operating budget provided by the City would decrease noticeably as more private monies were raised and earned.

Privatization requires the commitment of a strong and independent group to assume management responsibility. Such a group does not exist at this time in Fort Worth, and would take several years to develop. Additionally, public support, while not a sine qua non, can assist with the

transition to privatization and there is public opposition to this model at this time. This alternative was given an effective score of 0 because it is not feasible at this time. Whether or not the City of Fort Worth wishes to reconsider privatization as an option at some point in the future, once the organizational structure issues have been addressed and a fundraising program is in place, would be a policy decision for future leaders. If the Friends organization model achieves the organization's aspirations and goals, there would be no reason to do so.

Alternative Four: Privatization received a score of 28, as follows:

Quality – 12 points

- Progress toward strategic plan – 4 of 4
- Excellence of basic operations – 4 of 4
- Ability to respond – 4 of 4
Maximum control, flexibility and responsiveness

Revenue and Efficiency – 8 points

- Maximize revenue – 4 of 4
- Ensure value/control costs – 4 of 4
Maximum ability to increase revenue and control costs because the organization is not subject to regulatory constraints and CFW policies and procedures. Also, some donors are much more likely to support a private non-profit organization than a unit of the City

Feasibility – 8 points

- Ability to Implement – 0 of 8
No strong, organized, independent group in a position to assume responsibility for operating FWBG at this time; cannot be implemented within the timeframe of the strategic plan; members of the public are presently opposed to privatization
- Compliance – 8 of 8
Fully compliant with CFW and other regulatory constraints

Long-Term Implications

Although Alternative Four: Privatization received a lower score in the short term, the City of Fort Worth must consider the long-term implications in all its decisions. While predicting ten or twenty years from now is impossible with any precision, one can reasonably predict that the future will require all institutions to be as nimble and adaptable as possible to changing circumstances. The trends in recent years have been for non-profit organizations, including botanic gardens, to rely more on private sector funds, to build endowments and strong boards, and to have governance structures that allow for sound management practices.

The two management/governance alternatives that provide by far the best chance for Fort Worth Botanic Garden to succeed over the long run and be managed well are the development of the new Friends organization (replacing the two support organizations) or privatization. As noted above, privatization is a very large step for which the Garden is unprepared, and is unlikely to be for some years to come but it should remain a future consideration. The most critical step from a long-range perspective is to replace the two existing groups with a new Friends group under the direction of the Garden Director.

Recommendations

In summary, based on this assessment methodology, the consulting team recommends Alternative Three: New Support Organization. The first two alternatives - status quo and new umbrella organization - received lower scores because:

- They continue the fragmented organization structure, which minimizes the organization's ability to ensure quality, maximize revenue and ensure value and they are not in compliance with the City of Fort Worth fund accounting, cash handling and personnel policies
- The umbrella organization, while more effective overall than the status quo, requires significant coordination effort by the FWBG Garden Director, maintains some redundancy of positions, and does not address the compliance issues

The second two alternatives - creating a new Friends organization and privatization – received higher scores because they both address the fragmentation issue, creating a seamless, coordinated organization under a single director that is in full compliance. This alternative is the recommended option. A single coordinated organization has the greatest ability to ensure quality pursuing the goals in the strategic plan and responding effectively to challenges and opportunities. It is also most efficient at gaining revenues, controlling costs and ensuring value since the director has full authority to raise and spend money and use space and staff resources for the highest and best purpose. The new Friends organization was given a higher feasibility score because it can be implemented within a year given strong support by CFW leadership. Most public organizations that privatize do so with strong advocacy and support from an existing independent organization that has a vision for privatization and is ready to take on its challenges. Privatization would represent an enormous shift from the status quo, and since the recommended new Friends organization addresses many of the quality, revenue/efficiency and compliance criteria, and especially because it is far more realistic today, there is no compelling need to implement the change to privatization at this time.

Chapter 5. Master Plan Review and Recommendations

Introduction

The purpose of this review was to evaluate the garden’s evolution and site development goals since the 2010 master plan was completed. A completely new master plan, or even a master plan “update,” is beyond the scope of this review. The goal in this review is to offer suggestions of refinement in the context of the proposed broad strategic goals and suggest elements that might be studied further in a subsequent “plan update” process at a later date. This narrative also identifies several objectives that might be implemented in the short term, to make an immediate impact with low to medium investment. In general terms, it is suggested that a formal master plan process is undergone approximately every ten years, with an interim less-intensive update to occur at the completion of substantial projects or approximately every five years.

The 2010 Fort Worth Botanic Garden Master Plan by Andropogon and James Toal is a solid document that is still relevant. The vast majority of the goals and aspirations of the plan are still valid. The consulting team’s commentary will focus on specific strategies for the next five years to make an immediate impact on the garden’s visitor experience and public identity.

Primary points include the following, organized into three groupings: Circulation, Horticulture, and Infrastructure:

Circulation

- Create and celebrate a centralized visitor point-of-entry to the garden at the Garden Center
- Remove public vehicular circulation from the interior of the garden
- Create an intuitive pedestrian spine and loop experience
- Implement a small tram route

Horticulture

- Expand initiatives to differentiate public perception of FWBG as a Garden rather than a park
- Celebrate and expand the legacy of existing gardens
- Consider Home Idea Garden and Trial Garden

Infrastructure

- Solve parking pressures by adding parking

- Solve event and other required logistical access to various areas of the garden
- Integrate the relocation of the garden operations within the budget planning for the Children's Garden
- Implement wayfinding signage and interpretive system
- Relocate Restaurant to the Garden Center complex
- Renovate and repurpose Rock Springs structure and restaurant space as an event venue
- Establish new gift shop at the Garden Center
- Establish multiple outdoor classroom spaces for youth education
- Solve for storage that is currently off-site across University Drive

Circulation

Create and celebrate a centralized visitor point-of-entry to the garden at the Garden Center

An enhanced arrival sequence will enhance the visitor experience by allowing all visitors to be greeted and welcomed to the garden at a common point of entry. This is directly related to the removal of cars from the interior of the garden, but the impact on visitors goes well beyond that. A common entry point will allow for a better planning of routes by the visitor, and an understanding of the overall garden layout. The strategy should orient visitors at the Garden Center or within the courtyard, and then propel them on their discovery of the Fuller Garden and other gardens. Automatic doors should open from the Garden Center to the courtyard. Additionally, an arrival sequence offers an opportunity for interpretation and education fostering a better understanding of the special nature of botanic gardens.

Part of the overall arrival sequence should also address bus drop-off for school groups, including shaded staging areas for student collection and disembarking. A separate field trip entrance might be considered. Bus Parking should be addressed.

Remove public vehicular circulation from the interior of the garden

Private vehicles within the garden cause a number of detrimental effects on the garden experience:

- Visual and audible distraction
- Creates wide swaths of pavement that are not of a pedestrian scale
- Cuts axial views
- Diminishes the perceptions that this is a Garden and not a Park
- Dangerous for pedestrians
- Multiple entry points is confusing
- Erodes the sense of arrival

The existing roadways should be closed to public traffic. A logistical circulation study should be enacted that studies parking requirements, tram route and stops, and delivery/service access to all

areas of the garden that need it, including weddings (caterers, guests, etc.), operations center, restaurant, Texas Garden Clubs Headquarters, and other locations that need some level of car access from time to time.

Parking concerns related to this intervention are covered in the Infrastructure section of this narrative.

Create an intuitive pedestrian spine and loop experience

After arrival is addressed and cars are removed, the next logical step in enhanced visitor experience is the implementation of a well-orchestrated pedestrian spine from the Garden Center to the Rose Garden and Rock Springs. As a tram will also be needed (more detail below), this spine must also accommodate that use with the Texas Native Forest Boardwalk serving as an additional pedestrian experience. This linkage from the Garden Center to the historical core of the original garden should be the dominant pedestrian route that the other gardens are accessed from and have an address on. This linear garden experience may utilize the old roadway as the dominate route (Option 1-West Route). This route would require the future Children's Garden footprint to stay west of Old Garden Rd. Alternatively, a new route can be constructed to the east of the future Children's Garden along the western edge of the North/South Vista (East of the existing Native Texas Boardwalk) (Option 2-East Route). The route allows more space for the Children's Garden however pulls the garden off of the main tram and pedestrian loop. A horticultural theme, storyline, and program for this linear experience should be developed on either loop option. An important factor will be screening the operations center until the Children's Garden is realized. Narrowing the scale of the existing roadway as a pedestrian/tram spine garden is also important to make it inviting, engaging and an experience of itself.

Eventually, this spine might be expanded to create a loop through the eastern areas of the garden that are primarily naturalized and somewhat wet. The Garden should consider relocating the final route of this main loop to the interior of the garden and away from the traffic distraction on I-30 (i.e., not utilize the recently completed trail through Rock Springs as the dominant route, the Rock Springs trail can remain a part of that garden, but not as the main loop). The ultimate loop may also consider an alternate to the north side of the Rose Garden if it can be made to be an ADA accessible path for both pedestrians and the tram. Alternatively the Rock Springs Trail can be integrated into the main loop. If this route is preferred the Garden should consider heavily screening the path from the distractions on I-30.

Implement a small tram route

A small tram should be instituted that links the Garden Center with the Garden's historic core. The tram is critical to the garden's success once the roads are closed to automobile traffic. The proposed route would follow the pedestrian spine (as noted above) and include several stops

including the Japanese Garden and event destinations. The primary tram origin to the west or southwest of the Garden Center should be carefully evaluated as a dominant node on the overall loop and also a secondary point of orientation after leaving the Garden Center. This tram should operate during normal hours of visitation as well as during events.

Horticulture

Expand initiatives to differentiate public perception of FWBG as a Garden rather than a Park

Several planting initiatives will help define the Garden experience and claim an address within the context of park and institutional neighbors:

- Develop an enhanced Garden presence at the entry on University Drive
- Develop enhanced plantings along the “garden” side of University Drive so as to differentiate it from the park across the street; the current “naturalized” appearance on the west side of University is almost indistinguishable from the park except for the fence
- Tell the story of unknown aspects of the garden legacy, i.e., the Begonia Collection, among others

Celebrate and expand the legacy of existing gardens

The historic core and axial relationships of the original garden experience are the foundation of the FWBG experience. These should be enhanced, restored, and maintained to an inspiring level. The North South axis could benefit from some thoughtful tree removal on its northern end. The East West vista should also be restored. The old roadway that cut through the site (east west) should also be carefully considered for re-knitting into the garden fabric. Landmark gardens such as the Japanese Garden and the Rose Garden should be carefully maintained and enhanced. As mentioned above, a new horticultural/garden experience on the new pedestrian spine should be developed.

Consider home idea garden or trial garden program

As a resource for the community, a home idea garden program and/or a trial garden should be constructed. These have been proven to be very successful at other institutions, and might serve well with the mission of BRIT and the City.

Implement signage and interpretive system

Create a holistic signage plan that aides users as they explore the gardens. Interpretive signage can enhance the educational experience of the Garden.

Infrastructure

Solve parking pressures

Inherent to the removal of vehicles from the garden core is the loss of parking on the garden interior. Approximately 200 total spaces are removed from routine use. Space is available to expand the existing parking lot adjacent to the Garden Center and BRIT. A parking study should be initiated to aggressively plan for the expansion of onsite parking and also for accommodation of the reduced event parking available at the southwest corner of the site when the operations center is relocated to build the new Children's Garden.

While the existing master plan proposes a substantial parking lot to be constructed on the southwest corner of the site, it is proposed to be built on land that the City (i.e., the Garden) does not currently own. This proposal has apparently been circulated on several previous master plans dating back to the 1980s for the cultural district. Acquiring this property appears to be a long term goal (and a very worthwhile one, this parcel of land in question would be very strategic for the garden to acquire). Short term success of the garden, however, should not be based on the assumption that this land will be available for Garden development, without a substantial infusion of funds from an outside source. A shared parking agreement might be considered with the ongoing Arena project directly to the west of the garden. This option should be considered to accommodate large special events but is not convenient for the casual garden user. Many gardens throughout the country provide a shuttle service during peak events to off-site lots. With the volume of parking directly adjacent to the garden, it seems that this option should be seriously considered. Still, on-site parking is essential for day-to-day visitation with remote parking used for special events.

Solve event and other required logistical access to various areas of the garden

A component of the parking study should carefully evaluate routes and access to each garden for maintenance and event facilitation. This study should make recommendations regarding pathway widths for trams, service vehicles, and pedestrians, based on the type of vehicle and frequency that access would be needed to serve different destinations with the garden.

Implement wayfinding signage and interpretive system

As mentioned in the 2010 plan, a holistic wayfinding strategy and interpretive system will elevate the visitor experience significantly.

Integrate the relocation of the garden operations within the budget planning for the Children's Garden

The garden operations and maintenance center must be relocated and operational prior to the Children's Garden construction. This also has a direct impact on event parking.

Relocate restaurant to the Garden Center complex

Most garden restaurants succeed when they are surrounded by views that visually engage the surrounding garden environment and are also easily accessible at the arrival point to better serve guests who want to dine at the garden without traversing deep into the garden itself. The Garden Center complex already has a kitchen and ample space that might either be repurposed or expanded to create a complimentary dining experience to the garden identity. Such a resource at the Garden Center should also support other programs and facility rentals that occur at this hub of activity. After the Garden is closed to automobile traffic and before the restaurant is relocated tram service will be required. Alternatively, automobile restaurant access can be temporarily maintained through the southwest entrance by keeping a small portion of the existing road open to traffic, possibly only on certain dates.

Study the potential renovation and repurposing of the Rock Springs structure and restaurant space as event venue

The historic Rock Springs structure is a prominent landmark within the Garden core. The building should be completely renovated and probably repurposed either as a program or rental event space. Staff offices in this structure should be relocated to the Garden Center or within the yet-to-be-designed relocated operations center proposed at the southwest corner of the property.

Establish a new gift shop at the Garden Center

A consolidated point-of-entry will generate enough traffic to support a gift shop, especially when envisioned with a new restaurant at the Garden Center. The new shop should have easy access and prominent visibility within the Center. An architectural study on existing structures will need to be performed as it relates to current and future use.

Establish multiple outdoor classroom spaces for youth education

While various locations exist around the Garden that supports youth field trip and education programs, more should be added. In concert with the ongoing evolution of program development, existing spaces should be evaluated on how they may be flexible to accommodate a class or new areas should be identified for development.

Solve for storage that is currently off site across University Drive

The new operations center design should accommodate garden storage that is slated for elimination when a nearby street realignment project is realized.

Recommended Future Planning Initiatives

The Garden should consider several additional initiatives this strategic planning effort as a foundation upon which to build a future master planning update. These should include:

- Parking Study - evaluate opportunities for expanded parking at Garden Center and feasibility of future parking garage. Off-site agreements for event or seasonal shared parking should also be seriously considered. On-site event parking will also need to be addressed.
- Traffic Study - evaluate signalization, closing Rock Springs Rd., possible turn lane, etc.
- Tram Study - evaluate the size, route, stops, start-up cost, infrastructure, and operating costs.
- Conduct a facilities and infrastructure assessment for budget planning and to identify critical path items and establish/refine a holistic planned maintenance schedule for gardens and structures.
- Evaluate programming existing Greenhouse structures for visitor experience study.
- Develop a pro forma for restaurant and retail program.
- Study design and program for retail and restaurant space.
- Develop Operations Center design.
- Horticulture
 - Enhance the Native Texas Boardwalk

Quick Wins

The Garden should consider several additional initiatives that will provide an immediate positive impact with minimal investment. These should include:

- Create a single point entry
- Close roads and create temporary tram route
- Create a cost study for initiating tram route and spine garden
- Wayfinding
- Texas Garden Club access resolution
- Command Center at the Garden Center including a visitor services desk and arrival map
- Lighting
- Evaluate rental destinations in the Grove
- Vista drainage