



**AMERICAN CAMELLIA SOCIETY  
MASSEE LANE GARDENS  
STRATEGIC PLAN 2007**

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# EXECUTIVE SUMMARY

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## Overview

The Board of the American Camellia Society approved a strategic plan for the organization in March of 2006. That plan specified that a volunteer committee that was formed following the March meeting would create a Strategic Plan for Masee Lane Gardens. The Committee was established and began its work with meetings in Fort Valley in June 2006. The Plan has been developed and will be submitted to the Board of ACS for approval.

This Executive Summary is intended as a summary of the conclusions reached by the Committee and as set forth in detail in the Strategic Plan.

## Long Term Goals

This Strategic Plan for Masee Lane Gardens is intended to establish a program for strengthening the volunteer and financial support for Masee Lane Gardens, to build the “brand” awareness of Masee Lane and to create programs and events that will serve constituent groups – all of the above both regionally and nationally.

## ACS Operating Context

Masee Lane Gardens operates, and will continue to operate, within the ACS organizational umbrella. The mission statement of ACS – set forth below – specifically incorporates Masee Lane as an integral part of the overall ACS organization.

*The American Camellia Society is a self-sufficient, national membership society committed to continually building membership through offering world-class products, leading in camellia research and education and being supported by efficient and effective organizational systems; which also owns and maintains a self-sufficient, public garden at Masee Lane in Fort Valley, GA serving camellia lovers nationally as well as residents of the region and tourists.*

## Mission Statement – Masee Lane Gardens

The Committee agreed to the following Mission Statement for MLG – designed to direct development of MLG in the future and to act as a focus for communicating with various constituent groups as the Strategic Plan implementation progresses.

**Masee Lane Gardens, with an educational and horticultural focus, features the International Camellia Collection of the American Camellia Society along with other gardens and fine arts collections.**

Masee Lane Gardens offers:

- The nation’s preeminent camellia collection.
- The nation’s foremost collection of camellia publications.
- Other gardens with plants suitable for the Southeast.
- A collection of the region’s native plants from a variety of growing environments.
- An array of informative horticultural programs.
- The world’s largest public collection of Boehm porcelain along with works by other artists.

## Values

The core values of the organization as set forth below will provide guidance for interaction with everyone who receives services from or provides services to MLG

- **Integrity**
- **Excellence**
- **“One Team”**
- **Dynamism**

## Strategic Issues

The committee identified, and prioritized the following primary issues that MLG faces and that need to be addressed in establishing Goals and implementing projects to achieve the objectives of the Strategic Plan.

- **Development/fundraising**
- **Increase in visitors**
- **Budgeting, accountability, responsibility**
- **Quality of staff and Volunteers**

## Customer / Constituent Needs

The Committee identified a list of the constituencies with which MLG does and will interact and identified the primary needs — and resulting programs/products/services that will appeal to each constituency. This analysis will be validated through direct discussion with each of the constituencies and will be updated over time to ensure that MLG continues to provide relevant programs and service to members, customers and others. This work will help direct not only the design of MLG offerings but also the creation of marketing communications.

## Critical Success Factors

The Committee identified the following success factors that they felt would be faced by MLG. Some of these factors are within the control of management, and others are not. Regardless, management will have to address each of the issues to the extent feasible.

- Substantial increase in contributions
- Greater public awareness of camellias
- Greater public awareness of MLG
- Growth in local tourism
- Growth in rentals and facility use
- Growth in visitation
- Establishment of a viable support group of volunteers and other “partners”
- Volunteer programs for assisting with MLG work

## Strategic Goals

Based on the above work, as further detailed in the Strategic Plan, the Committee identified and prioritized the following Strategic Goals. For each of the goals, the Committee then identified detailed projects and tasks that will form the basis for actual implementation of the Strategic Plan commencing in 2007.

### **Strategic Goals**

- I. Program, Event & Rentals Development
- II. Volunteer Development
- III. Membership Development
- IV. Fundraising Development

### **Supporting Goals**

- Facilities and Gardens Cost Projections
- Financial Projection Model
- Marketing and PR Campaign

## Project Implementation

The Committee identified specific, measurable objectives for each goal as shown below. In addition each Goal has a set of projects that will be implemented in two phases. These Projects are set forth in detail in the Strategic Plan.

<b>Program Goal</b>	<b>Objective #1</b>	<b>Objective #2</b>
Programs & Events	Increase in the number of attendees for existing Programs and Events..	Increase in the number of new, viable higher margin programs.
Rentals	Increase in the number of Rentals.	Increase in the number of new higher margin Rentals.
Volunteers	An increase in the number of (qualified) volunteers.	Expansion of the geographic area from which volunteers come.
Membership	An increase in the number of members – year-to-year.	Growth in member-generated revenue.
Fundraising	Increase in the number of donors by category.	Increase in the amount of annual donations by each donor .

Each of the objectives will have numerical targets and timelines designated as part of the implementation plan, and the Committee will be working to achieve those numbers over the designated timeframe. The projects associated with the Supporting Goals will be implemented early in the process.

## BACKGROUND

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### Massee Lane History

David C. Strother came to Fort Valley in 1903 to manage the Fort Valley Oil Company and shortly thereafter he began to acquire land in the area and entered the peach business. In 1936 a disastrous windstorm swept across the Massee Lane Farm and blew down many peach and pecan trees. Mr. Strother planted a *japonica* in place of a pecan tree and he liked it well enough to plant more in the yard. This was the beginning of the huge plantings of camellias at what was to be known as Massee Lane Gardens. Each plant in the gardens had an interesting story as Mr. Strother would only accept those that he considered to be outstanding and friends considered it an honor when he would add one of their varieties to his garden.

Over the years brick walkways were added along with seating arrangements. There are 42 gristmill stones located in the gardens along with numerous granite milestone markers from the Old Wire Road that ran nearby. A formal boxwood bordered garden was added which was enclosed by a wall made of old brick obtained from Magnolia Gardens near Charleston.

In 1966 Mr. Strother donated approximately 150 acres of land including his gardens and a large trust fund to the American Camellia Society, of which he was a founding member, to be used as the headquarters. On May 1, 1968 a headquarters building had been constructed and this became the home of the ACS.



Over ten acres are cultivated with one of the finest collections of camellias in the United States. In addition to the camellias, which predominate, there are vast plantings of daffodils, gardenias, Confederate jasmine, tea olives, and Lady Banksia roses. Recently a daylily garden was added that contains a vast array of many colorful varieties.

In 1972 Mrs. William Parks Stevens of Macon, who with her husband, had been longtime friends with David Strother, donated her collection of 130 Edward Marshall Boehm porcelains to the Society along with a gallery to house the display. This began the activity of obtaining and displaying notable porcelain objects at Massee Lane Gardens.

The Annabelle Lundy Fetterman Education Museum was completed in 1989 and now serves as the Visitors Center for the Gardens. In the main room there is a sizable display of porcelains by Boehm, Cybis, Connoisseur, Bronn, and other well known studios. There is an auditorium that is available for various presentations, and a gift shop which offers camellia related items and other types of gifts.



Near the Fetterman building is the Scheibert Rose Garden that contains more than 150 roses. Complete with a latticed gazebo, the garden makes a perfect setting for outdoor weddings and other social functions. Located in the garden is the Japanese Garden. The tranquil ambience of this garden is enhanced by the sounds of gently tumbling waters falling over boulders to ponds filled with colorful Koi fish that swim slowly at your feet.

The gardens and buildings are available for rental to outside groups, and the facility hosts over 30 events each year ranging from weddings to small corporate retreats and training sessions. One of the objectives of the Strategic Plan is to expand use of the facility and increase revenue from events and rentals significantly.

## Strategic Plan Objectives

The Board of the American Camellia Society approved a strategic plan for ACS in March of 2006. The plan specified formation of a volunteer committee that would create a Strategic Plan for Masee Lane Gardens, including the buildings, programs, events and rentals. The Committee was established and began its work with meetings in Fort Valley in March 2006.

This Strategic Plan for Masee Lane Gardens is intended to:

- Establish a program for strengthening the volunteer and financial support for Masee Lane Gardens.
- To build “brand awareness” of Masee Lane, and
- To create programs and events that will serve constituent groups both regionally and nationally.

The objective of the strategic planning process is to create a foundation for ACS to capitalize better on the extraordinary assets it has in the gardens, the facilities, the camellia library and the porcelain collection. The intention is to build an organization at Masee Lane that will provide focus and resources for this effort.

## Strategic Planning Process

The Board of Directors of ACS authorized establishment of a Strategic Planning Committee, which included the following members:

Deane Hall – Committee Chair  
John Gamble  
Tom Johnson  
John Newsome  
Hulyn Smith  
Warren Thompson

Barbara Tuffli  
Gene Phillips  
Wilbur Rumph  
Ann Walton – Executive Director  
W.C. WyattCullen Coates –facilitator

The strategic planning process began with a constituent “feedback” session in March of 2006 at Masee Lane. The participants in that session were interested constituents from the local area who provided input on issues facing MLG and ideas for programs/projects that might be undertaken. The feedback from that session informed the meetings of the Committee held in June.

In June 2006, the Committee held its first formal meeting, preceded by a second half-day session with 20+ constituents to expand on the discussion held at the March meeting. The results of that session are available under separate cover.

The Committee then convened for one and a half days to identify review, confirm and modify the key elements of strategy that will form the basis for the strategic plan. The topics for discussion on the agenda were as follows:

### **Strategic Elements**

- Key Issues
- Mission
- Values
- Financial Objectives

### **Strategic Context**

- Constituents and Customer Needs

- Critical Success Factors
- Required and Existing Competencies/Skills
- Core Competency

### **Strategic Initiatives/Projects**

- Strategic Goals / Initiatives
- Implementation Projects and Tasks

The Committee also identified the additional information that is necessary to provide input for the Committee in deciding on courses of action under each goal. Generally this fell into the following categories – some of which information was obtained from ACS and some from calling other Gardens and Non-profit organizations:

- Visitor information at MLG
- Current marketing and PR materials
- Current Programs, attendance, revenue, etc.
- Development and fundraising methods
- Membership structure and goals
- Volunteer organization

The overall objective of the planning process was to establish a strategic plan driven by key issues facing Masee Lane – in a framework that will enable the organization to review the results annually and adjust goals based on changes in the operating environment for MLG and ACS.

## STRATEGIC ELEMENTS SUMMARY

### Strategic Issues

The committee identified, discussed and prioritized the top strategic issues facing MLG. In considering the issues they determined that, although a total of 25 issues were identified, in fact the top four, if adequately addressed, would resolve most of the other issues. It was these issues that helped inform the final goals and projects coming from this plan. Accordingly, the top four strategic issues identified by the committee were:

Issue	Category
1. <b>Development/fundraising</b>	Development
2. <b>Increase in visitors</b>	Marketing
3. <b>Budgeting, accountability, responsibility</b>	Organization
4. <b>Quality of staff and Volunteers</b>	People

### Mission Statement

The Committee considered various versions of a mission statement that incorporate the appropriate focus for MLG, as distinct but still a part of ACS. The intent was to develop a mission statement that would be sufficiently flexible but also clearly identify the focus of the MLG organization. Accordingly the following mission statement was created:

**Masee Lane Gardens, with an educational and horticultural focus, features the International Camellia Collection of the American Camellia Society along with other gardens and fine arts collections.**

Masee Lane Gardens offers:

- The nation's preeminent camellia collection.
- The nation's foremost collection of camellia publications and prints.
- Other gardens with plants suitable for the Southeast.
- A collection of the region's native plants from a variety of growing environments.
- An array of informative horticultural programs.
- The world's largest public collection of Boehm porcelain along with works by other artists.

### Values

The core values of the organization are intended to serve as guidelines for the organization's interaction with all constituencies – customers, donors, suppliers, employees, volunteers and so forth. The committee considered and agreed to the following four core values for MLG:

- **Integrity**
- **Excellence**

- **“One Team”**
- **Dynamism**

### Financial Objectives and Modeling

The Committee has developed a pro-forma financial projection model for the MLG operation. The Committee has considered various operating scenarios and is able to determine the amount of revenue from various sources that will be required based on differing assumptions about patronage and expense levels.

The Committee felt that it is premature to try to establish a set of objectives until the feasibility work is done based on the number of prospective donors, the size of MLG membership and the scope of the volunteer operation become clearer.

In the interim, the financial projection model will better enable the Board of ACS to understand how resources should be allocated to ensure that the MLG operation becomes and remains financially viable.

## STRATEGIC CONTEXT SUMMARY

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### Constituent and Customer Needs

The constituents of MLG include everyone and every type of organization with which MLG has contact. In order to ensure that MLG is able to attract the required support and patronage from all its constituencies, an ongoing and formal process of identifying, surveying and validating what constituents actually want and expect will be required.

In order to establish a baseline from which the MLG organization can expand and improve as operations move forward, the committee considered the work done in the earlier sessions as well as the experience of the participants over the years. From that it developed a list of constituencies and then evaluated their various needs. Based on that analysis the group created the following list of potential programs, products or services that MLG may offer. This list is preliminary for planning purposes. It is not intended as exhaustive and will be refined. However, it demonstrates the process and serves as a starting point for further and ongoing work.

<b>Constituent</b>	<b>Product/Service</b>
Individual visitors	Pleasant and informative visits
Children, parents, school and other groups, scouts	Children's programs
Tour groups	Garden tours
Porcelain lovers	Boehm and other porcelain information
Volunteers	Education and training workshops, thank you program, recognition
Individual donors	Recognition program, MLG/ACS communication
Employees	Training, recognition
Camellia professionals	Symposiums, customer referrals, web FAQ, hort. advice,
ACS members	Plant sourcing network, hort. Info.,
Government agencies	Camellia information, research partnerships,

MLG members	Special MLG events, MLG communications,
Garden clubs	Place for meetings, camellia info., club education,
Camellia societies	Hub for information, educational activities
Landscape professionals	Education about landscaping, source info.
Rentals	Weddings, other social and business gatherings
Plant sales	Camellia growers
Foundations	Camellia education
Corporate donors	Camellia education
Program Partners	MLG Projects

### Critical Success Factors

Based on the issues that MLG faces and the other elements of the strategy process, the Planning Committee discussed and identified certain critical success factors that they consider to be the primary determinants of the success of the Strategic Plan. Some of these factors are within the control of ACS and/or MLG and others may not be. Nevertheless the organization will have to be aware of their impact on execution of the plan so that management can control them where possible and leverage positive benefits or mitigate adverse consequences where required.

The Committee did not prioritize these in terms of which would have the most important impact, but that may be done at a later stage. The success factors are as set forth below:

- Substantial increase in contributions
- Greater public awareness of camellias
- Greater public awareness of MLG
- Growth in local tourism
- Growth in rentals and facility use
- Growth in visitation
- Establishment of a viable support group of volunteers and other “partners”

### Required Skills and Competencies

In order to execute the strategic plan, MLG will need to have available people with certain skills and competencies. These people can be involved with MLG in a variety of capacities such as:

- As paid employees – working full or part time on MLG projects.
- In the form of services provided by ACS through ACS employees (e.g. bookkeeping and accounting.)
- As volunteers
- As paid vendors/consultants
- As “partners” – (e.g. Fort Valley State University or local corporations and organizations may partner for certain programs or projects.)

The Committee went through a careful process of identifying the skills and competencies that they felt would be required to execute the Strategic Plan and identified the following:

Competency	Existing / Required
▪ Camellia horticulture	Existing
▪ Outreach (speaking, problem solving, other programs)	Existing
▪ Retail operations	Existing
▪ Ability to stage a variety of educational programs	Required

- |                               |          |
|-------------------------------|----------|
| ▪ Facility administration     | Required |
| ▪ Fundraising and development | Required |
| ▪ Gardens administration      | Required |
| ▪ Marketing and PR            | Required |
| ▪ Research                    | Required |

“Core Competency”

The Committee was then challenged to identify the single most important existing competency that drives Masee Lane. The question that was asked is: “What is the single most important thing at which MLG can be considered to be world class or at which MLG should strive to be world class”?

It was noted specifically by the Committee that this was not intended in any way to detract from other competencies or from overall focus and scope of the Strategic Plan or MLG programs and projects. The purpose of making this identification is to help the Committee, the ACS Board and Management in establishing priorities in the event that resource constraints require postponing desired programs or projects. It also can be a very important factor in marketing communications by helping to focus the message around MLG and its programs and projects.

The Committee agreed that if a single “core competency” was to be articulated it would be:

Masee Lane Gardens should be recognized as being world class as:

- **The authority** on camellias (also for ACS itself)
- The **best** camellia garden in the world
- The **premier source** for state of the art information on camellias (also for ACS itself)

## STRATEGIC GOALS AND INITIATIVES

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### Strategic Goals and Initiatives

The Planning Committee set forth and prioritized a list of strategic goals and initiatives that will have to be achieved in order to address the key issues that MLG faces in the coming years. The original list consisted of fourteen items and was prioritized to the four “strategic Goals” and three “Supporting Goals” set forth below set forth below. The Committee noted that the supporting goals are relatively short term in nature and, while being essential to the overall goals of the organization, will in fact be accomplished in a relatively short timeframe as “upfront projects” in the initial stages of executing the Strategic Plan.

Strategic Goals	Category
<b>I. Program, Event &amp; Rentals Development</b>	Programs
<b>II. Volunteer Development</b>	Administration
<b>III. Membership Development</b>	Membership
<b>IV. Fundraising Development</b>	Fundraising
Supporting Goals	
▪ <b>Facilities and Gardens Cost Projections</b>	Facilities
▪ <b>Financial Projection Model</b>	Finance
▪ <b>Marketing and PR Campaign</b>	Marketing

# STRATEGIC GOAL IMPLEMENTATION

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## Implementation Process Overview

The Planning Committee considered the agreed Strategic Goals and defined a series of Projects that will be implemented to achieve the objectives set forth in the Strategic Plan. The project sequence is consistent with the Goals but goes into more detail.

The Committee also recognized that the availability of resources and the logical “sequencing” of activities will cause some of the projects to require more than a twelve-month period for accomplishment. It was also noted that some “projects” in fact are ongoing in nature and are not “one time” events. For example, the process for determining which programs, products and services will be offered has a short term as well as an ongoing aspect. The work that is done at the outset is intended to be a platform for work done annually.

In defining each project the Committee created a “model” that can be used to help establish the project and can be used annually for review and updating of the plan.

The Project model has four components:

- Key issues that the project must address.
- The top two objectives (measurable outcomes) that the project will accomplish.
- Skills/Competencies that the organization will require to execute the project.
- Project deliverables/tasks, timing, etc., to accomplish the project.

The Committee considered all elements other than required skills/competencies for each project. The Definition of required skills will be addressed separately as each project is implemented to ensure that the correct focus is given to the “people” resources” necessary for success.

Further, while the Committee established measurable objectives for each project, the group felt strongly that at this point it is premature to try to put a number to each objective. It will be important, however, to make an effort, at the earliest opportunity, to force the processes of establishing some quantifiable objectives as a baseline for each of the projects. While the objectives may be difficult to determine initially, it is better to establish the objectives, recognizing that they are guesswork, than to avoid making the effort and thereby leave the outcome to speculation.

## I. Programs and Events Development Plan

### Overview

The Mission of Program and Events Development is to establish and market a compelling, professionally-run and financially self-sustaining series of Programs and Events that will serve a variety of MLG constituencies including but not limited to ACS and MLG members, volunteers, local and regional organizations, and others as identified. It will be important in the first instance to ensure that the program is responsive to participant needs through formal needs analysis and ongoing surveys, and that it balances the desire of participants for programs with the need to ensure that programs are adequately resourced from a financial and people perspective.

It is expected that Programs and Events will be an important vehicle for enlisting volunteer interest in MLG either through participation or by actually conducting programs on behalf of MLG. MLG may also be a venue for outsiders who want to have an appropriate place for their own programs.

As part of refining the Programs and Events part of the business, the Committee discussed the need for significant changes in infrastructure in order to begin managing this part of the enterprise more as a for-profit company would manage it – as set forth below under “issues”.

The Committee addressed the definitional question of what constitutes a Program or Event and agreed to distinguish between "Rentals" and "Events" and "Programs".

- Programs are activities put on for members such as horticulture training.
- Events are other paid events, which may or may not be member-focused, such as fundraising dinners, fashion shows, concerts, etc.
- Rentals are activities such as weddings, etc., where the primary purpose is rental of the facilities or gardens to outside groups for their own activities.

The Committee identified ways to target programs in many different ways such as the following:

- Area of interest – hobbyists, gardeners, professionals, etc.
- Geographic proximity — different types for locals vs. people from a distance. For example the owner of the local Days Inn is interested in partnering to bring groups from Atlanta or elsewhere in the region for overnight stays and programs, events or tours in the Fort Valley area.
- Type of visitor – individual, group, tour, etc.
- Local partnerships - universities, corporations, local clubs etc.
- Non-camellia programs.

The Committee also discussed ways that MLG can identify, track and market more effectively to prospective participants such as:

- Marketing to organizations that have access to prospects – such as corporations, Rotary Clubs, Garden Clubs, Youth groups, etc.
- Establish the infrastructure necessary to capture information about participants – identification on entry, feedback, follow-up.
- Partnering in development.
- Demographic research.

### **Objectives – Top Two**

The top two measurable objectives for the projects are:

- Increase in the number of attendees for existing Programs and Events
- Increase in the number of new, viable higher-margin Programs and Events.

### **Projects – Phase #1 and Phase #2**

The Committee established the following general sequence of tasks to implement the project – with the understanding that the task list may expand or be redefined, that these are general guidelines and that the timelines for execution should be left to those responsible for implementation of the Strategic Plan.

#### ***Phase #1 Projects – Increase in the number of attendees to current Programs and Events***

- Identify qualified staff or volunteer Program and Events coordinator who will also be suitable to assist in marketing, administration and Program creation/design.
- Create an administrative Infrastructure, shared with ACS where appropriate, to manage:
  - Costs, employee time and revenue tracking – this will involve timesheets, possible changes to the bookkeeping system, and/or a separate system to track and manage each Program and Event (and Rental) to assist with management and viability analysis.
  - Create a database of attendees' and prospects' contact information, organizational relationships, etc. This should/may be a part of the ACS master database as many of the participants will wear several hats with the ACS/MLG organizations (Donor, Participant, volunteer, Board Member, Corporate sponsor, etc.) This should also be tied to the system for managing costs, etc., so that management can have a simple snapshot of each program that is implemented with profitability, resource requirements, investment, survey results, etc.

- A formal process for managing and ensuring attendee follow-up and recognition, including post-event surveys, Thank You notes etc.
- Short-term marketing program
  - Refine and revise marketing materials for existing Programs and Events in a way that the material can be used for multiple purposes such as marketing brochures, letters, grant requests, press announcements, website, etc.
  - Implement outreach to local organizations, clubs, schools, universities, corporations, etc., to let people in the area know what is currently being offered.

**Phase #2 Projects – Increase in the number of higher-margin Programs and Events**

- Establish a formal Program and Event “design” system at ACS/MLG including
  - Research on alternatives offered by similar organizations.
  - Participants needs assessment/survey to establish what types of new programs will be popular and how current programs can achieve better attendance.
  - Profitability and investment analysis.
  - Success criteria.
- Establish a systematic approach to marketing based on clear and comprehensive messaging about Programs and Events that are offered, what types of people/organizations might benefit, credentials offered, etc.
  - This work should be coordinated with ACS marketing functions in terms of messaging with the intent being that any material or communications that are created should be developed with an eye to being able to be used in multiple ways by both organizations. For example, a detailed program brochure for MLG might be designed in a way to enable a summary of the Programs to be taken for insertion in ACS marketing materials, MLG fundraising communications, grant requests, PR announcements etc.

**II. - Rentals Development Plan**

**Overview**

The Mission of Rentals Development is to improve the current garden and facilities rentals program to increase the number of rentals, to increase the revenue and profitability of rentals, to expand marketing of MLG as a facility appropriate for a variety of private, corporate and non-profit functions.

Based on the experience of other, similar gardens, renting the facility and gardens for a wider variety of functions than has been attempted in the last several years may become an important revenue generator for MLG and should help to expand overall “brand awareness” of MLG in the region – which may lead to other opportunities for ACS and MLG such as corporate partnerships, increased individual participation at MLG events etc.

As part of refining the Rentals part of the business the Committee discussed the need for some changes in infrastructure in order to begin managing this part of the enterprise more as a for-profit company would manage it – as set forth below under “issues”.

On the other hand, the infrastructure and accounting issues are less significant than for other activities given that the organization has a history of managing function rentals and basic systems are in place.

Much of the work will involve basic marketing, cost control, and new ways of delivering execution.

**Objectives – Top Two**

The top two measurable objectives for the projects are:

- Increase in the number of Rentals.

- Increase in the number of new higher margin Rentals.

### **Projects – Phase #1 and Phase #2**

The Committee established the following general sequence of tasks to implement the project – with the understanding that the task list may expand or be redefined, that these are general guidelines and that the timelines for execution should be left to those responsible for implementation of the Strategic Plan.

#### ***Phase #1 Projects – Increase in the number of Rentals***

- Identify qualified staff or volunteer Rentals Coordinator who will be primarily responsible for marketing and execution of functions. (This function may be a part-time function and overlap with some other MLG/ACS functions initially.)
- Short-term marketing program
  - Refine and revise marketing materials for existing Rentals in a way that the material can be used for multiple purposes such as marketing brochures, letters, press announcements, flyers, website, etc.
  - Personally visit all local/regional sources of customers such as tour operators, event coordinators, wedding planners, hotels, local schools and universities etc. and provide them with packages that they can easily use to refer business.
  - Determine referral and partnership compensation benefits and pricing. (commissions, etc.)
  - Meet with the owners of the Fort Valley Days Inn to form a marketing partnership as appropriate.
- Improve the administrative Infrastructure as necessary in the short term, on a basis not to interfere with the core objective of improving marketing and sales. Consider changes in the following:
  - Costs, employee time and revenue tracking – this will involve timesheets, possible changes to the bookkeeping system, and/or a separate system to track and manage each Rental to assist with management, marketing and profitability analysis.
  - Create a database of customers' and prospects' contact information, organizational relationships etc. This does not need to be part of the ACS database initially as there may not be significant overlap and there are simple, free and readily available resources such as SalesForce.com that will serve as effective customer relationship management systems in the medium term.
  - A formal process for managing and ensuring customer follow-up to stimulate repeat business.
  - A formal process for evaluating pricing based on surveys and analysis of similar events in other areas.

#### ***Phase #2 Projects – Increase in the number of higher-margin Rentals***

- Establish a formal market research process (this might be a project in partnership with the business program at Fort Valley State University) including:
  - Research on rentals and functions offered by similar organizations.
  - Pricing.
  - Customer needs assessment/survey to establish what types of functions will be popular and how current marketing/sales efforts can be improved.
  - Profitability analysis and required "investment".
  - Success criteria.
- Establish a systematic approach to sales and marketing based on clear and comprehensive messaging about Rentals that are offered, what types of customers might benefit, success criteria etc.

### III. - Volunteer Development Plan

#### **Overview**

The mission of the volunteer development program is to create a sustainable and, if feasible, financially self-supporting organization composed of local, regional and, to the extent practical, national volunteers. (It is recognized that volunteers from outside the region may contribute services or support that can be delivered from a distance.) The volunteer organization will provide and help arrange for both financial support and for individuals and organizations to contribute time and other resources to support the program offerings of Masee Lane Gardens.

The Committee assumes that, at least initially, the volunteer organization will be a staff-run function with an employee of ACS assigned to recruit and coordinate volunteers. This is similar to what is currently being done but would be formalized and refined.

The volunteers for MLG will be asked to staff a wide range of activities such as garden maintenance, docent and visitor reception, work with the gardens, the store, the porcelain collections and office/admin work. The objective will be to establish volunteer opportunities to accommodate a wide variety of volunteer interests. This may also include volunteer programs for students such as Master Gardener candidates or students at Fort Valley State University who are interested in such fields as landscape design, horticulture, non-profit management, IT systems, marketing and so forth.

It will be important to understand that volunteers are a marketing opportunity in that their services offset the cost of paid staff and that to attract them requires a focus on both creating volunteer program opportunities and a focus on sales and marketing outreach.

#### **Objectives – Top Two**

The top two measurable objectives for the projects are:

- An increase in the number of (qualified) volunteers.
- Expansion of the geographic area from which volunteers come.

In addition, but less significantly, the Committee recognized the need for increasing the dollar savings to MLG from volunteer assistance and the need to expand the range of volunteer opportunities. Both of these objectives should be achieved by a clear focus on defining the “needs” of volunteers much as for-profit businesses define their “customer needs” so that they can create a better product and service offering. As was noted earlier, the Committee recognized the necessity of defining constituent needs on a regular basis.

#### **Projects – Phase #1 and Phase #2**

The Committee established the following general sequence of tasks to implement the project – with the understanding that the task list may expand or be redefined, that these are general guidelines and that the timelines for execution should be left to those responsible for implementation of the Strategic Plan.

##### ***Phase #1 Projects – Increase the number of volunteers***

- Assign and train a volunteer coordinator – from paid staff if necessary or from the volunteer corps if a suitably qualified candidate is available. (Note that this coordinator necessarily will be working closely with the membership development function as both activities will target many of the same people and the messaging and marketing will be similar)
- Establish a clearly defined and properly resourced infrastructure for the volunteer organization including:
  - Defined volunteer activities
  - A database for tracking volunteers, activities, hours, contact information etc.
  - Volunteer training
  - Volunteer qualification programs and credentials

- Volunteer recognition programs
- A marketing program to attract volunteers to the program, leveraging relationships in the region such as clubs, master gardener programs, universities, corporations etc.

**Phase #2 Projects – Expand the geographic area from which volunteers are drawn**

- Expand the program in the following areas in order to increase regional awareness and create an interest in volunteers to travel to MLG to participate in activities:
  - Expand the number and scope of volunteer activities.
  - Understand the needs and interests of volunteers that will create an interest in traveling to MLG – such as horticulture education, credentialing programs, specialized gardens etc.
  - Expand the marketing and outreach programs to volunteers in the region.

The Committee also recognized the need, as a lower priority, to establish a plan for a regular, formal review of the volunteer organization and structure in order to ensure that it is kept viable, current and relevant.

**IV. - Membership Development Plan**

**Overview**

The goal of the Membership Development Plan is to establish an active and viable membership base of support within the region for Masee Lane Gardens. This membership base will be that upon which the fundraising/development program is built and from which a corps of volunteers can be recruited for the Gardens. Those targeted for Masee Lane Gardens membership will particularly be those in the region who can be attracted to the Gardens as a local/regional cultural amenity — these people are not as likely to be as “into” camellias as are ACS members.

The Committee recognizes that the number of members available regionally may be limited, but it is expected that there will be strong overlap of participants with the Volunteer program. Further, there are national examples of major gardens that have been able to attract members nationally with programs and offering that appeal beyond the garden’s region. The challenge to MLG will be to establish programs and product/service offerings that have appeal beyond the region.

Much of the focus, and ultimate success, of this project will be based on the ability of MLG to develop compelling programs, products and services. As with some of the other projects, the heart of the matter comes back to the value proposition that is being offered to participants – to those being asked to give of their “time, talent or treasure”.

This project, as with several of the others, is based on the assumption that the project will be:

- Firstly – successful in implementation over an appropriate timeframe – which may be more than twelve months, and
- Secondly – a template for annual review and revision of the project to improve on past performance.

It is expected that members of MLG will join as part of or separately from membership in ACS. That is, members may elect to join ACS as an ACS member, an ACS and MLG member or as a MLG member only. All memberships will go through the ACS website for signup – so that the branding of MLG and ACS remain consistent.

**Objectives – Top Two**

The top two measurable objectives for the projects are:

- An increase in the number of members – year-to-year.
- Growth in member-generated revenue.

**Projects – Phase #1 and Phase #2**

The Committee established the following general sequence of tasks to implement the project – with the understanding that the task list may expand or be redefined, that these are general guidelines and that the timelines for execution should be left to those responsible for implementation of the Strategic Plan.

***Phase #1 Projects – Increase the number of members***

- Determine membership structure in consideration of ACS relations and ACS membership coordination.
- Determine who will handle membership coordination as staff liaison – the intent initially is that driving membership growth initially will be a responsibility of the Masee Lane Gardens Council (refer to later section on “Administrative Organization”).
- Define membership costs, programs and benefits.
- Determine who can be accessed as prospective members, where are they and how best to reach them.
- Establish a marketing program to create appropriate messaging and to establish channels for reaching prospective members.

***Phase #2 Projects – Grow member-generated revenue***

- Expand the number of members beyond the local area.
- Expand the type of memberships (e.g. corporate, university, clubs etc.)
- Grow revenue other than member dues – donations, member event attendance, member-initiated events etc. This aspect will require close coordination with the Program and Development parts of the MLG organization.

## V. - Fundraising Development Plan

### **Overview**

The mission of the Fundraising and Development function is to build a sustainable, Board/staff organization that will develop and coordinate fundraising activities that are specific to MLG. This operation will coordinate closely with the ACS Fundraising activities and may use much of the same staff and infrastructure. While responsibility for fundraising will rest with the ML Gardens Council, much of the day-to-day implementation will be handled as a staff function to the extent resources permit. It is expected that the Executive Director of ACS, as head of the combined organization, will also have a substantial role in fundraising for both ACS and MLG. Nevertheless, in the first instance, primary responsibility for soliciting major donors and bequests for MLG will rest with the ML Gardens Council members.

It is expected that the Fundraising activities of MLG will involve some of the following types of activities and that members of the volunteer organization will be solicited to assist with various functions. Examples of such giving activities include but are as follows:

- Annual fund
- Annual events
- Grants - programs (tied to mission) or events
- Sponsorships
- Partnerships - corporate and/or government funding
- Planned giving
- Naming opportunities
- Ongoing or “one-time” donations: Individuals, Clubs, Corporations, Individuals

It will also be necessary to establish policies around fundraising activities such as:

- ACS and MLG coordination - Who “owns” the donor? How are donors “shared”?
- Acceptance policies - what not to accept, what to accept.
- Solicitation priorities – Priorities within MLG and across MLG and ACS requirements.

## **Objectives – Top Two**

The top two measurable objectives for the projects are:

- Increase in the number of donors by category.
- Increase in the amount of donations by each donor year-to year.

The Committee noted that it will be important to remain conscious of the amount of the total budget that is met by donations and to ensure that the organization maintains a list of qualified, agreed and prioritized giving opportunities so that fundraising is handled as a “strategic” rather than ad-hoc operation.

## **Projects – Phase #1 and Phase #2**

The Committee established the following general sequence of tasks to implement the project – with the understanding that the task list may expand or be redefined, that these are general guidelines and that the timelines for execution should be left to those responsible for implementation of the Strategic Plan.

### ***Phase #1 Projects – Increase in the number of donors***

- Appoint a development coordinator either as a staff or dedicated, qualified volunteer function.
- Define the development “structure” in terms of types and prioritization of activities and donor recognition programs.
- Develop the administrative infrastructure – this likely will be provided by ACS as the activities of the organizations will be very similar.
- Develop methods and assign responsibility for donor prospect identification.
- Conduct a donor needs assessment – through surveys and focus groups as groups of prospective donors are identified. This activity can also be used as a marketing activity and as a way of creating “buy-in” by prospective donors who understand that they will have an impact on the organization’s direction.
- Establish donation policies and coordinate with ACS policies (gift acceptance etc. as above).
- Identify and prioritize donation “opportunities” for MLG.
- Define various donor programs such as bequests, IRA contributions, etc.
- Develop messaging for donor solicitation and create marketing communication materials. This will involve web and hard-copy materials, it should be coordinated with ACS, and there will be a lot of overlap in materials for both ACS and MLG as there will be overlap in materials directed to volunteers, members and donors. It is recommended that these considerations be taken into account by both organizations before creating material in order to minimize cost and optimize communication power.
- Identify solicitors and assign responsibilities.
- Execute the plan – this part of the plan probably is the single most important element of the strategic plan for the entire organization – and at the same time execution of a successful, ongoing fundraising activity will depend heavily on success in some of the other activities such as program definition, member and volunteer solicitation, administrative coordination and so forth. The implementation plan will be structured to ensure that the various activities are phased in to avoid overloading the volunteer and staff capabilities of ACS and MLG.

## **VI. - Administrative and Organization Plan**

### **Overview**

The mission of this part of the Strategic Plan is to recommend a viable approach to managing MLG, recognizing that it will continue to be an integral part of the overall ACS organization and that it will require a dedicated and focused group, dedicated to its success, to ensure continued viability and that it achieves its potential.

It is likely that, especially in the short/medium term, MLG and ACS will share people and resources, which has the benefit of reducing costs and ensuring the most effective approach to execution of the Strategic Plans of both organizations.

### **Issues / Context**

The Committee recognized and discussed a number of current contextual issues including the following:

- It is likely that there will be a new Executive Director for ACS, including the MLG operation, early in 2007, and that the new ED probably will want to have some input as to how administrative systems and the organizational structure are designed. Based on the prior professional experience of the ED, there may be differing requirements for Board support and assistance.
- There is a need for a “transition” structure to ensure that MLG has the undivided attention of a dedicated group of volunteers and supporters to focus on implementation and execution of this Strategic Plan.
- That as the MLG operation becomes much larger, in terms of members and volunteers, it may be appropriate to transition to a different form of structure to provide volunteer and donor support.
- In order to avoid distraction at this point in the organization’s (both ACS and MLG) development it is preferred to keep the organizational structure as simple as possible.

### **Organization structure recommendation**

#### ***Assumptions***

- The current and new Board structure of ACS includes a Committee designated to oversee in certain aspects the operations and issues around MLG.
- The ACS Board has previously authorized establishment of a “Massee Lane Gardens Council”, which entity has never formally functioned.
- The ML Gardens Council is a good structure to enable interested volunteers to work with MLG in various capacities.
- The Board Committee, Massee Lane Gardens/Facilities Committee, as called for in the ACS By-Laws, should be the Massee Lane Gardens Council with membership both from the ACS Board and from the community of MLG supporters and volunteers. This Council, operating together with the Executive Director, should be a source for MLG advice for the Executive Director as well as being a support for the carrying out of approved MLG activities when there is insufficient staff to undertake desired and approved activities (the current situation). The Council should have appropriate subcommittees to support its activities.

#### ***Recommendation***

- The Committee recommends that the ACS Board committee responsible for MLG and the ML Gardens Council be one and the same.
- The Board Committee will be referred to as the “**Massee Lane Gardens Council**”.
- Members of the Council will be appointed and approved pursuant to current provisions in the ACS By-laws for members of Board Committees – (it is permissible and in fact desired to have people on Board committees who are not current Board members).
- The Council will execute all the duties of the Board Committee at a minimum and other duties as proposed and designated.

## VII. - Marketing & PR Plan

### **Overview**

The mission of the interim marketing and PR campaign is fourfold:

1. To develop compelling sales-oriented materials and information that can be distributed to existing and prospective supporters/customers (both individuals and groups) of MLG programs in order to attract additional people, over the next 18 months, to:
  - visit the gardens,
  - participate in paid programs put on by MLG,
  - develop an interest in MLG leading to future volunteer and/or financial support for MLG, and
  - to support marketing of events and rentals.
2. To assess the current situation with respect to programs, volunteer activities and PR in order to refine, refocus and strengthen in a way that captures short to medium term opportunities.
3. To provide a template for longer term marketing and PR activities for MLG as the strategic plan moves into the implementation stage.
4. To coordinate development of marketing collateral and marketing communications to support implementation of the Strategic Goals.

### **Proposed Projects**

We will focus on three projects in the medium term under this goal:

#### **Programs**

- Marketing of existing and immediate new programs at MLG
  - Review programs to determine short term expansion, refocus, etc., opportunities.
  - Create new programs that can be done quickly, that meet a defined and strategic need, that either generate revenue or attract volunteers and that do not require significant new investment.

#### **Volunteers**

- Current volunteer structure/opportunities
  - Review existing database and list of ACS/MLG members to determine number of people whose information we have and the quality of that information.
  - Expand "volunteer" database as possible.
  - Review existing volunteer programs and opportunities to determine new possibilities for volunteer participation and contribution to MLG.
  - Review MLG / ACS volunteer overlap. (Review volunteer needs of ACS to determine if those needs can be used to attract volunteers into the MLG volunteer sphere.)
  - Leverage existing volunteers to expand current number of volunteers.

#### **Marketing / PR**

- Public awareness campaign
  - Recruit local PR agency or qualified volunteer to do pro-bono work on immediate awareness opportunities locally, regionally and statewide. (Example, the work with the State Tourist bureau and welcome centers.)
- Marketing materials
  - Recruit a marketing / graphics firm to assist with review and redesign of marketing/PR materials (including web presence).
  - Evaluate all current marketing/PR materials for MLG.
  - Determine goals, focus and requirements for materials, including materials to support all Strategic Goal implementation.
  - Redesign (to the extent financially feasible) and distribute in a focused manner to directly support the medium-term marketing/PR goals of MLG.

## **VI. - Finance and Facilities Plan**

### **Overview**

The Committee has developed a pro-forma financial model for MLG which can be used to project revenue and expense for MLG. As part of developing a set of ongoing projections that can be incorporated into the overall budgeting process for ACS, the Committee began a review of both deferred and future ongoing maintenance expenses for the MLG buildings and gardens with the understanding that the desired objective is to be able to maintain the MLG assets to a standard reflecting the Core Values for MLG.

This review will be ongoing and will include a review of the existing facilities Master Plan in order to establish priorities and phasing of implementation that is consistent with this Strategic Plan. The results of the review will help the Committee project required fundraising for implementation of the Master Plan – which will be coordinated into the Fundraising implementation set forth above.

**Financial Projections – (Available under separate cover)**

The current version of the financial projections along with assumptions for the projections will be available under separate cover.

**Strategic Planning Workbook – (Available under separate cover)**

In developing the Strategic Plan the Committee embedded much of its thinking and conclusions in an Excel-based workbook. The purpose of developing the workbook was twofold:

- To record the history of discussions and conclusions so that new members of the organization can easily understand the thought process underlying the Committee's recommendations, and
- To serve as a tool for annual/periodic review and updating of the strategic plan.

## CONCLUSION AND NEXT STEPS

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This Strategic Plan for Masee Lane Gardens is submitted to the Board of Directors of the American Camellia Society for approval at its meeting in January 2007.

Following approval and establishment of the Masee Lane Gardens Council, the Council will convene and establish detailed plans, priorities, reporting and accountabilities for execution of this Strategic Plan.