



**Museums for America
Sample Application MA-20-13-0176-13
Project Category: Community Anchors
Coastal Maine Botanical Gardens**

Amount awarded by IMLS:	\$150,000
Amount of cost share:	\$213,703

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Abstract

The Coastal Maine Botanical Gardens (CMBG/the Gardens), a 501(c)(3) cultural and educational institution in Boothbay, Maine, seeks a Museums for America, Community Anchors, grant from the Institute for Museum and Library Services (IMLS) to support twelve months of a 21-month master planning project that will plot the course of the Gardens through 2035. In 2012 CMBG celebrated the completion of a \$24.5 million capital campaign and the implementation of *Master Plan 2004-2012*. In less than a decade and during the most severe economic downturn since the Great Depression, CMBG turned 250 acres of mature coastal forest landscape destined for residential development into a forested preserve surrounding a 17-acre Central Campus with seven major themed and ornamental gardens, horticultural facilities, a visitor center and a net-zero energy education center. The Coastal Maine Botanical Gardens has become a true “community anchor” in the sense of the IMLS solicitation, reaching over 90,000 learners of all ages, becoming a significant tourist destination, and bringing over \$11.3 million annually into the Maine economy.

Recognizing that the goals of the *Master Plan 2004-2012* and the \$24.5 million capital campaign to fund it would be achieved in 2012, the CMBG Board of Directors in 2011 authorized development of a new master plan to manage and schedule development through 2035. After a multi-month, comprehensive and inclusive strategic planning process, on September 15, 2011, the Board approved *Coastal Maine Botanical Gardens Framework Strategic Priorities: 2012-2017*. Consequently, the Coastal Maine Botanical Gardens has convened a Master Planning Task Force of board and staff members, and began on January 1, 2013, a 21-month project to develop *Master Plan 2015-2035*. **To further this effort CMBG seeks a Museums for America, Community Anchors, grant of \$150,000, to be matched with \$213,703 from CMBG, to fund the final 12 months of the master planning process.** This project will establish CMBG as a firmly bedded community anchor for Maine, New England and the nation.

The master planning process will be comprehensive and inclusive, involving staff, stakeholders, community leaders, and visitors. The project will be conducted by CMBG staff and board members, and will be facilitated by a nationally recognized planning consultant. The project will be advised by leading professionals in horticulture and garden design.

Master Plan 2015-2035 will become a course of action approved by the Board of Directors to be implemented over for its twenty-year duration. It will lead to the creation of facilities, gardens, programs and staff positions that need to be maintained and sustained. We understand this and CMBG is making explicit concrete progress in its effort to maintain sustainability, defined by us as reaching a financial position that allows us to buffer against economic and weather downturns, build endowment and maintenance reserves, invest in new ideas and keep the Gardens positioned to fulfill its mission. It is anticipated that *Master Plan 2015-2035* will be followed by a plan similarly conceived to guide the Gardens well beyond mid-century.

Project Justification

The Coastal Maine Botanical Gardens (CMBG/the Gardens), a 501(c)(3) cultural and educational institution in Boothbay, Maine, seeks a Museums for America, Community Anchors, grant from the Institute for Museum and Library Services (IMLS) to support twelve months of a 21-month master planning project that will plot the course of the Gardens through 2035. In 2012 CMBG celebrated the completion of a \$24.5 million capital campaign and the implementation of *Master Plan 2004-2012*. In less than a decade and during the most severe economic downturn since the Great Depression, CMBG turned 250 acres of mature coastal forest landscape destined for residential development into a forested preserve surrounding a 17-acre Central Campus with seven major themed and ornamental gardens, horticultural facilities, a visitor center and a net-zero energy education center. The Coastal Maine Botanical Gardens has become a true “community anchor” in the sense of the IMLS solicitation, reaching over 90,000 learners of all ages, becoming a significant tourist destination, and bringing over \$11.3 million annually into the Maine economy. Supporting Document No. 1 shows a stunning 2012 aerial view of the Gardens in their coastal setting.

Recognizing that the goals of the *Master Plan 2004-2012* and the \$24.5 million capital campaign to fund it would be achieved in 2012, the CMBG Board of Directors in 2011 authorized development of a new master plan to manage and schedule development through 2035. After a multi-month, comprehensive and inclusive strategic planning process, on September 15, 2011, the Board approved *Coastal Maine Botanical Gardens Framework Strategic Priorities: 2012-2017*, the latest of a series of strategic plans that have guided the Gardens since its inception in 1991. A summary of the current strategic plan is provided elsewhere in this application. The plan identified *Master Plan 2015-2035* as a top priority for advancement. Consequently, the Coastal Maine Botanical Gardens has convened a Master Planning Task Force of board and staff members, and began on January 1, 2013, a 21-month project to develop *Master Plan 2015-2035*. **To further this effort CMBG seeks a Museums for America, Community Anchors, grant of \$150,000, to be matched with \$213,703 from CMBG, to fund the final 12 months of the master planning process.** This project will establish CMBG as a firmly bedded community anchor for Maine, New England and the nation.

CMBG defines *strategic* planning as the process by which the strategic direction of the institution is determined; we define *master* planning as the action steps by which strategic goals will be implemented. Master plans are like road maps that chart a course between the present and some envisioned destination, with milestones along the way. This project will build on our current strategic plan and create a new 20-year master plan that lays out how the goals of our strategic plan will be accomplished. The framework for our master planning process is provided as Supporting Document No.2. During the course of this project we will benchmark the Gardens against the botanical gardens industry and the regional non-profit market, evaluate existing CMBG programs, inventory existing and potential new property, engage in land acquisition studies, and undertake comprehensive site analysis to identify constraints and opportunities. We will plan to maximize landscape and water conservation and identify special site features and vistas, including sensory mapping across our stunning landscape to identify features especially appropriate for visitors with disabilities. This planning project will be accomplished with the overall objectives of perpetuating financial sustainability, enhancing the visitor experience, maintaining CMBG’s position as one of the ‘greenest’ gardens in the nation, capitalizing on CMBG’s unique waterfront location, and broadening our visitation season to increase our reach and enhance the regional economy of this historically seasonal area.

The need we have and the challenge we face is to sustain the remarkable success of the Coastal Maine Botanical Gardens long into the future. Our strategic analysis of 2011 identified a number of opportunities and challenges that need to be addressed, at this moment of opportunity, through a master planning process. In general:

1. We want to continue to enhance a world class garden experience for our visitors.
2. We want to build on the Gardens' three core competencies: horticultural innovation, educational excellence, and thoughtful applied research.
3. We want to develop excellence in organizational leadership and management.
4. We want to maintain financial sustainability through diversification of attractions, learning opportunities and revenue streams.
5. We want to continue to be regarded as a progressive, 21st century botanical garden, embracing technology but not being seduced by it.
6. We want to build on horticultural traditions without being unduly constrained by them.
7. And perhaps most of all, we want to celebrate this unique, enigmatic, and charismatic place on the edge of the continent.

More specifically, the master planning process needs to address the following issues:

1. "How big should the Gardens be?" Although CMBG is constrained by the Atlantic Ocean and adjacent developed properties, there are abutting undeveloped parcels with interesting topography and scientifically significant plant communities. How aggressively should the Gardens pursue acquisition of these properties?
2. "What new gardens would support our mission and delight our visitors?" (a) Plans are well underway to begin construction in the next few years on *Wilds Woodlands of Maine*, encompassing perhaps over 25 acres of our property. This area will showcase seven of our most distinctive and interesting plant communities such as blueberry barrens, bogs and boreal forests. It will not be a garden in the traditional sense, but rather an edited, refined, but still wild slice of coastal Maine. (b) Currently and prominently lacking from CMBG is a true woodland or shade garden. The woodland understory is the first to come alive with color in spring and the leafy overstory provides a cooling respite on those occasional sultry summer days. We envision a garden that weaves through clefts in moss-covered ledges under the shelter of towering evergreens and delights visitors with myriad flowers and leaf forms while offering cool, quiet places to sit and contemplate. (c) We hope to develop special gardens to delight and educate explorers of all ages and abilities. An example would be a stream garden that uses flowing water as an organizing principle and takes guests over bridges, under waterfalls, and through dense plantings as they following the meandering course of the water. (d) Plants are the foundation of the food chain, and almost all living things depend directly or indirectly upon them. For their part plants depend on other living things for their survival, and nowhere is this more evident than in the relationship between plants and their pollinators. To shed light on the importance and precariousness of this relationship, we are considering a pollinators' garden filled with plants that attract birds, bees and butterflies. This garden might also include a butterfly conservancy where visitors can step from a cold or rainy day into a warm bright oasis of life.
3. "How can we best incorporate our mile-long stretch of coastline into the Gardens?" We hope to create further connection with our most prominent water feature – the Atlantic Ocean. The opportunity to explore the dynamic inter-tidal zone needs to be incorporated into our offered experiences. Whether by dock, boat or other means, we want to feature both the natural and cultural history of the sea and shore.

4. “What should our mix of local and worldwide plantings be?” Although we celebrate local native plants and Maine-hardy species, we have designed the majority of our most intensively cultivated areas to also include collections of non-invasive rare treasures from the Orient and from other parts of the Americas as well. It is our hope to expand these collections, including particularly species that are disappearing from the wild.
5. “What research projects and facilities are appropriate to our mission?” We hope to establish a center for plant genomics research and breeding, focusing on special plants living at the very limits of their natural range. Such individual species possess genes for greater cold or heat tolerance and the ability to withstand drought or flood, and in general are better adapted to a changing world.
6. “How can we meet the critical challenge of connecting children with nature?” We are currently working with Maine teachers to design an innovative curriculum that will use technology to link children with plants and the out-of-doors. It is our hope that this program will give teachers a toolkit to utilize the great outdoors that is Maine while teaching both to established curriculum standards and student interests. Although this initiative is independently funded, the master planning process proposed here will consider how this major initiative integrates with Gardens operations.
7. “How can we expand our youth gardening programs?” One place where more and more young people are connecting with plants in a fundamental way is through food. CMBG already has youth programs that explain where food comes from and that promote the value of good nutrition. We need to plan how to expand these important programs and how to make them more effective in combating the problem of childhood obesity.
8. “How can we showcase the cultivation of a wide variety of food plants to visitors of all ages?” We would like to develop a place to show the latest methods for extending the growing season and getting the most from a small garden patch while displaying the newest varieties along with local heirlooms that offer better adaptability and taste. A few of these antique varieties still linger around the ancient foundations of a 19th century salt water farmstead that once thrived on the southern edge of our property. We dream of this old farmstead being rebuilt as both a testament to the traditions and tenacity of our forebears and also as a place where 19th and 20th century plants, techniques and traditions can be celebrated and displayed, along with those of the 21st century
9. “How will we expand our education programs?” With the help of IMLS and other sources of funding including earned income, CMBG has developed educational programs about plants and horticulture for learners of all ages. How will we expand our interpretation programs as our audiences and gardens grow? Interpretation at a variety of levels is integral to the Gardens, whether it is along forest preserve trails or in formal gardens. *Master Plan 2015-2035* must include interpretation and education programs for whatever new gardens or gardening facilities are developed.

The primary beneficiaries of this project will be the Gardens’ stakeholders, visitors, and participants in our educational programs. Since we will be sharing the products of this master planning project with the public gardens community, we will reach a professional audience as well. Because making a garden experience accessible to all is a core CMBG value incorporated into all planning, visitors with disabilities will benefit from this master planning project. Since its opening in 2007, Coastal Maine Botanical Gardens has become

one of New England's most popular attractions and one of the most distinguished botanical destinations in the country. True to our mission, we are a visitor-centered institution that seeks through horticultural and educational excellence to engage our visitors in learning about sustainable horticulture, environmentally friendly home gardening, plants, and nature. We also strive to be a model of sustainable resource management and energy efficiency.

This project will have two general intended results. First, we will create a reasoned and broadly vetted 20-year master plan that will guide future physical growth and facilities development for CMBG through 2035. Similar to *Master Plan 2004-2012*, the new master plan will have a number of elements, ranging from staffing recommendations to facilities and infrastructure improvements, specific garden designs, and land acquisition plans. Second, the project will increase our capacity for fulfilling our mission to protect, preserve and enhance the botanical heritage and natural landscapes of coastal Maine for people of all ages through horticulture, education and research.

This project is the direct outgrowth of a recent intensive strategic planning process, and is a specific recommendation of that plan. As stated above, the *Coastal Maine Botanical Gardens Framework Strategic Priorities: 2012-2017* identifies creating a 20-year *2015-2035 Master Plan* as the most urgently needed of its priorities. This project will create the action steps by which the Gardens strategic goals will be implemented. Now is the right time to take on this important task. CMBG has just completed a \$24.5 million capital campaign and successfully implemented its *2004-2012 Master Plan*. We are on track toward achieving long-term financial sustainability with a balanced operating budget, a \$3.5 million endowment fund and a \$1 million reserve maintenance fund. We must sustain the momentum toward this goal through seasonally broadened visitation and diversified revenue streams, activities and learning opportunities to appeal to the widest possible audience. We have completed a fully accessible 17-acre Central Campus with seven major gardens, distributed facilities for hands-on outdoor education directed from an energy-efficient Education Center, horticultural facilities for plant propagation and research, and a Visitor Center with an exhibit hall, café, gift shop, library, and other visitor amenities. Now is precisely the time to learn from what we have done well and what we can do better, step back, plan collaboratively, and prepare for the next 20 years.

Project Work Plan

Planning, implementation and activities: Specific activities for this project are listed in the Schedule of Completion provided below. This project will have a 21-month duration with a pre-IMLS award phase funded by CMBG (January 1, 2013-September, 30, 2013) followed by one-year phase (October 1, 2013-September 30, 2014) during which CMBG will partner with IMLS to complete a 20-year, *Master Plan 2015-2035*. Our goal is to create a plan that will revisit issues like circulation and parking that have arisen from larger-than-anticipated attendance, while also developing new gardens, facilities, infrastructure and programming. Throughout the process, relevance to our mission, long-term financial sustainability, and meeting the needs of our membership, guests and future generations will provide the lens through which we analyze ideas and synthesize the whole. A well-thought-out, comprehensive master plan will ensure that any future growth will be coordinated, necessary, supportable and done to the high standard of excellence we have set for ourselves. Our hope is to lay the groundwork for this plan by early 2013 and hire consultants and advisors to help us complete the plan in 2014.

In 2012 the Gardens created a 15-member Master Planning Task Force composed of board members and staff, including board President Susan Russell and CMBG Executive Director William Cullina. During 2012 the

Task Force undertook early-stage preparations that have been comprehensive, inclusive and collaborative, with active engagement of our stakeholders: Boards of Directors and Overseers, the staff and volunteers of CMBG, local community representatives, and municipal leaders. During this initial phase we concentrated on stakeholder analysis, conversations with internal and external audiences, analysis of our unique demographics, and program development tied to our strategic plan. Our process has been far-reaching and includes audience research locally, regionally and from peer institutions across the nation from whose experiences we could learn. Through standardized survey instruments and customized personal interviews, we have explored a range of options. From onsite visitations, we have accumulated a wealth of feedback on our preliminary plans.

Our Master Planning Task Force has developed a provisional scheduled plan of work, with identified milestones for completion, for this project. Until the planning consultant is selected it is not possible to provide a highly specific project work plan. However, as we have done in the past for several projects, we envisage a scheduled plan of work including an initial all-hands organizational and visioning meeting at CMBG early in October, 2013, followed by one or two planning charrettes at CMBG, followed by preparation of a preliminary draft master plan. We will then solicit stakeholder feedback on the draft master plan, hold a second planning meeting in the summer of 2014, after which the final draft of *Master Plan 2015-2035* will be completed. The pre-planning has been completed and there will be two more phases: the pre-IMLS and the IMLS phase. The IMLS phase of the project will have a duration of 12 months, beginning October 1, 2013 and ending September 30, 2014.

Pre-IMLS phase: Prior to the IMLS phase CMBG will have conducted extensive preliminary research including a natural resources inventory (soil and vegetation surveys, wildlife survey, climate analysis, and navigation charting of adjacent coastal waters), a cultural inventory (especially of an abandoned 19th century salt water farm on CMBG property), site analysis and land acquisition studies. From January 2013 through August 2013, also before the IMLS-funded phase begins, the Master Planning Task Force will draft and vet a program statement (RFQ) for nationally-recognized consulting firms specializing in master planning for non-profit museums and similar organizations. From at least three bids, the Gardens will select a firm to facilitate and evaluate our master planning process. The firm we select will have experience and expertise in economic, feasibility, management, planning and design services to non-profit organizations, and have a strong track record of working specifically with museums, zoos, aquaria and botanical gardens. The Coastal Maine Botanical Gardens has used this approach of working with professional planners in the past, and we have been successful in attracting top performers in the field. Supporting Document No. 3 lists possible planning consultant candidates.

IMLS phase: The IMLS phase will begin with an initial organizational and planning meeting of all participants, facilitated by our master planning facilitator. This will be followed by analysis and planning by work teams tasked to explore specific topics identified earlier, such as land, gardens, facilities, infrastructure and human resources. Decisions will also be made on garden development. At perhaps 5-6 months into the IMLS phase, a design charrette will be convened at CMBG to pull together ideas, generate draft schematic design descriptions and cost estimates. This will be followed by a second master planning meeting to review and refine designs and cost estimates, which will then be presented to stakeholders for feedback. At this point, during the summer of 2014, the Master Planning Task Force and our planning consultant will prepare a final draft of *Master Plan 2015-2035*.

Resources – institutional, external and financial: For this planning project we have created a Master Planning Task Force of CMBG staff and selected board members who will be supported and informed by nationally and internationally recognized external professional advisors from the public gardens, horticultural, and planning communities. The project will be under the overall supervision and direction of William Cullina, Executive Director of the Coastal Maine Botanical Gardens. He will be assisted by Ms. Susan Reid Russell, Board President; Ms. Rebecca Hutcheson, Chair, Board of Overseers; Mr. Rodney Eason, Director of Horticulture; Dr. Dorothy Freeman, Director of Philanthropy; Ms. Melissa Cullina, Director of Education; Ms. Kris Folsom, Director of Marketing; Mr. Adam Harkins, Facilities and Projects Manager.

This master planning project will be facilitated by a nationally recognized external consulting firm (TBD) experienced in master planning for non-profit museums and botanical gardens. CMBG has successfully utilized external planning consultants in the past, and we will select from among at least three respondents to an RFQ to be disseminated in early 2013.

External advisors have been selected for their expertise and experience aligned to CMBG’s mission, strategic vision, and values. These include Dr. Michael Dirr, Professor of Horticulture, University of Georgia, and an expert on ornamental woody plants and a leader in applied plant breeding testing and introduction, and Mr. Eliot Coleman, organic farmer, author, and past executive director of the International Federation of Organic Farming Movements. These two consultants are experts in aspects of public gardens like the CMBG and they have been selected specifically after careful review because they have expertise in areas in which we expect the master planning process to take us. Letters of commitment for Dr. Dirr and Mr. Coleman are provided as Supporting Document No. 4.

The estimated total budget for this project is \$363,703, of which \$150,000 is requested from the IMLS, to be matched by \$213,703 in cash and in-kind services from CMBG. The Gardens will be providing 59% of the total IMLS phase project costs. In addition, the Gardens will cover pre-IMLS phase costs currently budgeted at \$25,000. We will be contracting for the services of several external advisors for this long-range master planning project, specifically a master planning consulting firm to be determined at a later date, Dr. Michael Dirr (horticulture and applied research), and Mr. Eliot Coleman (organic horticulture and four-season farming). We will also be requesting funds for travel, planning materials, computer design fees, and a modest amount of field supplies. Please note that our annual budgets for 2010-2012 show a surplus greater the 10% of operating budgets because we were in the midst of a major capital fundraising campaign.

The Coastal Maine Botanical Gardens is fully prepared to contribute time, personnel, cash, equipment, and facilities to this project. CMBG has a range of digital tools for mapping living plant collections, gardens, landforms and cultural features, as well as the extensive results of prior land survey work. We have ample space and AV facilities for planning meetings and charrettes, and a robust capacity for teleconferencing. In addition to the governing Board of Directors and directors emeriti, an important resource for the Gardens is its Board of Overseers, currently 19 volunteers including master gardeners and professionals with experience in business, education, horticulture, and law, among other fields.

Tracking and dissemination: We will track our progress toward achieving the project’s intended results in several specific and documented ways. This project will proceed according to a detailed plan of work with identified milestones toward completion. Progress will be reviewed monthly by the Master Planning Task Force, and will be tracked by the Boards of Directors and Overseers. The finished *2015-2035 Master Plan* will be widely shared among CMBG stakeholders and audiences, and the broader public gardens community.

Because the plan will involve several state and federal regulatory processes, it must be reviewed by appropriate officials, e.g. State Department of Environmental Protection (Natural Resources Protection Act, Site Location & Development Act, Shoreland Zoning Act); Army Corps of Engineers (Rivers and Harbors); Boothbay Town Planning; Boothbay Harbor Town Planning. Because our current trails and/or those to be developed may connect with existing or proposed trail systems, we may share the plan with land trusts such as the extensive Boothbay Region Land Trust, the Nature Conservancy and the Boothbay region YMCA, whose property abuts ours. Results of the project will be disseminated via print media, the *Botanical Thymes* members' newsletter, and the Gardens' website; a summary of the plan will be published on the website as well. Director Cullina and other staff will incorporate the *Master Plan 2015-2035* in presentations to the professional public gardens community.

Project Results

The result of this project will be a twenty-year master plan completed by October, 2014, charting a general course for the Coastal Maine Botanical Gardens from 2015 to 2035, realizing full well that changes in the internal and external environments will almost certainly require revisions to the plan over time. Nonetheless, this master plan will be an invaluable aid for decision-making regarding developments for improving the visitor experience at the Gardens. Ultimately, this project will provide new educational experiences that will influence the behavior of our visitors regarding ecologically responsible home gardening and environmental stewardship. Specifically, the project will increase our capacity for fulfilling our mission to protect, preserve and enhance the botanical heritage and natural landscapes of coastal Maine for people of all ages through horticulture, education and research.

The primary tangible product of the project will be the *Master Plan 2015-2035*, a guide for future development of CMBG. The exact form this document may take is to be determined, but the *Master Plan 2004-2012* was a large body of work including design concept papers, conceptual drawings, architectural renderings, site plans, and cost estimates. Because our master planning requires state and federal reviews, one or more summary reports will be prepared for governmental agencies as required.

CMBG routinely uses outcome-based evaluation (OBE) using a mixed methods approach for evaluating its programs. Our Phase I Master Plan was evaluated internally by CMBG's Board of Directors and Board of Overseers. It was reviewed externally by Mr. Peter Bristol, former woody plants curator and director of several botanical gardens, and Dr. Marcella Wells, a specialist in the evaluation of educational programs. These external reviews resulted in significant improvements to our original master plan. *Master Plan 2015-2015* will be reviewed by stakeholders (boards of directors and overseers, staff, volunteers), state and federal agencies, visitors, and the external advisers to the project. The plan will be reviewed through the lens of our strategic goals and objectives. Possible evaluation questions are provided as Supporting Document No. 5.

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Schedule of Completion for Creating Master Plan 2015-2035 for the Coastal Maine Botanical Gardens

