



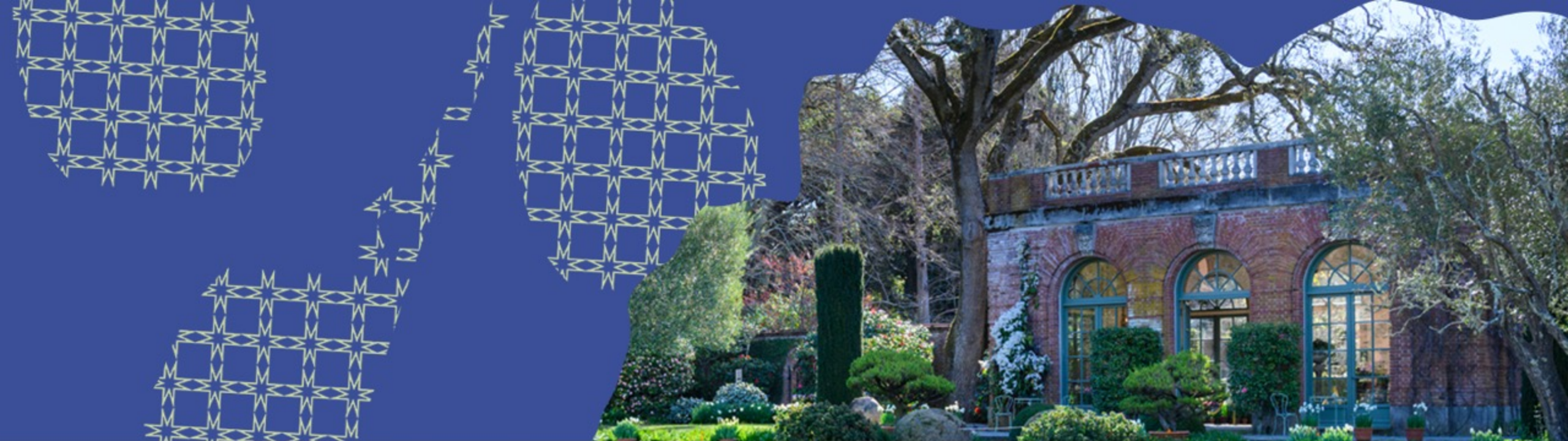
Creating a Vibrant Future

2019–2023



filoli





Our Mission

To connect our rich history with a vibrant future through beauty, nature, and shared stories.





Our Vision

We envision a time when all people honor nature,
value unique experiences, and appreciate beauty in
everyday life.

Cross Cutting Principles

Filoli's strategic plan builds on a century of tradition and focuses on engagement of all kinds.

- ❖ **Diversity, Equity, Accessibility, and Inclusion:**

Filoli is open to all and works tirelessly to create a place that welcomes and respects everyone

- ❖ **Sustainability:**

Filoli integrates sustainable environmental, operational and financial practices to preserve the estate for generations to come.

- ❖ **Organizational Excellence:**

Filoli achieves the highest standards and benchmarks in its industries and lead the nation with new programs, talent and partnerships.



Goals

People &
Culture



Visibility &
Branding



Infrastructure
Investments



Fundraising &
Financial Strength



Learning &
Engagement



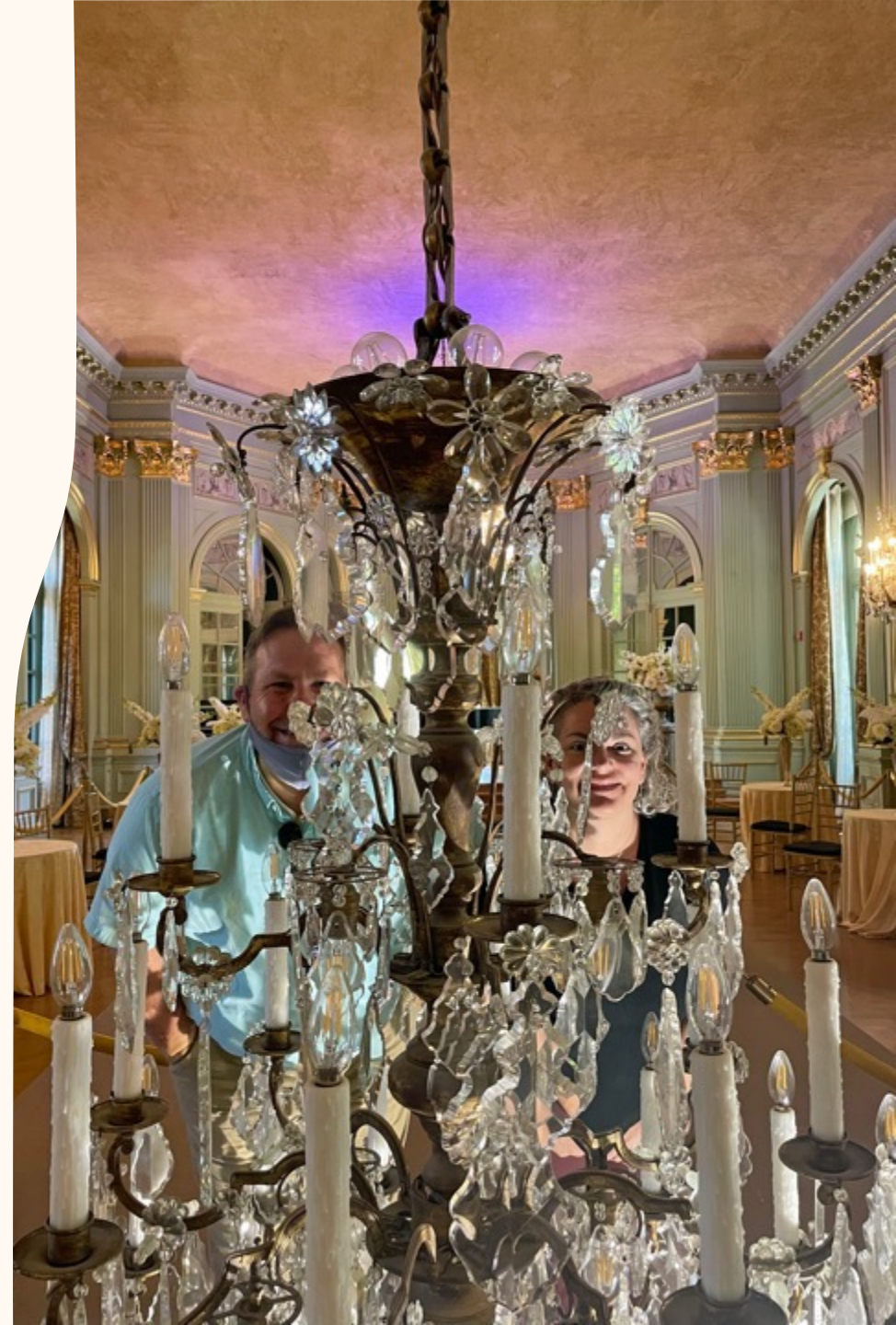
People & Culture

Create and support an inclusive culture that attracts and retains exceptionally talented professional staff; engages vendors, volunteers and partners from the community; and is led by a diverse board of directors.



People & Culture

- ❖ Expand training and professional development opportunities for staff, board and volunteers.
- ❖ Assess and revise Filoli's full compensation and benefits package to attract and retain top talent at all levels of the organization.
- ❖ Increase diversity among staff, board and volunteers to reflect our community through continuous assessment of recruitment strategies and efforts.
- ❖ Build an intentionally inclusive culture through collaborative onboarding, training, and increased cultural competency.



People & Culture

- ❖ Align the volunteer program's roles, responsibilities and size with Filoli's strategic objectives.
- ❖ Increase staff and capacity responsibly to support growth in infrastructure and programming.
- ❖ Develop partnerships with universities, craftspeople, technical professionals and others to enhance staff resources.



Fundraising & Financial Strength

Secure Filoli's financial strength and sustainability through contributed and earned revenue growth.



Fundraising & Financial Strength

- ❖ Maximize earned revenue by increasing attendance, participation and capacity for future growth by expanding the portfolio of offerings including rental events, public programs and experience-based retail sales.
- ❖ Build a sustainable operating and capital financial platform upon which to grow Filoli for future generations.
- ❖ Grow contributed revenue in both real dollars and as a percentage of total revenue.
- ❖ Create a professional, comprehensive development program.



Fundraising & Financial Strength

- ❖ Create a culture of philanthropy at all levels of the organization.
- ❖ Develop board and staff skill, confidence and participation in donor cultivation and stewardship.
- ❖ Invest in expanded fundraising staff, capacity and skill.
- ❖ Research need, scope and potential structure of major fundraising initiatives.



Infrastructure Investments

Invest in the future of the estate through master planning, industry-leading maintenance and preservation, and strategic physical upgrades.



Infrastructure Investments

- ❖ Develop a master plan for the estate's future development and space usage.
- ❖ Identify resources for and invest in rigorously maintaining the historic property to the highest standards.
- ❖ Assess and improve circulation, accessibility and amenities throughout the outdoor and indoor public spaces to maximize customer comfort and potential attendance.



Infrastructure Investments

- ❖ Upgrade technology throughout the organization, both administrative and customer-facing.
- ❖ Research and identify environmentally sustainable alternatives to current practices especially in retail, horticulture, and maintenance.



Visibility & Branding

Share Filoli's story more widely through branding, messaging and marketing that attracts a diverse audience and draws national and international attention to the plant and museum collections.



Visibility & Branding

- ❖ Develop and fund a marketing and public relations plan that aligns with and supports this strategic plan.
- ❖ Develop and implement consistent brand standards and messaging.
- ❖ Create new marketing initiatives and partnerships to reach, welcome, and include the perspective of more diverse and international audiences.



Visibility & Branding

- ❖ Increase visibility and engagement with museum object collections and plant collections.
- ❖ Participate in programs that allow Filoli to engage on a national and international professional stage.



Learning & Engagement

Redefine how visitors connect with history, beauty, and nature through innovative engagement, educational and interpretive programs.



Learning & Engagement

- ❖ Create learning experiences that engage visitors more deeply in horticultural excellence, preservation practices, and plant and museum object collections.
- ❖ Develop year-round, visitor-centered programming that activates new spaces, attracts diverse audiences, and encourages repeat visitors.
- ❖ Develop a customer service plan to activate staff, board and volunteers as ambassadors to the public.
- ❖ Develop industry-leading exhibitions and learning experiences that redefine how historic properties and public gardens engage visitors.



Learning & Engagement

- ❖ Identify and tell more diverse stories about Filoli, its place in California history, and its current relevance through learning experiences.
- ❖ Develop models and partnerships to co-create learning experiences that introduce new perspectives, and provide greater access to Filoli by diverse audiences.
- ❖ Develop specific learning experiences focused for both youth and adults designed to attract a broad audience and reach underrepresented communities.
- ❖ Share more stories and ensure consistent storytelling throughout all engagement and learning experiences.

