Creating a Vibrant Future

2019–2023
Our Mission

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