



BARTRAM'S GARDEN

REQUEST FOR PROPOSALS: STRATEGIC PLANNING

DEADLINE FOR SUBMISSION: March 29, 2024

The John Bartram Association (JBA) invites proposals from qualified facilitators to guide our process to formulate a new 5-year strategic plan for 2025–2030, during which we are eager to strengthen and institutionalize already-successful initiatives as well as complete key capital priorities identified within our campus masterplan. We see the coming years as a chance to elevate our current work and existing priorities, bringing the organization from good to great, and to build sustainability and resilience.

This RFP contains details about our organization and the key goals for the new strategic plan as well as specifics regarding proposal submissions, timeline, and budget. We understand that the ultimate details of this project's implementation may be subject to change upon facilitator recommendations, and we welcome your creative and thoughtful suggestions in your proposal.

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1. ABOUT BARTRAM'S GARDEN

Located on 50 acres on the Tidal Schuylkill River in Southwest Philadelphia, on land known by the indigenous Lenape as Lenapehoking, Bartram's Garden is a free public park and National Historic Landmark welcoming more than 100,000 visitors annually. The site is named for John Bartram (1699–1777); he founded his family farm here in 1728, and his 15-acre specimen garden is the country's oldest surviving botanic garden. Since 1893, the site has been cared for by the non-profit John Bartram Association in partnership with the City of Philadelphia Department of Parks & Recreation.

The Garden is in a period of tremendous organizational growth and maturation, thanks both to significant internal investment and expansion as well as increased external development planned for our nearby Southwest Philadelphia neighborhood. **In the last decade, our visibility and public renown have increased significantly as we have refined our vision and organizational priorities, thus nearly tripling our annual budget, annual visitation, and staff size.**

With a reclaimed meadow, community farm, ecologically significant natural tidal wetlands, and the neighborhood's only safe river access, we offer year-round free and low-cost programming focused on

A NATIONAL HISTORIC LANDMARK HOUSE & GARDEN

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building equitable relationships among people and nature. As a free public park, we particularly seek to welcome, serve, and champion our nearest neighbors in Southwest Philadelphia, where more than 80% of residents identify as Black or African American. This commitment is a relatively recent change for our historic institution: for many years, our Board was composed entirely of Bartram family descendants, and staff and neighbors alike recall that until the early 2010s, the Garden was a mostly-white space perceived as a private estate. A visitation study conducted in 2022–2023 revealed that our visitors’ racial and ethnic demographics echo those of Philadelphia as a whole, with roughly two-thirds of visitors identifying as people of color.

With the 2018 launch of the Southwest Philadelphia Community Leadership Team (SWLT), a stipended group of about 20 neighborhood leaders, the Garden began intentionally including local residents in large-scale organizational decision-making, beginning with a facilitated 18-month planning process that led to the development of our campus masterplan, finalized in 2020. In addition to their role in this planning process, we continue to partner with members of the SWLT on program priorities and site investments, and several members of the SWLT have subsequently joined the Garden’s Board of Directors.

Beyond our partnership with the SWLT, the Garden regularly uses an array of trusted and successful methods for direct stakeholder outreach and input, including focus groups, visioning sessions, in-person engagement at community festivals welcoming 1,500 neighbors per event, an opt-in neighborhood text message group, a twice-yearly partnership with a local newspaper reaching roughly 25,000 households, flyer distribution to local schools and libraries, USPS Every Door Direct Mail postcards, and more traditional communications via email newsletters and social media.

2. PROJECTED LONG-TERM PRIORITIES

The Garden’s current strategic plan was approved in 2017 and will expire in 2025. It identifies the following strategic priorities: horticultural excellence; historic interpretation and preservation; community engagement and education; agriculture and food sovereignty; and enduring sustainability through expanded organizational capacity and partnerships.

Though progress continues on all those goals, the adoption in 2020 of the campus masterplan marked a new phase in our understanding of this 50-acre site and its impact. The campus masterplan centers upon four major capital projects totaling roughly \$50 million in long-term site investment within or adjacent to the park’s physical campus. These efforts—including both continued fundraising and partnership development as well as eventual groundbreakings and construction—will be a key priority in the new strategic plan, with the first phase of construction projected to begin in Summer 2024 and subsequent work expected to continue throughout the duration of the new strategic plan. More details about the respective projects and associated partnerships are available online at [Our Plans & Partners](#).

The importance of these new facilities is highlighted by recent and planned programmatic growth, as the park’s outreach and activation will fuel expanded engagement throughout the campus, within these new capital investments, and—perhaps most importantly—beyond the borders of this public park. During the period of the current strategic plan, and particularly since the COVID-19 pandemic, the Garden has stewarded tremendous programmatic and partnership growth in key areas:

- **Climate resilience and community greening** through neighborhood tree planting, support for community food sovereignty, water quality monitoring, and initial planning efforts to ensure

the long-term resilience and ecosystems health not only of the park but of our wider Southwest Philadelphia neighborhood amidst a changing climate.

- **Paid youth workforce development** with high school students and young adults, primarily from our Southwest Philadelphia neighborhood, focused on skill-building in fields like urban agriculture, watershed management, arboriculture, and ecosystems management as well as on readiness for college and careers.
- **Neighborhood culture and wellness** through a range of year-round, free, community-driven activities inviting local residents to connect to nature and each other with everything from herbalism workshops to family movie nights, learn-to-bike classes to river recreation.
- **Inclusive storytelling and historic interpretation** reflecting a broader understanding of the history of this land, beyond the focus on the colonial-era Bartram family that shaped much of our previous work (including the 2017 strategic plan), and with a particular emphasis on learning and sharing the Black and indigenous histories of the site.

These areas of growth reflect a deeper understanding of our organizational commitments and principles, building off new mission and vision statements, which were developed by a collaborative team of Board and staff in 2020. Staff subsequently developed a set of values statements, meant to guide our internal work, in 2021. These documents guide much of our day-to-day work and decision-making, and these ideals also drove the development of the Garden's first Equity Action Plan in 2022.

3. EXISTING ORGANIZATIONAL EVALUATION & IDEALS

In both process and the final document, we expect that the new strategic plan will build off and benefit from a range of recent evaluation, planning, and training efforts, including the following:

- SWOT analysis by staff (2024)
- SWOT analysis by Board of Directors, led by Illustrating Progress (2023)
- Employee compensation study by Brighter Strategies (2023–2024)
- Visitation study, neighborhood/program participant focus groups, and neighborhood surveys led by Dr. Andrew J. Mowen of Penn State University (2017, 2022–2023)
- Equity Action Plan by staff, with support from Just Strategies (2022)
- Naming policy approved by Board (2022)
- Organizational equity audit by Just Strategies (2021)
- Website redesign study, focus groups, and surveys led by Masters Group Design and Concentric Strategy (2021)
- New values statements by staff (2021)
- New mission and vision statements by Board and staff, with support from Fairmount Ventures (2020)
- Campus masterplan by Board and staff (2020)
- Capital campaign feasibility study by Fairmount Ventures (2020)
- Gift acceptance policy approved by Board (2019)
- Campus visioning with local residents, led by the SWLT and DIGSAU (2018–2019)

As of this writing in Winter 2024, the Garden is also actively engaged in assessment of and planning for a range of programmatic and site-specific needs including campus safety and emergency response, historic interpretation and storytelling, archival management, ecosystems resilience, staff trainings and professional development, and design of the new facilities identified in the campus masterplan.

Both the Mission, Vision, and Values and the goals of the Equity Action Plan should be considered foundational documents for both the process and final document of the new strategic plan. We invite prospective facilitators to reference these documents (see Appendix) in developing your proposal and trust that you will work with us to ensure our shared adherence to these values throughout the process. Further, although these values and the work they underpin are powerful and deeply felt, these efforts are still relatively new within the lifetime of the Garden, and our next strategic plan should include opportunities to strengthen and sustain these vital commitments within our organizational identity.

4. PROCESS OUTLINE, BUDGET & TIMELINE

The selected facilitator for this project will work closely with a collaborative team of Board, staff, and SWLT members to guide prioritization of key themes and goals, ensure appropriate input and review from diverse stakeholders, create a shared framework for evaluating progress, and write and review the final, written plan.

Depending on facilitator availability, the planning process will begin between May–July 2024, with a full written draft of the new strategic plan available for review by February 15, 2025. The final written plan, including all revisions, should be complete by March 15, 2025.

Bartram’s Garden requests a proposal for a planning process that fulfills the goals above and includes the following activities conducted in partnership with the collaborative team:

- Efficiently reviewing existing documentation and evaluation, such as key selections from the list in Section 3;
- Identifying necessary additional stakeholder feedback and leading appropriate outreach to up to 200 key constituents, including but not limited to staff, Board, the Southwest Philadelphia Community Leadership Team, community partners, neighborhood residents and leaders, park visitors, and representatives from municipal agencies. Prospective facilitators are invited to consider using any communications strategy identified in Section 1, for which staff can provide support, or to propose alternate methods for outreach;
- Developing aspirational, achievable, and measurable strategic goals for 2025–2030, including high-level action steps and implementation plans, based on gathered input and the Garden’s identified plans for this period;
- Outlining metrics and key benchmarks to chart progress towards fulfilling the strategic goals, as well as a process for modifying the plan over its lifecycle if needed.

We expect the facilitator to also:

- Provide strong, inclusive facilitation to guide thoughtful but goal-oriented decision-making and to support a shared approach for determining priorities, including potentially deciding *not* to pursue or sustain opportunities;
- Lead the writing and editing of drafts and the final strategic plan document, including an Executive Summary appropriate for external dissemination; and
- Ensure integration of the Garden’s values and an equity-oriented approach in all aspects of the work.

We expect that these activities will include both on-site work at Bartram’s Garden as well as video meetings via platforms like Zoom or Teams.

BUDGET

The current budget for the deliverables outlined above is \$40,000.

TIMELINE

RFP Release Date: February 28, 2024

Response Deadline: March 29, 2024

Proposal Review: April 1–5, 2024

Finalists Notified: April 9, 2024

Finalist Presentations via Zoom: April 16, 2024, between 1–4 PM

Contract Award Date: April 22, 2024

Project Timeline: Spring/Summer 2024–March 2025

5. PROPOSAL SUBMISSION

Please submit proposals to Caroline Winschel at cwinschel@bartramsgarden.org by March 29, 2024, using subject line “Strategic Planning.” No phone calls or visits, please.

All proposals should include the following:

1. A description of the applicant’s general approach to strategic planning facilitation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking;
2. A description of the plan for accomplishing the deliverables listed above;
3. Professional resume for individual consultant(s) or background information on the applicant team, including any relevant additional expertise or experience that the applicant might bring to this particular project;
4. A work plan and timetable for the deliverables identified above;
5. A budget and outlined fee structure associated with the scope of work, including hourly rate(s) if applicable. If there are elements of the identified deliverables that you believe exceed the proposed budget, please indicate fees for those items so that we may consider adjusting either our scope or our available funds;
6. Example(s) of 2–3 representative projects demonstrating the applicant’s ability to successfully complete projects of a similar scope and nature; and
7. Names and contact information for people who might serve as a reference for the applicant’s skill in strategic planning.

Proposals will be considered without regard to race, color, religion, creed, gender, national origin, age, disability, marital or veteran status, sexual orientation, or any other legally protected status. People of color and LGBTQ+ people are encouraged to apply. Personal or professional connections to Southwest Philadelphia are a plus.

APPENDIX

MISSION, VISION, AND VALUES

The following vision and mission were developed by a joint committee of staff and Board over a seven-month process and affirmed by the Board of Directors in December 2020.

Vision

Bartram's Garden is a place and an aspirational vision for the future, where:

- Public spaces are centers of welcome, respite, and celebration.
- Nature and the environment are accessible and inviting to everyone.
- People decide what happens in their own communities.
- Historic places seek to repair our fraught legacies.

Mission

The mission of the John Bartram Association is to create equitable relationships among people and nature through immersive, community-driven experiences that activate the Bartram legacy, Garden, and House, on land and on the Schuylkill River, in Southwest Philadelphia.

With support from the Board, the following values were developed and affirmed by staff in Spring 2021 to serve as internal guidance for our day-to-day work.

Values

Bartram's Garden provides a respite from the world and a promise for its transformation. We strive to:

- Cultivate the sound health and stability of the garden, farm, river, buildings, and natural lands. In so doing, honor past, present, and future ecological communities, including humans.
- Center the voices of Southwest Philadelphia in our evolving interpretation of the Bartram legacy, house, garden, and programs.
- Foster experiences that encourage wonder, joy, and interconnectedness.
- Engage in honest dialogue about the histories of the garden and Bartram family.
- Create abundance and belonging with deference to those who have not always felt welcome.
- Nurture fellowship and reciprocity, a sacred mutualism among all beings.
- Act responsibly with an intentional commitment to honoring our mission and values, embracing uncertainty and renewing this commitment with every choice, every day.
- Respect our capacity and that of the land in all that we do.

EQUITY ACTION PLAN GOALS

Organizational Culture and Commitment

Goal: Bartram's Garden will cultivate a culture that reflects a commitment to racial equity and social justice for itself and the community it serves.

- Objective 1: Bartram's Garden has a culture where staff are committed to using direct communication and work to address challenges and resolve conflicts. Conflict is addressed in ways that are restorative and harm and abuse are mitigated. In those occurrences, staff, especially those with marginalized identities, have the tools, resources, and support to properly address the situations that have arisen.
- Objective 2: Bartram's Garden has an inclusive culture that celebrates the identity of Black, Indigenous, and People of Color and where people work closely across racial lines with trust and honesty.
- Objective 3: Bartram's Garden has a culture that is actively welcoming to Black people, both staff and community members.
- Objective 4: White staff at Bartram's Garden are actively working to mitigate harm, advance anti-racism, and provide allyship to Black, Indigenous, and People of color.
- Objective 5: Staff are given the space, time, and support to engage with the history of Bartram's Garden, its Indigenous people, and botanical colonialism in thoughtful ways that deepen relationships with the Southwest community and advance understanding of current racial dynamics.

Governance and Operations

Goal: Bartram's Garden culture, policies, and practices will shift to reflect its commitment to equity.

- Objective 1: Bartram's Garden has established fair and transparent pay equity across the organization and provides other forms of support that lift all staff out of poverty and underemployment without overwork; staff feel supported in managing work/life balance.
- Objective 2: Bartram's Garden has clear, equitable, standardized, and transparent policies and processes for inclusive hiring, influence and recognition, professional development, promotions, compensation, and pay increases across each department and the organization as a whole.
- Objective 3: Bartram's Garden will engage in equitable and inclusive hiring practices.
- Objective 4: Supervisors and managers are supported in the development of tools, trainings and practices to establish common practices and shared experiences of staff as it relates to their supervision that lend to a positive experience for all staff.
- Objective 5: Staff and Board leadership are racially diverse, reflect the communities served, and represent different backgrounds and skills.
- Objective 6: Bartram's Garden has and follows a clear set of policies for addressing harassment of all forms, including workplace bullying and threatening behavior, so that staff feel that the organization operates in ways that protect them.
- Objective 7: Organizational leaders (the Board, senior leadership, managers and Human Resources) actively work towards mitigating harm and addressing all claims of harm in a fair, timely and appropriate manner.

- Objective 8: Bartram's Garden adopts agreed-upon approaches to effective communication and its leaders are skilled in conflict resolution practices that are restorative, fair and equitable and staff who are the victims of harm or abuse are protected in ways that are kind and considerate.
- Objective 9: To the extent possible, Bartram's Garden policies, practices, and decisions are informed by the staff, particularly ensuring input on decisions that impact staff and their work.
- Objective 10: Bartram's Garden extends a significant amount of resources and opportunities to diverse businesses and vendors.

Empowered People

Goal: Bartram's Garden will deepen its engagement and communications with staff and external stakeholders and partner with them to advocate for equity and inclusion.

- Objective 1: Bartram's Garden partners with the community in meaningful ways that honor their wisdom and values their contributions. Bartram's Garden is an active partner in a bi-directional relationship with its neighbors and is informed and guided by their expressed wants and needs.
- Objective 2: Bartram's Garden has a workplace culture where everyone feels valued and respected and has a sense of common purpose and unity.
- Objective 3: Bartram's Garden leadership actively seek input from all levels of the organization, especially those most impacted and closest to the decisions at hand, and are transparent and openly share how decisions are made.