

Council work session agenda

Tuesday, July 23, 2019

2:00 PM

**Skyline Room, Cascade Crest Ballroom,
Oregon Zoo**

2:00 Call to Order and Roll Call

2:05 Safety Briefing

Work Session Topics:

2:10 Oregon Zoo & Oregon Zoo Foundation Financial Update [18-5247](#)

Presenter(s): Sharla Settlemier, Oregon Zoo Foundation
Sarah Keane, Oregon Zoo
Ruth Walkowski, Oregon Zoo Foundation

Attachments: [Work Session Worksheet](#)

2:40 Oregon Zoo Strategic Plan [18-5248](#)

Presenter(s): Don Moore, Oregon Zoo
Kathryn Jarrell, Future Work Design

Attachments: [Work Session Worksheet](#)

3:40 Chief Operating Officer Communication

3:45 Councilor Communication

3:50 Adjourn

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬស្នើសុំទទួលបានកាតបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំស្នើសុំអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក។

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Oregon Zoo & Oregon Zoo Foundation Financial Update

Work Session Topics

Metro Council Work Session
Tuesday, July 23, 2019
Metro Regional Center, Council Chamber

OREGON ZOO & OREGON ZOO FOUNDATION FINANCIAL UPDATE

Date: July 8, 2019
Department: Oregon Zoo - Finance
Meeting Date: July 23, 2019

Prepared by: Sarah Keane x5705
sarah.keane@oregonzoo.org

Presenter(s) (if applicable):
Sharla Settlemier, Vice Chair of Oregon
Zoo Foundation Board of Directors;
Sarah Keane, Zoo Finance &
Administrative Director; and
Ruth Walkowski, OZF Director of Finance
& Operations

Length: 30 minutes

ISSUE STATEMENT

Fiscal year 2018-2019 marks the fourth year of the Oregon Zoo being an enterprise fund. Progress continues to be made towards long term financial sustainability. However, the current fund balance is \$4 million representing 9% or 5 weeks of operating reserves. The Government Finance Officers Association recommends a reserve level of 16.5% of operating expenses. Additionally, the annual capital investment averages between \$1-2 million, whereas the Association of Zoos and Aquariums benchmark the average infrastructure investment to be \$3 million annually.

ACTION REQUESTED

N/A

IDENTIFIED POLICY OUTCOMES

N/A

POLICY QUESTION(S)

N/A

POLICY OPTIONS FOR COUNCIL TO CONSIDER

N/A

STAFF RECOMMENDATIONS

N/A

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Fiscal year 2015-2016 marked the first year the Oregon Zoo operated as an enterprise fund. The beginning fund balance at that time was \$1 million. In the first year a \$100K loss was experienced decreasing the fund balance to approximately \$900K. Fiscal year 2016-2017 also experienced a loss decreasing the fund balance to \$868K. Based on the 5 year projection expenses were set to outpace revenues by as much as \$1.2 million in the fifth year. Zoo and Metro leadership have been paying close attention to the fund to ensure long term sustainability.

The general fund continues to transfer approximately \$13 million of operating support and just under \$700K annually for the renewal and replacement fund. This constitutes approximately 29% of annual support for zoo operations. Other support includes 61% from enterprise revenues, 9% from the Oregon Zoo Foundation, and 1% from federal grants. On the expenditure side just over 50% of the budget is personnel, 35% is materials and services, and 10% is transferred back to the general fund for central services support.

Fiscal year 2017-2018 was the first year to see a growth in the fund balance. Due to new revenue strategies, expense management, foundation support, and cooperative weather the zoo experienced an attendance record of 1.7 million guests and a \$3 million surplus, growing the fund to just over \$4 million.

Attendance is the largest factor of revenue generation for the zoo. For example, for every 100,000 guests approximately \$1 million of admissions revenue is generated. Fiscal year 2017-2018 was a record setting year, more frequently attendance averages 1.5 million visitors. The largest driver of attendance is weather. In order for the zoo to operate a sustainable enterprise fund it is critical there be an appropriate beginning fund balance in order to absorb any downturns.

Becoming an enterprise fund also changed the financial dynamic between the zoo and the zoo's support organization, Oregon Zoo Foundation. Historically, the Foundation evaluated if there was a surplus and then the zoo applied for specific major grants. In fiscal year 2018-2019, the Foundation launched a comprehensive campaign proactively fundraising for both capital, to enhance the bond program for Polar Passage and Primate Forest, to fully fund renovation of Rhino Habitat, and for strategic operational priorities focused on animal welfare, conservation, and education. This was the first year the zoo was able to build the planned Foundation support into the annual budget in a proactive way during the budget process. The future-looking fundraising goals have aided success in fundraising.

BACKGROUND

At the Metro Council Work Session on June 27, 2017 Dr. Don Moore and Sarah Keane presented on the Zoo's financial situation and described the process Zoo staff were planning to create a long term financial framework. One year later, at the Metro Council Work Session on August 7, 2018, Sarah Keane provided an update on progress made during the fiscal year.

There are four cornerstones to the Zoo's financial sustainability: a structurally balanced budget, spending aligned with mission priorities, investments in infrastructure, and appropriate levels of operating reserves. To this end, in the first year of the plan (fiscal year 2017-2018) Zoo staff evaluated key program areas, created new revenue strategies, set an operating reserve target, and updated a prioritized capital replacement schedule. During the second year (fiscal year 2018-2019), the zoo introduced a process improvement program and the foundation launched a comprehensive fundraising campaign.

In addition to an update on the long term financial plan, preliminary FY19 financial results should be available for review.

ATTACHMENTS

- Is legislation required for Council action? ☐ Yes ☒ No
- If yes, is draft legislation attached? ☐ Yes ☐ No

- What other materials are you presenting today? POWERPOINT

Oregon Zoo Strategic Plan

Work Session Topics

Metro Council Work Session
Tuesday, July 23, 2019
Metro Regional Center, Council Chamber

OREGON ZOO STRATEGIC PLAN

Date: July 8, 2019

Department: Oregon Zoo

Meeting Date: July 23, 2019

Prepared by: Sarah Keane x5705

sarah.keane@oregonzoo.org

Presenter(s) (if applicable):

Don Moore, Zoo Executive Director (*and select staff*)

Kathryn Jarrell, consultant from Future Work Design

Length: 60 minutes

ISSUE STATEMENT

The Oregon Zoo is in the midst of a strategic planning process. The process is designed to honor the needs of key stakeholders, be open and transparent, and embody the zoo's "GPS" – innovation, adaptability, and originality.

This process includes meaningful engagement opportunities at key milestones to develop an informed, innovative and inspiring outcome. The plan will provide strategic goals for:

- Clarity and understanding for staff
- Visibility for our community and stakeholders
- Operational focus and sustainability
- Clear decision-making.

ACTION REQUESTED

Zoo staff seeks council engagement to seek feedback and guidance on targeted priorities through participation in an interactive workshop with zoo staff and several foundation board members. While the whole plan is open for comment and discussion staff recommends Metro Council's attention be focused on the areas with the most potential overlap with overall Metro goals. The following areas have been identified for focus:

Priority: Drive Wildlife Conservation - Campus sustainability

Priority: Elevate the Staff Experience

Priority: Create Diverse, Equitable & Inclusive Environments

Priority: Achieve Financial Sustainability – Long Term Funding

Staff also seeks clarity on how Metro Council would like to endorse the final plan in September 2019; via email communication, briefings, work session, or some other avenue.

IDENTIFIED POLICY OUTCOMES

N/A

POLICY QUESTION(S)

N/A

POLICY OPTIONS FOR COUNCIL TO CONSIDER

N/A

STAFF RECOMMENDATIONS

N/A

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Oregon Zoo has engaged its community of stakeholders and used design workshops led by consulting firm Future Work Design to draft strategic priorities and outcomes. A feasibility check was conducted and the plan was scaled to reflect projected resources. The **draft** priorities are as follows:

Lead the Way in Animal Care & Welfare

*We're driven to create a better life for wildlife inside and outside our zoo – this means creating environments in which all our animals thrive. We will accomplish this by steadily **upgrading habitats** based on basic needs and at the same time, testing **new innovative approaches** that integrate choice and cutting edge techniques for training, enrichment, fitness and research.*

Deliver an Inspiring Guest Experience (Every Time)

*The zoo experience is our opportunity to **WOW** our guests and also **connect** them to our mission. Our experience will be welcoming, modern, and allow guests to experience the wonder of animals at every possible opportunity.*

Drive Wildlife Conservation

*Wildlife conservation is at the heart of our mission. Externally, we'll achieve impact through **inspiring** our community to **take action, meaningful partnerships in species recovery, policy advocacy** work, and building **strong conservation networks**. Internally, it's critical that we align our **operations** with our values and goals in conservation. (For instance, to conserve natural resources through optimizing renewable energy production on-campus and taking action to mitigate climate change.)*

Elevate the Staff Experience

*Staff is the bedrock of our animal and guest experience. We know we have some of the most knowledgeable and passionate employees among zoos. We also know that we have work to do when it comes to creating a staff experience where staff feel **included, informed, heard, and connected** to the mission and our overall success.*

Connect with our Community

*Community perceptions of the zoo are generally very positive, showing high credibility and trust. Our opportunity lies in making our impacts in animal care and conservation evident through our **brand**. We have strong community connections but we can increase our impact through increased **partnerships** and **co-creation** with our key stakeholders.*

Create Diverse, Equitable & Inclusive Environments (DEI)

*We used DEI as a lens in creating our strategy. It is part of creating inspiring experiences for guests and increasing our staff and community engagement. It's also a strategic priority on its own because this effort requires **intention, focus, and funding** to do it right. We're committed to doing it right.*

Achieve Financial Sustainability

*We've made a lot of progress towards improving our financial condition and the success of this organization requires that we continue to steadily increase our revenue while carefully managing our expenses. This requires both **planning** and **strategy**.*

BACKGROUND

On Tuesday, April 30, 2019 Don Moore emailed Metro Council with an update regarding Oregon Zoo's planning process indicating the zoo was in the first phases of a strategic planning process which will guide the zoo for the next three years. The plan and the process will support the zoo's mission and vision of creating a better future for wildlife as well as align with the Metro Council's priority goals. The following timeline and touch points with Metro Council were outlined:

March-April	Planning and research	Develop process, form strategic planning team, collect research and data – including brand perception data
May-June	Discovery	Staff kickoff events, stakeholder input on key priorities
 June-July	Design – phase one	Draft strategic priorities, stakeholder engagement, feasibility check, Metro Council guidance
July-August	Design – phase two	Gallery walk for all stakeholders, feedback synthesis, final strategic plan developed, approval from zoo cabinet
Sept-Oct	Activation	Metro Council endorsement , launch communications, integrate into work plans, develop measurement scorecard, develop brand strategy
November +	Budget integration	Incorporate into budgeting process

ATTACHMENTS

Is legislation required for Council action? ☐ Yes ☒ No

- If yes, is draft legislation attached? ☐ Yes ☐ No
- What other materials are you presenting today? Powerpoint, posters on wall

Materials following this page were distributed at the meeting.



Long Term Financial Sustainability

Council Work Session

July 23, 2019



Today's Update

Zoo Financial
Overview

Foundation
Update

Action items
update

Future Focus



Zoo Operating Fund

	5 Year Historical	
	Average	
Zoo Generated Revenues	\$ 24,497,315	61%
Metro General Fund Transfer	12,532,667	31%
Oregon Zoo Foundation Support *	3,326,711	8%
	<u>\$ 40,356,694</u>	
Zoo Personnel Expenses	\$ 20,854,165	53%
Zoo Material & Services	14,612,031	37%
Central Services Transfer to General Fund	3,984,406	10%
	<u>\$ 39,450,603</u>	
Zoo Operating Fund Surplus	<u>\$ 906,091</u>	

**does not include support for capital projects.*

- As an enterprise fund, the zoo keeps any operations surplus and absorbs any deficits.
- Central Services Transfer is an allocated cost of the general fund for services provided to all the Metro Departments and includes legal, risk management, information systems, accounting and human resources.



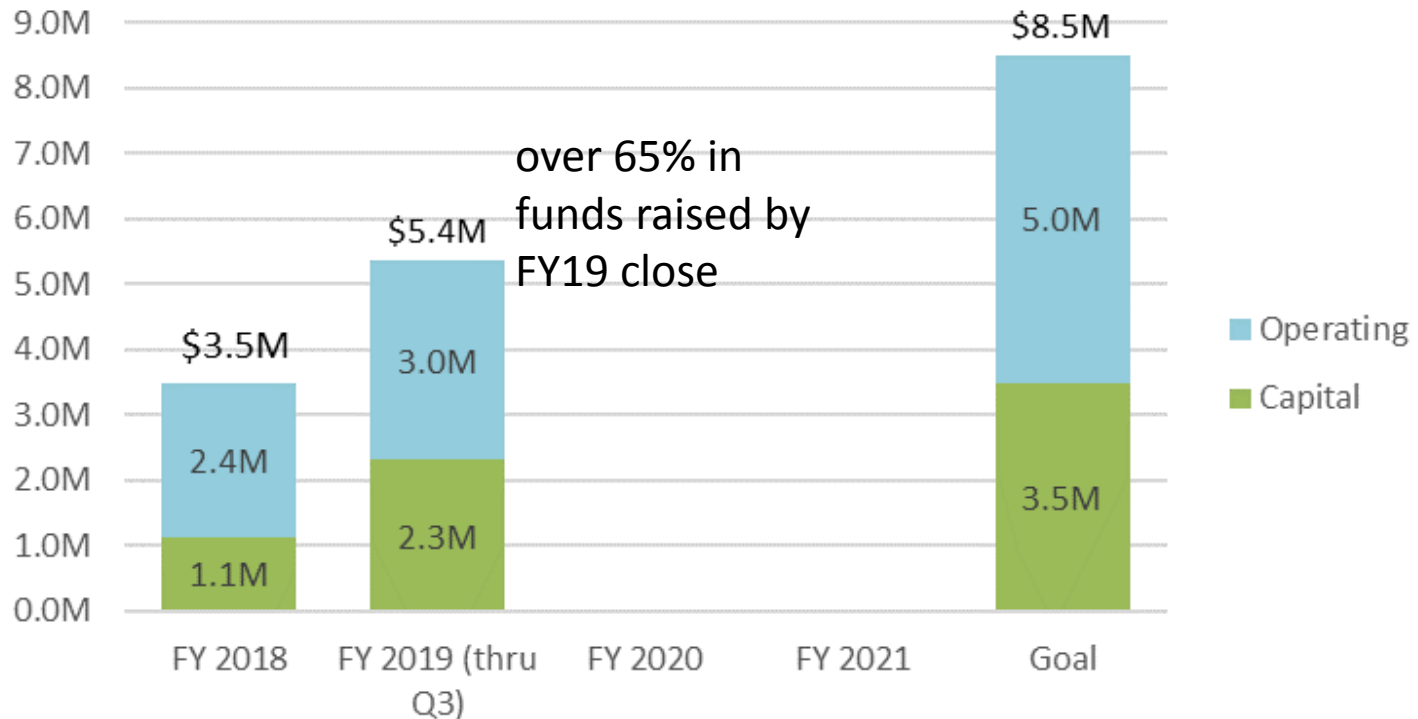
Sharla
Settlemyer,
Board Vice Chair

Annual
Foundation
Update



Oregon Zoo Foundation

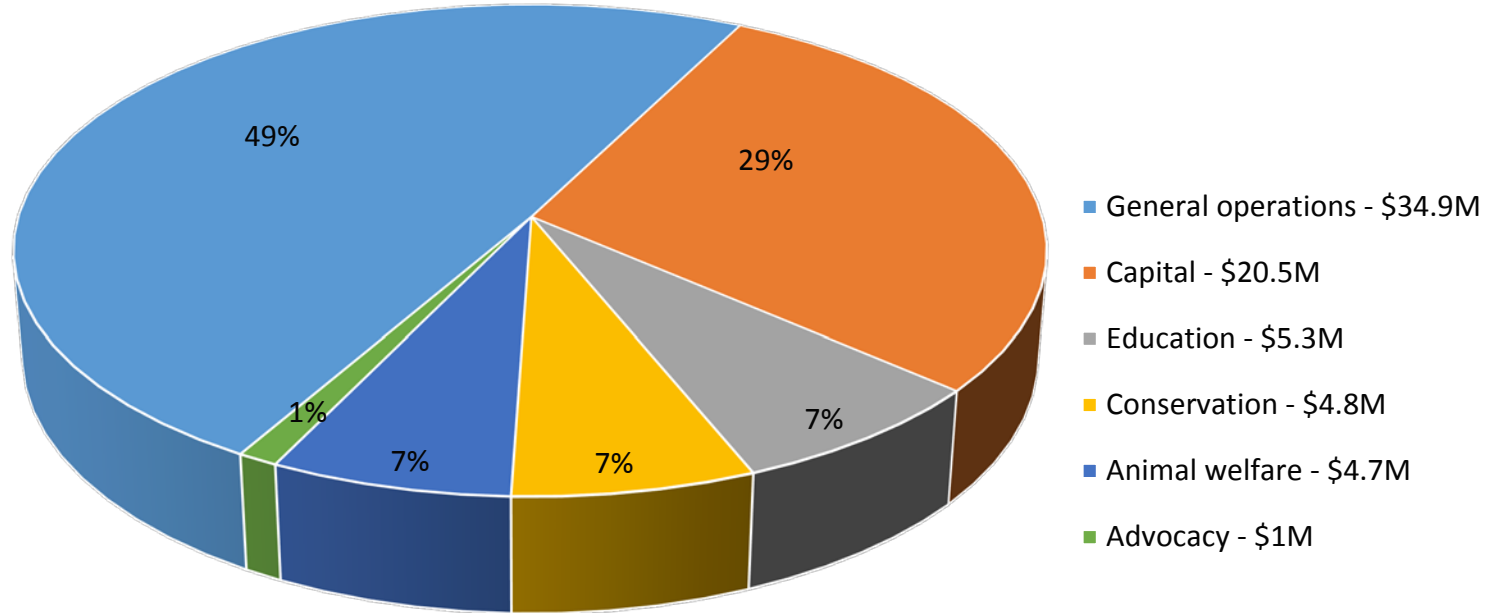
Progress on \$8.5M Heart of the Zoo Campaign



- OZF embarked on a 4 year \$8.5M Heart of the Zoo fundraising campaign on July 1, 2018
- The Heart of the Zoo Campaign supports a \$3.5M capital commitment for Polar Passage, Primate Forest and the Rhino habitat. And \$5M for strategic program priorities in Animal Welfare, Conservation and Education
- OZF expects to have exceeded 65% in total funds raised when FY 2019 is closed

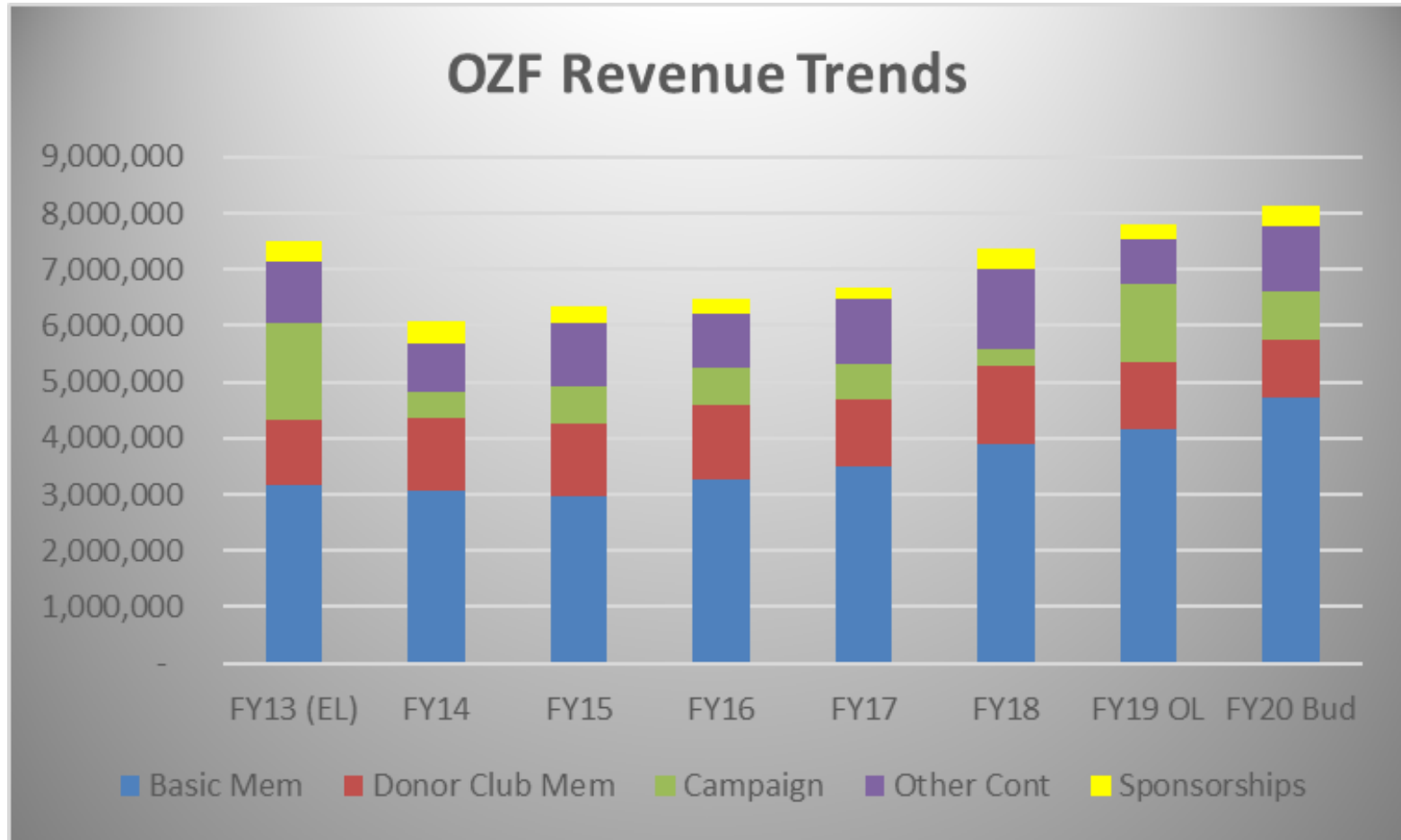
Oregon Zoo Foundation

Over \$71M in OZF Support for the Zoo from 2000 to 2019



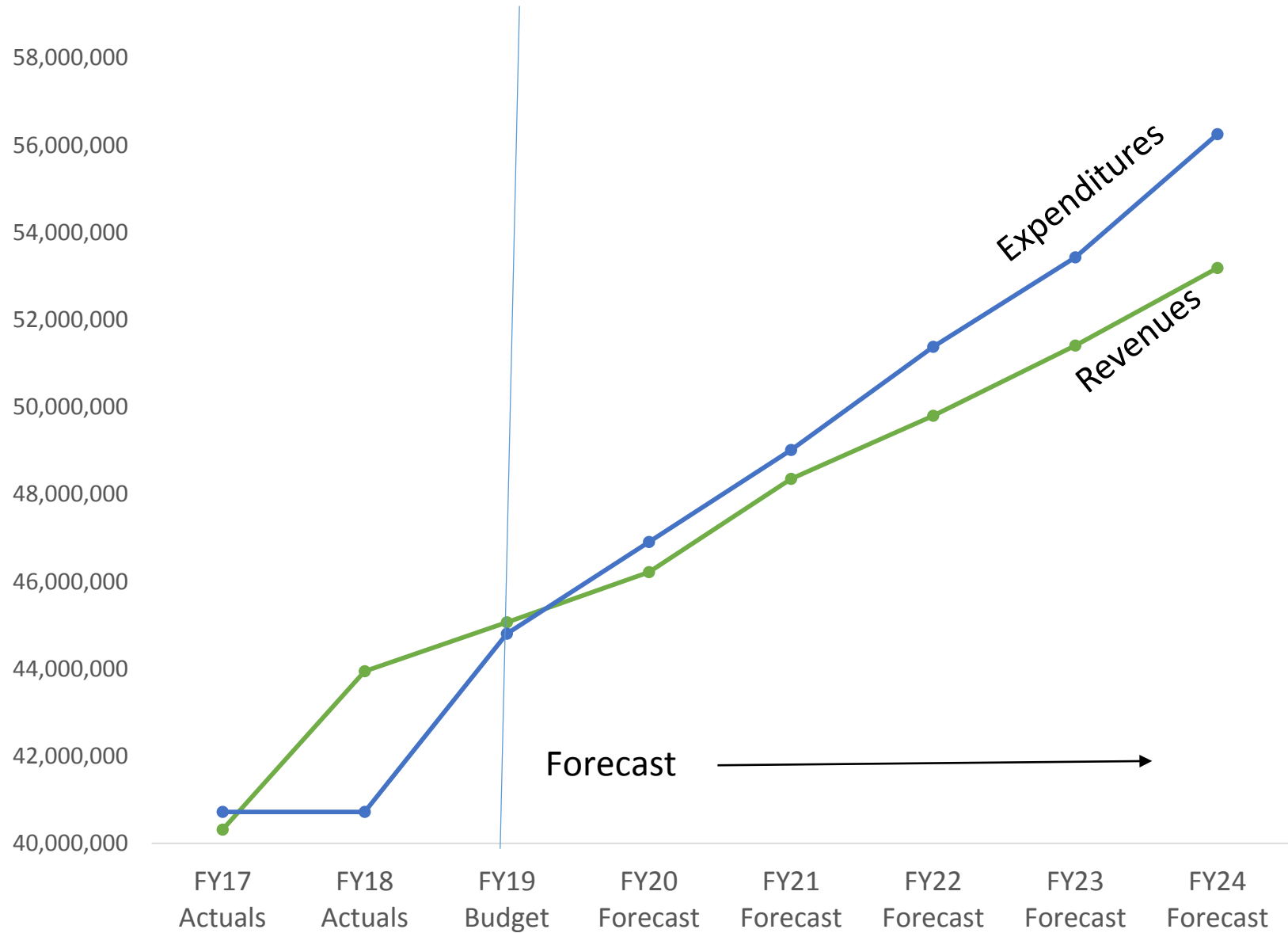
- OZF has provided over \$71M in program and capital support to the Zoo since FY 2000
- General Operations Support includes the Membership Sales and Sponsorships for which OZF does not track purpose
- Capital includes the support for bond and other capital projects such as Elephant Lands, the Education Center, the Veterinary Medical Center, Condors, Predators, and others, as well as the accrual for the current Heart of the Zoo Campaign commitment for Polar Passage, Primates and Rhinos

Oregon Zoo Foundation



- Memberships are a strong driver of overall revenue growth particularly with the advent on online sales and marketing
- Capital Campaign's drive significant variability between years

5 Year Forecast (in fall FY19)



Structurally
balanced
budget

Align
spending
with mission
priorities

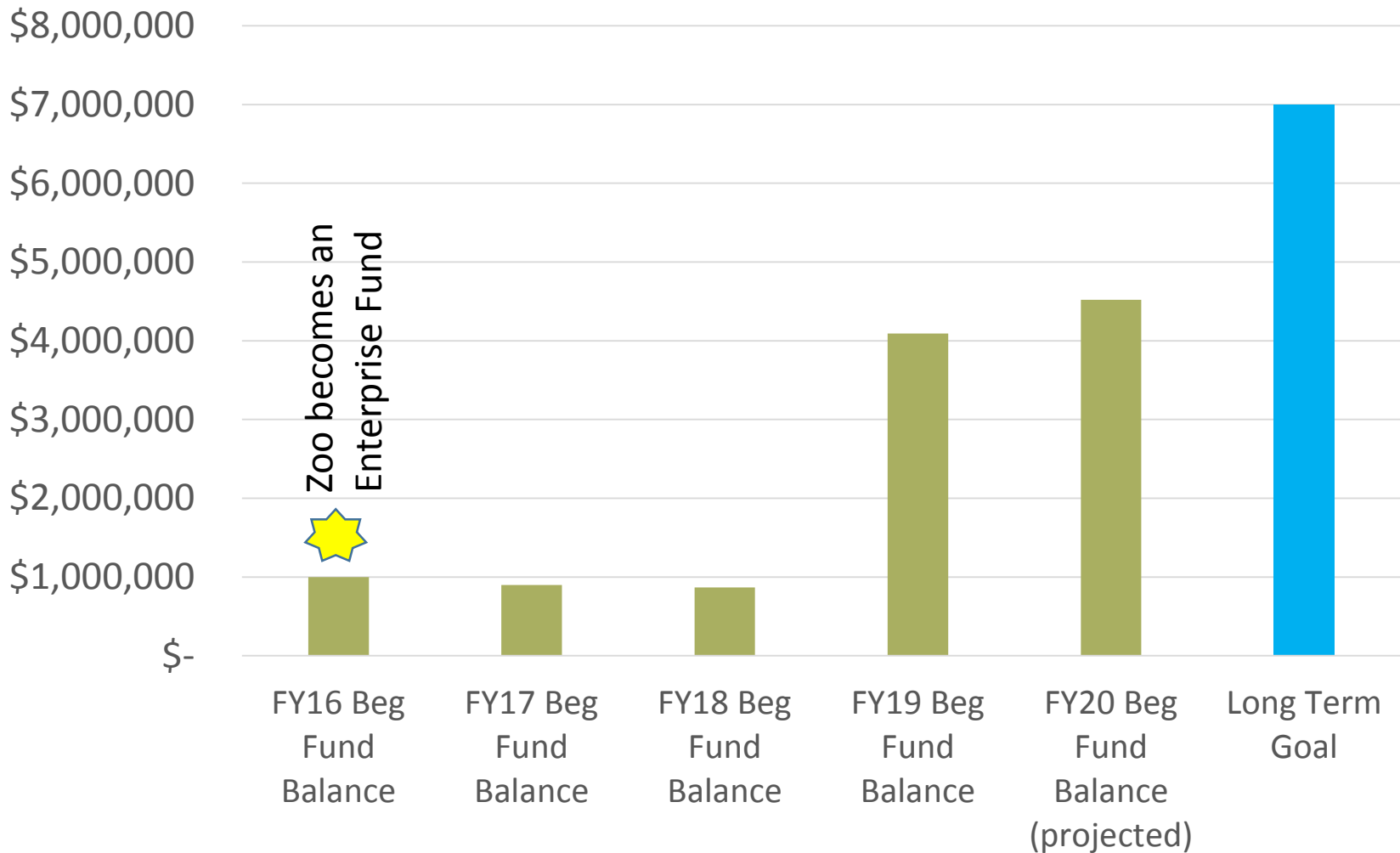
Long Term
Financial
Framework

Operating
reserves

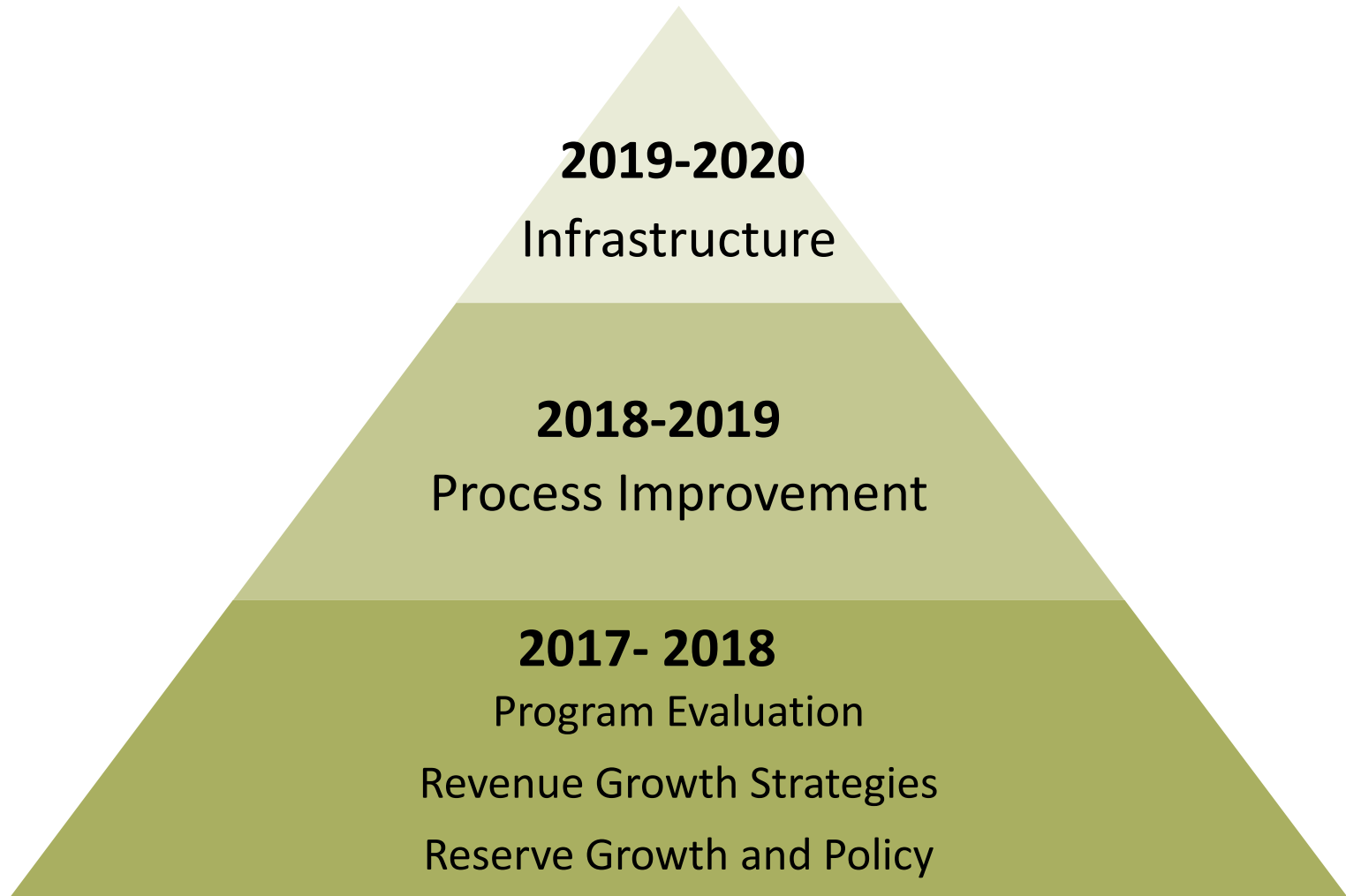
Infrastructu
re
investment

Reserve Growth

Operating Reserves



Timeline





Innovators!

DENVER
PEAK
ACADEMY



Just Do It!

Life Support Systems Closet Clean Up

Goal: never place an aquatic animal in a situation where we don't have the critical backup parts available.

Also, saves the zoo thousands of dollars in overnight and shipping costs.

A cross departmental team (guest experience, horticulture, warehouse, etc.) conducted a **workshop** to examine the set up of concert chairs before each performance resulting in measurable savings in staff time for the 2019 season.



Large Scale Project

Ticketing Software Replacement

- Providing a member with their card has gone from 3 to 6 weeks to 3 to 6 minutes.
- 18 months
- Collaboration across Metro Divisions



Bond & Infrastructure Update



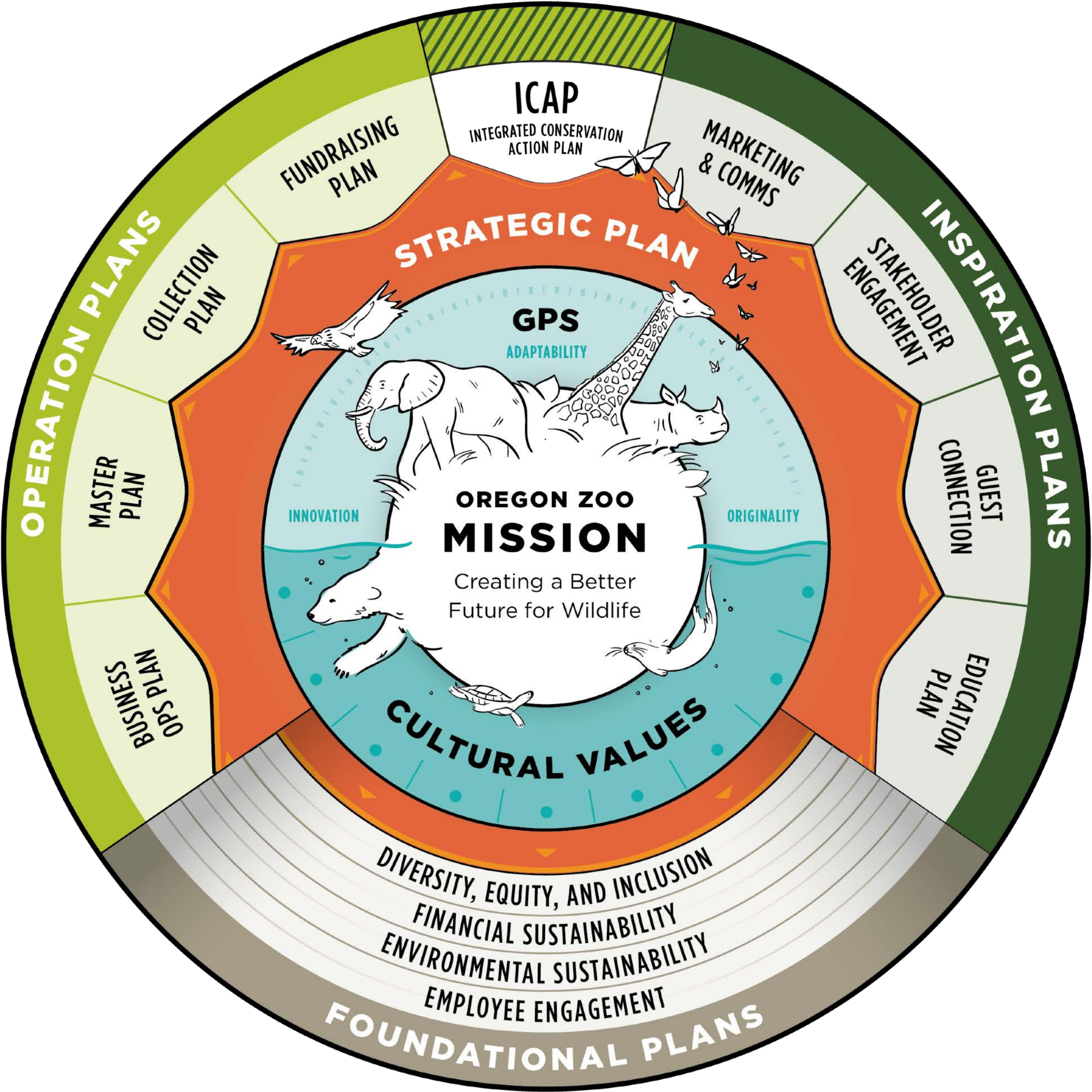
Time for discussion





OREGON ZOO STRATEGIC PLANNING

Each part of our navigational ecosystem serves a unique purpose and answers a distinct set of questions. They work in harmony to help us achieve our mission.

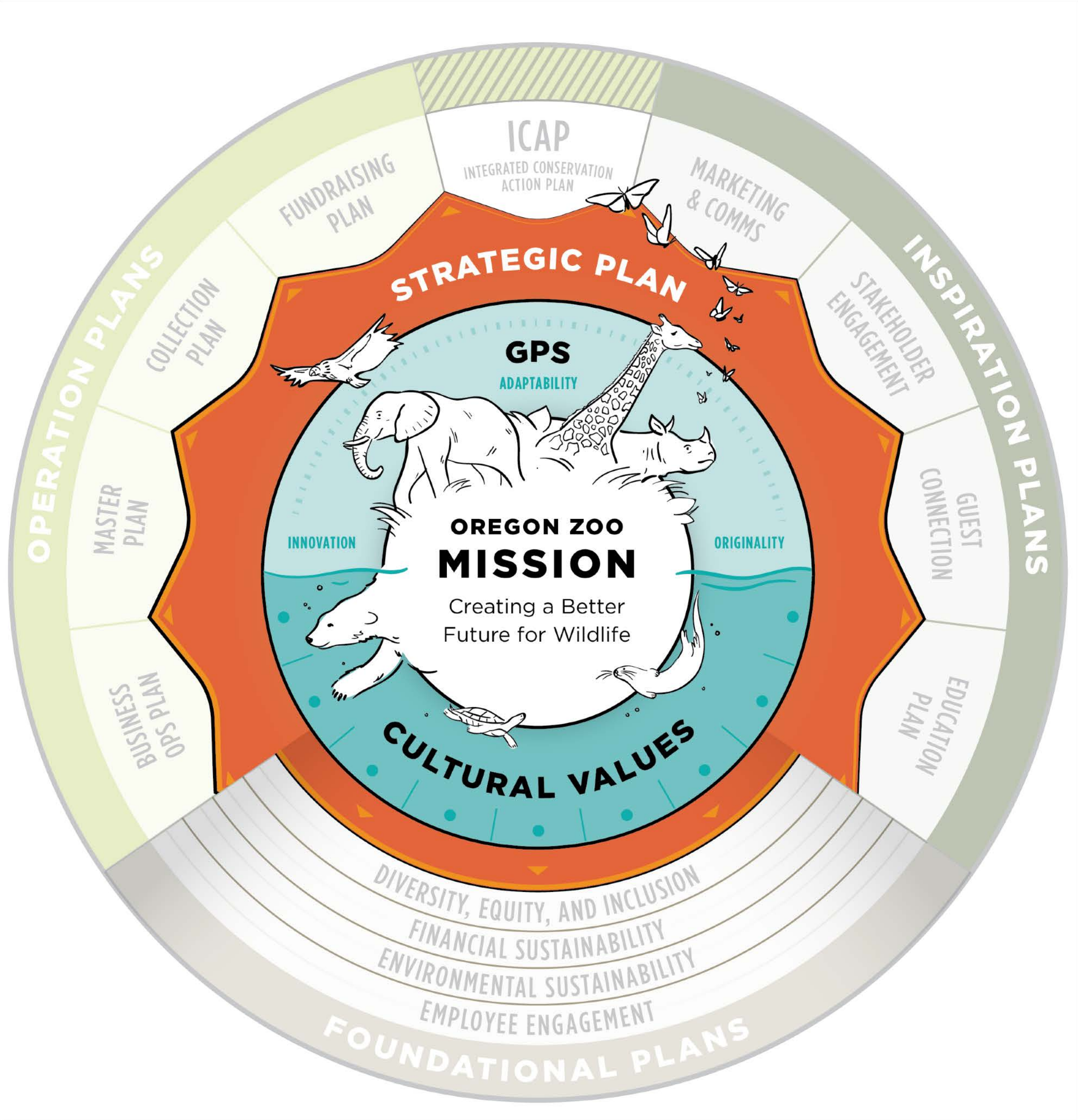


Strategic Plan

Our strategic plan tells us **where we're going** and **how we'll get there**.

It supports our mission and drives our other operational plans. The strategic planning process will guide us in innovating for the future, clarifying our priorities, and making strategic tradeoffs.

Strategic Planning will occur every three years and requires we look ahead on a 3-5 time horizon.



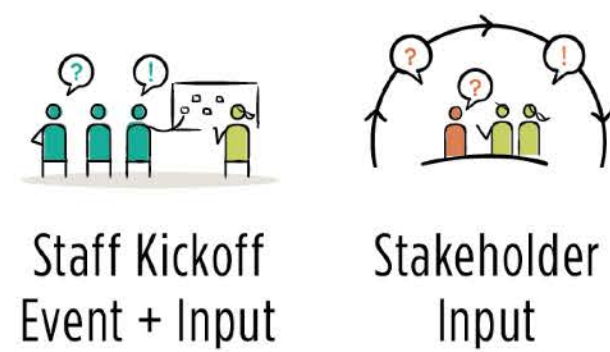
Oregon Zoo Strategic Planning Process Overview & Timing

PLANNING & RESEARCH



MARCH - APRIL

DISCOVERY



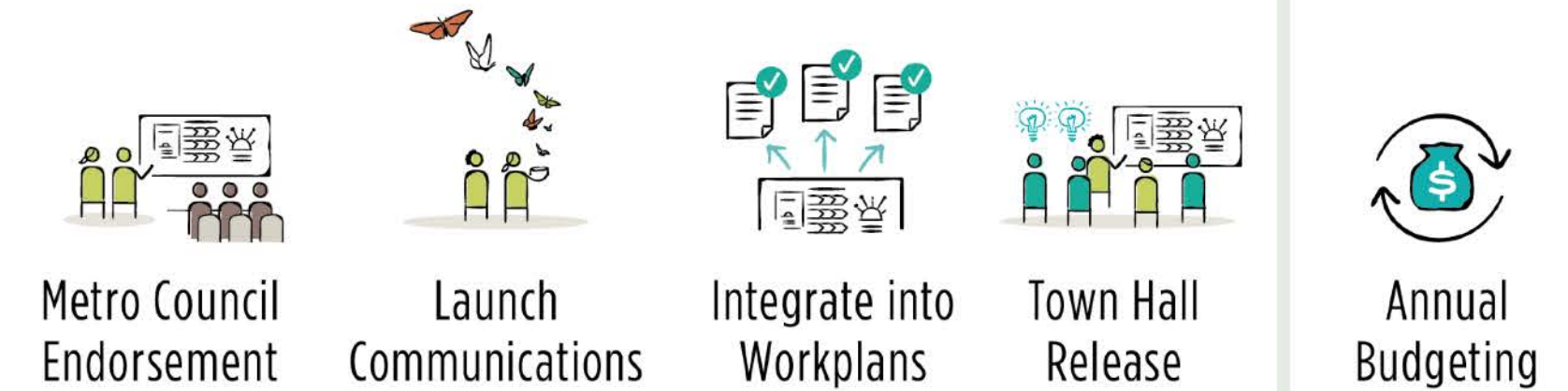
MAY - JUNE

DESIGN



JUNE - AUGUST

ACTIVATION

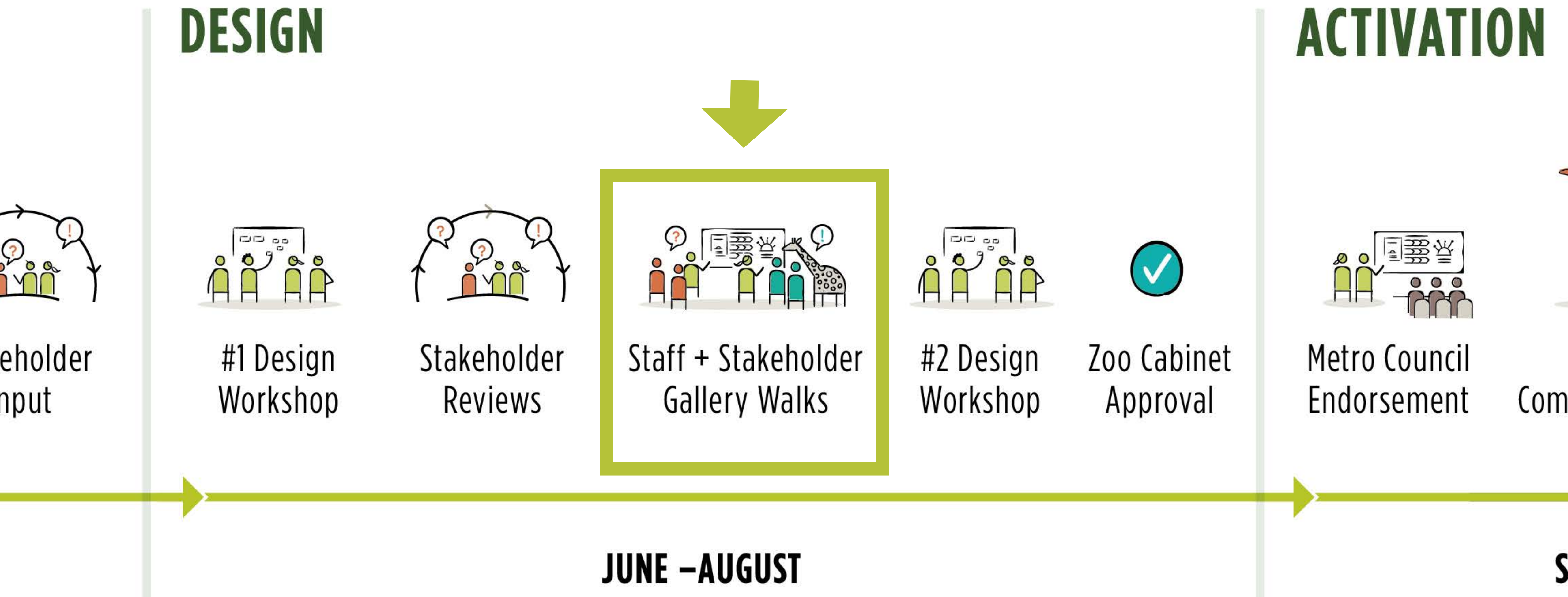


SEPTEMBER - OCTOBER

NOVEMBER

● STRATEGIC PLANNING TEAM
 ● STAFF
 ● KEY STAKEHOLDERS
 ● METRO COUNCIL

Oregon Zoo Strategic Planning Process Overview & Timing





1

Design Session

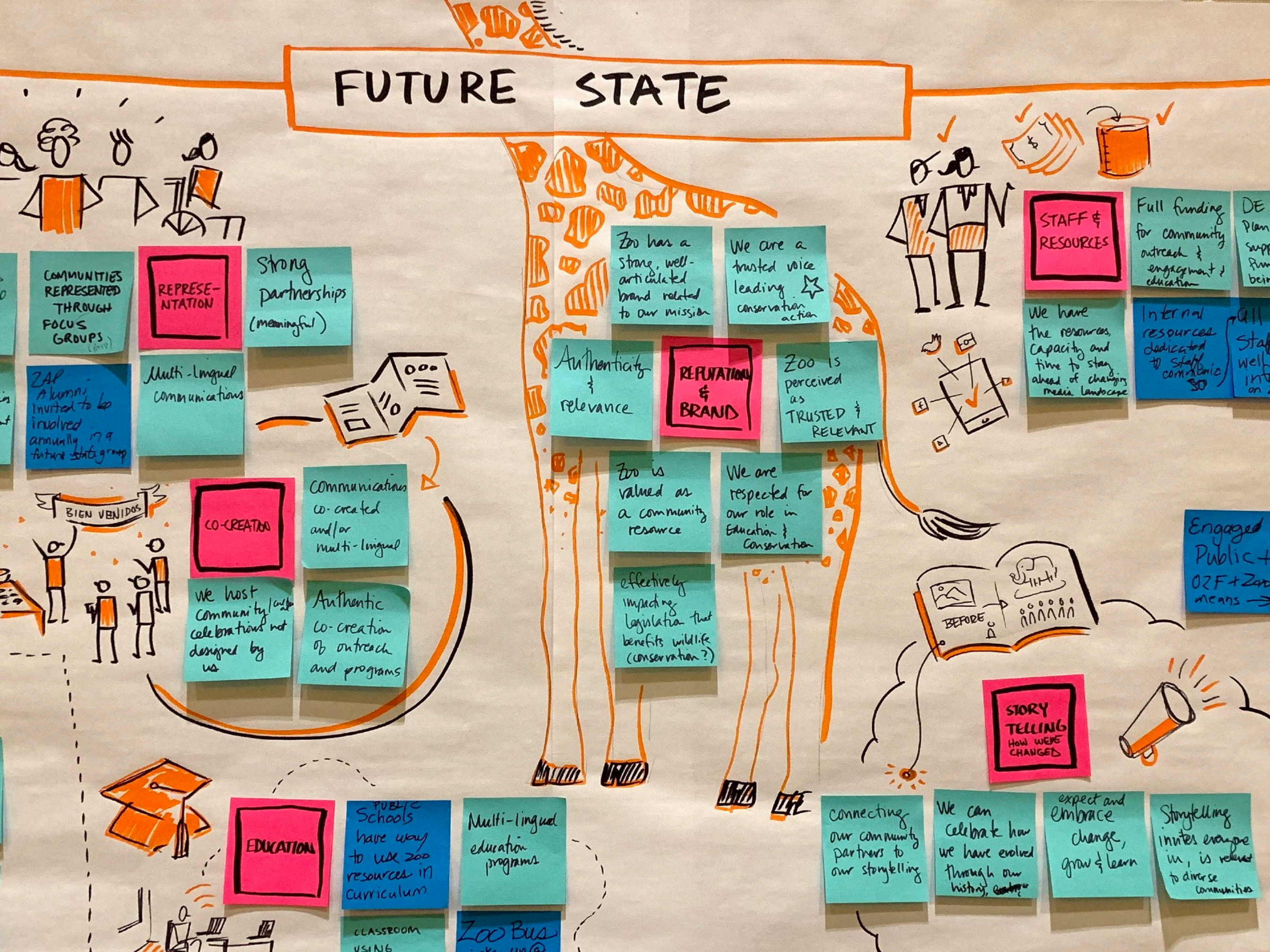
Kicking off planning with stakeholder input from employees, visitors, and the community



1

Design Session

Exploring our current & future states and how we'll get there through the lens' of our mission, animals, guests, employees, and community



1

Design Session

Work created in session

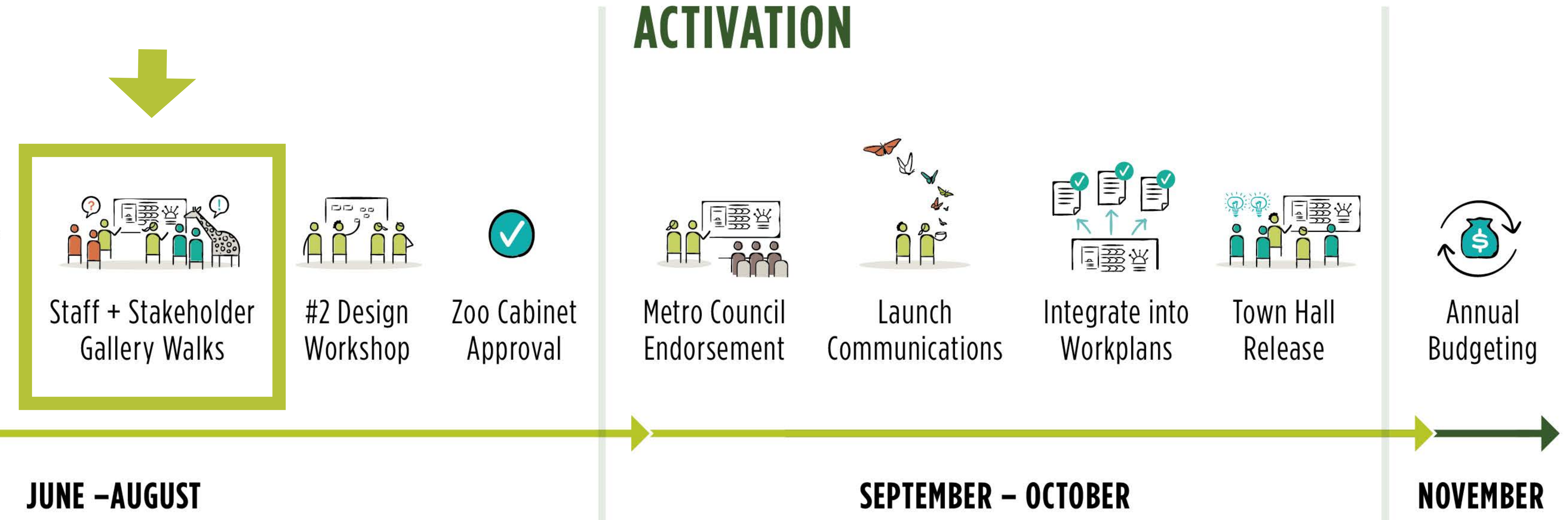


2

Design Session

Coming back together after the feasibility check

Oregon Zoo Strategic Planning Process Overview & Timing



OREGON ZOO
Strategic Plan
2020 – 2023

Our strategic plan is our guide for the next three years as we make progress towards our mission, **Creating a Better Future for Wildlife.**

DRAFT

Lead the Way in Animal Care & Welfare

We're driven to be a leader among zoos in animal care & welfare—this means creating environments in which all our animals thrive. We will accomplish this by steadily **upgrading habitats** based on basic needs and at the same time, testing **new innovative approaches** that integrate choice and cutting edge techniques to training, enrichment, fitness and research.

Drive Wildlife Conservation

Wildlife conservation is at the heart of our mission. We'll **maximize our impact** through meaningful partnerships in species recovery, policy advocacy work, strong conservation networks and inspiring our community and staff to take action.

Deliver an Inspiring Guest Experience (Every Time)

The guest experience will **WOW guests** and **connect them to our mission**. Our experience will be welcoming, modern, and transformative as guests experience the wonder of animals at every possible opportunity.

Create Diverse, Equitable & Inclusive Environments

We strive to create environments that are inclusive to all. Which is why we used DEI as a strategic lens when designing the guest and employee experience. It's also a strategic priority on its own because this effort **requires intention, focus, and funding to do it right**. The Oregon Zoo is committed to advancing diversity, equity and inclusion and creating safer and more welcoming spaces for everyone.

Achieve Financial Sustainability

The success of this organization requires that we continue to improve our financial outlook. We'll be **diligent in our research, strategy, and planning** to ensure we steadily increase our revenue while managing expenses so we can continue to invest in our people and our mission for decades to come.

Elevate the Staff Experience

Staff is the bedrock of our animal and guest experience. We know we have some of the most knowledgeable and passionate employees among zoos. We also know that we have work to do when it comes to creating a staff experience where staff feel **included, informed, heard, and connected to the mission and our overall success**. We're ready to do that work.

Connect with our Communities

The zoo is building a brand that shares our commitment to animal care and conservation as well as provides meaningful engagement with diverse communities throughout the region. We'll build on our strong tradition of communication by **carefully listening to our stakeholders**, especially communities of color, and **co-creating programs and experiences** that achieve our shared goals and mission.

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Equitable
Guests

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METRICS & STRATEGIC PRIORITIES


100%
of Oregon Zoo
animals experience
positive welfare

Habitat
Upgrades

Habitat & Welfare
Innovation

Research &
Technology

Staff Support &
Empowerment

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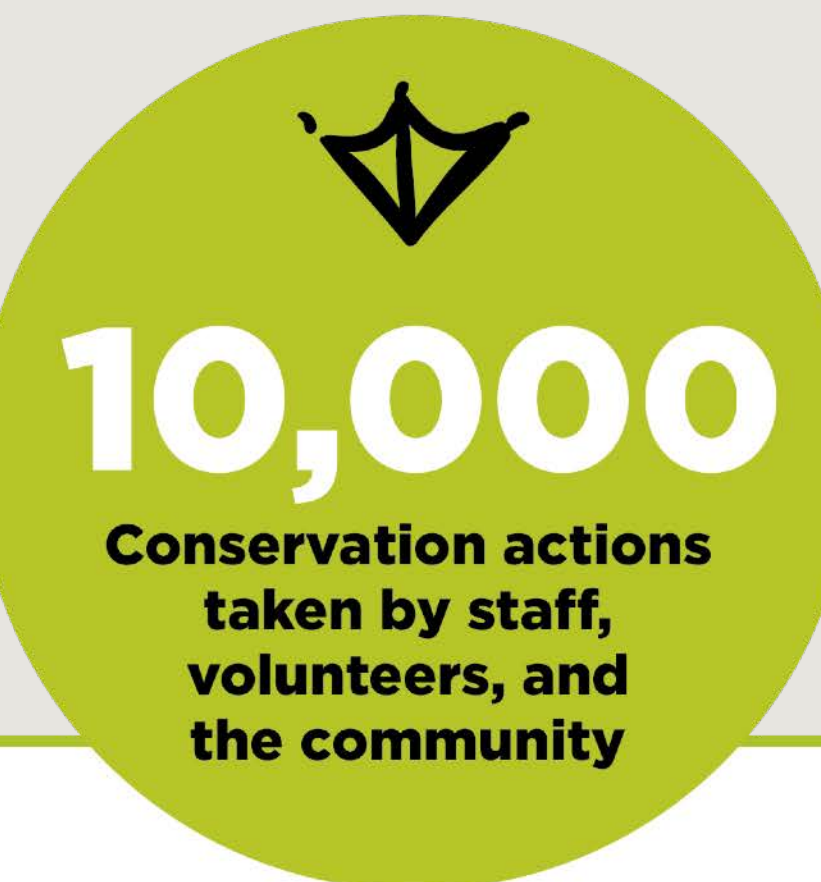
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METRICS & STRATEGIC PRIORITIES



Species
Recovery

Conservation
Network

Advocacy &
Engagement

Campus
Sustainability

Staff
Involvement

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70
NPS

Guest Connection
to the Animals

Campus
Upgrades

Staff Driven Guest
Engagement

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The top half of the strategic plan is the core of our strategy.



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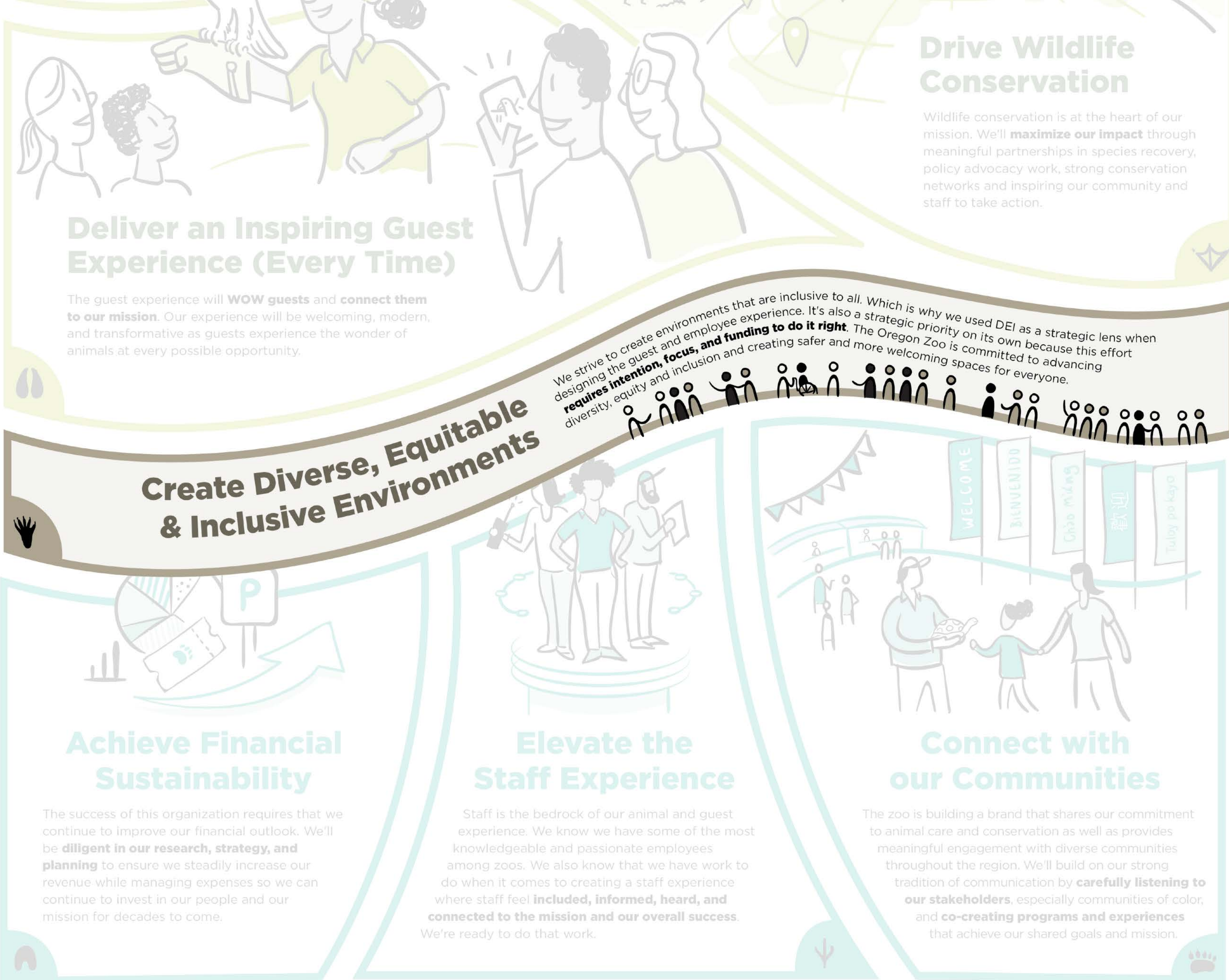
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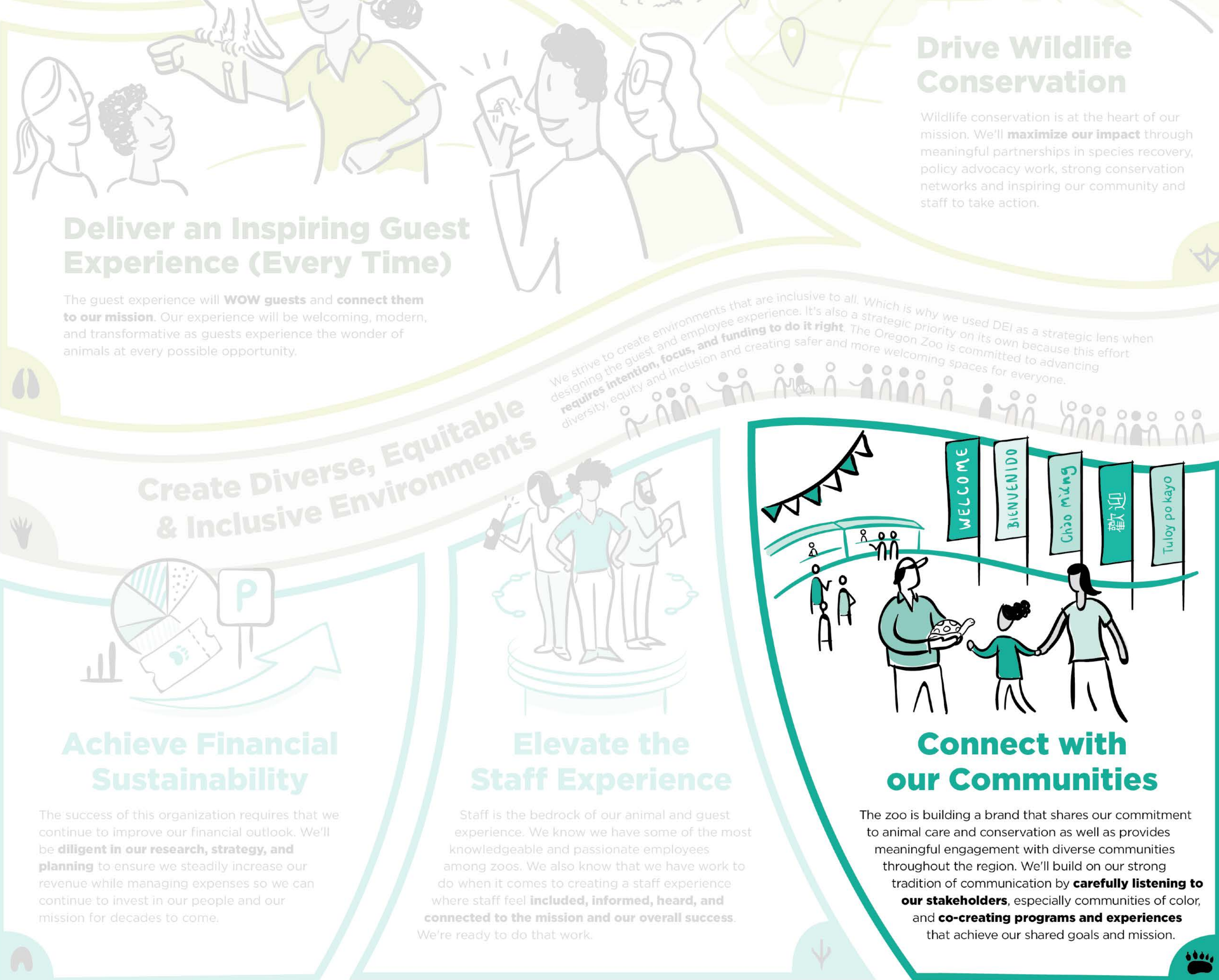
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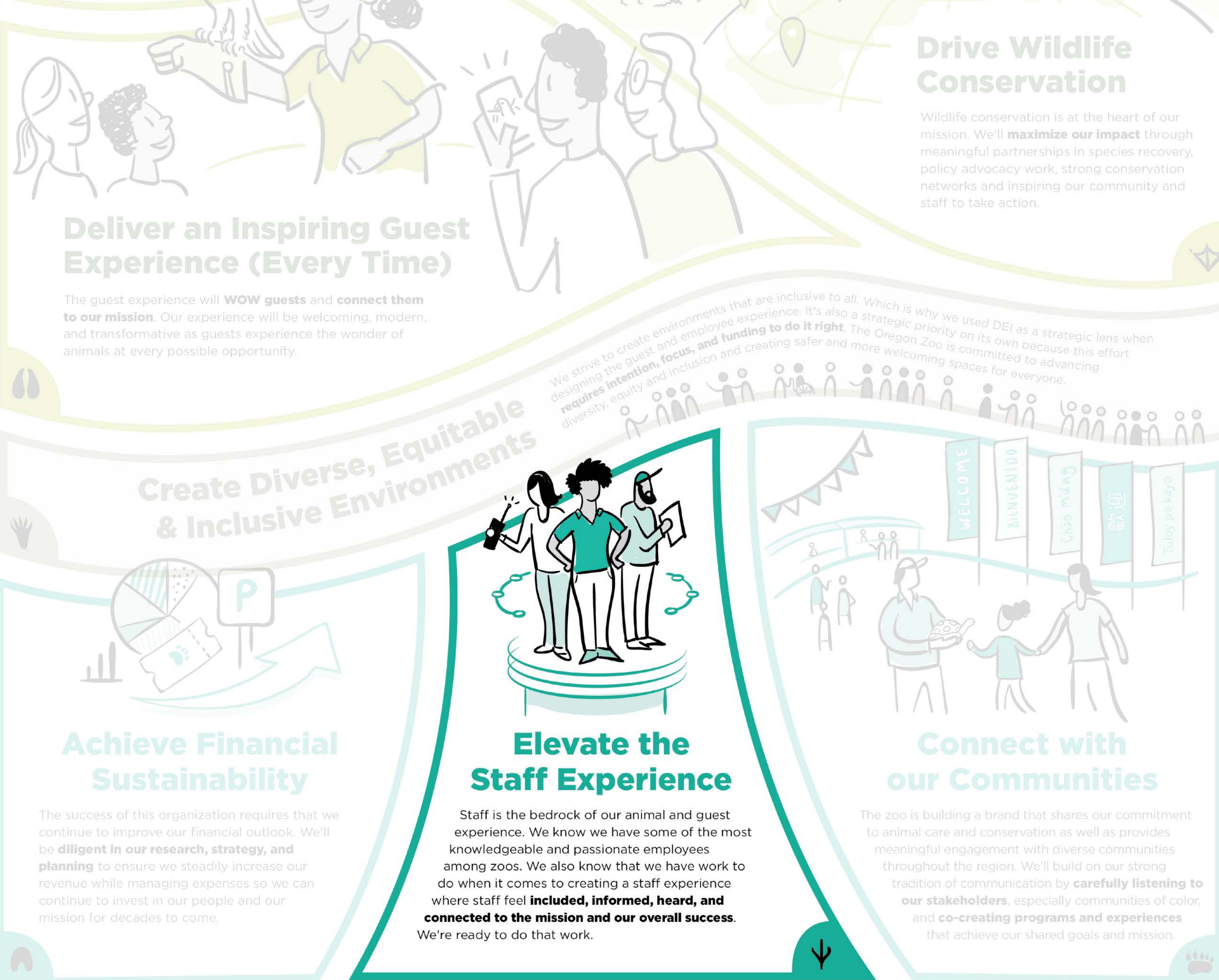
METRICS & STRATEGIC PRIORITIES

<div><p>OUR DIVERSITY MEETS OR EXCEEDS THAT OF THE PORTLAND METROPOLITAN AREA</p><p>Staff & Guests</p></div>	
STAFF	Learning
	Growth & Retention
	Recruiting
GUEST	Access
	Outreach
Funding	



METRICS & STRATEGIC PRIORITIES

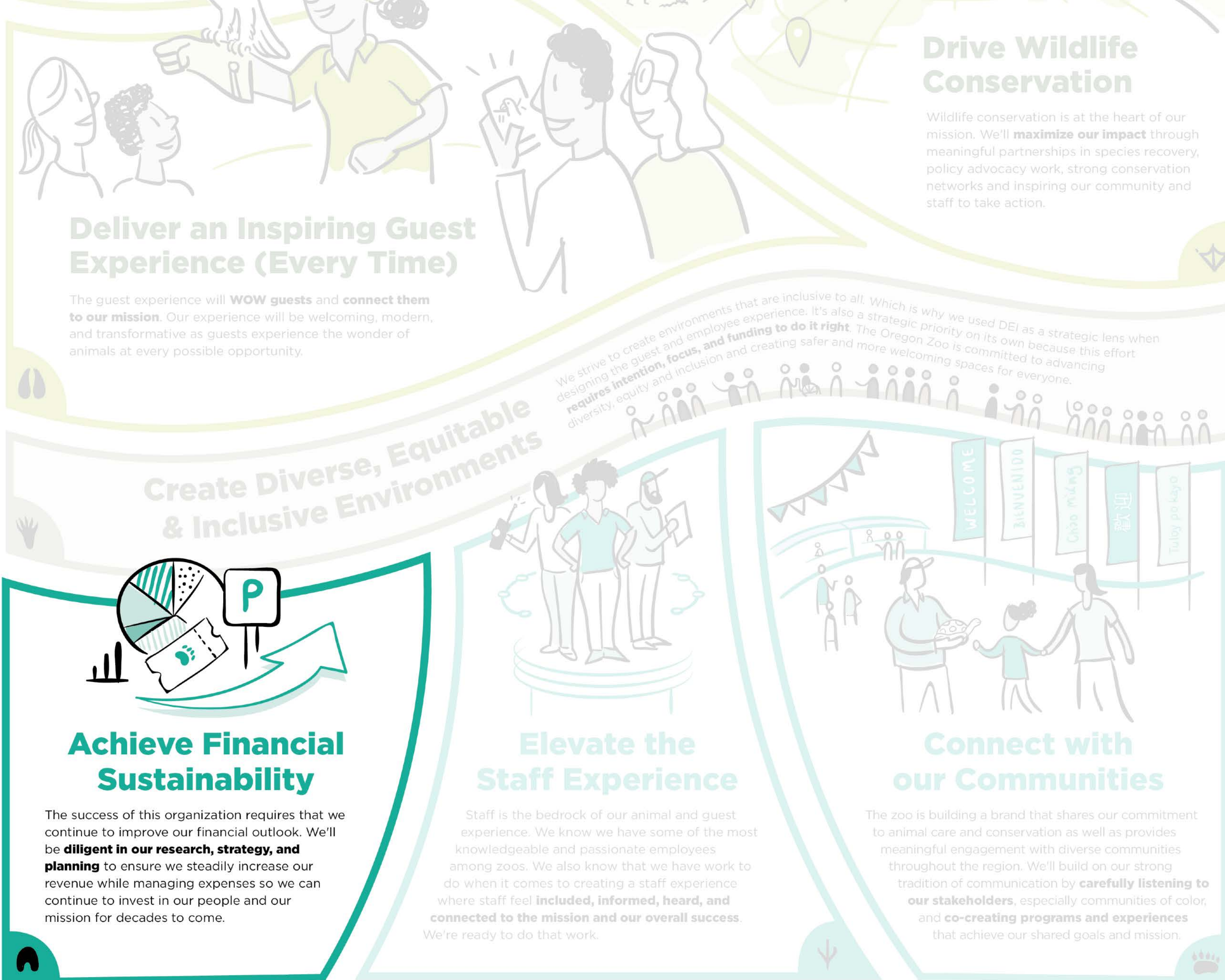
 65% of the community connects the OR Zoo with our mission
Community Engagement
Partnerships
Brand



METRICS & STRATEGIC PRIORITIES



Communication
Career Paths & Professional Development
Connection to the Zoo's Success



METRICS & STRATEGIC PRIORITIES

<div> \$7M Reserve</div>
Economic Study
Transportation Access & Parking Action Plan
Pricing Strategy
Expense Management
Long Term Funding

Strategic Focus Area

Other Zoo Plans that Connect

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RELATED PLANS

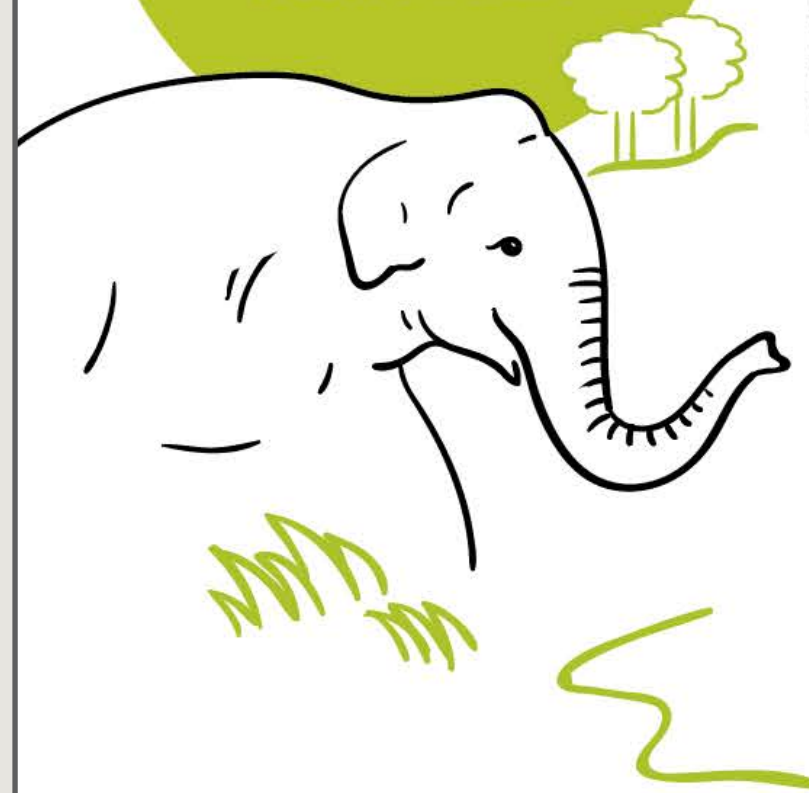


DRAFT

Key Metric

100%

of Oregon Zoo
animals experience
positive welfare



WHAT SUCCESS
LOOKS LIKE

STRATEGIC
PRIORITIES

HOW WE'LL DO IT

- We are recognized as a leader in our industry in animal care
- Welfare audit program is in place with measurable increases in animal lifespan, breeding, diversity of behaviors, and social structure
- A reduction in the number of serious health issues among animals
- Animals have more choice 24 hours a day
- 75% of the zoo is monitored for observational research
- We exceed AZA accreditation standards

Habitat Upgrades

- Complete welfare audits across the zoo
- Design and implement a welfare continuous improvement plan based on the audit results
- Upgrade habitats to maximize usage of space based on observational research
- Complete bond upgrades successfully and develop a plan for updates to additional habitats and holdings
- Establish funding through a Welfare Audit Action Fund

Habitat & Welfare Innovation

- Establish an innovation program with a clear process that includes ideation, funding, design, test and implement
- Implement 1-3 new habitat innovations per year depending on size and scope

Research & Technology

- Extend monitoring zoo-wide
- Deepen research & development on novel enrichment devices and robotics
- Host a Welfare & Technology summit to identify partnership opportunities in innovation and habitat design
- Implement MS Kinect

Staff Support & Empowerment

- Increase staff time to focus on innovation and raising the bar on animal welfare
- Ensure appropriate staff levels for successful opening of new habitats

Outcomes

Strategic Priorities

Strategies & Tactics

Q&A

YOUR FEEDBACK MATTERS

[HTTPS://WWW.SURVEYMONKEY.COM/R/ZOOSTRATEGICPLANNING](https://www.surveymonkey.com/r/zoostrategicplanning)

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METRICS

STRATEGIC PRIORITIES

100%
of Oregon Zoo animals experience positive welfare

Habitat Upgrades
Habitat & Welfare Innovation
Research & Technology
Staff Support & Empowerment

10,000
Conservation actions taken by staff, volunteers, and the community

Advocacy & Engagement
Species Recovery
Campus Sustainability
Conservation Network
Staff Involvement

70
NPS

Guest Connection to the Animals
Campus Upgrades
Staff Driven Guest Engagement

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Staff & Guests

STAFF	Learning
	Growth & Retention
	Recruiting
GUEST	Access
	Outreach
	Funding

65%
of the community connects the OR Zoo with our conservation mission

Community Engagement
Partnerships
Brand

3.8+
Employee Engagement Score

Communication
Career Paths & Professional Development
Connection to the Zoo's Success

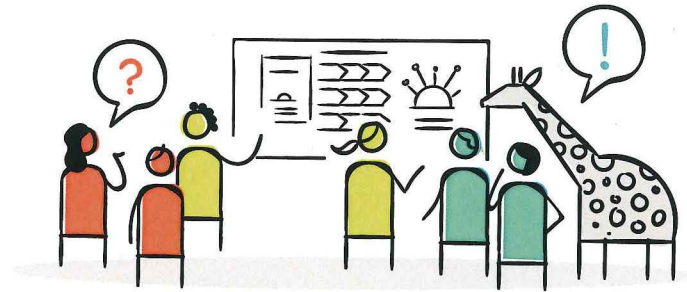
\$7M
Reserve

Economic Study
Transportation Access & Parking Action Plan
Pricing Strategy
Expense Management
Long Term Funding

OREGON ZOO

STRATEGIC PLANNING PROCESS

Our strategic planning process was designed to honor the needs of our key stakeholders, be open and transparent, and embody our GPS – innovation, adaptability, and originality. This process will guide us in creating our strategic plan every 3 years.



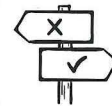
Clarity and
understanding for staff



Visibility for our community
and stakeholders



Operational focus
and accountability



Clear decision making

NAVIGATIONAL ECOSYSTEM

The strategic plan is one part of our navigational ecosystem. Each component serves a unique purpose and answers a distinct set of questions but they work in harmony to help us achieve our mission.



KEY STAKEHOLDERS



ANIMALS

Our animals are our highest priority and at the center of all we do. We consider their needs at every stage of the process.



STAFF & VOLUNTEERS

Staff and volunteers bring insights based on their daily interactions with guests, animals, and the community that can drive innovation and operational improvements.



OZF BOARD

The strategic plan will influence the campaigns, goals, and planning for OZF so it's critical that we work together from the start.



DONORS & MEMBERS

Donors and members bring an essential perspective into strategic planning that can drive innovations in guest experience.



METRO EXECUTIVE LEADERSHIP

Metro leadership will provide a bigger picture perspective on how we're working together to achieve our collective vision for the metro region.



KEY COMMUNITIES OF INTEREST

Gathering input from our key communities ensures that we are working together to achieve our shared goals for the community.



Clarity and understanding for staff



Visibility for our community and stakeholders



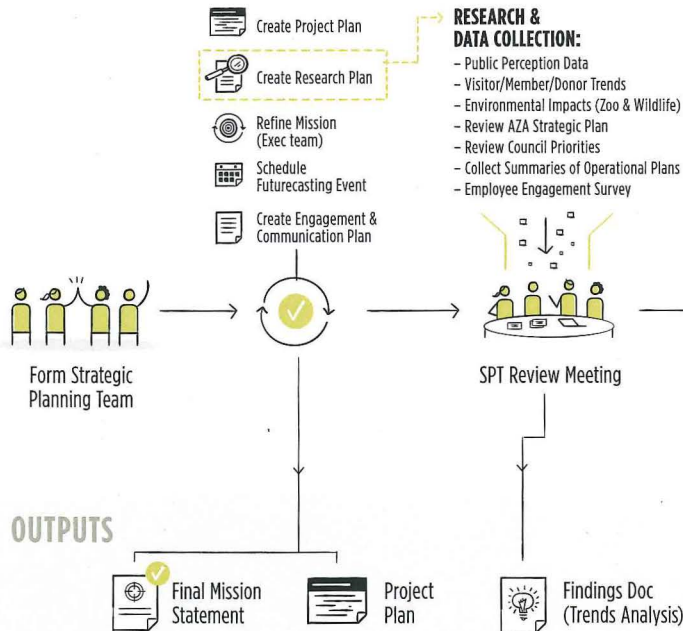
Operational focus and accountability



Clear decision making

STRATEGIC PLANNING PROCESS OVERVIEW

PLANNING & RESEARCH



MARCH - APRIL

DISCOVERY



MAY - JUNE

We'll engage our community of stakeholders in an iterative process. There will be moments for open-ended input as well as reacting to and providing feedback on our direction.

& TIMING

DESIGN



STRATEGIC PLANNING TEAM



STAFF



KEY STAKEHOLDERS



METRO COUNCIL

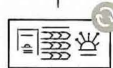
EXPLORE:

- Current/Future State Mapping
- Identify our Priorities to Getting There

DRAFT:

- Identify and Weigh Priorities
- Test with Key Internal Stakeholders
- Feasibility Check

DESIGN WORKSHOP V1
(1-2 Days)



Draft Strategic Priorities



Reactive Survey



GALLERY WALK for Staff

GALLERY WALK for Volunteers, Neighbors, Teens, Members, Donors, OZF Board, Metro Council

Feedback Synthesis

SPT Review Meeting

FINALIZE:

- Identify Key Priorities and Initiatives for Getting There
- Validate with Related Experts and Managers

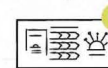
OPERATIONALIZE:

- Determine Outcomes and Owners
- Feasibility Check
- Evaluate Against Current Projects & Programs

DESIGN WORKSHOP V2
(2-3 Days)

Approval from Zoo Cabinet

Findings Doc Updated



Final Strategic Plan



Storytelling Presentation

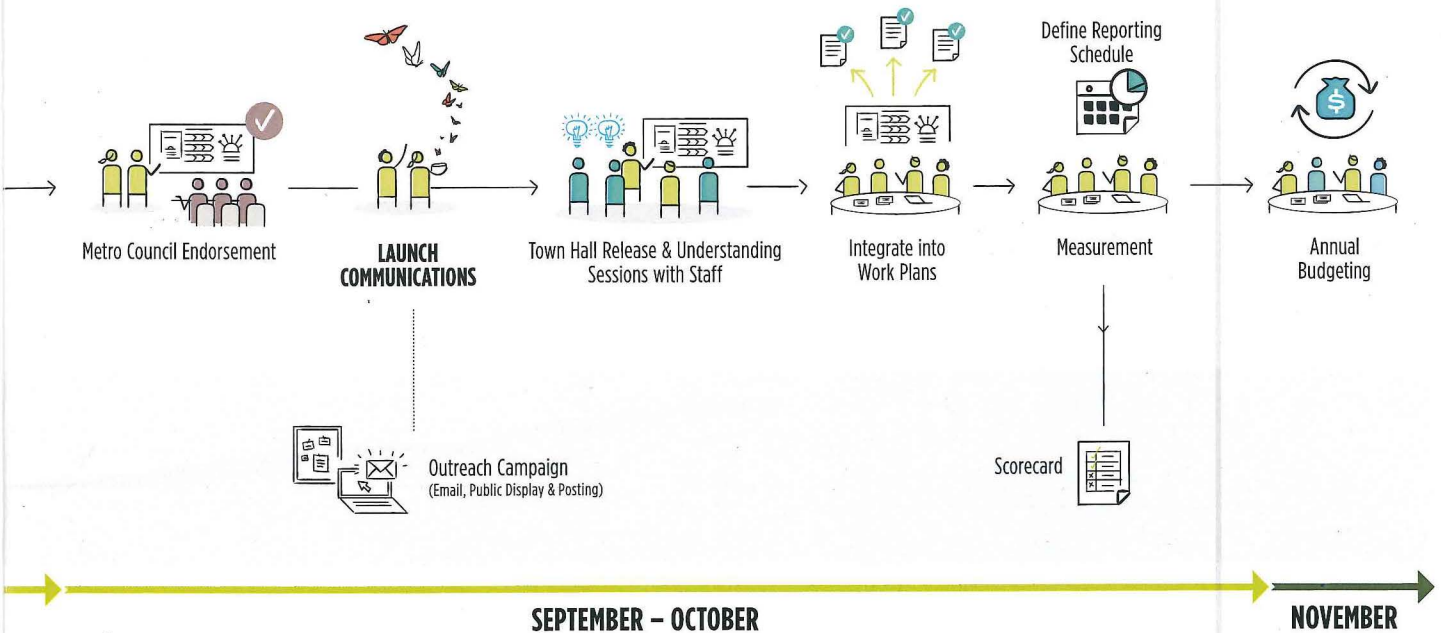
MID JUNE

JULY – AUGUST

We'll use design workshops led by our consulting partner to push our thinking, evaluate options, and make strategic tradeoffs.

Feasibility checks are built into the design process so we can ensure that we're designing a future that is achievable given budget and resource capacity.

ACTIVATION



Our strategic plan will have measurable outcomes tied to it. We'll design a scorecard and transparent reporting cycle that will hold us accountable to progress and results.