

OREGON ZOO STRATEGIC PLAN

Date: September 6, 2019
Department: Oregon Zoo
Meeting Date: September 17, 2019

Presenter(s) (if applicable):
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Length: 60 minutes

ISSUE STATEMENT

The Oregon Zoo has drafted a strategic plan to guide the zoo's work in the next three years towards our mission of **creating a better future for wildlife**.

ACTION REQUESTED

Staff will seek Metro Council approval of Oregon Zoo's Strategic Plan 2020-2023 sometime in the fall of 2019.

Staff also request Metro Council's assistance in carrying out aspects of the strategic plan (see POLICY OPTIONS FOR COUNCIL TO CONSIDER section).

IDENTIFIED POLICY OUTCOMES

Approval of the Oregon Zoo's 2020-2023 Strategic Plan will provide clear guidance to staff around key priorities and goals. It will answer the question "where is the zoo going" for key partners and the community. In addition, the annual budget process will utilize the plan for direction regarding the allocation of the zoo's resources.

POLICY QUESTION(S) & OPTIONS FOR COUNCIL TO CONSIDER

1. Does the strategic plan align with Metro Council priorities?
2. Are there any areas where the Council would like to engage more comprehensively, or areas that are not represented in the current plan? For example:
 - a. Legislative advocacy for conservation efforts
 - b. Supporting events and honors the zoo and its staff receives
 - c. Work with regional partners to increase awareness of programs with other elected and policy-making bodies.

STAFF RECOMMENDATIONS

Staff recommends Metro Council support the Oregon Zoo's 2020-2023 Strategic Plan.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The zoo's draft strategic plan supports already established/adopted plans and goals of Metro Council.

The Oregon Zoo published its Equity Action Plan in April 8, 2019 and it is a critical component of the strategic plan; it cuts across all of the identified goals. **Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion** was adopted by Metro Council in 2015. While the Strategic Plan to Advance Racial Equity, Diversity, and Inclusion guides the entire agency, each Metro department is responsible for developing its own priorities and integrating Metro's strategic goals into their work. Over the course of two years, members of the Zoo's Racial Equity, Diversity and Inclusion Plan development team drafted the plan, ensuring that it was complementary to the Metro plan.

In 2019, the zoo established the Oregon Zoo Green Team whose charge is to (1) update the Zoo's Sustainability Plan and (2) find green initiatives/ideas and act on them. The Zoo's Sustainability Plan will be in line with the **sustainability goals set by Metro Council**. Some actions taken on the zoo campus in recent years include sub metering a significant portion of the campus, installation of LED lighting, a switch from bottled wine and beer to kegs, a switch from bottled water to aluminum cans, purchase of green energy from Northwest wind projects, installation of a two-port electric vehicle charging station, replacing water heaters with tankless units, installing a high efficiency boiler in the Swamp building, shutting down equipment at night, decommissioning the hippo pool, fixing water leaks, and an efficiency upgrade of Steller Cove. As a result of these efforts, in FY2017-2018 the zoo experienced 20 percent savings in natural gas use, 11 percent savings in electricity use, and 23 percent in water savings compared to the previous year.

In addition to the Green Team the Zoo Bond Projects demonstrate the zoo's commitment to the agency's sustainability goals. The new Education Center is designed for net zero energy and achieved LEED Platinum certification. Some of the key features include more than 700 solar panels, LED lighting, high efficiency heating and cooling systems, rainwater harvesting, rain gardens, a wildlife garden, salvaged building materials, and bird-friendly glass. The Elephant Lands project earned LEED Gold certification. Some of the sustainable features include: pool filtration, improved storm water management, geothermal system, solar photovoltaic panels on Forest Hall roof, solar hot water, and natural ventilation.

Oregon Zoo's strategies are also aligned with the **Climate Smart Strategy** adopted by Metro Council in December 2014. The zoo works closely with Explore Washington Park in trying to direct visitors towards the use of MAX. The zoo recently installed a bike repair station available to bikers in Washington Park. Zoo facilities have goals to reduce the number of fleet vehicles and transition to more fuel-efficient vehicles.

In 2017 an **audit on organizational culture at the Oregon Zoo** was conducted by Metro's Auditor. The draft strategic plan considers recommendations from the findings. Specifically, having a clear strategy will help to clarify the zoo's vision and prioritize actions.

The Oregon Zoo, as a venue of Metro, strives to work as an integrated unit to advance the agency's mission. Many areas of the draft strategic plan overlap with work being done in other areas of the agency or as an overall coordinated effort. To ensure the Oregon Zoo is working as part of Metro, zoo leadership recently met with Metro's External Services Team

to engage in conversations around topics such as disaster preparedness (taking care of agency as well as regional role), transportation, and climate action. In addition to prompting collaboration, the draft plan continues to support already established partnerships across Metro departments to best leverage resources.

BACKGROUND

Community & Staff engagement:

The zoo's strategic planning process was designed with co-creation at the core. Touch points with key partners, community groups, and staff were built in at each step in the design process. Before initial design 15 community partners were interviewed and staff were engaged during two Town Halls. After the draft plan was developed 4 focus groups were held with community and conservation partners and a 4 day gallery walk was offered to staff and public (more than 100 staff participated). Currently, an online survey (available in four languages) is open for broader community input.

The zoo focused on organizations where a relationship was already established. Those included: IRCO, Latino Network, APANO, Youth Mentoring Collective, Camp Elso, PPS Head Start, Portland Metro STEM Partnerships, Explore Washington Park, World Forestry Center, Arlington Heights Neighborhood Association, Portland Children's Museum, Portland Parks & Recreation, Portland Japanese Garden, US Fish and Wildlife Service, the Bureau of Land Management, and Zoo Youth Advisory Council.

- Zoo staff engaged with the community and staff before drafting the strategic plan goals. The areas community and zoo staff want the zoo to focus on are listed below. This feedback was incorporated into the plans goals. Diversity, Equity, Inclusion & Accessibility – staff, programming, experience, and outreach
- Conservation – climate action, sustainability, endangered species
- Education – in-depth experiences for students and teachers, scholarships, internships
- Parking & Transportation – access, costs

These themes emerged from initial interviews and this input informed much of the plan. Some specific examples that are in the current plan include: host culturally specific events co-created with those communities, deepening our conservation network and growing our conservation actions, expand internships, jobs and service learning for marginalized youth.

After the plan was drafted, the gallery walks and focus groups provided some reactive feedback. In general, feedback was very positive on the draft strategic plan regarding clarity, inspiration, confidence in the zoo's direction and connection with the zoo's success. We also received helpful feedback on how we can improve. Several groups felt we were missing the inspiration in our current conservation programs. This is something Metro Council noticed as well during the work session on July 23, 2019. We plan to elevate the work we're doing in climate action and species recovery in the final draft. There were inquiries around community engagement -who we are engaging with and how we are engaging them. The feedback was for deeper community engagement, "Who you are

engaging with matters. One person can't represent an entire community". We plan to act on this through distributing translated versions of the plan and providing an online survey. In addition, there will be a commitment to more community co-creation on zoo programming.

Above represents synthesized feedback. Staff heard from Council in July it would be valuable to add an appendix with the detailed feedback so it does not get lost. This will be added to the final draft.

Strategic Priorities (DRAFT)

Listed below are the seven priorities identified through the strategic planning process. The planning team believes these goals reflect input received by both staff and community and should be the zoo's highest priorities over the course of the next three years.

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 for training, enrichment, fitness and research.*

Deliver an Inspiring Guest Experience (Every Time)

*The zoo experience is our opportunity to **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.*

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.*

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 Community

*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.*

Create Diverse, Equitable & Inclusive Environments (DEI)

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.*

Performance Measures & Accountability

Each of the above priorities has metrics tied to measuring success. In addition to these being regularly monitored by zoo leadership, these metrics will feed into Metro's performance measure reporting.

- 100% of Oregon Zoo animals experience positive welfare [Animal Care]
- 10,000 conservation actions taken by staff, volunteers, and the community [Conservation]
- Net promoter score of 70 – NPS is a metric used to measure the guest experience and how likely a guest is to recommend a zoo visit to others. [Guest Experience]
- Our diversity meets or exceeds that of the Portland metropolitan area (staff & guests) [DEI]
- 65% of the community connects the Oregon Zoo with our mission [Connect with Communities]
- Employee Engagement Score of 3.8+ [Staff Experience]
- \$7 million in operating reserves [Financial Sustainability]

Zoo staff propose an annual update for Metro Council on plan progress including the performance measures as well as more detail around specific initiatives and key milestones.

Staff request any feedback from Metro Council regarding the drafted strategic plan be received by September 25th in order for it to be incorporated into the September 30th design workshop and final plan draft.

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, Strategic Plan Draft