

IN CONSIDERATION OF NO. 19- 5056, FOR THE PURPOSE OF APPROVING THE
OREGON ZOO'S 2020-2023 STRATEGIC PLAN

Date: November 12, 2019
Department: Oregon Zoo
Meeting Date: December 5, 2019

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Presenter(s) (if applicable): n/a
Length: n/a

ISSUE STATEMENT

The Oregon Zoo has developed 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 seeks Metro Council approval of Oregon Zoo's 2020-2023 Strategic Plan.

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 Council approve the Oregon Zoo's 2020-2023 Strategic Plan?

STAFF RECOMMENDATIONS

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

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The zoo's draft strategic plan emphasizes seven focus areas and multiple goals within each focus area. Due to the plan's robust nature, it was noted in previous presentations how it can be challenging to absorb that level of information in one presentation. Therefore, staff presented at two additional work sessions.

The initial presentation to Metro Council in July 2019 focused on an overview of the process to create the plan and an overview of all of the focus areas. The second discussion with Metro Council focused more deeply on how the strategic plan aligns with established Metro priorities, community engagement, and performance measures. The November work session highlighted two strategic priorities of the draft plan: career pathways and conservation. Staff also provided an update on how survey feedback was incorporated to the final plan, the activation plan, and progress reporting.

Alignment with Metro Council Priorities

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 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 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 plan include: host culturally specific events co-created with 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 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. The work we're doing in climate action and species recovery has been elevated 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 acted on this through distributing translated versions of the plan and providing an online survey. In addition, there is a commitment to more community co-creation on zoo programming.

There were 115 survey responses (majority coming from zoo staff), in addition several focus groups participated in the survey during the gallery walks. On a scale of 1-5 the results were as follows:

The plan is clear & easy to understand	4
I am inspired about the zoo's direction	4
I feel confident the zoo is focused on the right things	4
I see my role in the zoo's success	3.5

The following themes were identified and addressed in the plan revision at a design workshop:

- Simplify language and definitions
- More emphasis on education
- Bring conservation work to life
- Call out volunteer experience
- DEI and accessibility clarity

There were 80 relevant comments which were reviewed during the design workshop; 40 of them were incorporated into the strategic plan and 22 will be put into other plans. 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 work was documented in a decision log. Also, an idea appendix capturing feedback throughout the process was created and will be reviewed at least annually.

Staff is circling back with stakeholders, like the Zoo Youth Advisory Council, to share how feedback was used. This action is based on comments received during the engagement process that it is important for stakeholders to know their feedback is considered.

Performance Measures & Accountability

Each of the seven 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.

Plan Activation

Staff's role is critical to the success of the strategic plan and as such the thoughtful activation of the plan and the ongoing monitoring is essential.

Plan activation will start at the manager level. Managers participated in a workshop where they started incorporating plan goals into their area work plans. Next, the final plan will be shared at an all staff meeting. Managers will then meet with their work teams and connect each staff's goals to the strategic plan.

It is important to keep the plan alive after initial rollout. Zoo staff are committed to providing quarterly progress reports. In addition, visual representations of plan accomplishments and progress will be strategically placed around campus so it is top of mind for staff.

The plan will provide the zoo direction for the next three years. Animals are the heart of the zoo and their welfare is our number one priority. We will continue to grow as a conservation organization. We want every visitor to feel safe, welcome and inspired. In order to accomplish this, we need to be financially sustainable. And we know we can't do any of this without staff. They show up in every area of this plan and improving their experience is critical to our success. Through connecting our staff to our core mission and empowering them to take innovative approaches, the Oregon zoo will lead the way in **animal care & welfare, advance wildlife conservation, and deliver and inspiring guest experience.**

ATTACHMENTS

Resolution no. 19- 5056 Approving the Oregon Zoo's 2020-2023 Strategic Plan
Oregon Zoo's 2020-2023 Strategic Plan (Summary)
Oregon Zoo's 2020-2023 Strategic Plan (Detail)