

Metro | Agenda

Meeting: Metro Council Work Session
Date: Tuesday, Dec. 17, 2013
Time: 2 p.m.
Place: Council Chamber

CALL TO ORDER AND ROLL CALL

- | | | |
|----------------|---|---|
| 2 PM | 1. ADMINISTRATIVE/ COUNCIL AGENDA FOR DEC. 19, 2013/ CHIEF OPERATING OFFICER COMMUNICATION | |
| 2:15 PM | 2. OREGON VALUES AND BELIEFS - <u>INFORMATION / DISCUSSION</u> | Jim Middaugh, Metro
Adam Davis, DHM Research |
| 2:55 PM | 3. BREAK | |
| 3PM | 4. OREGON ZOO FOUNDATION (OZF) ANNUAL UPDATE - <u>DISCUSSION</u> | Kim Smith, Oregon Zoo
Jani Iverson, Oregon Zoo Foundation
Mark Loomis, OZF Board of Trustees |
| 3:40 PM | 5. METRO ATTORNEY COMMUNICATION | Alison R. Kean, Metro |
| 3:50 PM | 6. COUNCIL BRIEFINGS/COMMUNICATION | |

ADJOURN

Metro's nondiscrimination notice

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Agenda Item No. 2.0

OREGON VALUES AND BELIEFS

Metro Council Work Session
Tuesday, Dec. 17, 2013
Metro, Council Chamber

METRO COUNCIL

Work Session Worksheet

PRESENTATION DATE: December 17, 2013 **TIME:** 2:15 p.m. **LENGTH:** 40 minutes

PRESENTATION TITLE: Oregon Values and Beliefs

DEPARTMENT: Communications

PRESENTER(S): Adam Davis, adavis@dhmresearch.com, 503-220-0575; Jim Middaugh, jim.middaugh@oregonmetro.gov, 503-797-1505;

WORK SESSION PURPOSE & DESIRED OUTCOMES

- Purpose: Respond to several requests from the Council to provide a general overview of the 2013 Oregon Values and Beliefs survey with a closer look at some issues that are important to Metro, including land use and transportation issues and opinions.
- Outcome: Better Council awareness of the current state of public opinion.

TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

The presentation will provide an overview of the third installment of the decennial Oregon Values and Beliefs study, continuing and extending similar opinion research conducted in 1992 and 2002. The study reaches across a broad and representative swath of Oregon’s adult population—making a point to include large groups that are typically not heard in other public forums or civic participation methodologies—to learn what residents think about important issues affecting our social and political lives. Findings show that Oregonians may not be as divided on many issues as is commonly perceived. There are differences, to be sure. But the survey finds surprising areas of consensus, even when examining the much-cited urban and rural divide within Oregon.

This installment of the Oregon Values and Beliefs Project serves multiple purposes. One is to provide the public a snapshot of the beliefs held by regular Oregonians at this point in time and, through comparison to previous studies, to examine how our views on certain topics may be changing. Another purpose is to provide information to policymakers and interest groups about how regular Oregonians feel about the most fundamental issues of the day. The political discourse of our state, and our nation, is often driven by assumptions about public attitudes. This project tests the validity of some of these assumptions. This study stands out from others in that, when asking questions about policy priorities with cost implications, we inform respondents that rating an item as “important” or “desirable” means willingness to support some increase in taxes or reallocation of funds from other public services. The visual surveys used \$ symbols to emphasize the real-world implications of policy preferences.

Three statewide surveys conducted in April and May 2013. Final sample sizes were 3,971 respondents for Survey #1, 1,958 for Survey #2, and 1,865 for Survey #3. DHM Research and PolicyInteractive Research designed and administered the study using telephone and online formats to aid accessibility and help obtain a representative sample. Email invitations were sent to Opt In panel members to participate in the online survey. Enough interviews were completed in five geographic regions (Central, Eastern, Portland Metro, Southern, and Willamette) to permit statistically reliable analysis at the regional level. The research design used quotas and statistical weighting based on the U.S. Census to ensure representativeness within regions by age, gender, and income. The regions were then weighted proportionally by population per the U.S. Census to yield statewide results.

QUESTIONS FOR COUNCIL CONSIDERATION

- Does Metro Council have any questions for presenters?

PACKET MATERIALS

- Would legislation be required for Council action No
- If yes, is draft legislation attached? Not applicable
- What other materials are you presenting today? none

Agenda Item No. 4.0

**OREGON ZOO FOUNDATION (OZF)
ANNUAL UPDATE**

Metro Council Work Session
Tuesday, Dec. 17, 2013
Metro, Council Chamber

METRO COUNCIL

Work Session Worksheet

PRESENTATION DATE: 12/17/2013 **TIME:** 3 PM **LENGTH:** 40 minutes

PRESENTATION TITLE: Oregon Zoo Foundation annual update

DEPARTMENT: Oregon Zoo

PRESENTER(S): KIM SMITH, OREGON ZOO DIRECTOR, (503)887-6131; KIM.SMITH@OREGONZOO.ORG

WORK SESSION PURPOSE & DESIRED OUTCOMES

- Purpose: Provide an annual update to Council on the Oregon Zoo/Oregon Zoo Foundation partnership and share Foundation accomplishments and Zoo/OZF joint strategic plan.
- Outcome: Reporting requirements included in the Memorandum of Understanding (MOU) between the Oregon Zoo and Oregon Zoo Foundation are met.

TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

In FY 2011-12, an MOU was signed between the Oregon Zoo and Oregon Zoo Foundation (OZF) that outlined expectations, goals and principles for the operations of and collaboration between the two organizations. In addition to clarifying the OZF mission and fundraising functions, the MOU established reporting protocols to enhance the transparency and understanding for Metro and the general public.

A requirement to jointly provide annual updates to the Metro Council on OZF goals, objectives, strategies and accomplishments was included in the MOU. This work session is intended to fulfill the reporting requirement and provide opportunities for Council to learn and ask questions of OZF.

Zoo director Kim Smith will be joined by Jani Iverson, OZF executive director and OZF Board chair Mark Loomis. The presentation will include an overview of past accomplishments, current fundraising strategies and the Zoo/OZF five-year strategic plan.

QUESTIONS FOR COUNCIL CONSIDERATION

This briefing is intended to be informational only; no policy direction is requested.

PACKET MATERIALS

- Would legislation be required for Council action Yes No
- If yes, is draft legislation attached? Yes No
- What other materials are you presenting today?

Materials following this page were distributed at the meeting.



Metro | *Agenda*

Meeting: Metro Council Work Session
Date: Tuesday, Dec. 24, 2013
Time: 2 p.m.
Place: Council Chamber

THIS MEETING HAS BEEN CANCELED

2013 Oregon Values and Beliefs Survey Key Findings

Prepared For:
Metro Council Work Session
December 17, 2013



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THANK YOU!



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INTRODUCTION/METHODOLOGY

- General population
- Multiple tracks: scientific and public involvement; number and length of questionnaires
- Over 9,000 Oregonians completed questionnaires (2,909 from Opt In Panel)
- Phone (landline and cell), online, and mail
- Demographic quotas and statistical weighting for representative sample
- Full study: 200 questions



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PRESENTATION TOPICS

Feelings About Oregon And Your Community

Most Important State and Local Issues

Most Important Public Services

Land Use

Transportation & Infrastructure

Other Findings



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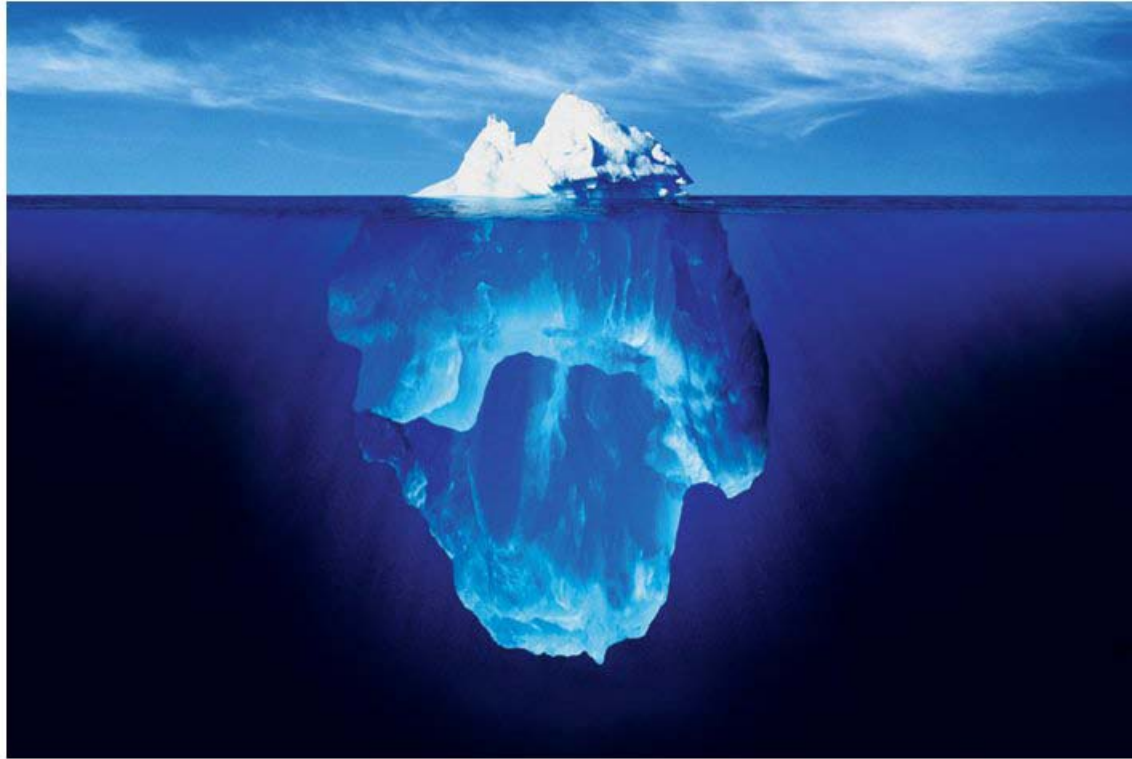


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Feelings About Oregon And Your Community



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What do you personally value about living in Oregon?

Response Category	Statewide	Metro
Beauty/scenery	21%	21%
Weather/climate	19%	18%
Friendly residents/people	13%	15%
Outdoors/outdoor activities	11%	11%
Forest/trees	11%	11%
Proximity to coast/ocean	10%	12%
Nature-general	10%	13%
Great place to live/neighborliness/friendly town	10%	11%
Proximity to mountains	9%	11%
Environment-general	6%	6%
Environmentally friendly/promotes recycling	6%	7%
Other Responses	5% or less	6% or less



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What do you personally value about living in Oregon?

“I value that Oregon is mindful of the environment, and being able to go from the ocean to the mountains and the plains.” Male, Multnomah Co

“Surrounded by beautiful nature. Friendliness of the people. Relaxed living.” Female, Clackamas Co

“The outdoors and people. I also love the earth-conscious way we run out society.” Female, Multnomah Co

“Only place on the west coast that is affordable to live, good place to raise a family, all the amenities of a big city without the big city headaches.” Male, Washington Co

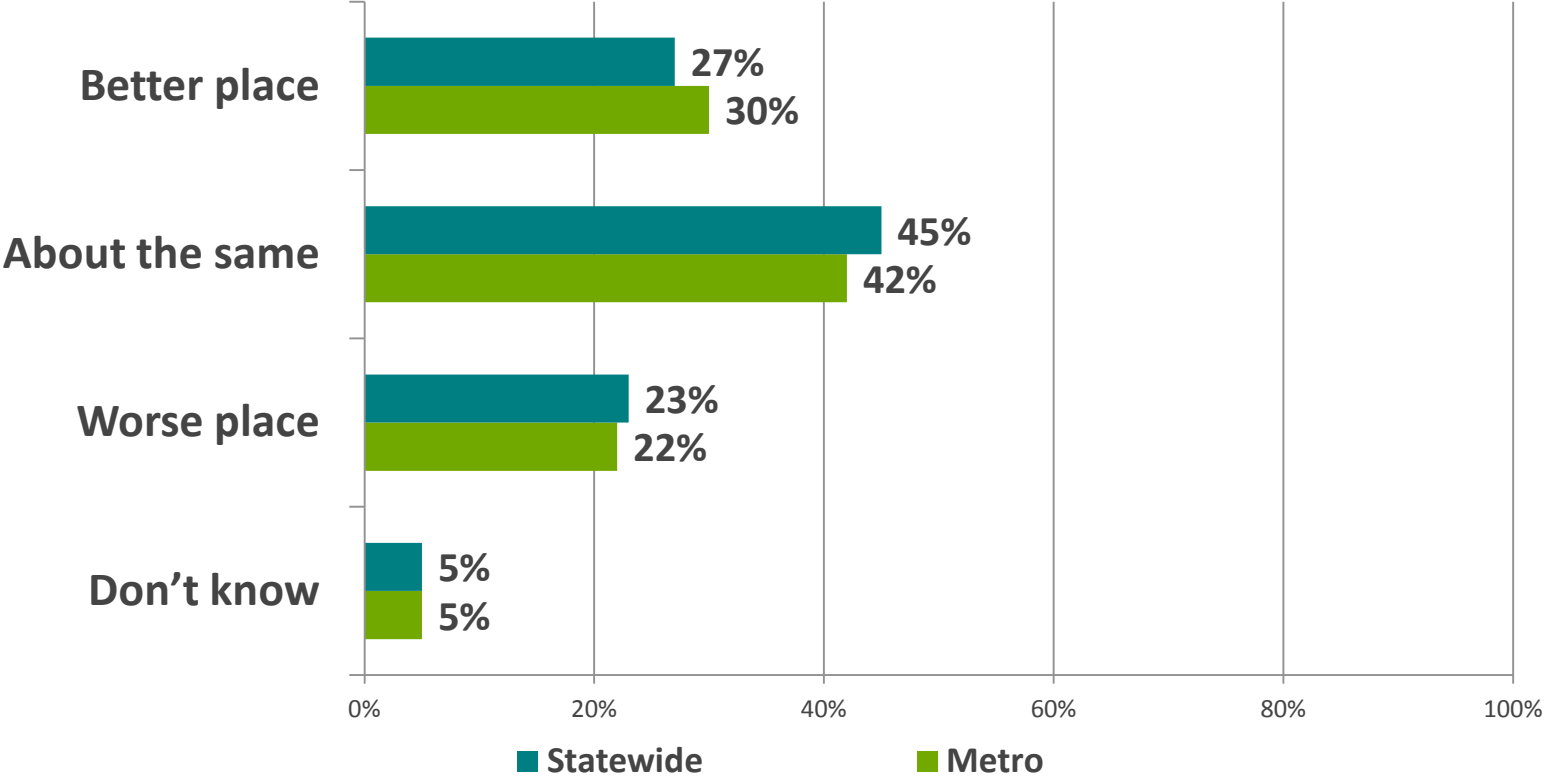
“The environment and the progressive nature of the majority of the population.” Male, Clackamas Co



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When you think of your community ten years from now do you think it will be a better place to live, about the same as it is today, or worse than today?



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Why do you think your community will be better (10 years from now)?

Response Category	Statewide	Metro
Making progress/ moving forward	21%	27%
Community caring/ getting involved	20%	18%
Stronger economy	11%	8%
Business growth	10%	7%
Environmental awareness	8%	9%
Population growth	7%	6%
Employment opportunities/ jobs	7%	3%
Better education system	6%	4%
Public transit	6%	10%
Growth planning	5%	6%
Better political leadership	5%	3%
Quality of life	4%	6%
Better infrastructure	4%	2%
Progressive	4%	5%
Better/ revitalized areas/ downtown area	4%	2%
Technological progression	4%	2%
All other responses	3% or less	5% or less



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Why do you think your community will be better (10 years from now)?

“We will have invested in public transportation and the repair/reuse of industry which will put people to work and Oregon on the map as a leader in innovation.” Female, Multnomah Co

“We will have improved bicycle infrastructure and mass transit, discrimination against gays will be eliminated, and begin moving toward the end of fossil fuels.” Male, Multnomah Co

“Because the people who choose to live in Oregon are thoughtful and care deeply about the environment and quality of life.” Female, Clackamas Co

“The state is making an effort to improve the parks and public areas of the cities. They are repairing and upgrading roads, working on balancing the budget and improving education.” Female, Washington Co



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Why do you think your community will be worse (10 years from now)?

Response Category	Statewide	Metro
Crime	12%	12%
Over population	12%	12%
Unemployment/ lack of jobs	10%	2%
Economy	10%	7%
Poor government leadership	8%	11%
Moral standards declining	8%	7%
Drugs usage/ addition	7%	2%
Too many taxes/ keep raising taxes	6%	8%
Cutting essential public services	6%	7%
Keep going in the wrong direction	6%	4%
Poverty/ homeless	6%	7%
Too many people depending on welfare	6%	6%
Traffic congestion	5%	6%
Less law enforcement	5%	3%
Upgrade infrastructure	5%	10%
Environmental issues	4%	4%
Decrease in education quality	4%	4%
Over development	4%	4%
Gangs	4%	4%
Government spending	4%	4%
All other responses	3% or less	4% or less



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In a few words, why do you think your community will be worse (10 years from now)?

“I feel as if Oregon is neglecting the nuts and bolts of economic issues in favor of social and environmental topics of the day.” Male, Washington Co

“Over-development. It is an easy cycle to get caught in because development means jobs, and that is good for the politicians.” Male, Multnomah Co

“There will be more buildings, more concrete, less farmland that I love, and more people.” Female, Clackamas Co

“We don’t have the courage to invest in the future. Too many people think like it’s 1960—but old growth timber is gone. We blinked when it came to funding schools and the rest of the world passed us by. It will be hard to play catch-up. A Pearl District full of retirees won’t make up the difference.” Male, Multnomah Co



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Most Important State and Local Government Issues



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What is the most important issue that you want your state government officials to do something about?

Response Category	Statewide	Metro
Unemployment/jobs	11%	9%
Education funding	11%	14%
Reduce taxes	9%	11%
Quality of education	9%	12%
Balance the budget	5%	5%
Economy/Economic growth	5%	4%
Gun control issues	4%	3%
PERS	4%	4%
Control govt. spending/ wasteful spending	4%	4%
All other responses	3% or less	4% or less



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What is the most important issue that you want your state government officials to do something about?

“I would like to fix the tax system and establish a more stable form of funding for education.” Female, Clackamas Co

“Wasteful spending and not distributing wealth equally. Not taxing corporations enough.” Female, Multnomah Co

“Illegal immigration and its impact on Oregon society, public spending and crime.” Male, Washington Co

“Progressive revenue reform in order to better fund education at all levels.” Male, Clackamas Co

“Better health care for the uninsured and working solutions for ongoing gun violence that is growing in our communities.” Female, Washington Co



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What is the most important issue that you want your local government officials to do something about?

Response Category	Statewide	Metro
Unemployment/jobs	11%	10%
Education funding	8%	11%
Taxes	7%	8%
Government spending/ wasteful spending	7%	7%
Road infrastructure	6%	8%
Crime/public safety	6%	4%
Education-general	4%	6%
Economy/economic growth	4%	2%
Poverty/homeless	3%	4%
Quality of education	3%	4%
Government leadership/ corruption	3%	3%
All other responses	2% or less	4% or less



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What is the most important issue that you want your local government officials to do something about?

“Be more critical of urban development in the city. Stop giving big developers special waivers.” Male, Multnomah Co

“Reduce unnecessary spending on welfare and government programs to promote healthy living and spend more on schools and education of children.” Male, Clackamas Co

“Public safety and mental health services that are sadly lacking leaving it to the police to handle.” Female, Washington Co

“Transportation issues and infrastructure.” Male, Washington Co

“Stabilize funding for schools, mental health, and higher education through eliminating the kicker and establishing more reliable funding sources outside of property taxes.” Female, Multnomah Co



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Most Important Public Services



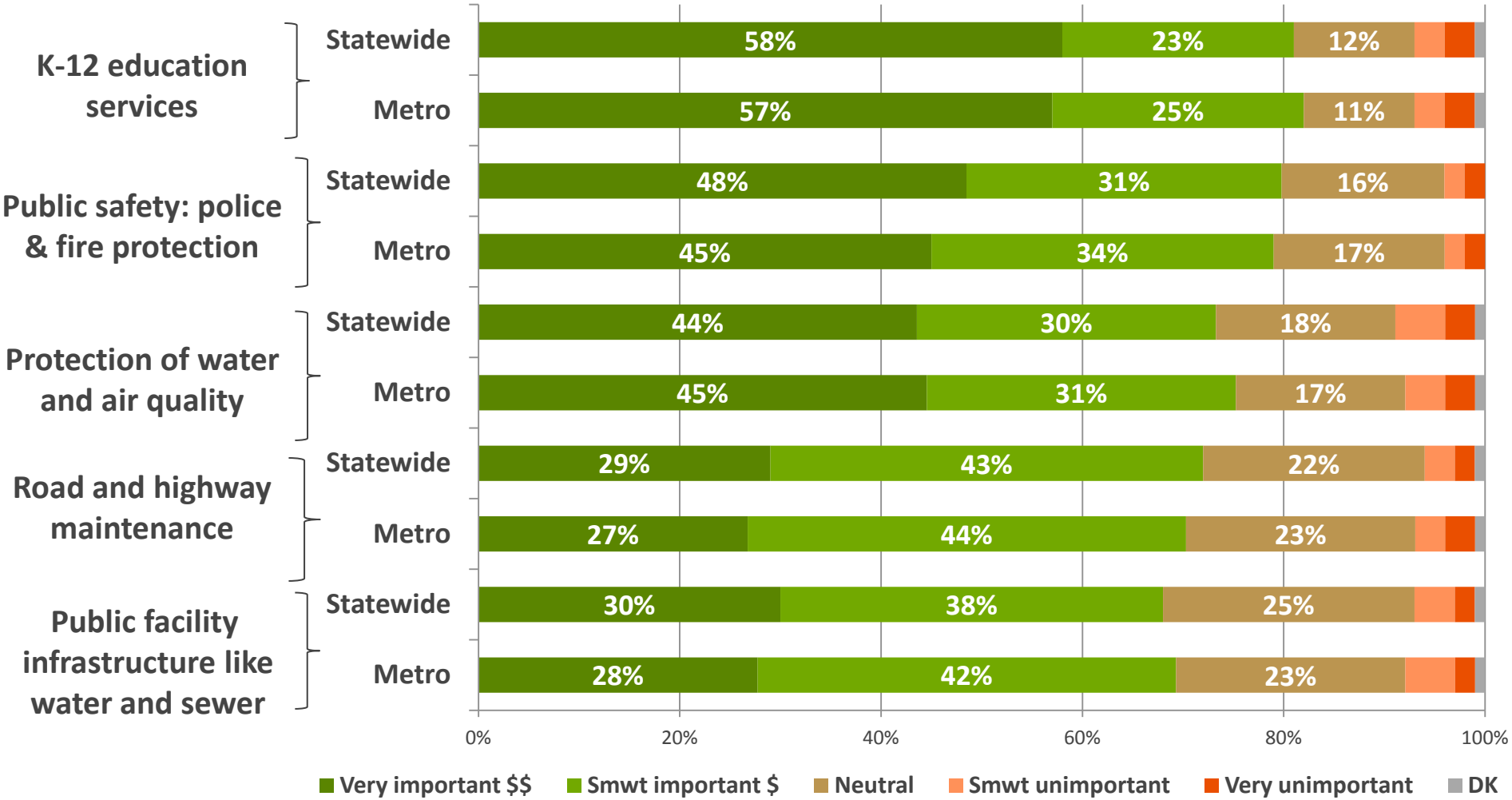
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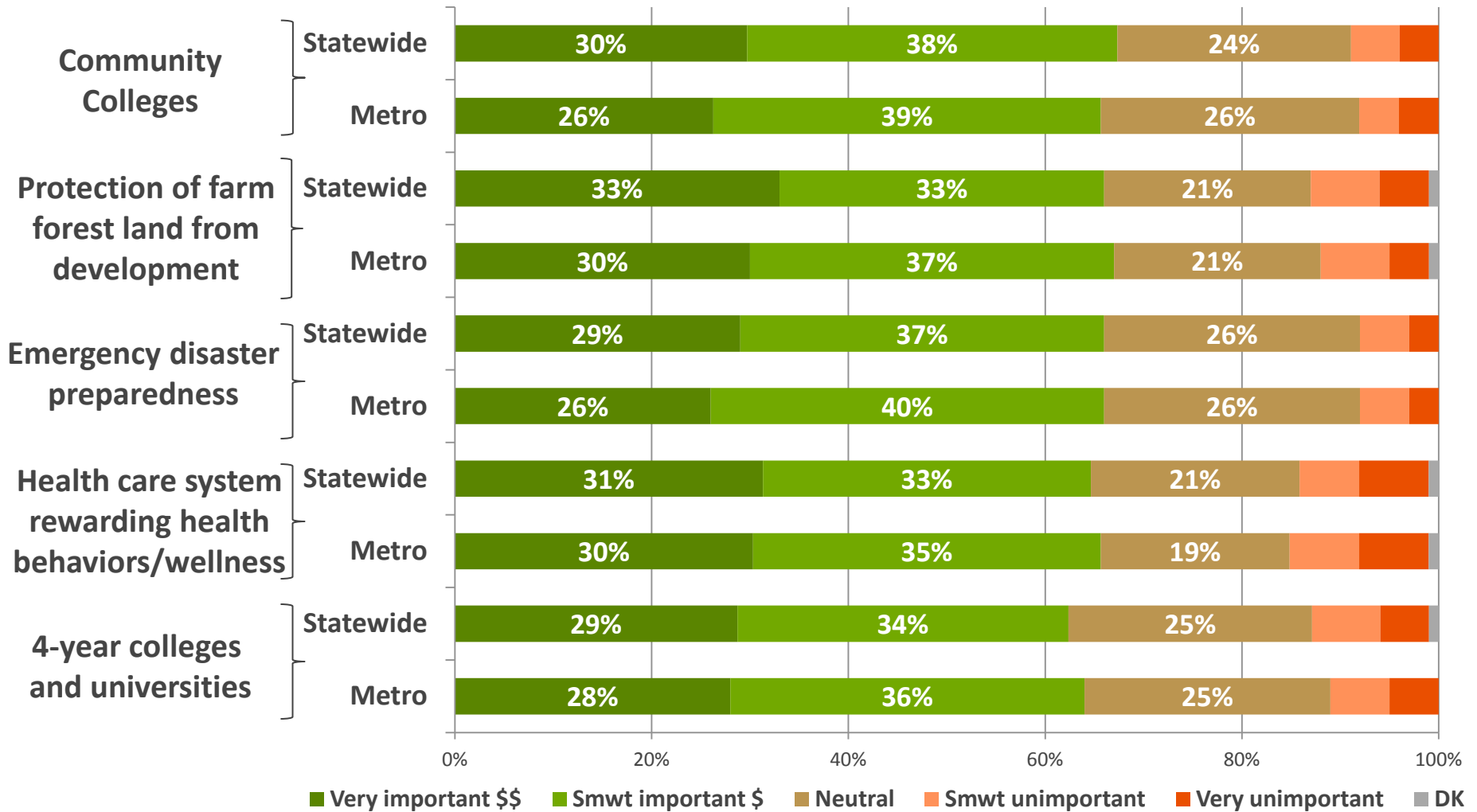
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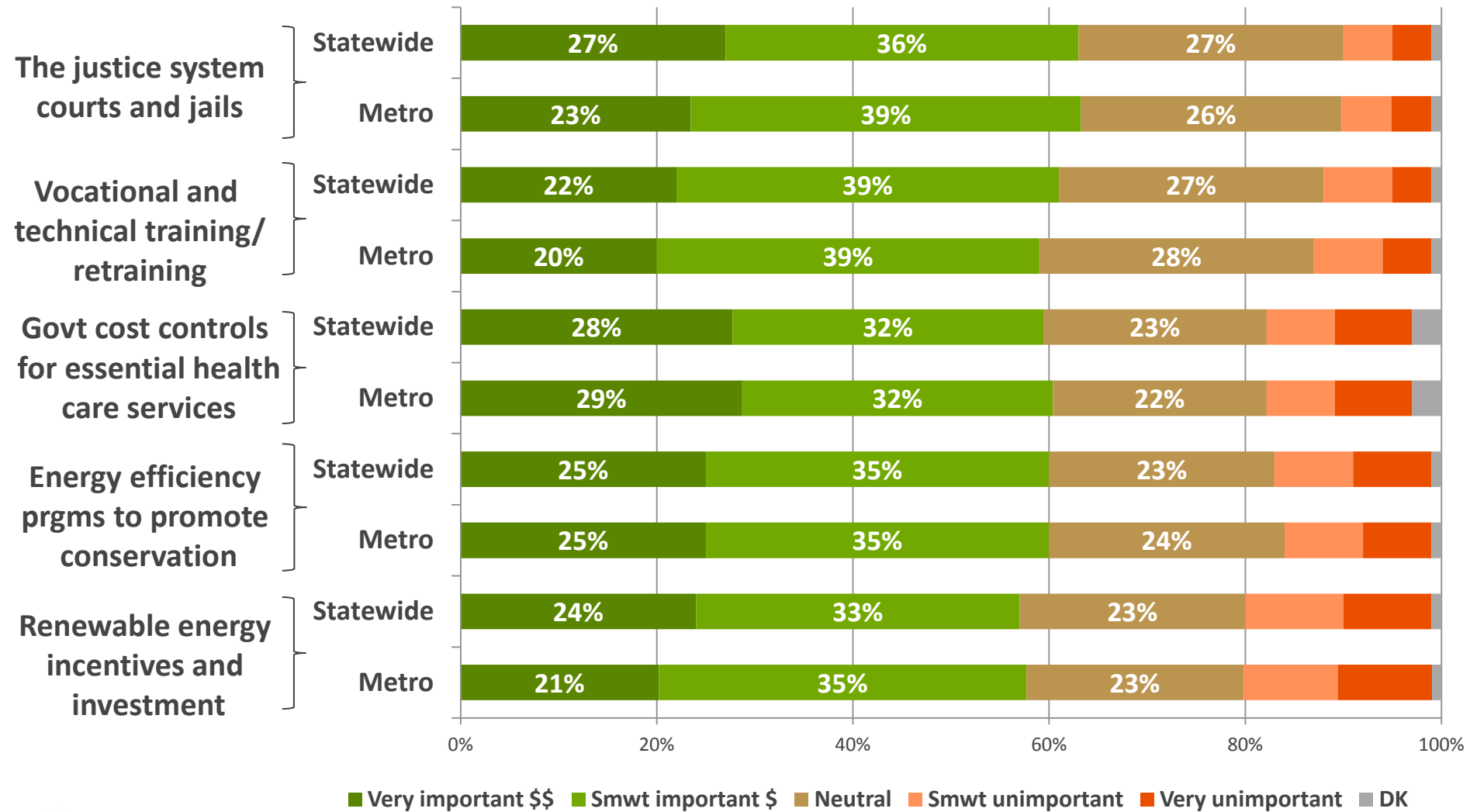
Importance: Willingness to support some increase in your taxes to increase the service or some reallocation of tax dollars away from other existing services



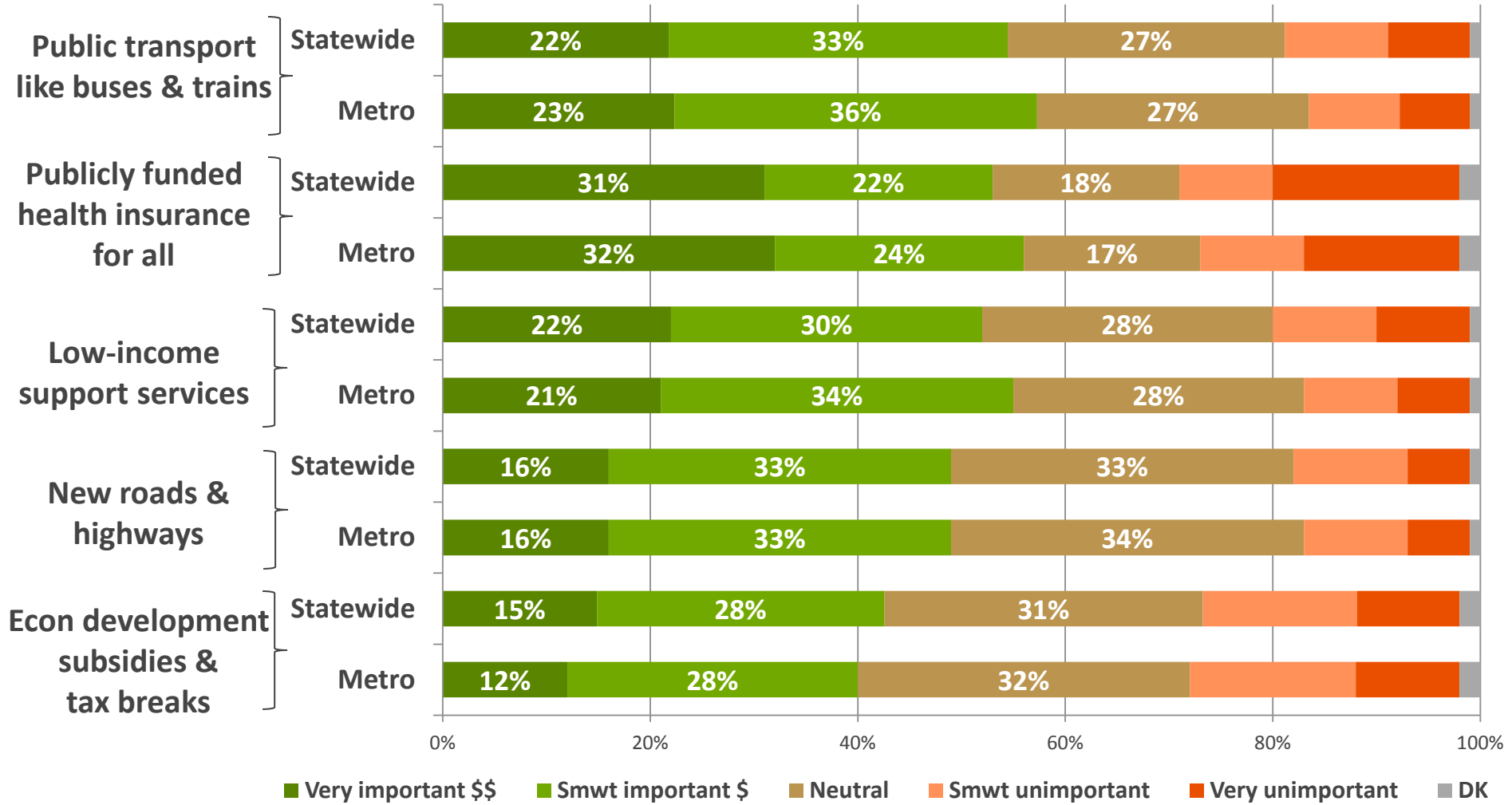
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Importance: Willingness to support some increase in your taxes to increase the service or some reallocation of tax dollars away from other existing services



Importance: Willingness to support some increase in your taxes to increase the service or some reallocation of tax dollars away from other existing services



Land Use



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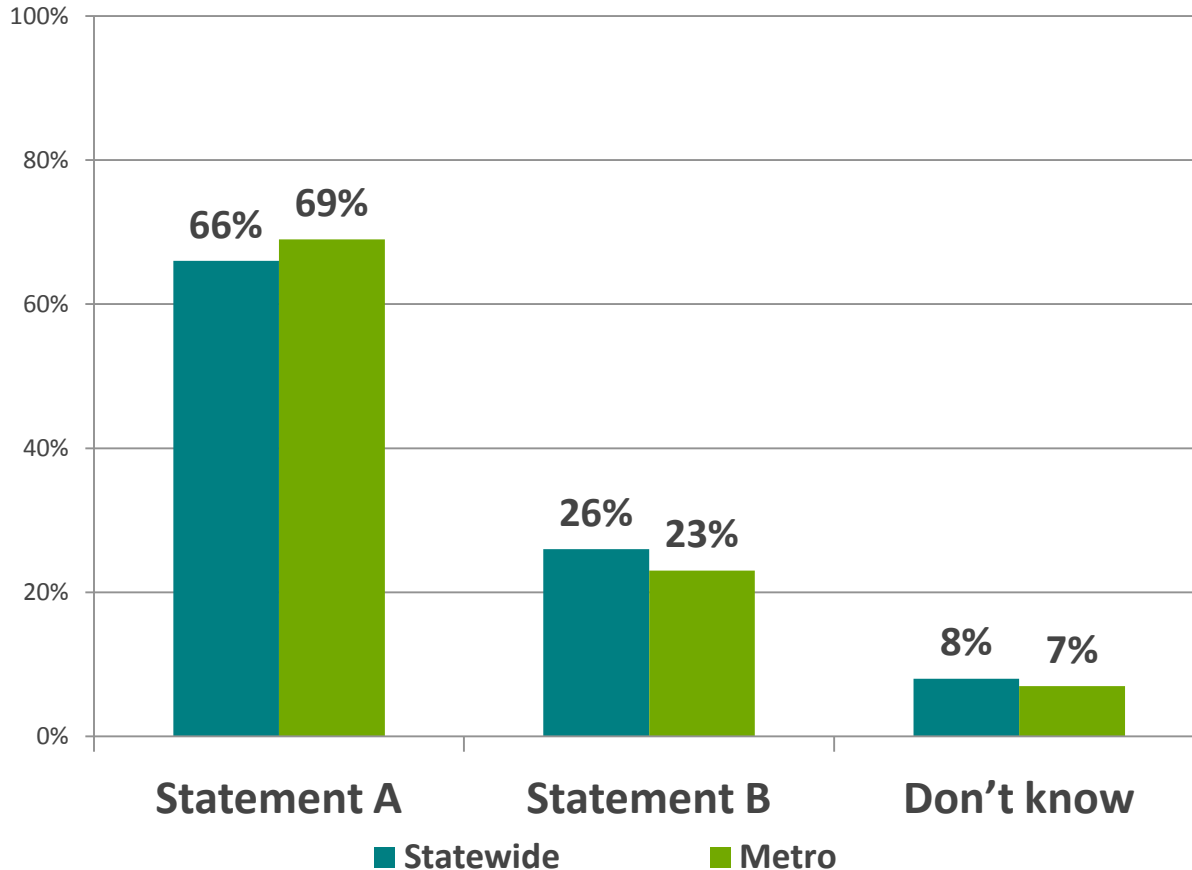
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New Development: Which statement comes closest to your view?



Statement A:
New development should occur within existing cities and towns to save farmland and stop sprawl

Statement B:
New development should be allowed to occur outside urban growth boundaries

Ten Year Trend: New population growth will be directed toward existing cities and towns, not into natural areas and farmlands

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Probability						
Very likely	22%	22%	19%	26%	26%	23%
Somewhat likely	38%	36%	41%	33%	40%	37%
Neutral	14%	14%	16%	11%	10%	14%
Somewhat unlikely	16%	16%	15%	18%	10%	18%
Very unlikely	6%	7%	5%	4%	6%	5%
Don't know	4%	3%	4%	7%	7%	2%
Desirability						
Very desirable	31%	37%	29%	24%	24%	22%
Somewhat desirable	27%	23%	32%	25%	20%	32%
Neutral	21%	21%	20%	23%	26%	22%
Somewhat undesirable	10%	8%	9%	14%	13%	14%
Very undesirable	5%	4%	4%	9%	11%	4%
Don't know	4%	4%	3%	4%	7%	3%



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Economic Development Actions--Desirability

Response Category	Statewide	Metro	W. Valley	Central	Eastern	Southern
Revamp land use laws to permit more development						
Strongly Desirable	7%	6%	5%	10%	19%	8%
Somewhat Desirable	17%	13%	20%	14%	25%	19%
Neutral	22%	21%	23%	26%	11%	22%
Somewhat Undesirable	26%	26%	26%	22%	20%	33%
Strongly Undesirable	24%	28%	22%	24%	20%	16%
Don't know	4%	6%	4%	4%	4%	2%



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Healthcare Actions--Desirability

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Ensure people can safely engage in a more active lifestyle in their communities						
Strongly Desirable \$\$	26%	23%	28%	30%	25%	28%
Somewhat Desirable \$	36%	37%	34%	36%	39%	38%
Neutral	27%	28%	30%	24%	22%	20%
Somewhat Undesirable	4%	4%	4%	3%	4%	5%
Strongly Undesirable	3%	4%	1%	2%	8%	5%
Don't know	3%	4%	3%	5%	2%	2%

Healthcare Actions--Desirability

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Support neighborhood gardens to increase exercise, access to nutritious food, and self-reliance in low income communities						
Strongly Desirable \$\$	28%	27%	27%	34%	38%	28%
Somewhat Desirable \$	33%	33%	35%	24%	22%	33%
Neutral	23%	24%	24%	22%	19%	23%
Somewhat Undesirable	7%	8%	5%	7%	11%	4%
Strongly Undesirable	5%	4%	5%	6%	7%	8%
Don't know	4%	4%	4%	6%	3%	2%

Which statements about the size of your residence most accurately reflects your view?

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
I would prefer a <u>smaller</u> place	11%	13%	8%	12%	12%	11%
The size of my residence is <u>about right</u> for my needs	62%	59%	67%	63%	57%	61%
I would prefer a <u>larger</u> place	25%	26%	22%	25%	31%	27%

Transportation & Infrastructure



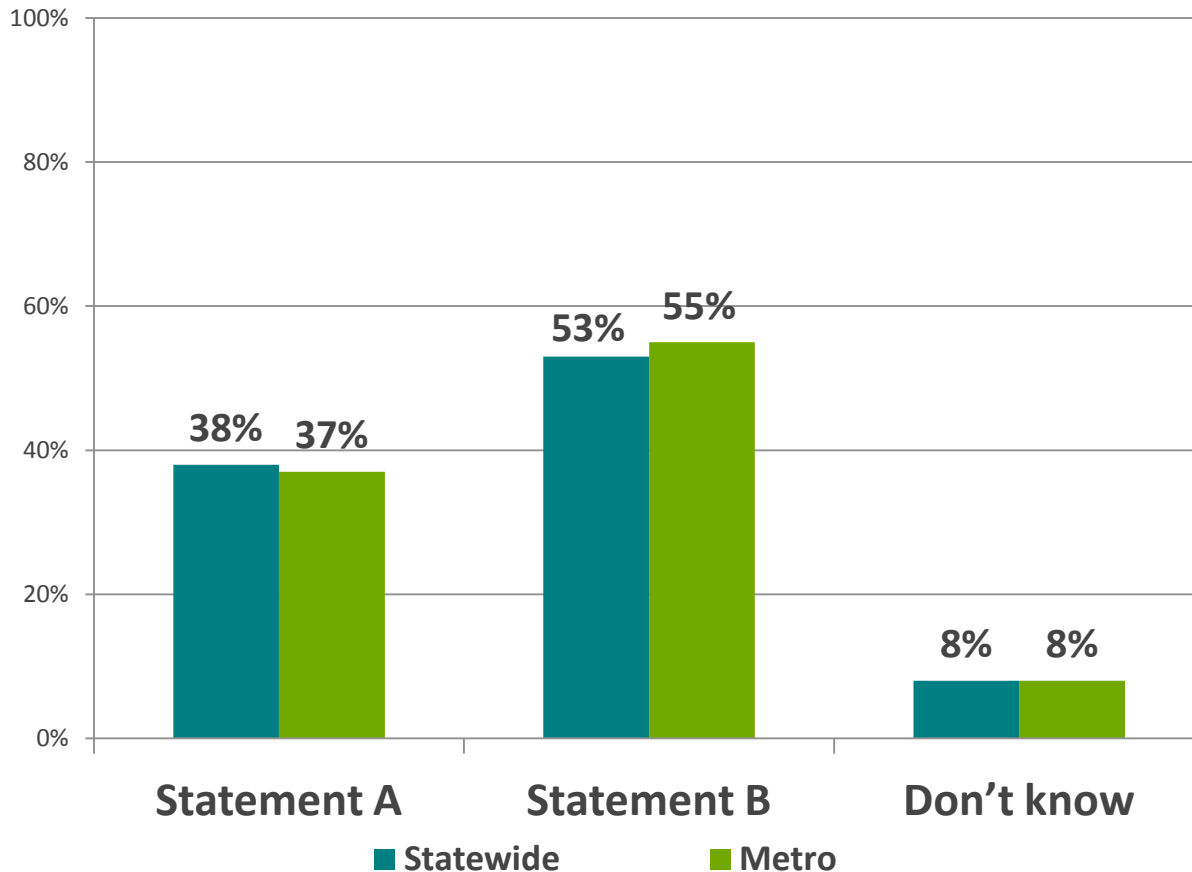
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Which statement comes closest to your view?



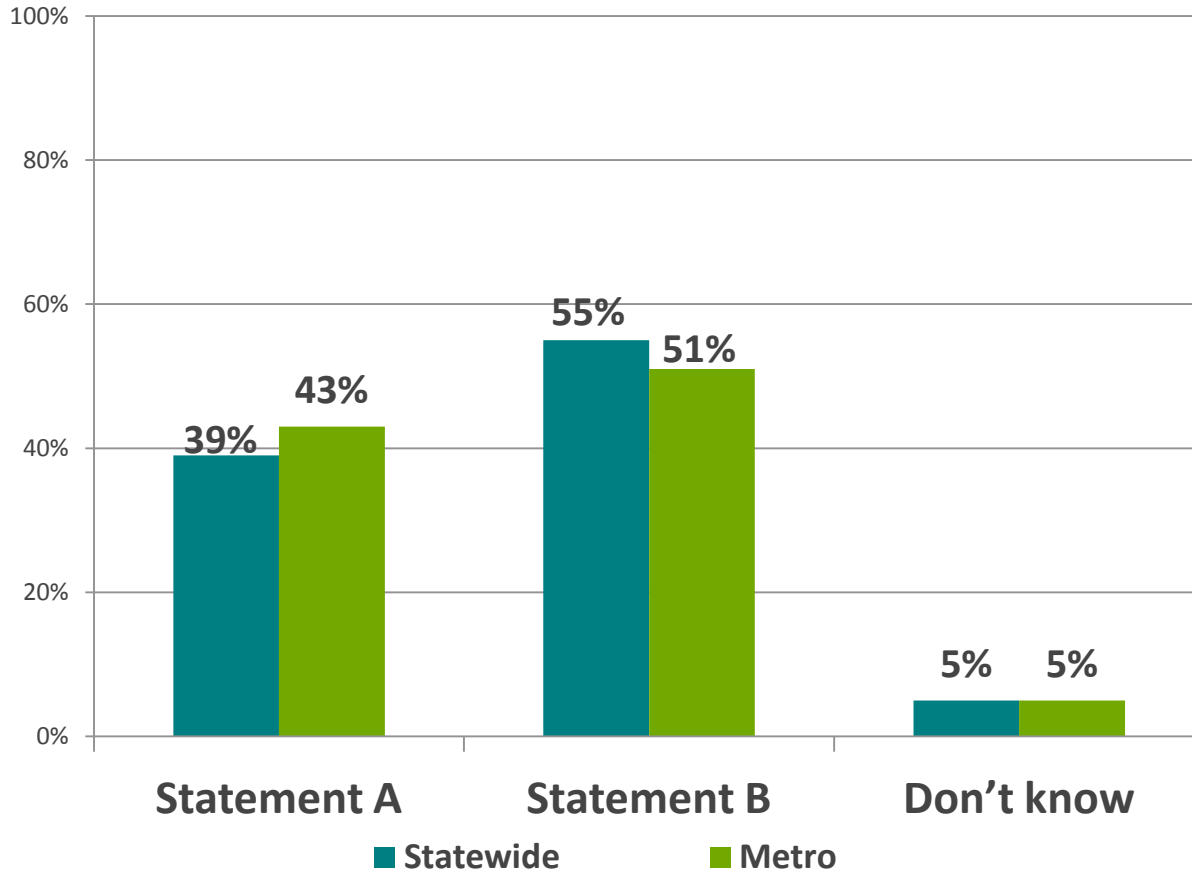
Statement A:
We should invest more in roads for cars

Statement B:
We should invest more in public transit

Energy Supply Actions - Desirability

Response Category	Total	Metro	W Valley	Central	Eastern	Southern
Shift some funding for road and highway construction towards public transportation such as better bus service and high speed rail projects						
Strongly desirable	18%	16%	20%	20%	19%	16%
Somewhat desirable	29%	30%	27%	29%	24%	34%
Neutral	21%	22%	22%	21%	18%	20%
Somewhat undesirable	14%	14%	15%	10%	14%	15%
Strongly undesirable	13%	13%	12%	19%	23%	12%
Don't know	3%	4%	3%	2%	1%	2%

Which statement comes closest to your view?



Statement A:
The government should stimulate the economy through spending on jobs and infrastructure

Statement B:
Government should reduce deficit spending

Other Findings



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Ten Year Trend: Environmental protection will become more important than economic growth

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Probability						
Very likely	16%	13%	16%	17%	29%	19%
Somewhat likely	31%	29%	34%	32%	28%	30%
Neutral	18%	20%	16%	13%	15%	21%
Somewhat unlikely	20%	23%	21%	19%	11%	16%
Very unlikely	10%	10%	11%	9%	14%	10%
Don't know	3%	4%	2%	10%	4%	3%
Desirability						
Very desirable	26%	27%	28%	24%	20%	23%
Somewhat desirable	26%	27%	25%	20%	15%	31%
Neutral	20%	20%	20%	20%	20%	17%
Somewhat undesirable	13%	11%	14%	12%	17%	11%
Very undesirable	12%	10%	10%	17%	23%	15%
Don't know	3%	3%	2%	5%	4%	1%



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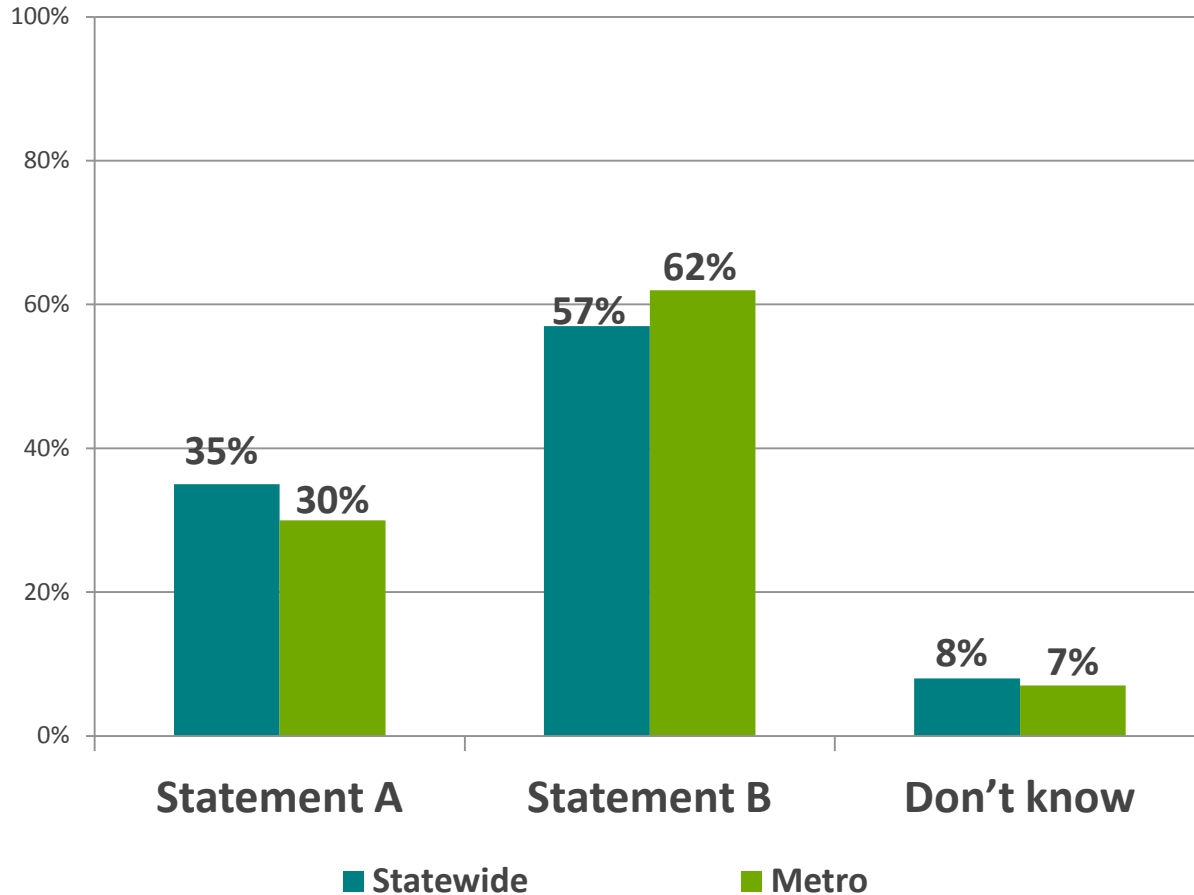


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Economic Growth vs. Environmental Protection

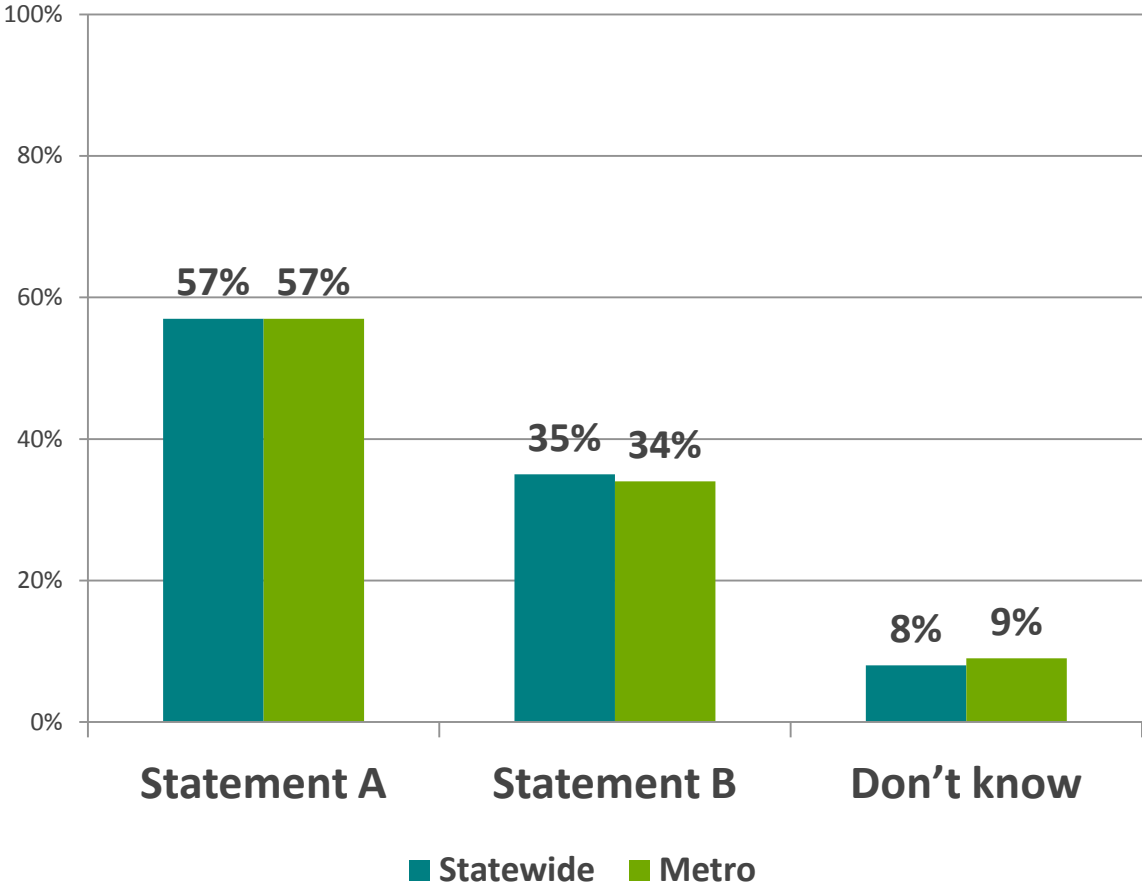
Which statement comes closest to your view?



Statement A:
Economic growth should be given priority even if the environment suffers to some extent

Statement B:
Protection of the environment should be given more priority even at the risk of slowing economic growth

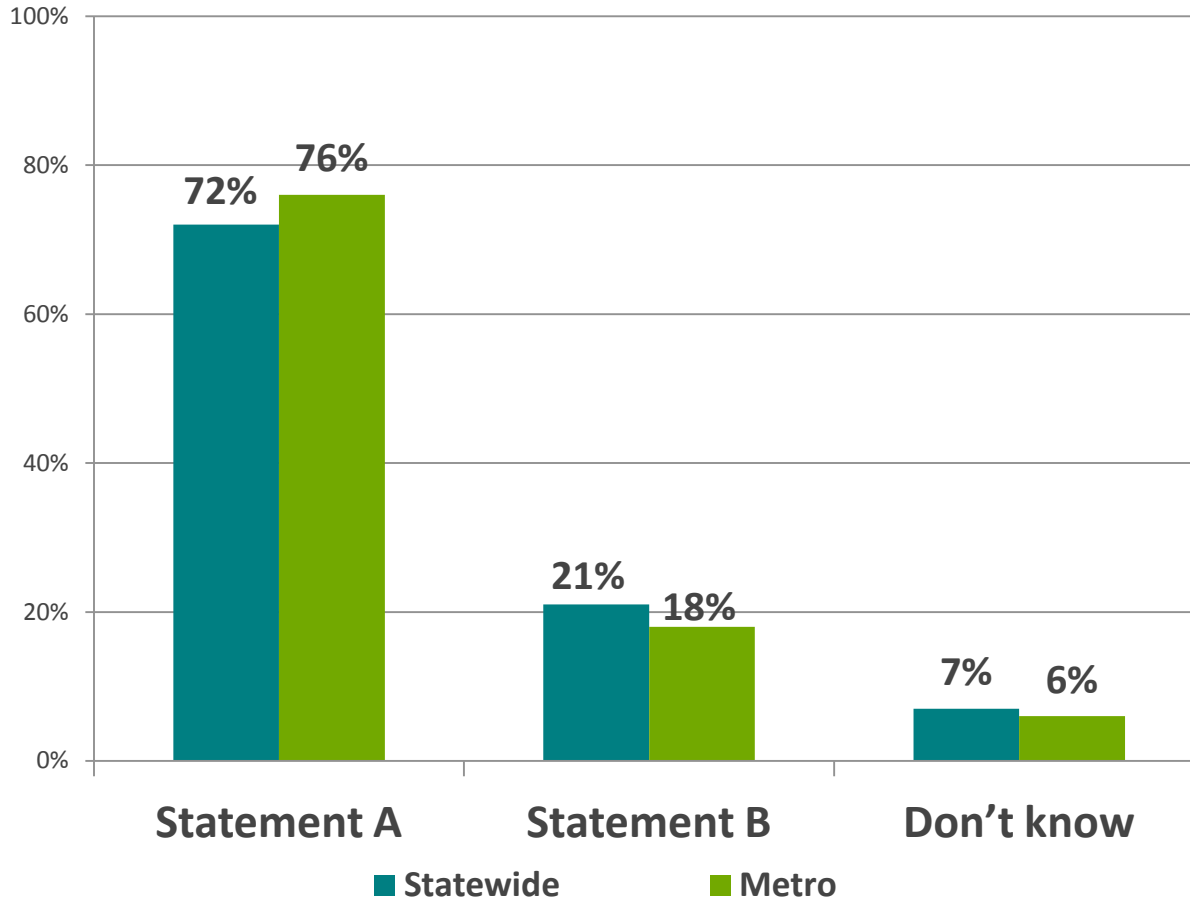
Consumerism: Which statement comes closest to your view?



Statement A: Our country would be better off if we all consumed less

Statement B: We need to buy things to support a strong economy

Climate Change - Which statement comes closest to your view?



Statement A:
Climate change requires us to change our way of life such as driving less or living more simply

Statement B:
If climate change becomes a problem we can deal with it later

Distribution of Wealth – Agree/Disagree

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Our society would be better off if the distribution of wealth was more equal						
Strongly disagree	14%	11%	12%	24%	28%	16%
Moderately disagree	8%	7%	9%	10%	10%	9%
Mildly disagree	9%	9%	10%	4%	8%	10%
Mildly agree	18%	20%	16%	14%	10%	21%
Moderately agree	20%	20%	22%	19%	21%	17%
Strongly agree	25%	27%	25%	23%	20%	22%
Don't know	5%	5%	6%	6%	2%	5%



Government and Our Taxes – Agree/Disagree

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Government is wasteful and inefficient with our taxes and cannot be trusted to make good decisions						
Agree Strongly	32%	32%	28%	31%	47%	38%
Agree Somewhat	32%	29%	36%	33%	32%	35%
Disagree Somewhat	20%	22%	21%	17%	10%	15%
Disagree Strongly	9%	11%	8%	10%	7%	6%
Don't know	6%	6%	7%	9%	2%	6%

Public Services and Taxation

Response Category	Total 2013	Metro	W. Valley	Central	Eastern	Southern
We spend <u>too much</u> on public services and taxes should be reduced	30%	31%	24%	29%	46%	31%
We spend about <u>the right amount</u> on public services and taxes should remain the same	31%	28%	34%	36%	28%	32%
We <u>don't spend enough</u> on public services and we should increase some taxes	28%	30%	31%	21%	19%	26%
Don't know	10%	10%	11%	13%	6%	11%

Oregon's Tax System—Is Change Needed?

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Do you believe a change is needed in Oregon's tax system at this time?						
Yes	64%	66%	60%	64%	71%	62%
No	21%	17%	23%	21%	18%	27%
Don't Know	16%	17%	17%	15%	10%	11%

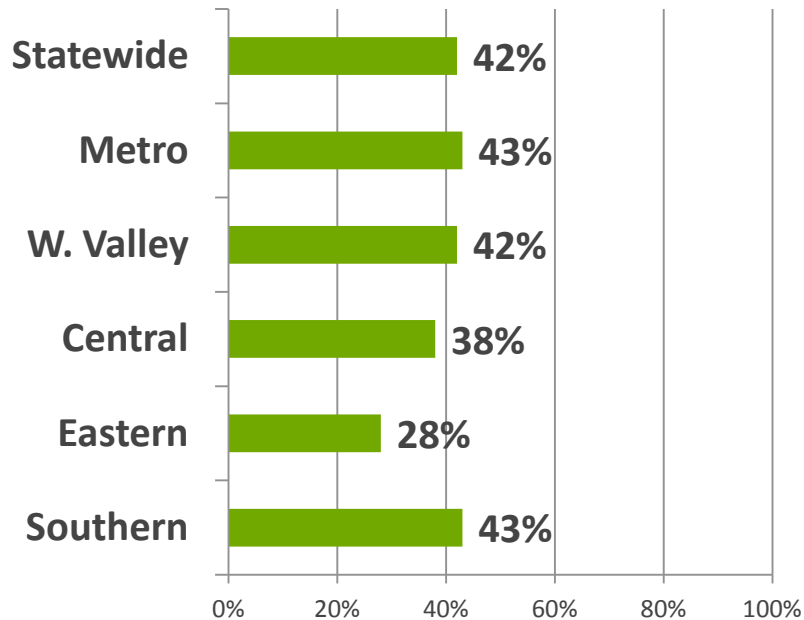
Oregon's Tax System—Agree/Disagree

Response Category	Total	Metro	W. Valley	Central	Eastern	Southern
Our current tax system with just the income tax and property tax is too unstable to pay for public services						
Agree Strongly	17%	20%	14%	15%	7%	16%
Agree Somewhat	26%	27%	26%	25%	25%	25%
Disagree Somewhat	24%	23%	25%	26%	30%	20%
Disagree Strongly	18%	16%	19%	18%	23%	22%
Don't know	15%	14%	15%	15%	15%	16%

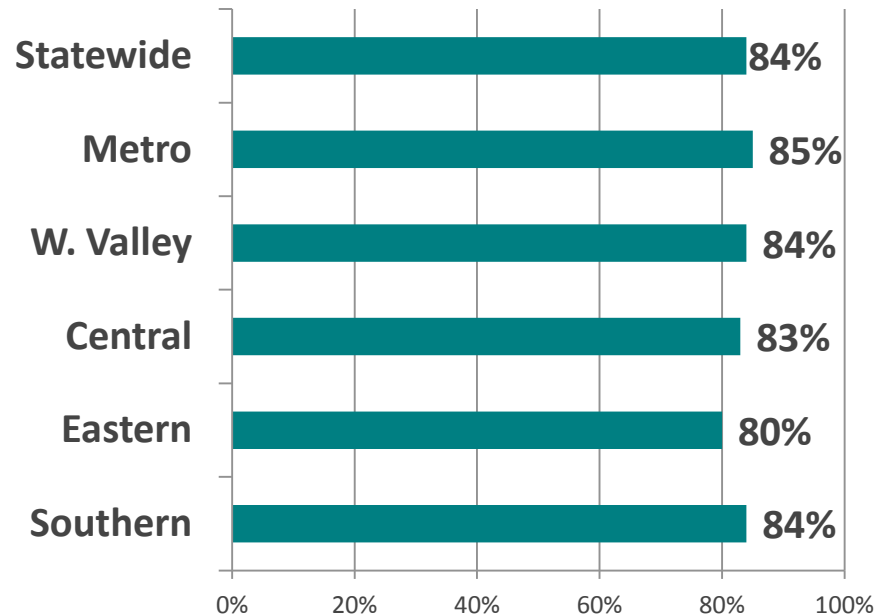
Oregonians from diverse backgrounds will find common ground and work together to make progress addressing the critical issues we face as a state

(Combined Very/Somewhat Responses)

Probability



Desirability



Values & Beliefs
PROJECT



PROJECT SPONSORS



RESEARCH PARTNERS



THANK YOU!



PROJECT SPONSORS



RESEARCH PARTNERS





2013 Oregon Values & Beliefs Survey

EXECUTED BY DHM RESEARCH AND POLICYINTERACTIVE

Sponsored by Oregon Health & Science University, The Oregon Community Foundation,
Oregon Public Broadcasting and Oregon State University

truenorthoregon.org

“People are aware of how special this place is, so we are making strides to keep Oregon green and healthy.”

— Woman, 23, Willamette Region

IN APRIL AND MAY 2013, WE WENT IN SEARCH OF OREGONIANS’ TRUE NORTH.

We wanted to find out what they value and believe, where they stand and where they want to put their energies – and the state’s – economically, politically and environmentally.

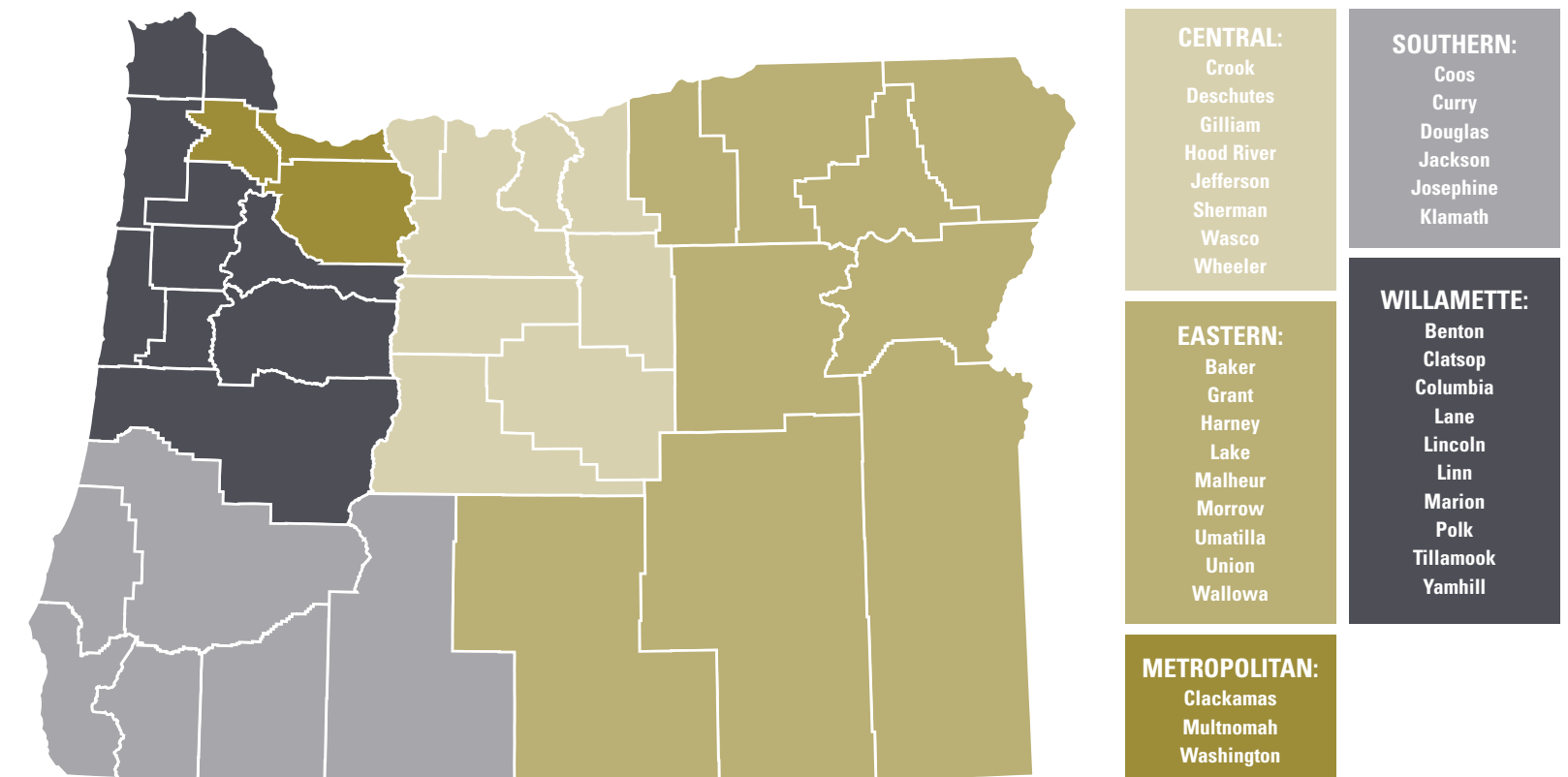
We went to all corners of Oregon and to every population group – not just voters. We contacted them via email, cell phone, landline and community outreach, and engaged them with a series of surveys. More than 9,000 Oregonians from all walks of life participated – people of all incomes, registered voters and not registered, young and old, in English and Spanish. This is by far the most in-depth and far-reaching research yet done about Oregonians’ beliefs and values. (For full details see Appendix A and B and visit truenorthoregon.org.)

THE 5 REGIONS:

Hundreds of Oregonians in each region participated in the project. Researchers used quotas and statistical weighting based on the U.S. Census to ensure valid samples within regions by age, gender and income.

Like any large, diverse group, Oregonians’ values and beliefs are complex.

They are interconnected and often inconsistent. But across the state, the results of our research show that Oregonians’ similarities outweigh their differences. Often, our goals aren’t so different; it’s the strength of our convictions that sometimes vary.



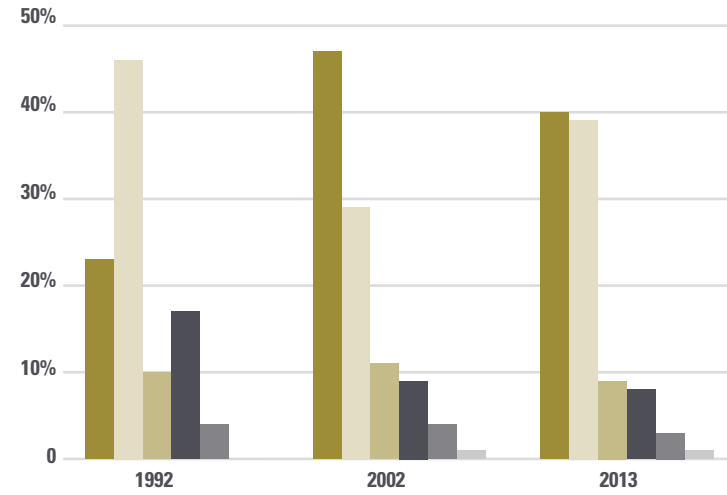
20-YEAR OVERVIEW

Shifts in Oregonians' Values and Beliefs: 1992 to 2013

2013 marks the third time the Oregon Values and Beliefs Survey has been done.

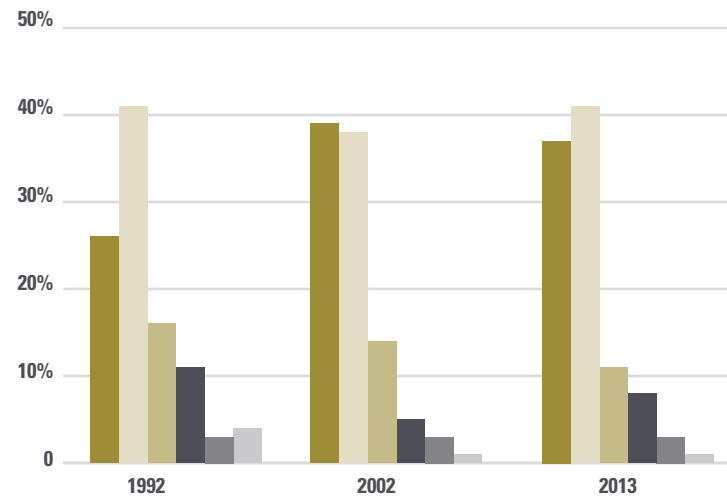
It was first conducted in 1992, then again in 2002.

Overall, we've remained positive and optimistic about Oregon in general, our personal futures, and the future of our communities.



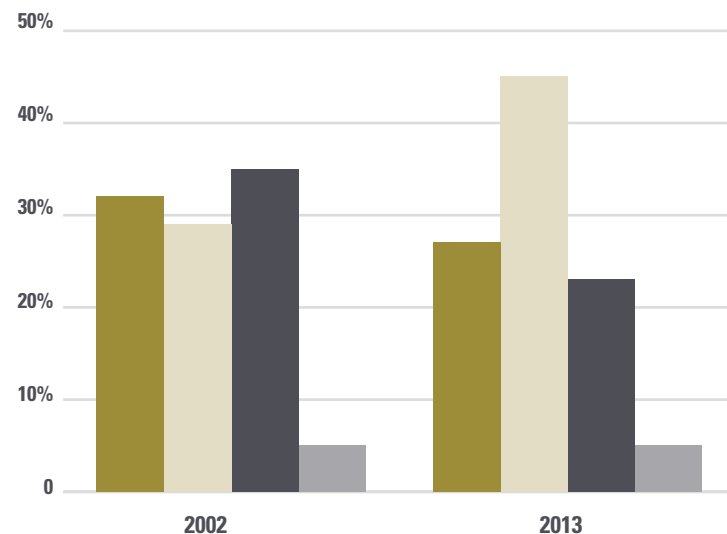
Overall, today, how would you rate your feelings about Oregon?

- Very positive
- Somewhat positive
- Neither positive nor negative
- Somewhat negative
- Very negative
- Don't know



How optimistic are you about your personal future over the next five years?

- Very optimistic
- Somewhat optimistic
- Neither optimistic nor pessimistic
- Somewhat pessimistic
- Very pessimistic
- Don't know

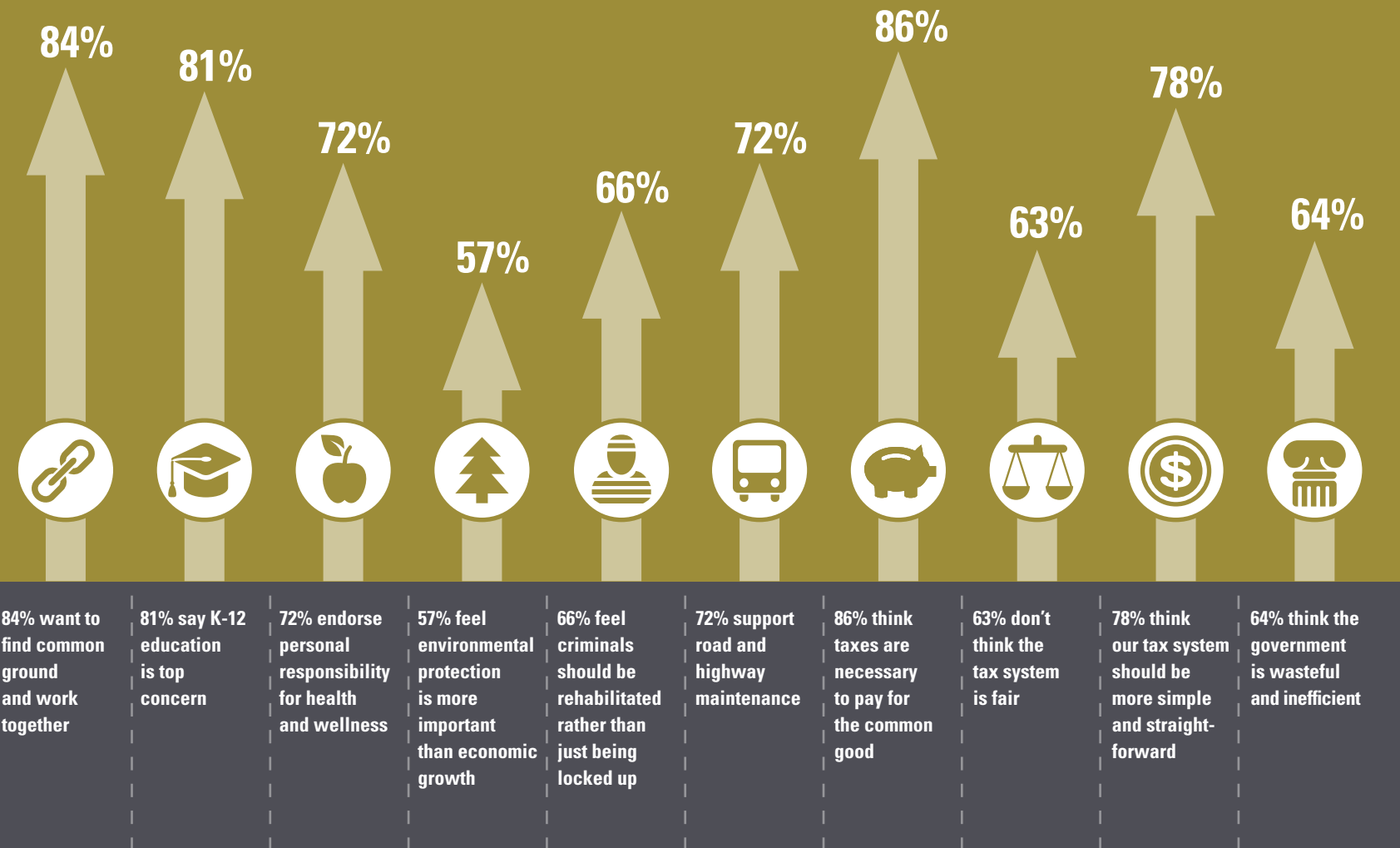


When you think of your community 10 years from now, do you think it will be a better place to live, about the same as it is today, or worse than today?

- Better place
- About the same
- Worse place
- Don't know

OREGONIANS SHARE A TRUE NORTH

Across the state, Oregonians share a guiding set of values and beliefs—on many topics. Whether you live in Northwest Portland or on a ranch in Eastern Oregon, you are likely to appreciate the same things about living in Oregon and to rate the importance of public services similarly.





“The school system funding, that’s my main concern.”

—Female, 20, Eastern Region

1. We Support Children.

Oregonians greatly value K-12 education.

From a list of 20 services, “K-12 education services” received the highest rating of importance at 81% and was the only item to exceed 50% strong feeling. Rating a service “important” indicated a willingness to support some increase in taxes or reallocation of funds from other services.

K-12 education services

Response Category	Very Important	Somewhat Important	Neutral	Somewhat Unimportant	Very Unimportant	DK/Refuse/Other
Total	58%	23%	12%	3%	3%	1%
Metro	57%	25%	11%	3%	3%	1%
Willamette	58%	22%	13%	3%	3%	1%
Central	59%	21%	13%	3%	4%	0%
Eastern	59%	23%	13%	2%	2%	1%
Southern	60%	20%	15%	2%	2%	1%

Oregonians want more parent involvement in children’s education, broadened curriculum choices, and graduates who know more about money management and have better learned the lessons of citizenship, work, and family. They foresee schools being fundamentally different places in 10 years involving new classroom atmospheres and teaching techniques.

Oregonians value post-secondary education and are particularly concerned about cost and workforce training.

Across the state, 76% of us want to make higher education more accessible by reducing the cost of tuition.

70% consider enhanced job training programs desirable to support low-income and disadvantaged Oregonians. A similar 69% are willing to support some increase in taxes to increase workforce training to boost economic development.

Oregonians feel some ambivalence to broad welfare support but not when it comes to the care of children:

- 79% of us are willing pay more taxes to ensure children have access to nutritious food at school.
- 77% of Oregonians want to ensure that all children have access to essential healthcare.

“I am pro public schools, and am anxious about their future. I am happy my children are finished, but worry about today’s kids and teachers.”

—Female, 64
Willamette Region



2. Oregonians endorse personal responsibility for health and wellness.

We also support access to a basic level of quality healthcare.



77%

of us feel wellness and healthy living should replace treatment of illnesses as the primary goal and focus of the healthcare industry.



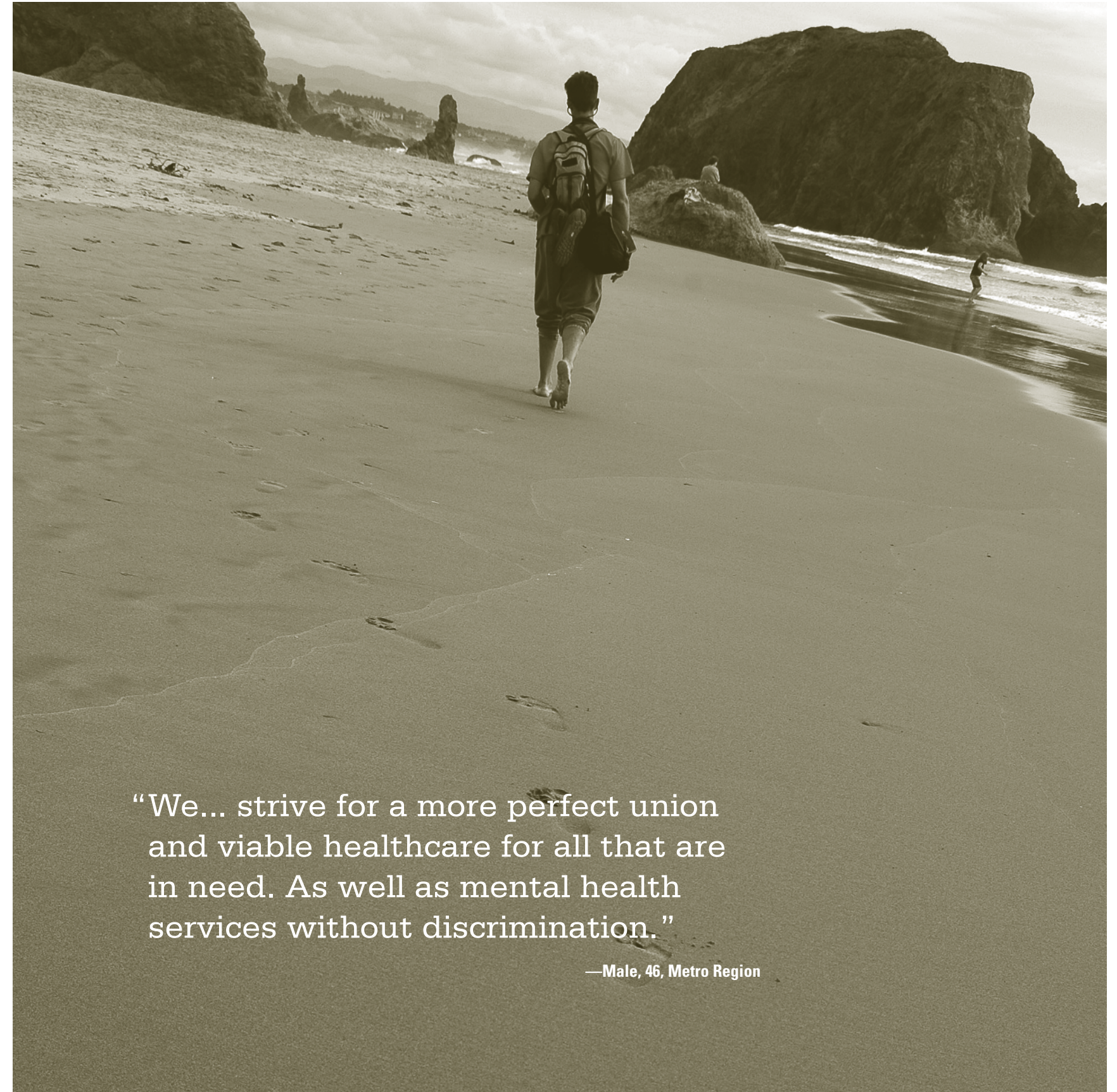
72%

feel people should be held accountable for high-risk behaviors like smoking, drug use and lack of exercise through higher insurance premiums.



70%

feel all people should have equal access to a basic level of quality healthcare.



“We... strive for a more perfect union and viable healthcare for all that are in need. As well as mental health services without discrimination.”

—Male, 46, Metro Region

“I support the environment over progress (big money) every time.”

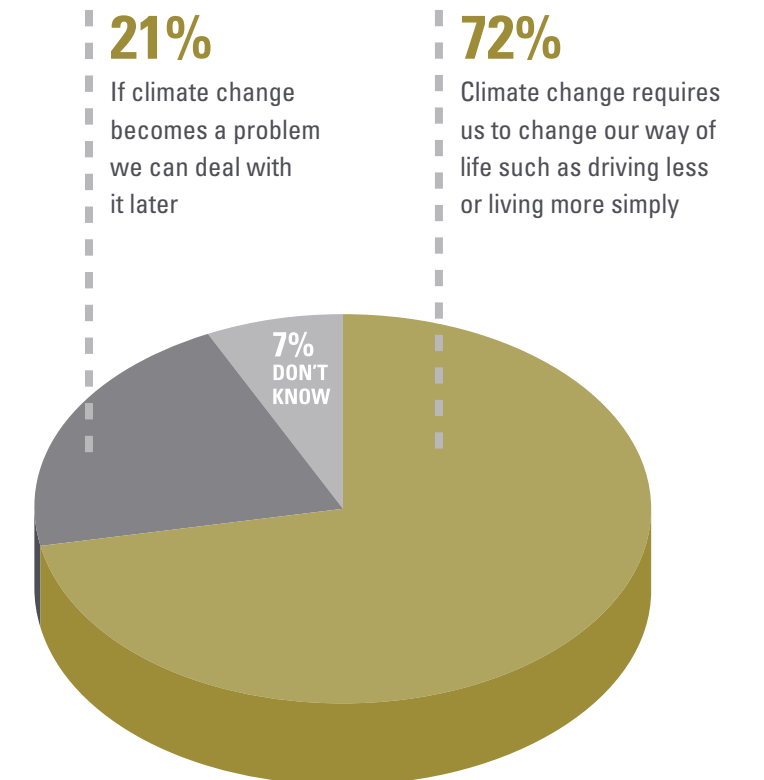
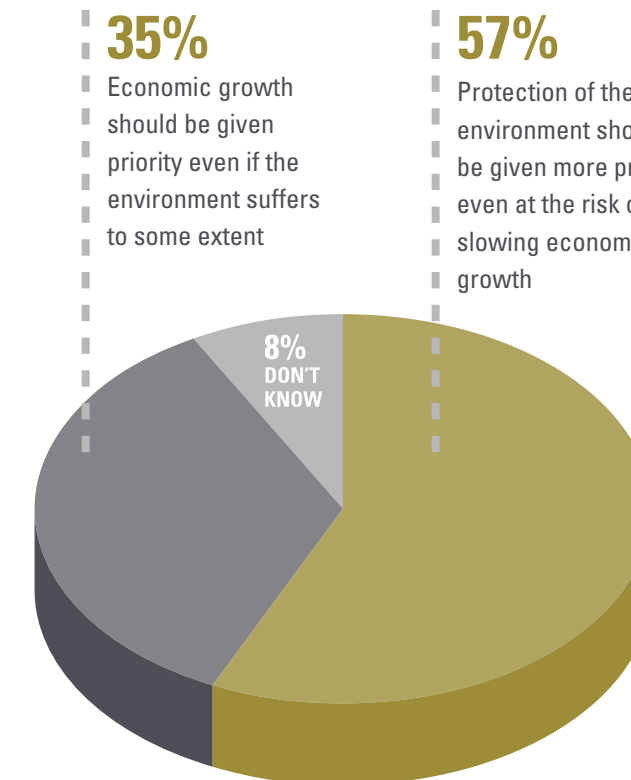
—Male, 30, Metro Region

3. We want to protect the environment for future generations, and are willing to consider changing behaviors or priorities to address the prospects of climate change. When asked to share what they value about Oregon in their own words, 78% of Oregonians used terms like “natural landscapes,” “cleanness of air and water,” “green landscape,” “forests and mountains,” and “open spaces.”

Oregonians also value a healthy economy, but they want an approach to development that recognizes the importance of the state’s natural environment to its quality of life. When asked to choose between the environment and the economy, 57% favor environmental protection and 35% choose economic growth:

We also believe climate change requires us to change our behaviors.

It is a concern across all regions in the state, although less so in the Eastern region:

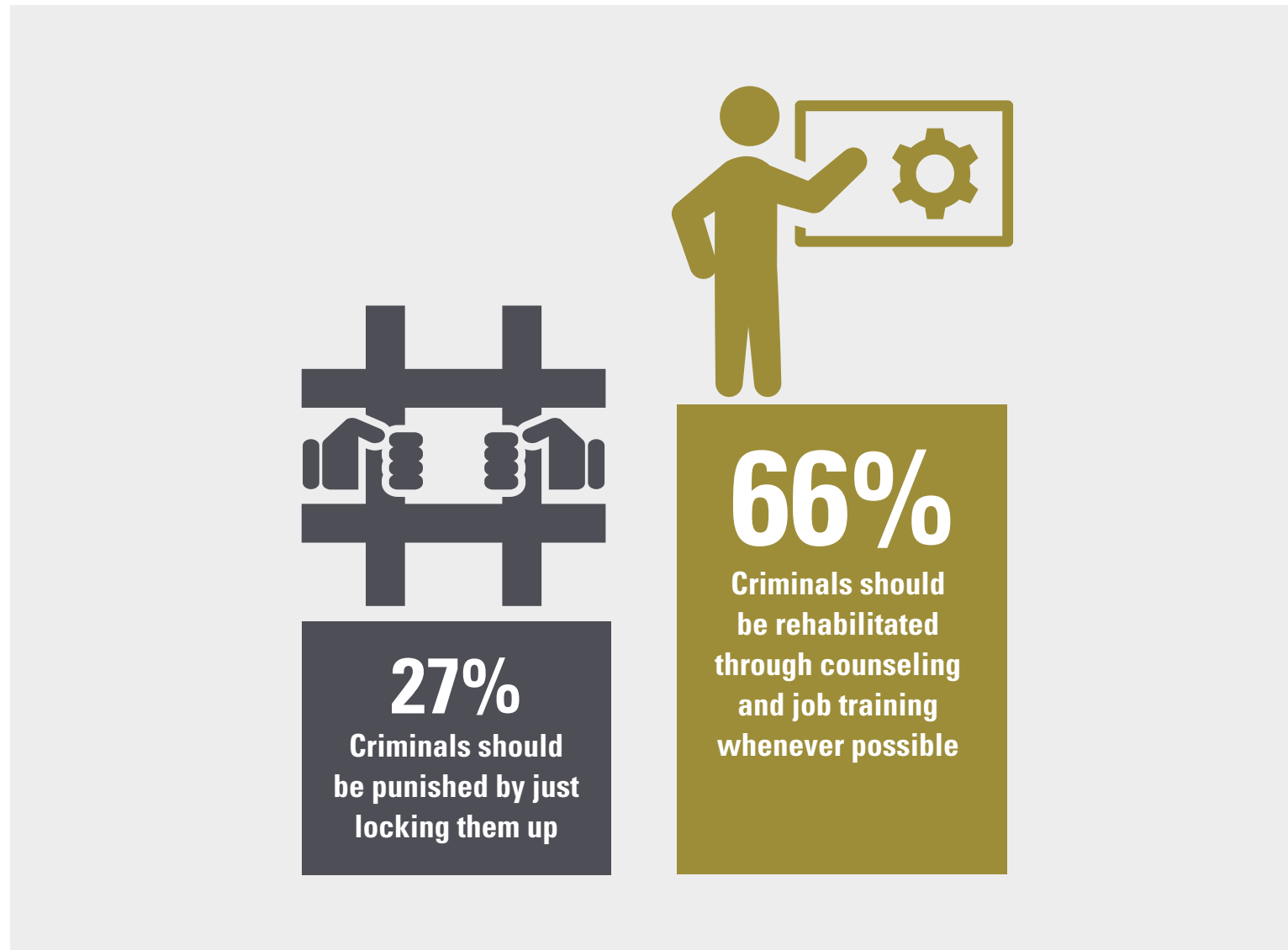


“We could use a greater sense of caring for the environment.”

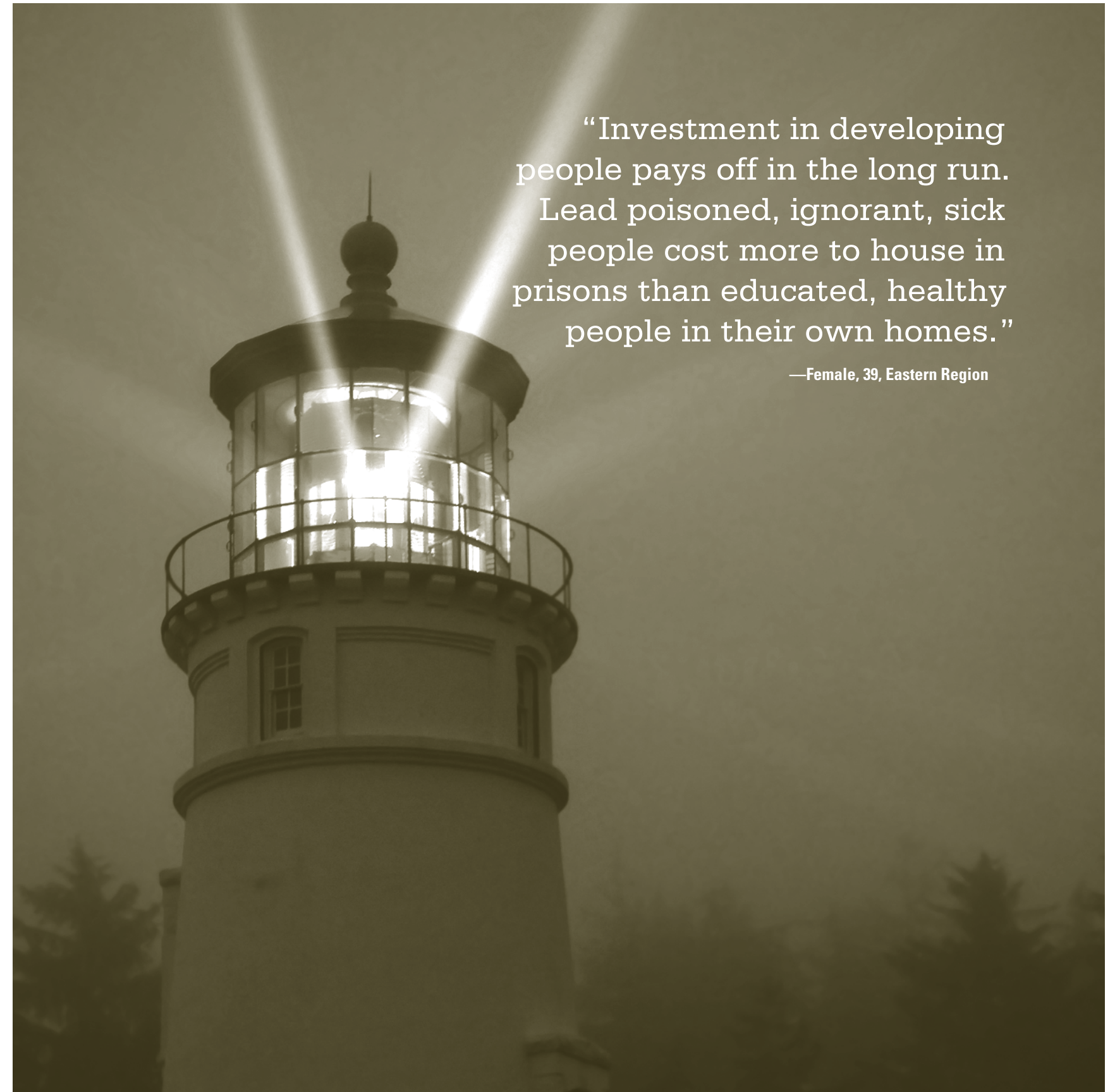
—Male, 66, Southern Region



4. We favor rehabilitation for criminals and find incarceration alone to be insufficient.



The question provided no information about the dollars currently spent on each approach; however, the finding validates a 2012 statewide survey that provided budget information and also showed that Oregonians support alternative approaches to imprisonment and parole when dealing with non-violent offenders.





5. We support maintaining our roads and investing in transit but are skeptical of building new roads. Majorities support this view in the Southern, Metro and Willamette Regions, while opinion is split in Central and Eastern Regions.



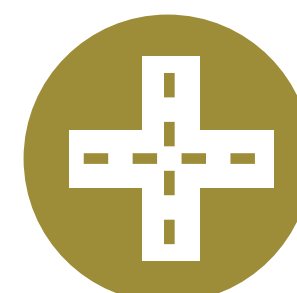
72%

SUPPORT ROAD AND HIGHWAY MAINTENANCE



55%

SUPPORT PUBLIC TRANSPORTATION LIKE BUSES AND TRAINS



49%

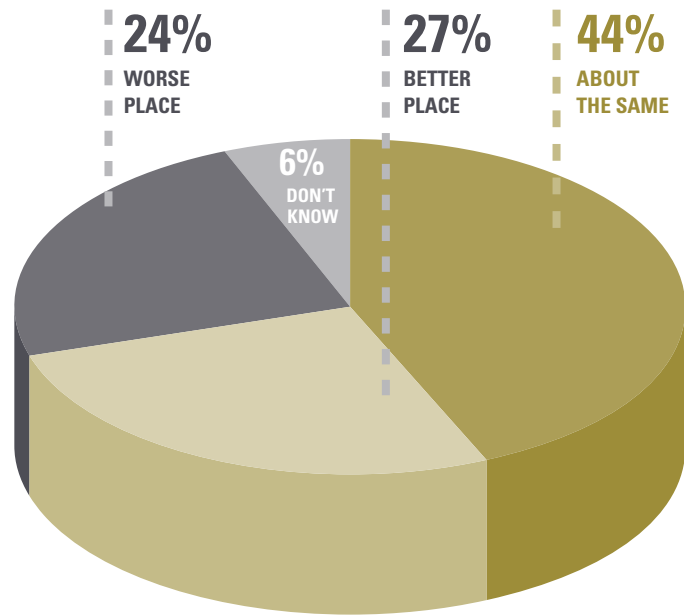
SUPPORT NEW ROADS AND HIGHWAYS

Oregonians are willing to shift some funding for road and highway construction toward public transportation, such as better bus service and high-speed rail projects, **at a 1.7 to 1.0 ratio:**

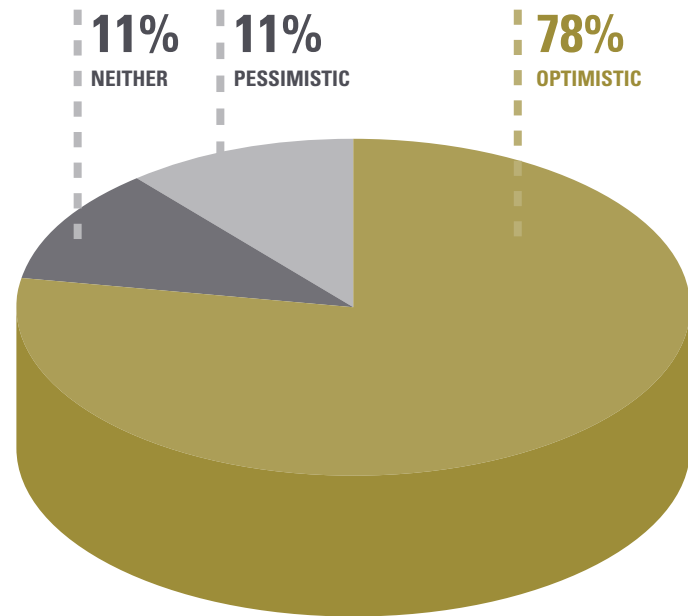


6. We are optimistic about our personal futures but more pessimistic about the state's future and our ability to work together.

Asked when you think about Oregon 10 years from now, do you think it will be a better place to live, about the same as it is today, or worse than today? most take a middle position:



In their personal lives, however, Oregonians feel relatively satisfied and optimistic. To the question how optimistic are you about your personal future over the next five years?:



Asked whether in 10 years Oregonians from diverse backgrounds will find common ground and work together to make progress addressing the critical issues we face as a state:



84%
SAY THE GOAL IS DESIRABLE

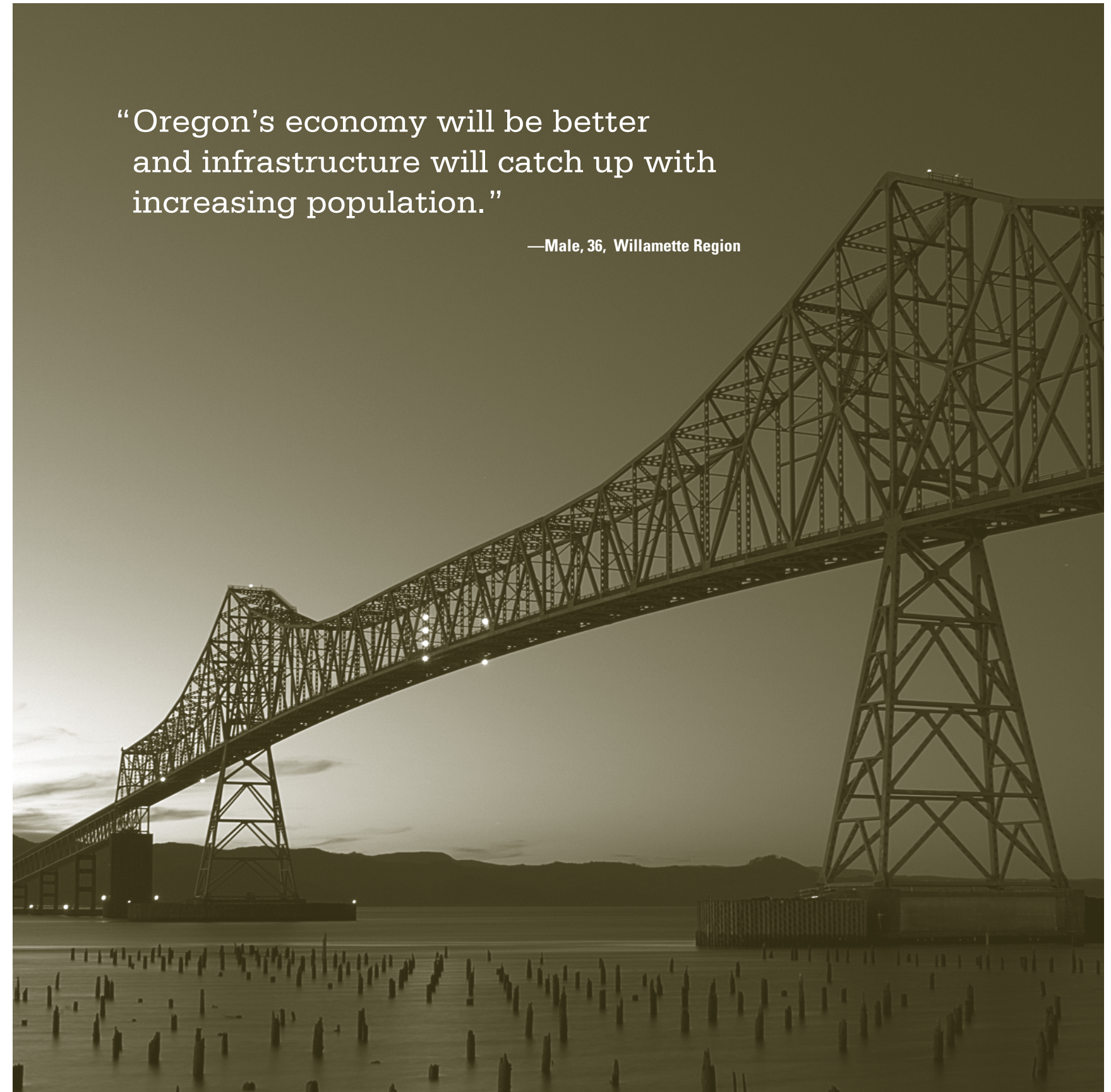
42%

THINK IT PROBABLE, SUGGESTING A SIGNIFICANT DEGREE OF PESSIMISM



“The economy will be worse and wages will not keep up with expenses. Oregon will be a more expensive place to live than the income we have. Property taxes will push us out of our homes.”

—Female, 54, Eastern Region



“Oregon’s economy will be better and infrastructure will catch up with increasing population.”

—Male, 36, Willamette Region

“Manage the timber we have and plant more, don’t let the environmentalists have it all their way, compromise so we can have jobs and timber.”

—Female, 57, Southern Region



7. We don’t think government can help improve the economy.

Fewer than 20% of Oregonians mentioned spontaneously that unemployment, jobs and economic growth were issues they want their state and local government officials to do something about. Also mentioned as frequently were other issues such as education and taxes and government spending. Respondents rated economic development like subsidies and tax breaks for business attraction or expansion the lowest of 20 different services:



16%
**JOBS,
 UNEMPLOYMENT
 & ECONOMIC
 GROWTH**



16%
EDUCATION



14%
**TAXES &
 GOVERNMENT
 SPENDING**

On the other hand, there is support across the state for government to increase timber harvests in dense, over-crowded forest stands and a willingness to pay something more to increase workforce training:

Increase timber harvests in dense, over-crowded forest stands

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Strongly Desirable	22%	16%	20%	34%	47%	31%
Somewhat Desirable	31%	32%	33%	31%	20%	29%
Neutral	22%	26%	18%	14%	15%	23%
Somewhat Undesirable	12%	11%	16%	8%	5%	11%
Strongly Undesirable	7%	7%	9%	5%	7%	4%
Don't Know	6%	8%	4%	6%	5%	2%

Increase workforce training

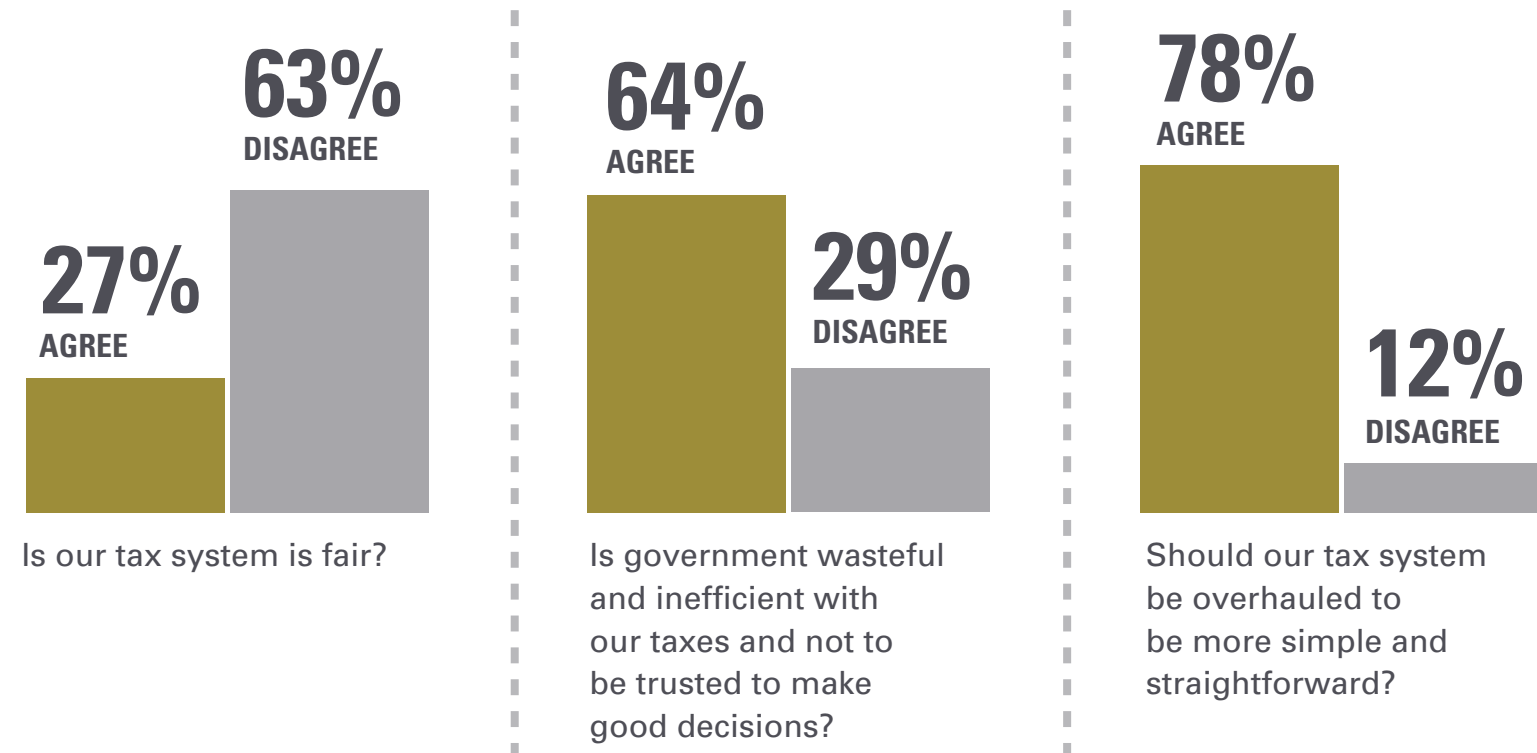
Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Strongly Desirable \$	24%	21%	25%	23%	27%	27%
Somewhat Desirable \$	45%	46%	46%	47%	40%	45%
Neutral	21%	22%	21%	18%	24%	18%
Somewhat Undesirable	4%	4%	3%	3%	3%	6%
Strongly Undesirable	2%	2%	2%	4%	1%	2%
Don't Know	3%	4%	2%	2%	2%	1%

8. We don't think the state tax system is fair and believe it should be made simpler.

The statement **Taxes are necessary to pay for the common good** wins extremely high agreement among Oregonians, at 86% overall:

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Agree Strongly	46%	49%	44%	40%	46%	41%
Agree Somewhat	40%	38%	43%	42%	36%	41%
Disagree Somewhat	7%	6%	6%	10%	12%	10%
Disagree Strongly	3%	3%	3%	2%	5%	4%
Don't Know	4%	3%	4%	5%	1%	4%

But on issues of fairness and efficiency in taxation, the tables are turned:



9. We see ourselves as moderate. Whether registered as a Republican, Democrat, Independent, Green, etc., a majority of Oregonians in all regions do not consider themselves strongly conservative or liberal on social and economic issues.

Socially we are

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Very liberal	16%	19%	16%	11%	9%	12%
Somewhat liberal	25%	28%	25%	18%	14%	22%
Middle-of-the-road/ Moderate	28%	28%	27%	31%	27%	29%
Somewhat conservative	18%	15%	18%	23%	26%	19%
Very conservative	11%	7%	12%	14%	22%	14%
Don't know	2%	2%	1%	2%	2%	2%
Refused	1%	0%	0%	1%	1%	1%

Economically we are

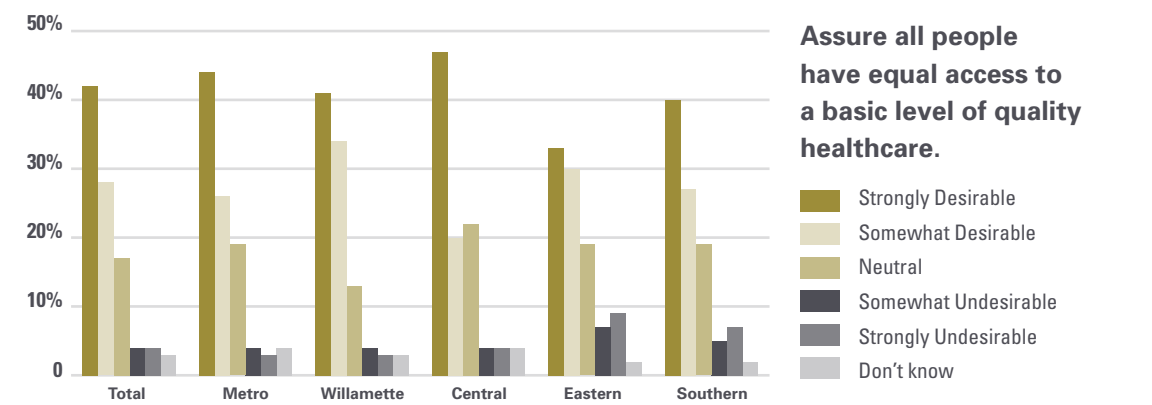
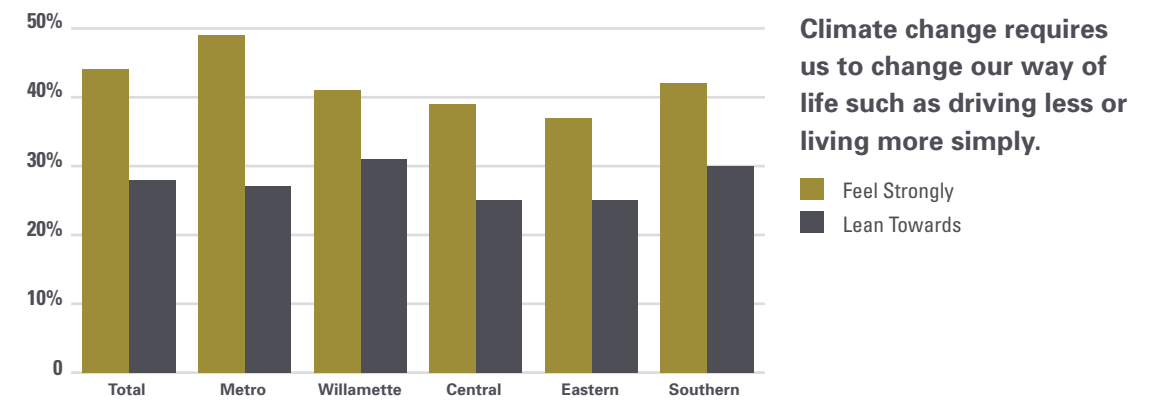
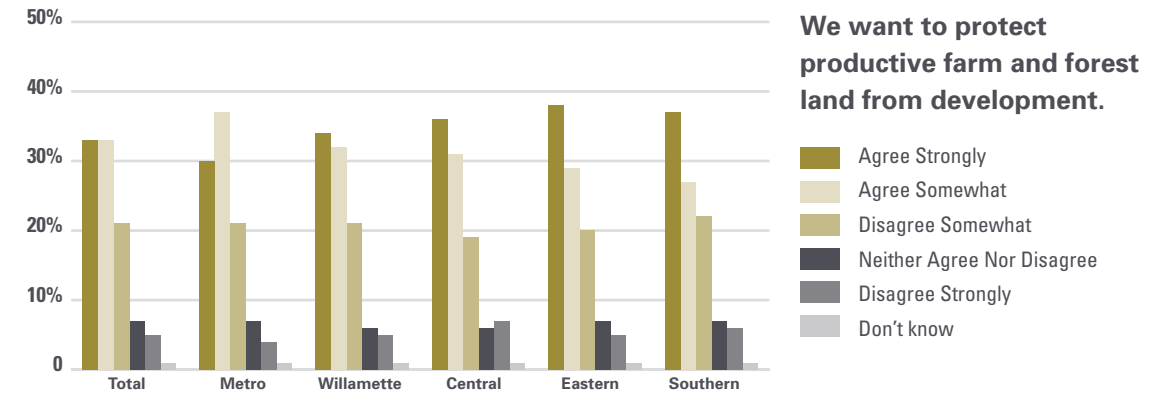
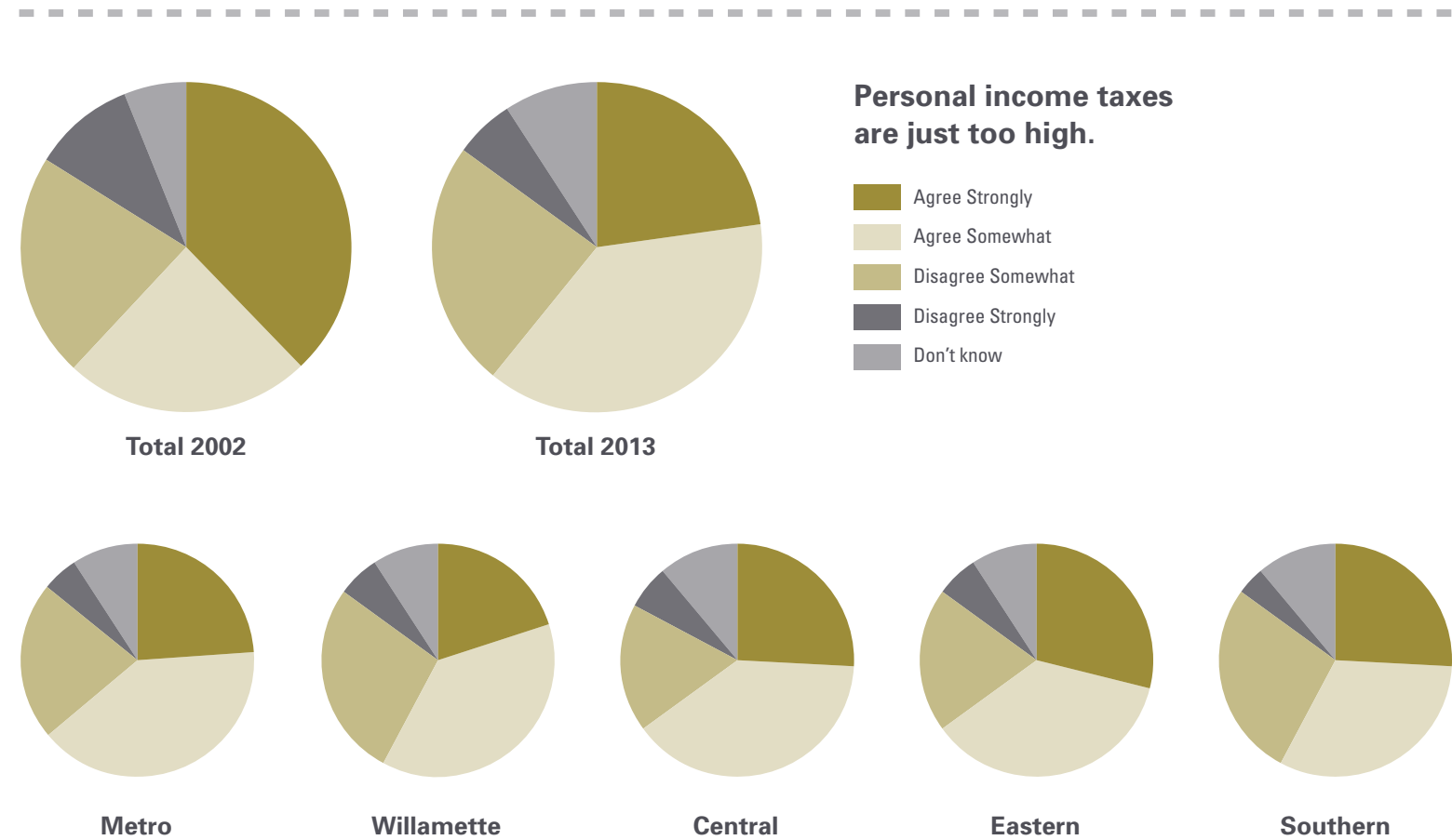
Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Very liberal	8%	11%	7%	5%	4%	7%
Somewhat liberal	21%	25%	22%	15%	13%	14%
Middle-of-the-road/ Moderate	34%	33%	35%	33%	30%	36%
Somewhat conservative	21%	19%	21%	25%	24%	23%
Very conservative	13%	10%	14%	18%	25%	16%
Don't know	2%	1%	1%	4%	3%	3%
Refused	0%	0%	0%	0%	1%	1%

We have an urban-rural divide.

But it's not as deep or as wide as we often assume.

10. We have more in common than we might think. Oregonians across the state have similar values and beliefs about many things. Coast, Valley, Cascades or Columbia Plateau, you are likely to value the same things about living in Oregon and to rate the importance of public services similarly.

A majority of Oregonians in each region of the state **want protection of productive farm and forest land from development**, feel **climate change requires us to change our way of life such as driving less or living more simply**, and are willing to pay more to **ensure a basic level of quality healthcare, that children have access to nutritious food at school**, and to **create greater access to mental health services**. Furthermore, Oregonians across the state feel that **personal income taxes are just too high**, that **change is needed in Oregon's tax system**, and that **government is wasteful and inefficient with our taxes and cannot be trusted to make good decisions**.



“Budget cuts and shortfalls will lead to fewer services available to Oregonians.”

—Female, 42
Willamette Region



“Our culture, commitment to education, and natural environment will continue to draw great people and businesses.”

—Male, 37
Metro Region





Agreement on key issues doesn't mean we don't disagree.

Statewide and regional differences came to light in the survey, but most by small margins.

We are divided on the level of public services that should be provided, and the cost to tax payers.

When it comes to the use of natural resources, Oregonians living in rural areas are more likely to agree that economic growth should be given priority even if the environment suffers to some extent and to support increased timber harvests in dense, overcrowded forest stands. But again, rarely are these differences more than a small margin.

We are divided on the level of public services that should be provided, and on some tax issues, too.

Response Category	Total 2013	Total 2002	Metro	Willamette	Central	Eastern	Southern
We spend too much on public services and taxes should be reduced	30%	28%	31%	24%	29%	46%	31%
We spend about the right amount on public services and taxes should remain the same	31%	44%	28%	34%	36%	28%	32%
We don't spend enough on public services and we should increase some taxes	28%	22%	30%	31%	21%	19%	26%
Don't know	10%	6%	10%	11%	13%	6%	11%

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
A. Reducing personal income taxes and capital gains taxes will spark economic growth.						
Feel strongly	16%	14%	13%	19%	32%	21%
Lean towards	26%	26%	27%	27%	22%	27%
B. Reducing personal income taxes and capital gains taxes will strangle essential public services and support for those in need.						
Lean towards	22%	22%	26%	16%	23%	15%
Feel strongly	19%	22%	16%	16%	10%	18%
Don't know	17%	16%	19%	20%	13%	18%

We also feel somewhat differently about some economic issues.

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
A. Economic growth should be given priority even if the environment suffers to some extent.						
Feel strongly	13%	10%	13%	18%	21%	16%
Lean towards	22%	20%	23%	26%	28%	22%
B. Protection of the environment should be given more priority even at the risk of slowing economic growth.						
Lean towards	28%	30%	29%	25%	16%	28%
Feel strongly	29%	32%	27%	25%	26%	26%
Don't know	8%	7%	9%	6%	9%	9%

Increase timber harvests in dense, over-crowded forest stands.

Response Category	Total	Metro	Willamette	Central	Eastern	Southern
Strongly Desirable	22%	16%	20%	34%	47%	31%
Somewhat Desirable	31%	32%	33%	31%	20%	29%
Neutral	22%	26%	18%	14%	15%	23%
Somewhat Underirable	12%	11%	16%	8%	5%	11%
Strongly Undesirable	7%	7%	9%	5%	7%	4%
Don't Know	6%	8%	4%	6%	5%	2%

CONCLUSION

Oregonians really do share a True North, overall. Across urban and rural areas, socio-economic statuses and race, we have much more in common than not. Our greatest assets in bridging our differences are our optimism and desire to work together to create a bright future for our state.

Appendix A

How the Oregon Values & Beliefs Survey was conducted: Two Tracks

Track 1: Scientific/Random Sample

- Three statewide surveys involving **3,958 completed questionnaires** were conducted via telephone (landline and cell) and online to reduce any disadvantage in using one collection medium.
- **Enough interviews were completed to permit reporting in five regions:** Eastern, Central, Southern, Willamette and Portland Metro.
- Quotas and statistical weighting were based on the U.S. census to ensure representativeness by age, gender and income at the regional level.
- We used more than one question to measure attitudes about key issues, utilizing different question formats and wording.

Track 2: Public Outreach Sample

Over 5,500 Oregonians participated in the Public Outreach Track of the Oregon Values & Beliefs Survey. Citizens were invited to become part of Oregon's Kitchen Table and to complete one or more of the surveys at www.oregonskitchentable.org. A short questionnaire featuring a mix of questions from all three surveys was also available for Oregonians to take online. This survey had more open-ended questions, allowing citizens to offer their views in their own words.

Overall, more than 9,000 Oregonians participated in the 2013 Oregon Values & Beliefs Survey.



Appendix B

Who Participated?

We went to all corners of Oregon and to every population group—not just voters.

GENDER	
Male	49%
Female	51%

INCOME	
Less than \$25,000	22%
\$25,000-34,999	10%
\$35,000-49,999	14%
\$50,000-74,999	18%
\$75,000-99,999	11%
\$100,000-149,999	11%
\$150,000+	6%
Refused	7%

AGE	
18-24	12%
25-34	18%
35-44	14%
45-54	21%
55-64	17%
65-74	12%
75+	6%
Refused	1%

PARTY – SELF-IDENTIFIED IF REGISTERED TO VOTE	
Republican	26%
Democrat	41%
Independent/Other	33%

ETHNICITY	
White	88%
Other	9%
Refused	3%



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Oregon Zoo/Oregon Zoo Foundation
Overview of five-year strategic direction and accomplishments



Vision

A better future for wildlife

Mission

The Oregon Zoo inspires the community to respect animals and take action on behalf of the natural world. We do this by creating engaging experiences and advancing the highest level of animal welfare, environmental literacy and conservation science.



Our Values

- ✓ Public Service
- ✓ Excellence
- ✓ Teamwork
- ✓ Respect
- ✓ Innovation
- ✓ Sustainability

Our strategic areas of focus

Make animal welfare a guiding principle.

Be conservation leaders.

Educate and inspire our community.

Implement phase one of the master plan.

Further a culture of organizational excellence.

Grow usable net resources to support our mission.

Make animal welfare a guiding principle.

Why is this Strategic Area of Focus Important?

We have an ethical responsibility to provide the best possible lives for all animals under our care.

Through this focus we will not only increase the quality of our zoo animal's lives, but also the lives of all animals influenced by our actions.

5 year plan

- **Animal Welfare Management**
Implement welfare assessment tool with a majority of the collection.
- **Animal Welfare Training and Awareness**
90% of staff show identified levels of animal welfare knowledge and awareness through a comprehensive approach to staff training.
- **Animal Welfare Research**
Increase funding contributed to welfare projects by 20%.
Increase funding received for welfare projects by 20%
Ensure an increase in identified leadership effectiveness measures.

Fiscal Year 2014

- **Animal Welfare Management**
Develop a welfare assessment strategy.
- **Animal Welfare Training and Awareness**
Develop a comprehensive plan for staff training and for increasing staff awareness about animal welfare.
- **Animal Welfare Research**
Identify and increase funding contributed to and received for welfare strategy.
Establish leadership effectiveness measures and their baseline

Be conservation leaders.

Why is this Strategic Area of Focus Important?

Animals everywhere rely on our leadership to help solve local and global conservation issues.

By focusing on conservation we can prevent species extinction, encourage our community to live more sustainably as well as preserve resources and natural areas for future generations.

5 year plan

- **Species Conservation**
Increase the number of recovery programs.
Increase AZA conservation expenditure metric by 2%.
- **Conservation Research**
Increase funding contributed to conservation projects by 20%.
Increase funding received for conservation projects by 20%.
Ensure an increase in identified leadership effectiveness measures.

Fiscal Year 2014

- **Species Conservation**
Continue and Maintain level of support for recovery programs we are currently involved in and assess sustainability of efforts for the future impacts/programs.
Establish a proper baseline for AZA Conservation Expenditure Metric
- **Conservation Research**
Establish (and increase if possible) funding levels contributed to and received for conservation projects.
Establish leadership effectiveness measures and a baseline for these measures.

Educate and inspire our community.

Why is this Strategic Area of Focus Important?

In order to accomplish our mission we must partner with the community to develop environmentally literate conservation leaders.

Through our work we engage the community in making informed decisions regarding their impact on animals and the natural world.

5 year plan

- **Environmental Literacy**
80% of all education materials and programs will have incorporated measurable literacy objectives.
75% of education program participants will achieve the environmental literacy objectives identified for each program.
- **Conservation Leaders**
75% of staff and volunteers indicate they are more knowledgeable about zoo conservation issues and more engaged in sustainability efforts than when they began working/volunteering.
75% of participants in identified conservation leadership programs will achieve the leadership objectives identified for each program.
- **Diversity**
Establish a baseline of current education participants during year 2.
Meet or exceed diversity participation goals for identified audiences and programs.

Fiscal Year 2014

- **Environmental Literacy**
Develop environmental literacy framework for Metro/Zoo.
- **Conservation Leaders**
Define Metro/Zoo conservation leadership program outcomes and audiences
Create process for developing and implementing Zoo public conservation action campaigns

Implement phase one of the master plan.

Why is this Strategic Area of Focus Important?

Completion of the projects outlined in this plan will help us to achieve our vision and mission and will position us for our next phase of the master plan.

By successfully implementing this phase of the master plan, the zoo will deliver on commitments made to the community, investors and donors.

5 year plan	Fiscal Year 2014
<ul style="list-style-type: none">• Bond projects and related infrastructure are completed on schedule, within budget, and within scope• Meet animal welfare, conservation, education, and sustainability goals for the following capital projects:<ul style="list-style-type: none">• Elephant Lands• Condors of the Columbia• Education Center• Polar Bears• Primates• Rhinos	<ul style="list-style-type: none">• Build Elephant Land Infrastructure : reroute train, build service road, water and energy sustainability measures, elephant lands.• Build Condors of the Columbia exhibit• Design Education Center• Conduct due diligence for Remote Elephant Center

Further a culture of organizational excellence.

Why is this Strategic Area of Focus Important?

In order to accomplish our day-to-day work, while pursuing lofty goals, we must be strategic. We will focus on developing a culture of thoughtful planning, innovation and efficient operations as a primary aspect of how we define our organizational excellence.

This will allow the zoo to recruit and retain superior talent, demonstrate leadership in the zoo community and organize and prioritize our work. We will strengthen the zoo's brand as a result.

5 year plan

- **Goal Attainment**
All goals indicated in the strategic plan are successfully achieved.
- **Internal Processes**
90% of full-time staff believe they have the tools to do their jobs well and understand the key internal processes related to their work.
- **Brand Strength**
All Zoo employees understand and reflect the zoo brand in their work.

Fiscal Year 2014

- **Goal Attainment**
Develop and implement an integrated communication strategy and implementation plan.
Communicate and involve employees in strategic plan.
- **Internal Processes**
Identify and implement 1-3 key process improvements.
- **Brand Strength**
Define our brand.

Grow usable net resources to support our mission.

Why is this Strategic Area of Focus Important?

To achieve our established goals and position the zoo for ongoing growth and success we must be adept asset managers who consistently deliver value to partners, investors, members and visitors.

5 year plan	Fiscal Year 2014
<ul style="list-style-type: none">• Increase mission share of budget over prior year.• Increase number of donors over prior year.• Increase donor revenues over prior year.• Increase sponsor revenues over prior year.• Spend 98% of available resources to invest in zoo.• Increase the percentage of favorable responses to identified customer service questions over prior year.	<ul style="list-style-type: none">• Increase mission share of budget over FY12.• Increase number of donors by 10% over FY12.• Improve and streamline membership program.• Increase donor revenues over FY12.• Increase sponsor revenues by 5% over FY12.• Invest in Zoo through effective use of Zoo resources

The mission of the Oregon Zoo Foundation

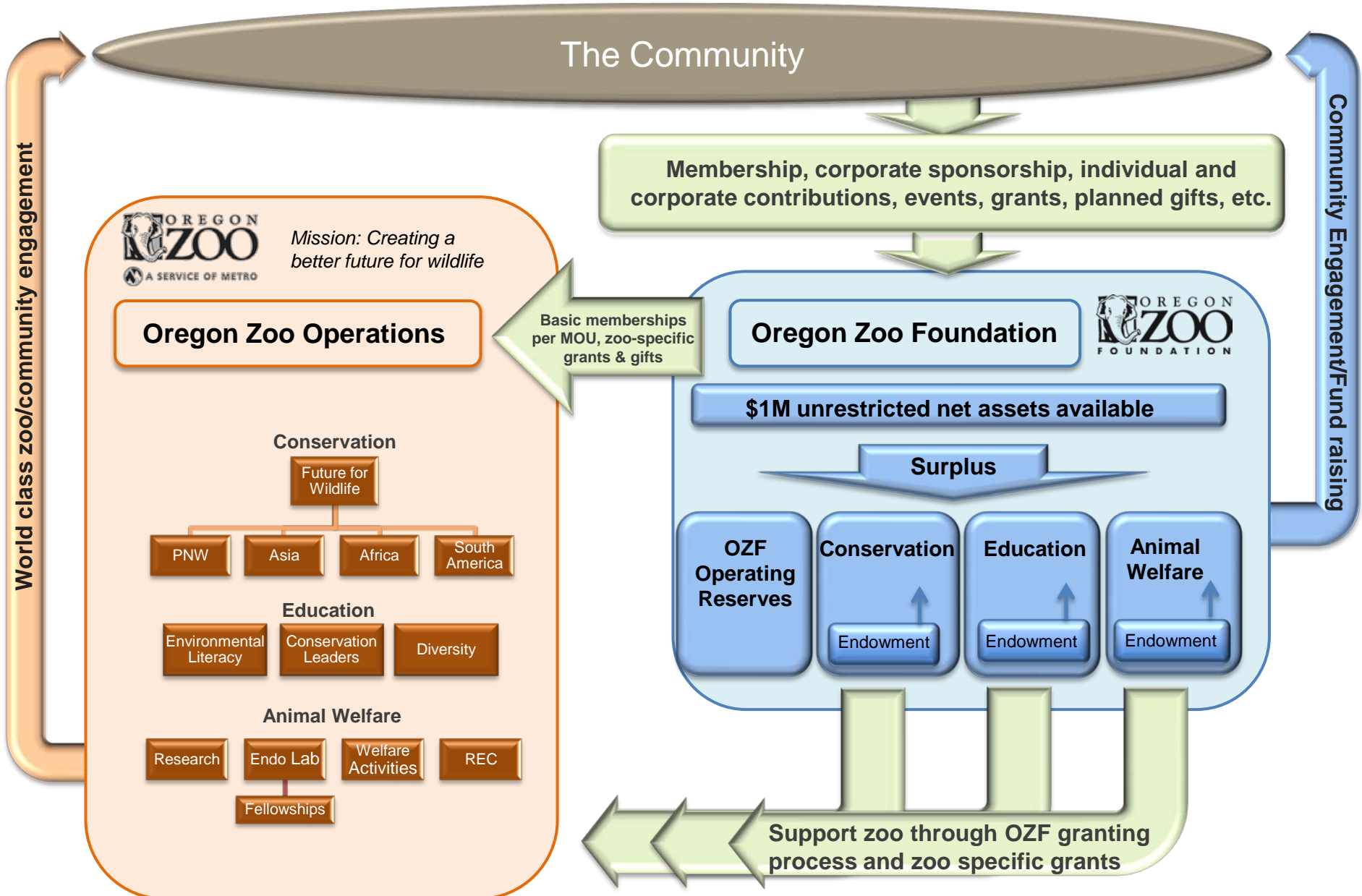
is to foster community pride and involvement in the Oregon Zoo and to secure financial support for the zoo's conservation, education and animal welfare programs.

OZF Key Initiatives (2013-14)

- Conduct a successful elephant campaign
- Diversify and strengthen OZF funding streams
- Strengthen the OZF organization
- Build and support external relationships in support of the zoo
- Develop the OZF board as ambassadors for the zoo

Accomplishments

- Since 1997, OZF has contributed \$48M
- \$500,000-\$2.2M annually from membership sales
- Advocacy support—2008 bond (\$125M); 2013 Metro Levy
- Campaign successes—Predators, Aviaries, Elephants
- Infrastructure—policies, governance, financial
- Integration with zoo strategic planning (2013)
- Strong membership program—42,000 member households
- Evolving into a fundraising organization
 - Increase in higher level memberships
 - Increase in members giving outside of membership

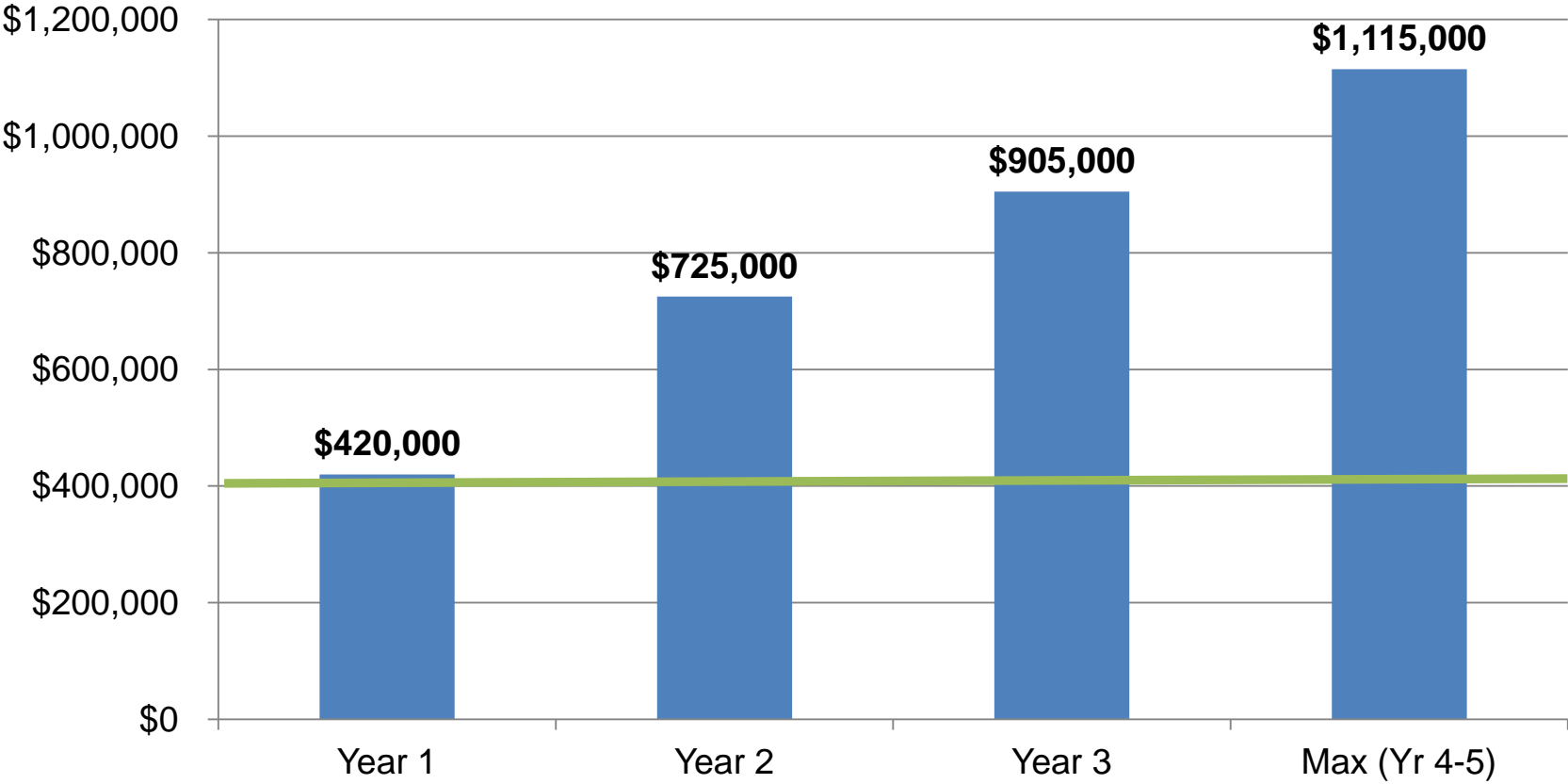


OZF Mission: To foster community pride and involvement in the Oregon Zoo and to secure financial support for the zoo's conservation, education and animal welfare programs.

Sponsorship Framework

- To create a proactive structured sponsorship strategy that will:
 - Provide the Oregon Zoo Foundation with sustainable, incremental revenue to complement the Zoo's mission initiatives
- To gain internal alignment around a core corporate partnership strategy and common goal

\$1.12M projected unrestricted revenue for the Oregon Zoo Foundation



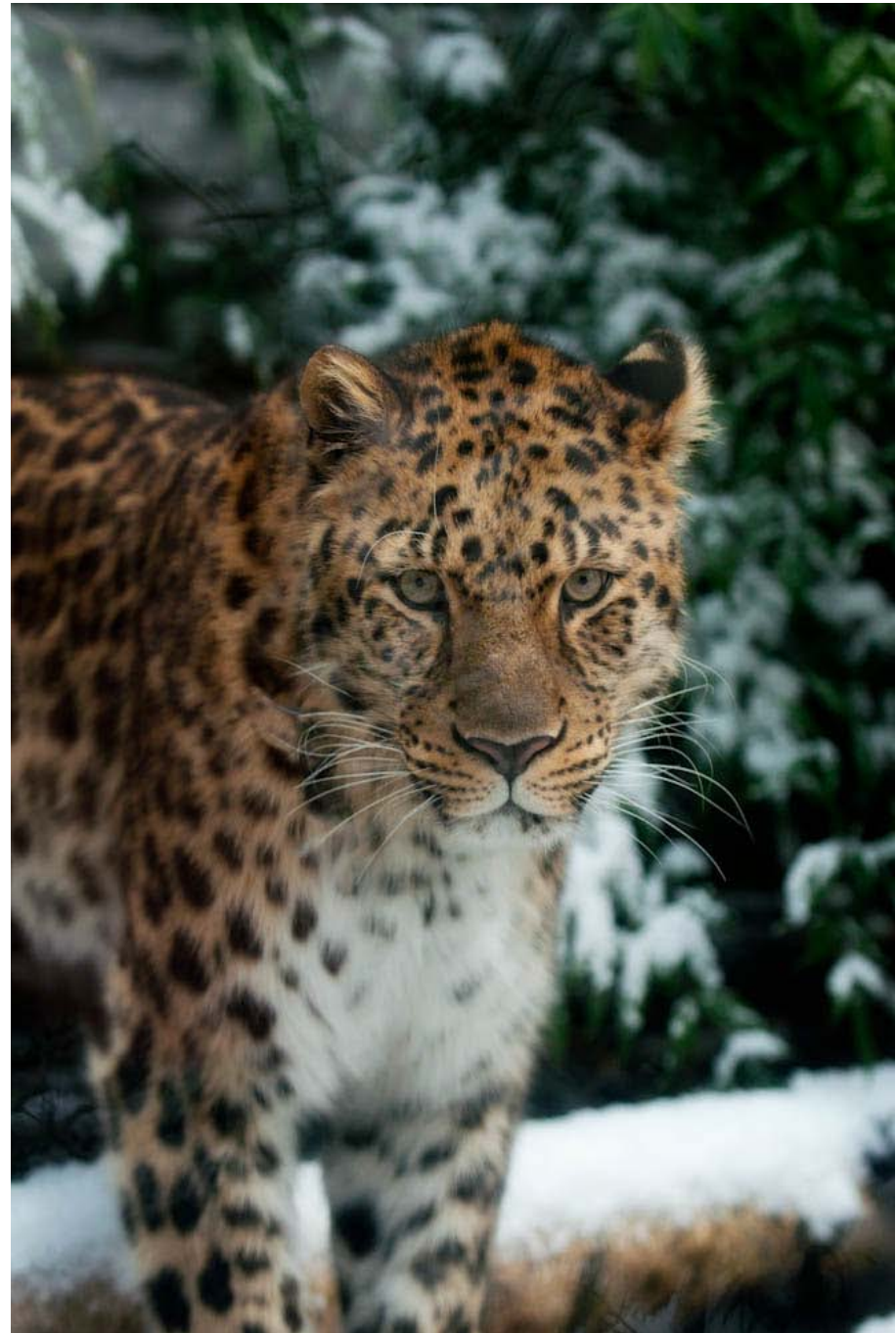
Revenue projection figures do not include philanthropic support or in-kind promotional inventory
\$414,500 baseline number is based on 2013 revenue figures provided to IEG

Portland property comparables

Property	Sponsorship Fee	Yearly Attendance	Days to Activate	Promotional Time Frame
Oregon Zoo	\$125,000	1,600,000	50 (Approx.)	12 months
Portland Timbers	\$100,000- \$200,000	393,937	20	7 Months
Portland Trailblazers	\$600,000- \$1,000,000	819,290	41	8 Months

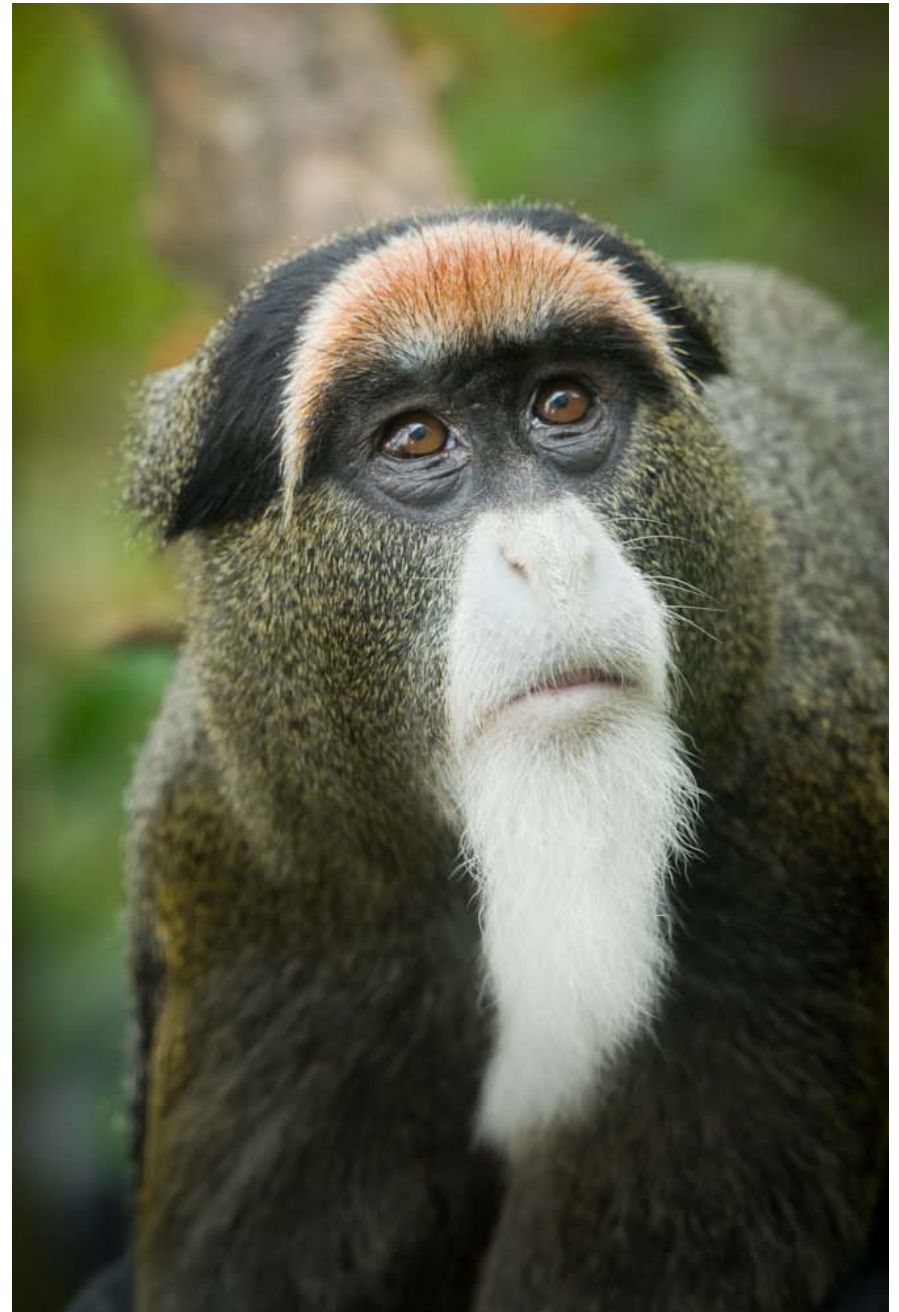
Summary

- Strong Collaboration
- Vision and Strategic Goals
- OZF = Fund-raising organization



Questions

- Sponsorship
- OZF Support
 - Oregon Zoo
 - Metro
- Future reporting
 - What
 - When
 - How



Board Member Bios

- Heidi Bell**
joined in 2010
- Heidi is a community volunteer whose background is in strategic marketing for companies in their infancies. She is currently raising two young children and volunteering for various organizations in her free time. She is wild about all animals, yet has a special affinity for large cats.
- Stan Bland**
joined in 2009
- Stan has spent most of his life in public relations and entrepreneurial pursuits. His love of animals has kept him involved with a number of non-profit organizations, including Project Pooch, The Pongo Fund and the Oregon Zoo. Stan's favorite animals are dogs and rhinoceroses, and he does what he can for their benefit.
- Sigrid Button**
joined in 2013
- Sigrid is currently Administrative Director of the Casey Eye Institute at Oregon Health & Science University. Additionally, she serves as an Officer and Director for Guide Dogs for the Blind and a Director for Safety In Motion, a Portland-based safety consulting business. Her favorite animal is the giraffe.
- Laurie Christensen**
joined in 2012
- Laurie is a retired pediatric ophthalmologist from Oregon Health & Science University. She is still involved in teaching resident physicians at the Casey Eye Institute. Her favorite animal is the elephant, sea otter, African wild dog, polar bear...
- Tracey Clark**
joined in 2011
- Tracey is a longtime community volunteer, a zoo supporter for over 35 years and a former Friends of the Zoo board member. She is currently a member of the Clark Foundation Board of Directors and is co-chairing the Elephant Lands campaign with her husband Mike. Tracey's favorite animal is the elephant.
- Ryan Deckert**
joined in 2008
- Ryan was named President of the Oregon Business Association in 2007. He previously represented Washington County in the State House of Representatives and State Senate. Governor Kulongoski appointed Ryan to the Oregon Innovation Council, where he serves as vice-chair. Additionally, he is a commissioner representing Oregon on the Western Interstate Commission for Higher Education.
- Rob Erickson,**
Treasurer
joined in 2010
- Rob is currently the Vice President of Corporate Finance, Controller and Treasurer for Stancorp Financial Group, which includes The Standard Insurance Company and all of its subsidiaries. Rob is a member of the Financial Executives International and is on the accounting committee for the American Council for Life Insurers. He serves as the chair the Audit and Finance Committee. Rob's favorite animal is the lion.
- Steffeni Mendoza Grey**
joined in 2011
- Steffeni is a community volunteer who previously served as Government Relations Specialist for the City of Portland.
- Raimund Grube**
joined in 2011
- Raimund is President/COO for Element Power. He and his family have been zoo members for more than 10 years.
- Kregg Hanson**
joined in 2003
- Kregg, a Board Member Emeritus, is the retired former President/COO for Banfield Pet Hospital. He served for thirty years in the health care industry as CEO and senior executive for two national health care systems. He currently serves as chair and OZF representative for the Metro Public Art Commission. His favorite animal is the eagle.
- Deborah Herron**
joined in 2013
- Deborah is Director of Public Affairs and Government Relations for Wal-Mart. She serves on the boards of the Portland Business Alliance and Washington Retail Association. She and her husband joined the zoo when their daughter was born and they return frequently to visit their favorite animal families.

Board Member Bios

- Mark Loomis,**
Chair
joined in 2008
- Mark is Senior Director Strategic Initiatives, Sustainable Manufacturing & Sourcing for Nike, where he leads long-term initiatives to improve the labor conditions and environmental impact of Nike’s manufacturing supply chain and integrate sustainability into Nike’s internal sourcing practices. His favorite animals are the great apes—in particular the orangutans.
- Nancy Hinnen**
joined in 2009
- Nancy is a retired business attorney and a community volunteer. These days she spends her time in a variety of pursuits ranging from angel investing to coaching youth lacrosse. She currently serves as co-chair of the Advocacy Committee. Nancy's favorite animal is the cheetah.
- Aili Jokela**
joined in 2009
- Aili is director of strategic communications and content development for the Wealth Management Group at U.S. Bank. She is co-chair of the Advocacy Committee and chair of Board Recruitment and Governance Committee. Her favorite animals are bears and wolves.
- Campbell Kidd**
joined in 2012
- Campbell is the Managing Partner of Red Hills Holdings, a national real estate private equity firm based in Portland. In addition to being a member of the Board of Trustees, he is also the chair of the Wild Life Board. His favorite animal is the leopard.
- Cynthia Malen,**
Secretary
joined in 2010
- Cynthia is currently the Senior Director of Store Operations for Fred Meyer. Her favorite animals are the big cats.
- Pete Norman**
joined in 2013
- Pete is currently a Senior Vice President and Managing Director in The Private Client Reserve of U.S. Bank. Pete delivers meals for Meals on Wheels and is on the fundraising board for Meals on Wheels Summer in September event. His favorite animal is the flamingo.
- Craig Norris**
joined in 2012
- Craig serves as Executive Vice President of Retail Banking for Umpqua Bank, overseeing the customer experience, operations, consumer and small business loans at more than 200 locations in Oregon, Washington, Nevada and California. He serves as chair of the Development Committee. He and his family are longtime supporters of the zoo, and their favorite animal residents are orangutans Inji and Kutai.
- Jeff Nudelman**
joined in 2009
- Jeff is Vice-President and General Counsel of Harsch Investment Properties. He is a past chair of the Development Committee and the Executive Board. A fourth-generation Oregonian, Jeff has led and served on numerous boards of not-for-profit organizations, and has coached baseball and basketball.
- Kim Overhage,**
Vice Chair
joined in 2010
- Kim is a retired strategic planner from the high-tech industry. She now serves as the Planning Commission chair for the City of Beaverton and the Budget Committee chair for the Beaverton School District. Her favorite animals are the elephants.
- Jared Short**
joined in 2010
- Jared is President of Regence Health Insurance Services. He serves on the board of directors for Trillium Family Services, the Portland metropolitan area Boys & Girls Clubs and the Oregon Business Association, and he serves on the Oregon Health Improvement Plan Committee.
- Tony Ueber**
joined in 2010
- Tony is President and CEO of Banfield Pet Hospital. He previously served in various global sales, marketing and consulting roles for companies including Procter & Gamble and Office Depot.



CERTIFIED PUBLIC ACCOUNTANTS

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Independent Auditors' Report

The Board of Trustees
The Oregon Zoo Foundation

Report on the Financial Statements

We have audited the accompanying financial statements of The Oregon Zoo Foundation (the Foundation) (a nonprofit organization) which comprise the statement of financial position as of June 30, 2013, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Oregon Zoo Foundation as of June 30, 2013, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of Matter

As discussed in *Note 18* to the financial statements, the 2012 financial statements have been restated to correct the accounting treatment for certain membership dues that were received in prior years. Our opinion is not modified with respect to this matter.

Report on Summarized Comparative Information

We have previously audited The Oregon Zoo Foundation's 2012 financial statements, and our report dated October 25, 2012, expressed an unmodified opinion on those audited financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2012, is consistent, in all material respects, with the audited financial statements from which it has been derived, except for the effects of the restatement described in the preceding paragraph.

Hamman, Stewart & Schmitt, P.C.

Lake Oswego, Oregon
October 16, 2013

THE OREGON ZOO FOUNDATION

Statement of Financial Position

June 30, 2013 (With Comparative Amounts for 2012)	2013	2012 (Restated)
ASSETS		
Cash and cash equivalents	\$ 3,267,510	\$ 2,966,864
Investments (Notes 3 and 17)	9,064,899	8,539,595
Due from the Oregon Zoo	224,619	207,937
Pledges receivable (Note 4)	940,439	305,570
Other receivables	7,329	90,713
Prepaid expenses and other assets	133,489	69,789
Equipment and furnishings - net (Note 5)	22,143	30,858
Total assets	<u>\$ 13,660,428</u>	<u>\$ 12,211,326</u>
LIABILITIES AND NET ASSETS		
Liabilities:		
Accounts payable (Note 6)	\$ 225,929	\$ 378,744
Deferred revenue (Notes 7 and 18)	146,314	96,600
Grants payable to the Oregon Zoo (Note 8)	1,286,878	478,954
Gift annuities payable (Note 9)	70,326	73,347
Total liabilities	1,729,447	1,027,645
Net assets:		
Unrestricted:		
Available for operations	8,063,425	6,313,379
Board designated - operating reserve	2,310,000	-
Board designated - endowment (Note 16)	1,044,722	3,777,073
Total unrestricted	11,418,147	10,090,452
Temporarily restricted (Notes 10 and 16)	462,834	1,043,229
Permanently restricted (Notes 11 and 16)	50,000	50,000
Total net assets (Note 18)	<u>11,930,981</u>	<u>11,183,681</u>
Total liabilities and net assets	<u>\$ 13,660,428</u>	<u>\$ 12,211,326</u>

The accompanying notes are an integral part of the financial statements.

THE OREGON ZOO FOUNDATION

Statement of Activities

Year Ended June 30, 2013 *(With Comparative Totals for 2012)*

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	
				2013	2012 (Restated)
Public support and revenue:					
Membership dues	\$ 4,556,727	\$ -	\$ -	\$ 4,556,727	\$ 4,283,640
Contributions	287,088	2,518,662	-	2,805,750	1,235,199
Special events - net <i>(Note 12)</i>	73,797	-	-	73,797	186,678
Net investment return <i>(Note 13)</i>	706,973	10,747	-	717,720	30,952
Change in value of gift annuities	(8,339)	-	-	(8,339)	(8,274)
Miscellaneous revenue	9,542	-	-	9,542	-
Net assets released from restrictions <i>(Note 10)</i>	3,109,804	(3,109,804)	-	-	-
Total public support and revenue	8,735,592	(580,395)	-	8,155,197	5,728,195
Expenses <i>(Note 2)</i> :					
Program services:					
Granting	5,273,196	-	-	5,273,196	2,799,816
Membership services	612,884	-	-	612,884	613,448
Supporting services:					
Membership development	262,664	-	-	262,664	262,906
Fundraising	919,648	-	-	919,648	762,403
Management and general	339,505	-	-	339,505	307,713
Total expenses	7,407,897	-	-	7,407,897	4,746,286
Increase (decrease) in net assets	1,327,695	(580,395)	-	747,300	981,909
Net assets, beginning of year <i>(Note 18)</i>	10,090,452	1,043,229	50,000	11,183,681	10,201,772
Net assets, end of year	\$ 11,418,147	\$ 462,834	\$ 50,000	\$ 11,930,981	\$ 11,183,681

The accompanying notes are an integral part of the financial statements.

Oregon Zoo Foundation Briefing Sheet



Mission

To foster community pride and involvement in the Oregon Zoo and to secure financial support for the zoo's conservation, education and animal welfare programs.

In partnership with the Oregon Zoo, the Oregon Zoo Foundation has been working to further the mission of the Oregon Zoo by evolving from a membership-based organization to a fundraising operation. By working together to develop a strong fundraising platform (strategy, consistent leadership and accountability) we see tremendous potential to build on our success in support of our shared vision.

Fundraising

- Since 1997, OZF has contributed over **\$48M** to the Oregon Zoo
- \$1.5–\$2.2M** provided annually in operating funds through membership sales; annual membership support has grown from \$570K in FY01 to \$2.2M in FY13.
- Since implementation of MOU, donor club revenue increased by **7%**, conservation circle increased by **42%**, individual giving increased by **24%** (excluding campaign gifts)
- Predators of the Serengeti/Red Ape Reserve – **\$6.4M** (2006–13) including campaign, \$1M additional support in FY10, and ongoing support through the Predators endowment; AZA Exhibit Award (2010); 3 new lion cubs (2013)!
- Great Northwest Campaign - **\$2.1M** (2000-06)
- Aviary Campaign – **\$830K** (2010-11); replace netting, update collection
- Pledge for bond construction - **\$5.2M** (2011); **\$460K** for medical equipment for Vet Medical Center
- Elephant Lands campaign – raised **\$2.1M** towards **\$3M** goal (furtherance of \$5.2M pledge) (2012 -)
- Elephant Lands Interpretive design - **\$130K** pledge (2012)
- Elephant purchase – contributed **\$400K** for the purchase of Tusko and Lily (2013)

Advocacy

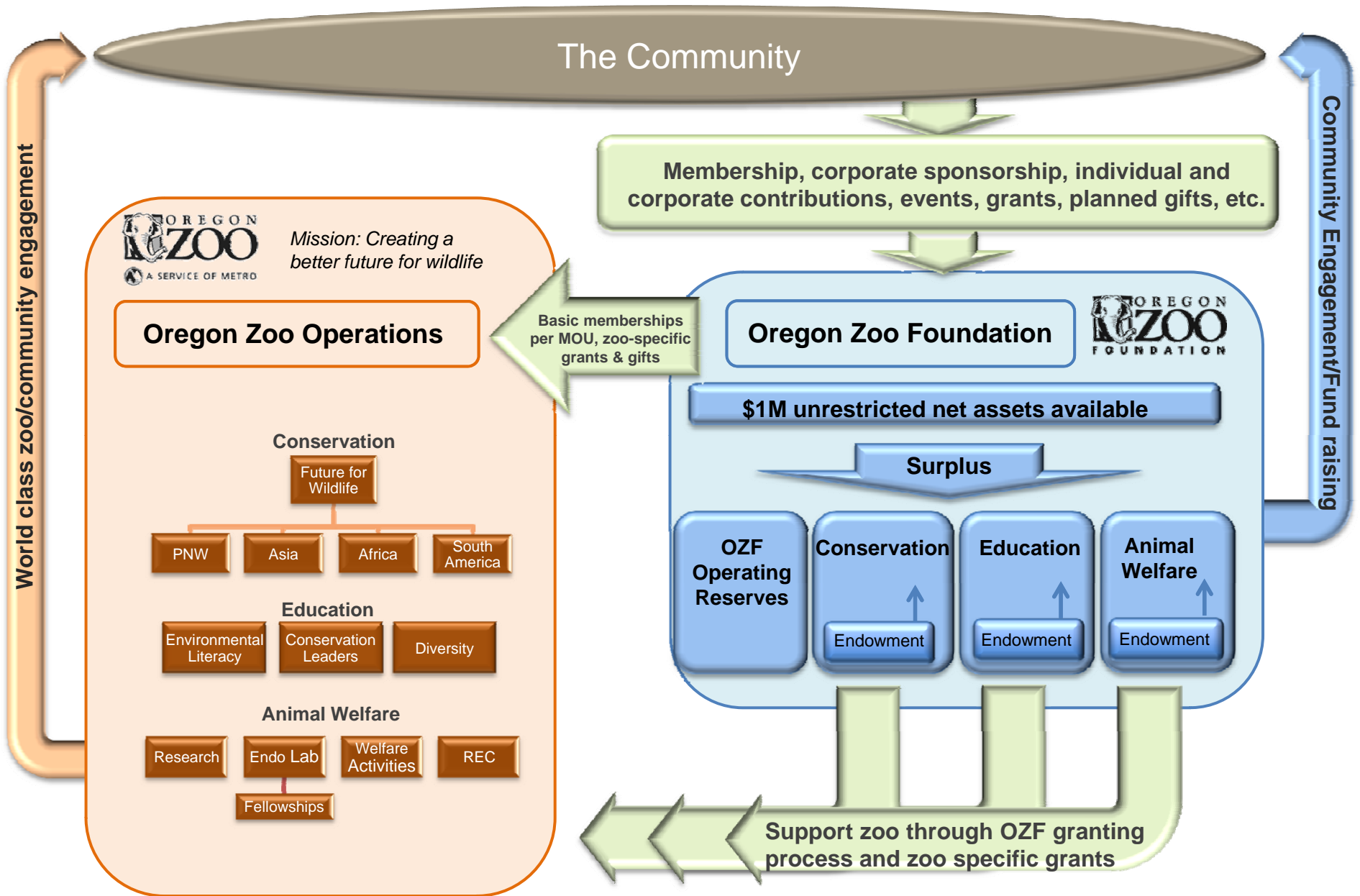
- Contributed **\$7,500** to parks bond measure (2007)
- Contributed over **\$775K** and actively campaigned in support of successful **\$125M** bond measure (2008)
- Provided testimony in support of land use hearings (2012)
- Contributed **\$10K** and reached out to membership in support of successful Metro levy campaign (2012)

Governance/Operations

- Signed new MOU between OZF and Metro (July 2011)
- Revised bylaws to align with the new MOU (July 2011)
- Current OZF Director (Jani Iverson) hired (September 2011)
- Updated financial, gift acceptance, personnel policies and all committee charters; developed policies/procedures for board recruitment, officer selection and board emeritus selection
- Developed 2-year strategic goals and supporting metrics/scorecard for OZF, goals are integrated into the zoo's strategic plan (September 2013)
- Adopted proposed 'Funding Model' providing greater transparency and creating strategic alignment with the zoo; established **\$3M** in board designated endowments (October 2013)

The Foundation

OZF is a private nonprofit (501(c)) foundation governed by a volunteer Board of Trustees of community leaders and representatives of leading businesses and organizations, including: US Bank, Wal-Mart, OHSU, Nike, Intel, Fred Meyer, The Standard, PGE, Umpqua Bank and Banfield. OZF has a staff of 17 led by the OZF Director and is responsible for furthering the mission of the Oregon Zoo by garnering financial support. Income generating activities include fundraising, grant writing, sponsorship and the administration and cultivation of over 47,000 member households.



OZF Mission: To foster community pride and involvement in the Oregon Zoo and to secure financial support for the zoo's conservation, education and animal welfare programs.