

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE  
OREGON ZOO'S 2020-2023 STRATEGIC PLAN

) RESOLUTION NO. 19-5056

) Introduced by Acting Chief Operating Officer  
) Andrew Scott in concurrence with Council  
) President Lynn Peterson

WHEREAS, the Oregon Zoo has developed a strategic plan to guide the Zoo's work in the next three years towards the Zoo's mission of creating a better future for wildlife; and

WHEREAS, the strategic planning process was co-created with key partners, community groups and staff; before drafting the strategic plan goals, 15 community partners were interviewed and staff were engaged during two Town Halls for input to the Strategic Plan goals;

WHEREAS, after the draft plan was developed, four focus groups were held with community and conservation partners; over 100 staff and public participated in a 4-day gallery walk engaging the public and staff for input to the draft strategic plan, feedback from the Metro council was solicited; and an online survey (in four languages) was available for broader community input to the Strategic Plan goals;

WHEREAS, the Strategic Plan includes 7 focus areas: 1) lead the way in animal care and welfare; 2) advance wildlife conservation; 3) deliver an inspiring guest experience (every time); 4) create diverse, equitable & Inclusive environments; 5) connect with our communities; 6) Provide meaningful and fulfilling staff experiences; and 7) achieve financial sustainability; and strategic priorities are outlined for each focus area;

WHEREAS, for each of the focus area goals, Zoo staff has identified a set of strategies and actions to attain those goals within a certain time frame.

WHEREAS, the Zoo's draft strategic plan supports already established/adopted plans and goals of Metro Council of Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion; sustainability goals; and Climate Smart Strategy; now therefore,

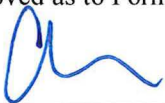
BE IT RESOLVED that the Metro Council approves the Oregon Zoo's 2020-2023 Strategic Plan and authorizes the Metro Chief Operating Officer to implement the Plan.

ADOPTED by the Metro Council this 5th day of December 2019.



Sam Chase, Deputy Council President

Approved as to Form:



Carrie MacLaren, Metro Attorney



# OREGON ZOO Strategic Plan 2020 – 2023

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

## Lead the Way in Animal Care & Welfare

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

**100%**  
of Oregon Zoo animals experience positive welfare

## Advance 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**.

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

## Deliver an Inspiring Guest Experience (Every Time)

The guest experience will WOW guests and connect them to our mission. Our campus and experience will be welcoming, modern, and inspiring as guests **learn from staff** and **connect with our animals** at every opportunity.

**70**  
Guest Loyalty Score

## Create Diverse, Equitable, & Inclusive Environments

We are committed to advancing diversity, equity and inclusion and creating safer and more welcoming spaces for everyone. We're committed to the **recruitment, retention** and professional **growth** of a diverse staff, and removing barriers to **access** for our guests.

Our racial diversity meets or exceeds that of the Portland metropolitan area  
Staff & Guests

## Achieve Financial Sustainability

The success of our 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, animals and mission for decades to come.

**\$7M**  
Reserve

## Provide Meaningful & Fulfilling Staff Experience

Staff is the bedrock of our animal and guest experience. We seek to improve their experience through better **communication**, investments in **professional development** and increasing **connection** to our mission and overall success.

**3.8+**  
Employee Engagement Score

## Connect with our Communities

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

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





**OREGON ZOO**

# Strategic Plan 2020 – 2023

The Oregon Zoo strategic plan was co-created with input from guests, staff, volunteers and the community. It will serve as our guide in innovating for the future, clarifying our priorities, and making strategic trade-offs for the next three years.

## Focus Areas

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- 
- » Lead the Way in Animal Care & Welfare
  - » Advance Wildlife Conservation
  - » Deliver an Inspiring Guest Experience (Every Time)
  - » Create Diverse, Equitable & Inclusive Environments
  - » Connect with Our Communities
  - » Provide Meaningful & Fulfilling Staff Experiences
  - » Achieve Financial Sustainability





# Lead the Way in Animal Care & Welfare

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

### RELATED PLANS



100%  
of Oregon Zoo  
animals experience  
positive welfare



WHAT SUCCESS  
LOOKS LIKE

- We are recognized as a leader in animal care by our staff, volunteers, guests, and partners
- Welfare audit program is in place with measurable increases in quality, for example: breeding, diversity of behaviors, and social structure
- Animals have more choice 24 hours a day
- 75% of the zoo is monitored for animal welfare science
- We exceed **AZA accreditation** standards
- We have both maintained and advanced modern zoological practices and philosophies in our work

STRATEGIC  
PRIORITIES

Habitat Upgrades	Habitat & Welfare Innovation	Science & Technology	Staff Support & Empowerment
<ul style="list-style-type: none"><li>• Complete welfare audits across the zoo annually</li><li>• Design and implement a welfare continuous improvement plan based on the audit results</li><li>• Upgrade habitats to maximize usage of space based on animal welfare science</li><li>• Complete bond upgrades successfully and develop a plan for updates to additional habitats and holdings</li><li>• Establish funding through a Welfare Audit Action Fund</li></ul>	<ul style="list-style-type: none"><li>• Establish an innovation program with a clear process that includes ideation, funding, design, test and implement</li><li>• Implement 1-3 new habitat innovations per year depending on size and scope</li><li>• Develop specific stories about successes we can share via staff, volunteers, and other outlets</li><li>• Advance ambassador animal programming through development of shared vision</li></ul>	<ul style="list-style-type: none"><li>• Extend <b>monitoring</b> zoo-wide</li><li>• Deepen animal welfare science &amp; development of novel <b>enrichment</b> devices and robotics</li><li>• Host a welfare &amp; technology summit to identify partnership opportunities in innovation and habitat design</li><li>• Collect data to support stories that our animals are “happy”</li></ul>	<ul style="list-style-type: none"><li>• Increase animal care staff time (by a minimum of 15 minutes a day) to focus on innovation and raising the bar on animal welfare and science</li><li>• Ensure appropriate staff levels for successful opening of new habitats</li></ul>

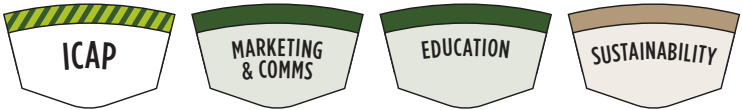
HOW WE’LL DO IT



# Advance 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, staff, and volunteers to take action.

### RELATED PLANS



10,000

Conservation actions taken by staff, volunteers, and the community

A stylized illustration of a polar bear walking towards the right, rendered in a light, sketchy style.

WHAT SUCCESS LOOKS LIKE	<ul style="list-style-type: none"><li>• <b>ICAP</b> is complete with measurable outcomes in place for:<ul style="list-style-type: none"><li>- Climate action</li><li>- Thriving wildlife</li><li>- Healthy habitats</li><li>- Nature connection</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Sustainability plan is established with measurable outcomes in place that align with Metro's sustainability goals</li><li>• Measurable results in resource conservation</li></ul>	<ul style="list-style-type: none"><li>• We are recognized as a conservation leader within <b>AZA</b>, <b>WAZA</b>, &amp; <b>IUCN</b></li><li>• We are recognized as an important conservation partner both locally and globally</li><li>• Staff at all levels are involved in professional societies</li></ul>	<ul style="list-style-type: none"><li>• New laws are passed that support wildlife (aligned with <b>ICAP</b>)</li><li>• Measurement is in place for tracking conservation actions</li><li>• Community members participate in zoo sponsored conservation actions (aligned with <b>ICAP</b>)</li></ul>	<ul style="list-style-type: none"><li>• 100% of staff have done at least 1 <b>conservation action</b> in the last year</li></ul>
STRATEGIC PRIORITIES	Species Recovery	Campus Sustainability	Conservation Network	Advocacy & Engagement	Staff Involvement
HOW WE'LL DO IT	<ul style="list-style-type: none"><li>• Finalize and implement our <b>Integrated Conservation Action Plan (ICAP)</b> with measurable results</li><li>• Focus programs and achieve results in Borneo, East Africa, Arctic, and especially, PNW</li><li>• Maximize <b>AZA</b>, <b>SSP</b> partnerships and <b>SAFE</b> programs</li></ul>	<ul style="list-style-type: none"><li>• Create and implement the sustainability plan</li><li>• Staff and empower the Green Team to track and report on the implementation of the sustainability plan</li><li>• Evaluate systems for efficiency (e.g. energy, water, waste, purchasing, etc.)</li></ul>	<ul style="list-style-type: none"><li>• Invest in deeper relationships with elected officials &amp; tribes</li><li>• Establish and deepen regional, national and global conservation partnerships</li><li>• Provide support for staff to attend and present at conferences</li><li>• Work with universities (e.g. PSU, Miami University, etc.) to advance conservation and staff development</li></ul>	<ul style="list-style-type: none"><li>• Plan for future conservation campaigns</li><li>• Establish a conservation advocacy strategy with defined roles and opportunities for staff, volunteers, and the Oregon Zoo Foundation advocacy committee</li><li>• Expand <b>community conservation/science</b> opportunities (e.g. Pika Watch)</li><li>• Promote conservation action and tell stories of conservation impact through education and interpretive programming</li></ul>	<ul style="list-style-type: none"><li>• Continue investments in staff/volunteer driven conservation actions (<b>SCAT</b>, etc.)</li><li>• Develop a process for funding and allocating staff conservation grants</li><li><div>DEI</div> Provide training on how DEI relates to wildlife conservation</li></ul>



# Deliver an Inspiring Guest Experience (Every Time)

The guest experience will WOW guests and connect them to our mission. Our campus and experience will be welcoming, modern, and inspiring as guests learn from staff and volunteers, and connect with our animals at every opportunity.

### RELATED PLANS



### WHAT SUCCESS LOOKS LIKE

### STRATEGIC PRIORITIES

### HOW WE'LL DO IT

- Guests connect with animals immediately upon entering
- Guests experience a consistent animal experience across all zoo hours
- Guests develop empathy for animals

## Guest Connection to the Animals

- Deliver animal experiences that surprise, delight and educate guests (e.g. pop up animal experiences and magic moments)
- Design for viewable care, feeding, and training
- Adjust staffing schedules and approaches to animal care to maximize animal visibility for guests
- Celebrate the successful opening of new habitats
- Evaluate impacts of animal experiences and educational programming on guest empathy
- Evaluate visitor engagement and conservation learning

- Zoo infrastructure, facilities, and site are maintained to the highest standards possible
- 15% increase in year-round attendance by 2023
- **ADA Transition Plan** is in place which meets and exceeds ADA standards

## Campus Maintenance & Upgrades

- Provide increased guest-to-guest connection areas, seating options and rest areas
- Offer and promote locally sourced food and gift options
- **DEI** Provide clear wayfinding in multiple languages (signage, maps, and/or technology)
- **DEI** Increase overall translation options (staff & technology) with a focus on Spanish, Vietnamese, Chinese/Mandarin, and Russian
- Create better food experiences through consistency and quality
- Experiment with rainy day attractions and activities for guests
- **DEI** Complete development and begin implementation of **ADA Transition Plan**, including all gender bathrooms
- Complete train feasibility study
- Encourage moments for social media sharing with fun backdrops

- Staff regularly interacts with and shares stories with guests
- Guests have increased opportunities to connect with staff and volunteers

## Staff Driven Guest Engagement

- Provide training for staff and volunteers on how to engage passionately and consistently
- Create opportunities for transformative animal experiences for all staff so they can authentically inspire guests and tell stories
- Provide educational resource guides on key species for staff and volunteers to provide consistent, conservation based, messaging for guests

70

Guest Loyalty Score

As calculated by our  
Net Promoter Score  
(Baseline 28)

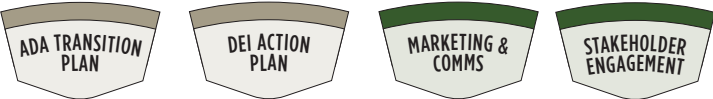




# Create Diverse, Equitable & Inclusive Environments

The Oregon Zoo is committed to advancing diversity, equity and inclusion and creating safer and more welcoming spaces for everyone. We're committed to the recruitment, retention and professional growth of a diverse staff, and removing barriers to access for our guests.

## RELATED PLANS



## STAFF

## GUESTS

WHAT SUCCESS LOOKS LIKE	<ul style="list-style-type: none"><li>We are actively creating an inclusive, diverse, equitable and accessible work environment</li><li>Our staff, including those in leadership positions and those who connect our guests to the mission, represent diverse cultural backgrounds</li><li>The zoo tracks and maintains retention of diverse employees from marginalized communities at the same or greater rate than those from dominant culture</li></ul>	<ul style="list-style-type: none"><li>People from marginalized communities see the zoo as a desirable place to work, and are motivated to apply</li><li>We focus on attracting new staff and volunteers with bilingual or multi-language competency and value those skills in the hiring process</li></ul>	STRATEGIC PRIORITIES	<ul style="list-style-type: none"><li>Zoo facilities and programs are inclusive to all</li></ul>	<ul style="list-style-type: none"><li>Everyone in our community feels a sense of belonging at the zoo</li></ul>	<ul style="list-style-type: none"><li>Effective implementation of the <b>DEI Action Plan</b></li></ul>
	<b>Learning</b>	<b>Growth &amp; Retention</b>	<b>Recruiting</b>	<b>Access</b>	<b>Outreach</b>	<b>Funding</b>
HOW WE'LL DO IT	<ul style="list-style-type: none"><li>Conduct listening sessions with current staff from marginalized communities to understand opportunity areas</li><li>Require awareness training on WHY diversity, equity, and inclusion is important</li><li>Expand <b>DEI</b> tools training</li></ul>	<ul style="list-style-type: none"><li>Provide leadership development programs for non-mgmt staff from marginalized communities</li><li>Create clear career paths from variable hour employee, volunteer and internship roles to permanent roles</li><li>Provide multi-cultural training to all staff and volunteers to increase understanding, and create a safe and welcoming work environment for staff of color</li><li>Work with staff from marginalized communities to develop feedback systems, evaluation and support for a safe work environment</li></ul>	<ul style="list-style-type: none"><li>Develop creative and authentic recruiting strategy based on community input</li><li>Refresh recruiting materials and approach to attract under-represented communities and bilingual staff and volunteers</li><li>Require unconscious bias training for hiring managers</li><li>Expand internships, jobs, and service learning for marginalized youth across all departments</li></ul>	<ul style="list-style-type: none"><li>Work with Metro, EWP and TriMet to expand access for all potential visitors in the region and beyond</li><li>Implement the <b>ADA Transition Plan</b>, including providing inclusive and accessible programs and services</li><li>Evaluate, with the goal of expanding, access programs for communities where price is a barrier</li></ul>	<ul style="list-style-type: none"><li>Apply a racial equity lens and engage culturally specific communities in co-creating programs, services, and communications</li><li>Co-create experiences with disabilities communities</li><li>Host culturally specific events that are co-created with communities</li><li>Use paid media and promotions to better reach under-represented communities</li></ul>	<ul style="list-style-type: none"><li>Identify resources to fund successful implementation of our DEI Action Plan</li><li>Identify a dedicated project manager</li></ul>

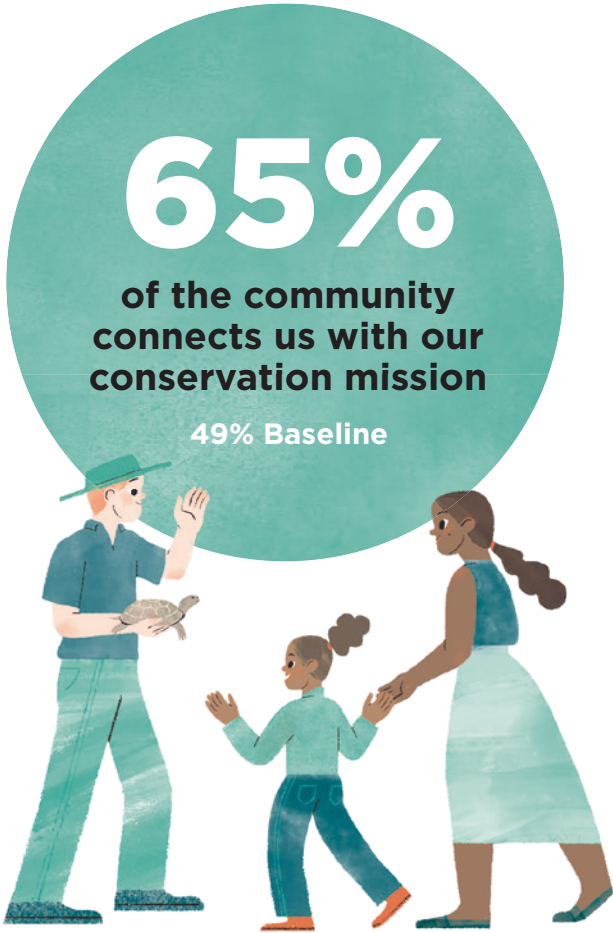
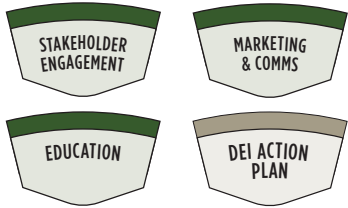




# Connect with Our Communities

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

## RELATED PLANS



WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT

- We are seen as a convener in the conservation space
- Co-creation is utilized in designing communications\*\*, events, and programs

### Community Engagement

- Conduct regular listening sessions with key stakeholder communities in service of brand, advocacy, and guest experience
- DEI** Targeted outreach to underrepresented guest audiences, especially communities of color
- DEI** Leverage the Youth Advisory Council (YAC) and other key advisors to inform decisions and practices
- Share stories of impact with partners, guests and donors so they can see their role in our shared achievements
- Develop stakeholder engagement plan that includes showing how community feedback was used

- We actively seek partnerships with organizations that align with our mission and goals
- Increased impact in conservation, program delivery, and audience connection through the use of partnerships

### Partnerships

- DEI** Develop a partnership framework with a **racial equity lens** to identify partners aligned with our strategic priorities and equity action plan
- DEI** Establish a process for developing co-created community partnerships, programming, and communications
- Regularly evaluate partner relationships

- Every staff member can articulate, and feels responsibility for, the values and mission
- Members of the community connect the zoo with our conservation mission
- DEI** Key stakeholders feel informed and understand zoo operations

### Brand & Reputation

- Re-branding initiative focused on fostering respect for animals and nature connection
- Form a cross-functional brand team to ensure rebrand roll-out is authentic and successful
- Continue to market ourselves as a conservation and education facility



# Provide Meaningful & Fulfilling Staff\*\* Experiences

Staff is the bedrock of our animal and guest experience. We seek to improve their experience through better communication, investments in professional development, and increasing connection to our mission and overall success.

### RELATED PLANS



WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT


- Staff feels confident giving input on key decisions
- Staff feels their opinions count
- Staff feels informed about decisions that affect their roles
- Volunteers feel valued and included

## Communication

- Continue a communication philosophy of transparency
- Build and execute an internal communications plan
- Audit current communication channels and processes, and invest in tools as needed
- Designate a resource to implement internal communications
- Establish strong two-way communication channels for staff and volunteers to provide input and receive information
- Ensure consistent interactions and face time between managers and staff and volunteers to foster communication, and discuss issues and opportunities

- Staff can see clear paths for growth and what it takes to get there
- Staff feels supported in their professional development at the zoo

## Career Paths & Professional Development

- Define clear growth paths for each role, including developing a paid internship program
-  Establish clear process and criteria for how professional development investments are spent
- Develop a zoo-wide training plan that supports staff growth and development, based on Metro's training strategy

- Staff at all levels understand how their contributions and those of their colleagues affect the success of the zoo
- We celebrate our success as a team
- Staff and volunteers' ideas and innovations contribute to our success

## Connection to the Zoo's Success

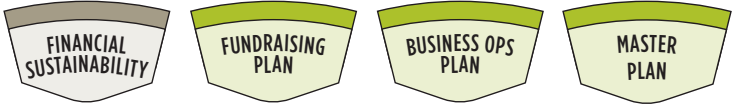
- Gain consistency in connecting and understanding how individual goals relate to organizational goals
- Establish a meaningful recognition program
- Increase community building and celebration events
- Expand our internal innovation program, "Innovators!"
- Highlight contributions of all teams to foster respect, appreciation, empathy and teamwork across work groups



# 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, animals and mission for decades to come.

## RELATED PLANS



WHAT SUCCESS LOOKS LIKE

- We have increased net contribution per guest
- Revenues exceed expenses annually by \$1M by 2023
- **Capital investment** has increased to better match AZA benchmarks
- OZF average annual fundraising for Operating and Capital has doubled from \$900k to \$1.8M by FY23
- **Master Plan** is refreshed
- Staff understands their role in achieving financial sustainability

STRATEGIC PRIORITIES

### Economic Study

- Assess revenue mix potential for growth over time
- Analysis of revenue line items, expenses, and opportunity areas
- Analysis of seasonal impacts to revenue
- Share outcomes and recommendations

### Transportation Access & Parking Action Plan

- Update and implement Transportation Management Plan
- Evaluate and test the use of parking discounts and other strategies to maintain or increase access

### Pricing Strategy

- Develop data driven pricing strategy
- Evaluate and test the use of discounts
- Communicate and implement pricing strategy

### Expense Management

- Align balanced budgets to our strategic plan
- Plan and implement better financial reporting to inform decisions
- Encourage staff to be innovative and improve processes
- **DEI** Prioritize **COBID** and local vendors in contractors and procurement

### Long Term Funding

- Form planning team to drive planning and funding of **Master Plan**
- Assess resources needed to increase federal and state funding
- Develop and maintain commitment to best fundraising practices and analysis
- Plan next fundraising campaign

HOW WE'LL DO IT



# Appendix



## Footnotes

\* For the purposes of this strategic plan, the zoo’s geographic focus extends to the four counties of the Greater Portland area – Clackamas, Multnomah, and Washington in Oregon and Clark in SW Washington

\*\* “Staff” includes Oregon Zoo employees and Oregon Zoo Foundation employees.

\*\*\* “Communications” includes external and internal communications, including interpretive displays.

## Acronyms

<b>ADA</b>	Americans with Disabilities Act
<b>AZA</b>	Association of Zoos & Aquariums
<b>COBID</b>	Certification Office for Business Inclusion and Diversity
<b>ICAP</b>	Integrated Conservation Action Plan
<b>DEI</b>	Diversity, Equity and Inclusion
<b>IUCN</b>	International Union for Conservation of Nature
<b>SCAT</b>	Staff Conservation Action Trips
<b>SSP</b>	Species Survival Plan
<b>SAFE</b>	Saving Animals from Extinction
<b>WAZA</b>	World Association of Zoos & Aquariums



# Appendix



## Glossary

### Accessibility

Accessibility is the practice of making your facility, services and programs usable by as many people as possible. We traditionally think of this as being about people with disabilities, but designing and implementing the environment using an accessibility lens means that it can be accessed, understood and used to the greatest extent possible by all people.

### ADA Transition Plan

Accessibility plan that contains two major components – an assessment of physical barriers and a self-evaluation of programs and services. The physical assessment combined with the self-evaluation will become the zoo’s ADA transition and action plan, which will be reviewed by community and adopted in spring 2020. The Oregon Zoo strives to be a welcoming and inclusive facility for people of all abilities.

### AZA Accreditation

Provides a publicly recognized badge signifying excellence in, and commitment to, such things as animal management and welfare, safety, conservation and education; and increases eligibility for funding and grants from certain foundations, corporations, and other sources.

### Capital Investment

An item permanent in nature with a cost of greater than \$50,000 and a useful life exceeding one year.

### Collection Plan

An analysis of our animal population: current and future as it pertains to the zoo’s mission, goals, programs and master plan. It is used to guide our future development to achieve effective utilization of limited space and resources.

### Community Conservation/Science

Programming designed to encourage community members to actively contribute to the conservation of a species through participation in research, habitat restoration, invasive species removal or other conservation related activity. *NOTE: Oregon Zoo does not use the term “Citizen Science” as we do not want to imply that all community members participating must be U.S. citizens.*

### Conservation Action

Conservation actions are things that a person does to help wildlife or the environment, such as buying a hybrid car, volunteering on a stream restoration project or voting for an environmental bill.

### DEI Action Plan

Foundational plan for ensuring we achieve inclusive, diverse, equitable and accessible environments for staff and guests. Aligns with and supports Metro’s Racial Equity Strategy.

### Enrichment

The act of improving animals’ lives through stimulating and challenging environments, objects, and activities. It was here, at the Oregon Zoo, in the 1980’s that the concept of environmental enrichment was established.

### Inclusion

Inclusion refers to the degree to which diverse individuals are able to participate fully in the services, programs or decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive”.

### Master Plan

20 year plan which guides the zoo’s physical development such as land use, facilities and infrastructure.

### Monitoring

Process of observing animals use of their habitats, activity levels, and social structure in order to make welfare and design decisions.

### Net Promoter Score (NPS)

A metric used to gauge the loyalty of guests. Our metric is based on the question, How likely are you to recommend the Oregon Zoo to a friend or relative? Responses are based on a 1 to 10 scale and the overall score is based on a scale of -100 to 100. A score of 50+ is considered “excellent” and 70+ is believed to be “world-class”.

### Racial Equity Lens

Applying a racial equity lens means that we will pay close attention to race and ethnicity when making decisions—minor or significant, with a goal of changing the policies, programs and practices that perpetuate inequities. This must include using intentional tools to check our own implicit bias, listening to people affected by our decisions, factoring in the impacts on marginalized communities, utilizing a set of reflective questions and ultimately shifting the way we make future decisions.

### Sustainability Plan

Foundational plan that ensures we achieve a sustainable campus and operations. Aligns with sustainability goals set by Metro Council.

### Welfare Audit Program

Annual institution-wide animal welfare review process in accordance with new AZA accreditation standard 1.5.0 which is designed to:

- Promote a welfare discussion for all animals in our care on an annual basis
- Guide which animals/groups require more detailed welfare assessments
- Contribute to collection planning decisions

The review is designed to yield a high level assessment in each animal area (North America, Africa, Family Farm, etc) and identify specific species or specimens which require an individual assessment. These individual assessments are then prioritized and tracked. This process is one tool in an array of measures that we use to look at animal welfare, which allows us to survey our entire animal population.

**Associated documents available upon request:** decision log, idea list, stakeholder map, planning ecosystem and process graphic, feasibility check, AZA accreditation standards (<https://assets.speakcdn.com/assets/2332/aza-accreditation-standards.pdf>)



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

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

Prepared by: Sarah Keane, Zoo Finance &  
Administration Program Director  
503.220.5705  
sarah.keane@oregonzoo.org  
Presenter(s) (if applicable): n/a  
Length: n/a

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### **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)