

**METROPOLITAN EXPOSITION RECREATION COMMISSION**

**Resolution No. 07-01**

**For the purpose of approving the Metropolitan Exposition Recreation Commission 2007-2012 Strategic Business Plan and the 2007-2008 Implementation Program.**

WHEREAS, MERC has developed business plans to strategically manage operations, capital improvements and organizational responsibilities; address fiscal challenges; explore new opportunities; and ensure the ongoing success of the regional venues under its management; and

WHEREAS, a strategic business planning process was begun in January 2006 to develop an updated five year strategic business plan for MERC through a participatory process involving key stakeholders; and

WHEREAS, the strategic planning process is now concluded and a new five year strategic plan and a two year implementation program have been developed to guide the direction and future of the organization.

**BE IT THEREFORE RESOLVED AS FOLLOWS:**

1. The MERC strategic business plan and implementation program, attached, are hereby approved; and
2. The General Manager is authorized to make any stylistic alterations deemed appropriate in the final document.

Passed by the Commission on January 24, 2007

Approved as to Form:  
Daniel B. Cooper, Metro Attorney

By:   
Nathan A. Schwartz Sykes  
Senior Attorney

  
Chair – George Forbes

  
Secretary-Treasurer – Janice Marquis

## STAFF REPORT

**In consideration of Ordinance no. 07-01, For the purpose of approving the Metropolitan Exposition Recreation Commission 2007-2012 Strategic Business Plan and the 2007-2008 Strategic Plan Implementation Program.**

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Date: January 19, 2007  
Presented by: Julie Reed

Prepared by: Julie Reed

### BACKGROUND

MERC has developed strategic business plans since 1994 to provide sound leadership and expert management of the public event venues under its management authority. MERC most recent five-year strategic business plan expired in December 2006.

The 2007-2012 MERC strategic business plan is a unified vision for the future. It provides clear guidance and strategic direction for MERC during the next five years to help the agency effectively manage its business responsibilities, advantage opportunities and synergies, and to grow its capacity as a premiere public venue management agency.

The strategic business plan also recognizes the needs and unique role of each of the venues under the agency's management authority. Important goals of the planning process were to unify our collective direction, create greater synergy between the venues, and better engage its employees. The strategic business plan includes a new statement of shared values that reflect our aspirations for a common organizational culture.

The strategic business plan focuses on addressing *strategic* issues—the critical priorities, challenges, and opportunities facing the organization. A large part of the work developing this plan was identifying these elements within and outside the organization through an environmental assessment and extensive stakeholder engagement. The ideas and recommendations that were generated from this process become the basis for developing the strategic emphasis, goals and actions of this plan.

#### *The Planning Process*

A business planning team consisting of MERC executive management directed the work of the plan. The consulting services of Cogan Owens Cogan and Fleishman Hillard were used to facilitate the environmental assessment and stakeholder involvement work.

Last spring an extensive stakeholder engagement process was undertaken to seek the ideas, wisdom, and viewpoints from MERC Commissioners and employees and from more than 60 community and business leaders through surveys, focus groups session and personal interviews. The following forums and groups provided input during the engagement process:

- MERC Day workshop with 33 employees from administration and each venue
- Internal survey completed by 71 employees

- Interviews with six MERC Commissioners
- Meetings with venue stakeholder/advisory groups, totaling more than 35 people
- Interviews with 28 external stakeholders

Throughout last summer, the project team and selected employees from the venues reviewed the summary of findings and debated ideas and viewpoints on the vast amounts of information that were gathered from stakeholders. (A summary of findings from the stakeholder engagement and environmental assessment process is Appendix A).

From these discussions, the project team held a summit in July to draft the framework (themes, goals, values) of the strategic plan. A copy of the strategic plan framework outline was distributed to the Commission and all MERC employees in July for feedback.

During the fall, the planning team reviewed the feedback and worked on a series of refinements to the strategic business plan. A proposed draft was presented to the Commission in October 2006. Based on suggestions received from the Commission meeting and information gathered from subsequent briefings with individual MERC Commissioners, the plan underwent another revision.

The Commission also expressed interest in knowing what specific actions we to be taken once the plan is approved. To address this, a series of group sessions with agency staff were facilitated to develop an 18-month implementation plan that addresses specific actions and outcomes for the strategic business plan goals and strategies.

#### **ANALYSIS/INFORMATION**

1. **Known Opposition:** None known.
2. **Legal Antecedents:** Metro Code requires MERC to complete business plans.
3. **Anticipated Effects:** This plan is critical strategic business planning tool to help the agency effectively manage its business responsibilities, advantage opportunities and synergies, and to grow its capacity as a premiere public venue management agency during the next five years.
4. **Budget Impacts:** MERC's annual budgets are developed to support the strategic priorities, goals and actions identified in the five year strategic business plan and the implementation program. Specific impacts of implementation will be incorporated in the 2007-08 budget.

#### **RECOMMENDED ACTION**

- Recommend adoption of Ordinance No. 07-01

## **Appendix A**

### **MERC Strategic Business Plan**

#### **Summary of Findings**

The following is a summary of the results of interviews of MERC employees and external stakeholders by members of the consulting team as part of the MERC strategic business planning process. As agreed, the verbatim responses are confidential. A complete compilation of responses is available.

#### **Themes**

- MERC plays an important role as the premier facility management company in the region. However, the name is ambiguous and not easily understood. MERC should change its name and do a better job of communicating its role to the public.
- MERC should provide political leadership and drive efforts to identify and develop more funding resources. Enhanced commitment to marketing and public relations efforts for the agency and its venues should be made.
- MERC excels at managing events and providing quality service to its customers. There is significant support from external stakeholders for MERC taking on other venues, though employees are less supportive of this idea. Possible venues include PGE Park, Rose Garden, Memorial Coliseum and the Zoo.
- MERC plays an especially important role in streamlining processes and increasing efficiencies for its venues. It should do more to promote best practices and develop synergistic relationships among the venues and across organizational functions.

#### **Key Issues & Challenges**

- The most important challenge facing MERC is to secure increased and sustainable funding resources. Other key challenges include undertaking facility upgrades and expansions, employing current and appropriate future systems and technology, and hiring more staff. MERC and each of the venues should invest more in public relations and marketing efforts. MERC's organizational structure needs to be evaluated and revised to enhance business opportunities and operating efficiencies.

#### **Key Opportunities**

- Most important for MERC in the next three to five years include marketing, public relations and developing collaborative partnerships. More effort should be made to partner with businesses, non-profit and agencies for joint marketing and events. Opportunities to market jointly among MERC venues should be explored. MERC should change its name and create and implement a public relations strategy to convey its role, mission and values to key stakeholders. MERC and the venues should develop ways and incentives to keep clients in house, i.e. to refer event planners to another MERC venue. This may help take advantage of opportunities to fill venues during times and seasons that are currently under-booked. Furthermore, efforts should be made to reach out to new clients and provide flexible venues and services to meet the needs of potential clients. Each venue could benefit from improved access through increased transit service and parking.

### **Organizational Development**

- MERC employees are proud of the agency's role in the community, its commitment to customer service, and its openness to using innovative ideas to provide excellent customer service. Employees enjoy their relationships with co-workers and especially value accountability/responsibility, honesty/direct communication, collaboration/cooperation, giving/receiving respect, and quality/continuous improvement. They appreciate being asked for their input on strategic and operational planning issues.
- MERC employees want better and more communication within venues and across agency functions, especially from supervisors, and expressed strong interest in having a structure for engagement in cross-functional teams and projects. Employees say that MERC should do a better job motivating its workforce and providing training and professional development opportunities. While full-time employees think benefits and pay are competitive, part-time workers feel undervalued because of the lack of benefits. Employees expressed feelings of inequity with the dual union/performance based compensation system (PFP).



METROPOLITAN EXPOSITION RECREATION COMMISSION

STRATEGIC BUSINESS PLAN  
2007—2012

# 2007-2012 MERC Strategic Business Plan

## Acknowledgements

### *Metropolitan Exposition Recreation Commission*

- George Forbes, Chair
- Don Trotter, Vice Chair
- Janice Marquis, Secretary-Treasurer
- Gale Castillo
- Gary Conkling
- Ray Leary
- Gary Reynolds

### *Strategic Planning Team*

- Jeff Miller, former MERC General Manager
- Kathy Taylor, CFO, Interim MERC General Manager
- Julie Reed, Project Director, MERC Public Affairs Manager
- Rachel Bertoni, MERC Human Resources Manager
- Penny Knouf, MERC Administrative Assistant
- Chris Bailey, Executive Director, Portland Expo Center
- Jeffrey Blosser, Executive Director, Oregon Convention Center
- Robyn Williams, Executive Director, Portland Center for the Performing Arts
- Dan Cooper, Metro Attorney, Metro
- Nathan Sykes, Senior Attorney, Metro

### Contributors

- MERC employees
- Venue Advisory Committees for Portland Expo Center, Oregon Convention Center, and Portland Center for the Performing Arts
- Jeff Miller, former MERC General Manager
- Sheryl Manning, former MERC Commissioner
- Project Consultants --Elaine Cogan, Steve Faust, Cogan Owens Cogan; Cate Millar, Michael Lindberg, Fleishman Hillard

*We are grateful to the many individuals and organizations in our community that contributed ideas to help shape this plan and guide the future of MERC.*

### **ABOUT METRO**

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines.

A regional approach makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro programs and planning tools help protect our air, water, parks, natural areas and fish and wildlife habitat. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, Portland Expo Center, and Portland Center for the Performing Arts, which benefit the region's economy and promotes cultural vitality.

Metro is a directly elected regional government that serves more than 1.3 million residents in Clackamas, Multnomah and Washington counties and the 25 cities in the Portland, Oregon, metropolitan area.

Metro is governed by a council president elected region-wide and six councilors elected by district. Metro's auditor is elected region-wide.

**Metro Council**

Council President David Bragdon  
Deputy Council President Rod Park  
Councilor Rex Burkholder  
Councilor Kathryn Harrington  
Councilor Carl Hosticka  
Councilor Robert Liberty  
Councilor Brian Newman

**Metro Auditor**

Metro Auditor Suzanne Flynn

For more information, visit [www.metro-region.org](http://www.metro-region.org), or call Metro at 503.797.1510 (public affairs) or 503.797.1540 (Metro Council). Hearing impaired may call TDD (503) 797-1804.



## Executive Summary

This 2007-2012 Strategic Business Plan is an innovative blueprint for the Metropolitan Exposition and Recreation Commission's continued growth as a premiere public venue management agency. It represents a unified vision that at the same time recognizes the unique qualities of each MERC venue--the Oregon Convention Center, Portland Center for the Performing Arts, and the Portland Expo Center.

We have made great progress following the roadmap of the previous Strategic Business Plan, even during the difficult economic climate in 2000-2003. The Oregon Convention Center completed its expansion on time and within budget, increased revenues and achieved LEED® designation. Portland Center for the Performing Arts strengthened its financial structure and made substantial capital improvements to its facilities. Portland Expo Center continues to cover its operating costs and debt service without public support.

MERC plays an important role in shaping the vision, dialogue, and planning that address the needs for public assembly venue development and management in this community. Securing a convention headquarters hotel is essential for Portland to remain competitive as a national meeting destination and for the Oregon Convention Center to fully deliver its economic promise to the region. Sustainable funding is necessary to maintain and preserve existing infrastructure and to develop new facilities that will meet our region's needs for quality performance arts, public event and entertainment venues. Responsible maintenance and investment in public infrastructure will help keep Portland a vibrant region, promote tourism, and support a healthy economy.

Throughout the process to create this plan, the agency engaged its commissioners, employees and management and reached out to involve many business and civic leaders and customers. Select employees participated in a full-day workshop and all employees were asked to complete a questionnaire. A separate questionnaire was distributed to customers. Interviews were conducted with community stakeholders, including business and political leaders. Finally, meetings were held with advisory and stakeholder groups from each venue.

Several themes that emerged through the planning process are paramount in this strategic business plan and will influence our work in the future:

- Leadership and Expertise – Administrators of MERC venues are experts in facility management and recognized by their peers as leaders in their field. Each venue takes pride in creating a positive customer experience. Commissioners bring business and industry expertise and experience.
- Organizational Synergy – We are dedicated to bringing together the expertise of staff in various venues to work towards the good of the whole organization.
- Technology – We will obtain and integrate emerging technologies essential to our internal efficiency and customer responsiveness.
- Communication with Stakeholders – It is vital that MERC build greater awareness of the benefit its venues provide to the region’s economy and livability.
- Capital Renovation and Development – We will focus our efforts on the development of a convention headquarters hotel near Oregon Convention Center, replacing obsolete exhibit halls at Portland Expo Center, and renovate our performance halls.
- Marketing and Sales – We will seek to retain existing customers and attract new ones through innovative marketing and sales strategies.
- Effective Workforce and Development Management Practices – We will engage our workforce as business partners and invest in their development to achieve performance excellence.
- Sustainable, Diversified Funding Structure – Long-term financial stability is crucial to preserving the integrity and growth of MERC and its venues.

This plan is intended to set the stage for the next 20 years, while encompassing strategic goals, strategies and implementation actions for the years 2007-2012. Shared values are a new element of the plan, which were developed as a direct result of employee involvement in the planning process. The following values reflect our aspirations for a common MERC culture:

- Respect
- Excellence
- Teamwork
- Innovation
- Community

Five over-arching goals serve as the framework of this plan:

1. Maximize the positive impact of MERC venues on the economy and livability of the region.
2. Exert leadership to ensure construction of a convention headquarters hotel at the Oregon Convention Center.

3. Expertly manage world class public assembly venues.
4. Effectively communicate MERC's role and value.
5. Engage employees in creating an exceptional workplace.

Each goal is followed by relevant strategies and measurable outcomes. The latter will help us chart our progress and make changes to increase our effectiveness. An Implementation Plan companion piece to this Strategic Business Plan contains actions to ensure that the plan is a living document that guides MERC's future decisions and activities.

## Introduction

This 2007-2012 Strategic Business Plan is ambitious in its vision, yet grounded in practical strategies and actions. The plan will serve as a guiding framework during the next five-year business cycle to promote livability and cultural vitality for the region through leadership, excellent service, expert management and accountable stewardship of the region's landmark public assembly venues.

We have made great progress following the roadmap of the previous Strategic Business Plan. The Oregon Convention Center (OCC) completed a \$116 million expansion on time and budget, increased its enterprise revenues at a steady pace, and achieved LEED® designation in 2003. The Portland Center for the Performing Arts (PCPA) has been a cultural nexus for the region, strengthened its financial structure and made substantial renovations and infrastructure improvements to enhance the customer experience. The Portland Expo Center (Expo) is the region's hub for consumer shows and events. Through effective marketing and management, it covers its operating costs and debt service without any public funding support. Collectively, MERC venues serve over two million visitors every year at more than 1,000 performances and events.

The next five years hold many opportunities and certain challenges. Portland needs a convention headquarters hotel to fully realize the economic benefits from the expanded Oregon Convention Center and keep Portland viable as a preferred convention destination. MERC has an important role to play in shaping the vision, dialogue, and planning to address the future needs of public assembly venues development and management in this community. It is essential to secure sustainable funding to maintain and preserve public venue infrastructure and develop new facilities to meet our region's needs for quality performance, consumer trade, public event and entertainment venues. This will help keep Portland a vibrant region, promote tourism, and support a healthy economy.

The plan is a unified vision that harnesses the ideas and expertise we gathered through an extensive stakeholder engagement process with employees, community and business leaders, and industry partners. At the same time, it recognizes the unique qualities and needs of each MERC venue. By strengthening relationships, building coalitions, employing creativity and innovation, wisely managing resources, and harnessing the talent and power of our workforce, we will create workable solutions to regional challenges and make the most of the opportunities ahead.

## Governance

The Metropolitan Exposition Recreation Commission is an enterprise-driven public venue management agency charged with managing regional trade, convention and entertainment facilities in an effective, independent, entrepreneurial and accountable manner.

MERC is a subsidiary of the Metro regional government. MERC is governed by a seven-member citizen commission whose members are appointed by the Metro Council president and approved by the Metro Council. Commission members serve as representatives of the city of Portland and Washington, Clackamas and Multnomah counties. The commission appoints the MERC general manager, who is accountable to the commission for leadership and management of the agency.

MERC manages the Oregon Convention Center, the Portland Center for the Performing Arts and the Portland Metropolitan Exposition Center. MERC is supported primarily through its own operations and tax subsidies from the lodging and tourism industry and receives no property tax support for operations. More than 74% of MERC's funding is generated by its enterprise businesses from fees and services for facility rentals, event services, parking and food and catering operations. The remainder is from lodging industry taxes, government contributions and investments.

## Business Climate

The last two years have been marked by strong business growth as the meeting, hospitality, consumer trade and entertainment industries recovered from the nation's recession of 2000-03. Just as we were poised to open and market the expanded Oregon Convention Center, MERC and many other tourism and related facilities across the country were confronted with the recession and a subsequent downturn in revenues. Since then, OCC and PCPA have experienced major revenue increases while the consumer show business at Expo is experiencing more modest growth.

## Planning Process

This plan evolved over time to encompass new and innovative ideas as well as reinforce practices that have proved successful and should be continued and enhanced. It was developed with extensive participation from our employees and stakeholders.

The process was inaugurated with MERC Day, a full-day workshop attended by key employees from throughout the agency that expressed enthusiasm for the opportunity to share ideas with others in the organization. Many productive suggestions from this

workshop became the first stepping stones of the plan. In addition, all employees were asked to complete a questionnaire, and a separate questionnaire was distributed to our customers.

In further outreach, our consultants interviewed business and political leaders in the community, including MERC commissioners and Metro council members and staff. Meetings also were held with advisory or stakeholder groups for each venue and with key venue managers and administrators and the MERC management team. The thoughtful remarks and suggestions that we received were considered as the plan developed.

## Strategic Business Priorities

This forward-thinking framework for the future was undertaken with extensive dialogue and conversations with many key stakeholders regarding the future direction of this agency, its priorities, and how best to marshal its resources and community goodwill to meet the opportunities and challenges ahead. From these discussions emerged top priorities and findings around which this business plan is focused.

*Leadership and Expertise.* Administrators of MERC venues are recognized by their peers as leaders in their field. They hold office in national organizations and are frequently sought out for advice and counsel. They serve on community boards and committees dedicated to the enhancement of the region's vitality and livability for its citizens and visitors. Through Metro, MERC is a key player in the drive to secure a headquarters hotel close to the Oregon Convention Center. We will continue to expertly manage our venues to create the ultimate customer experience.

*Organizational Synergy.* In recognition that the whole is greater than the sum of its parts, MERC is dedicated to bringing together the expertise of staff in all its venues to take advantage of organizational efficiencies. This allows MERC to coordinate its energy toward the good of the whole organization.

*Technology.* We will stay abreast of innovations that positively influence our operational and business effectiveness. Emerging technologies allow us to be more responsive to the needs of our customers and attendees and do our work more efficiently. We will commit resources to obtain and integrate new technology and train our employees to ensure its maximum utilization.

*Communication with Stakeholders.* It is vital that MERC build greater awareness among stakeholders and the public about the value and benefits of conventions, tradeshow and performance arts on the economy and livability of the region. Educating the public about the necessity of subsidizing these public venues as a critical component of the quality of life in this community is an ongoing responsibility.

*Capital Renovation and Development.* This will continue to be a priority. MERC doubled the capacity of the Oregon Convention Center, a \$116 million expansion completed on time and within budget, with the full support of the lodging industry. To fully realize the economic potential of this venue and keep Portland competitive as a convention city of choice, Portland must secure a convention headquarters hotel. Replacing the remaining obsolete exhibit halls with modern facilities at the Portland Expo Center, the largest consumer show complex on the West Coast, is essential to meeting changing client needs and demands. New performance technology and changing audience demographics challenge PCPA to renovate its facilities to meet contemporary expectations and increase the comfort of patrons and performers.

*Marketing and Sales.* Marketing and sales are the lifeblood of MERC as an enterprise-focused, event-driven agency. Staying competitive and retaining market share is essential. We will collaborate among our venues to reach our optimum potential to keep and attract customers and seek opportunities to generate new business for each. We will consider new and innovative marketing and branding opportunities.

*Effective Workforce Development and Management Practices.* Engaging our workforce as business partners and harnessing the knowledge, skills, talents, and motivation of employees is essential. We will continually invest and promote technical competency and professional development to achieve performance excellence while retaining and enhancing our reputation for industry leadership and excellent customer service.

*Secure a Sustainable, Diversified Funding Structure.* Long term financial stability is essential to preserving the integrity and growth of MERC and its venues. We must seek to maintain strategic fund balances to weather economic cycles. We will pursue enterprise revenue growth and maximize return on investments. We seek to secure appropriate public investments in MERC venues, including development of a headquarters hotel.

## The Plan

This strategic business plan will chart MERC's course for the next five years and beyond. It is ambitious yet practical and achievable. The plan is comprised of a vision, mission, new agency values, five over-arching goals and relevant strategies. It differs from the previous plan as it also contains measurements to chart success. A companion 18-month Implementation Plan assigns responsibilities for actions and outcomes beginning January, 2007. The program will be reviewed annually, with changes made to ensure MERC's effectiveness.



## **Vision**

To be the acknowledged leader in public assembly venue management in the region.

## **Mission**

To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly venues.

## **MERC Values**

### *Respect*

We embrace diversity within our workplace and our community. Employees, customers and guests are treated with care and appreciation. We promote an atmosphere of equality and personal integrity and seek to understand the perspective of others. We strive for a culture supported by honesty and trust. Above all, we demonstrate respect for each other.

### *Excellence*

We aspire to achieve exceptional results and do not compromise quality. We practice continuous improvement and reflect on how we can improve in the future. We face problems head on and focus on finding the best solutions. Our goal is to meet or exceed the expectations of our customers. We promote employee development and encourage them to be their best.

### *Teamwork*

Teamwork forms the essence of our work environment. Through collaboration and commitment to common goals, we achieve greater outcomes. We value positive relationships and nurture them with cooperation and honest communication. Individually, we contribute to the greater whole by being dependable and accountable for our actions. We have fun and enjoy one another!

### *Innovation*

We understand the importance of taking appropriate risks and learning from our successes and setbacks. We encourage flexibility and embrace creativity and new ideas. We respond mindfully when challenges come our way and address obstacles with ingenuity. We are adaptable and strategic in the face of change. We serve our customers better as a result of anticipating and solving problems.

### ***Community***

MERC plays an important role in the economic and cultural vitality of the region. We build strong relationships, alliances and partnerships in the community to better serve our citizens and visitors. We generously share our expertise and wisdom to promote community enhancement and development. We strive to make a positive difference through leadership and by taking action.

### **Strategic Business Goals**

1. Maximize the positive impact of MERC venues on the economy and livability of the region.
2. Exert leadership to ensure construction of a convention headquarters hotel at the Oregon Convention Center.
3. Expertly manage world class public assembly venues.
4. Effectively communicate MERC's role and value.
5. Engage employees in creating an exceptional workplace.

## Strategies and Measures

**Goal 1: Maximize the positive impact of MERC venues on the economy and livability of the region.**

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STRATEGIES	MEASURES
1. Provide leadership and expertise to guide public assembly venue development and management.	<ul style="list-style-type: none"><li>• Develop advocacy plan</li><li>• Create Board development plan</li><li>• Leadership in regional venue planning and decision-making</li></ul>
2. Strengthen relationships and build alliances with community and business partners.	<ul style="list-style-type: none"><li>• Leadership on boards and committees</li><li>• Partnerships with hospitality, cultural and tourism industry organizations</li><li>• MERC's expertise is recognized and valued</li></ul>
3. Promote opportunities for small, minority, women-owned and emerging businesses to provide services and products to MERC.	<ul style="list-style-type: none"><li>• Purchasing benchmarks</li><li>• Contracts with businesses</li></ul>

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**Goal 2: Exert leadership to ensure construction of a convention headquarters hotel at the Oregon Convention Center.**

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STRATEGIES	MEASURES
1. Transfer ownership of the headquarters hotel project from Portland Development Commission to Metro/MERC.	<ul style="list-style-type: none"><li>• Metro accepts the developer chosen by the PDC selection committee</li><li>• Predevelopment agreements in place</li></ul>
2. Develop a financing plan and secure funding for construction of a publicly owned convention hotel.	<ul style="list-style-type: none"><li>• Financing plan approved</li><li>• Construction bonds issued</li></ul>
3. Determine the organizational structure to manage and operate the hotel.	<ul style="list-style-type: none"><li>• Management structure and entity selected</li></ul>
4. Build and open a first class convention headquarters hotel.	<ul style="list-style-type: none"><li>• Convention quality hotel built on time and within budget</li></ul>
5. Advocate for implementation of OCC Blocks Vision Plan	<ul style="list-style-type: none"><li>• City approval of OCC Blocks Vision Plan</li></ul>

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**Goal 3: Expertly manage world class public assembly venues.**

STRATEGIES	MEASURES
1. Deliver an exceptional customer experience for customers and attendees.	<ul style="list-style-type: none"> <li>• Percentage of repeat clients</li> <li>• Customer service surveys</li> <li>• Industry awards</li> </ul>
2. Effectively market and sell MERC venues and services.	<ul style="list-style-type: none"> <li>• Number of new clients and events</li> <li>• Increased lead/conversion rate</li> <li>• Collaborative marketing approaches</li> <li>• Strong national marketing results</li> <li>• Increased net revenue</li> </ul>
3. Upgrade and maintain existing facilities.	<ul style="list-style-type: none"> <li>• State-of-the-art venues</li> <li>• Venues meet or exceed customer requirements</li> </ul>
4. Optimize operational efficiencies and effectiveness.	<ul style="list-style-type: none"> <li>• Increased profitability per event</li> <li>• Improved procurement processes</li> <li>• Cross-venue efficiencies implemented</li> <li>• EBMS optimization</li> <li>• Technology plan developed</li> </ul>
5. Attain and maintain sustainable, diversified funding.	<ul style="list-style-type: none"> <li>• Strategic fund balance maintained</li> <li>• Innovative programs and projects funded</li> </ul>
6. Incorporate sustainable practices into all aspects of the organization.	<ul style="list-style-type: none"> <li>• LEED® certification where appropriate</li> <li>• Green purchasing results</li> <li>• Recycling recovery rates</li> </ul>
7. Prepare to respond to disasters, crises and major emergencies.	<ul style="list-style-type: none"> <li>• Develop and update disaster plans</li> <li>• Develop and implement crisis communications plan</li> <li>• Develop business continuity plan</li> <li>• Collaborate and train with regional disaster planning agencies</li> </ul>

**Goal 4: Effectively communicate MERC's role and value.**

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<b>STRATEGIES</b>	<b>MEASURES</b>
1. Document the value MERC provides to the region.	<ul style="list-style-type: none"><li>• Economic impact reports for all venues</li><li>• MERC annual report</li></ul>
2. Clarify MERC identity.	<ul style="list-style-type: none"><li>• Brand evaluation process implemented</li><li>• Graphic identity goals and standards</li></ul>
3. Promote greater awareness about MERC's role and value.	<ul style="list-style-type: none"><li>• Sufficient resources allocated</li><li>• Communication plan developed</li><li>• Staff and Commissioners represent MERC effectively</li><li>• Annual communications audit</li></ul>
4. Keep government, industry, business and community partners informed.	<ul style="list-style-type: none"><li>• Focused outreach activities increased</li></ul>

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**Goal 5. Engage employees in creating an exceptional workplace.**

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<b>STRATEGIES</b>	<b>MEASURES</b>
1. Hire and retain a motivated workforce committed to MERC values.	<ul style="list-style-type: none"><li>• Competitive salaries and benefits</li><li>• Voluntary employee turnover</li><li>• Consistent employee recognition system</li><li>• Demonstrated collaboration among workgroups and venues</li></ul>
2. Employees demonstrate performance excellence.	<ul style="list-style-type: none"><li>• Annual facility evaluations</li><li>• Internal customer service surveys</li><li>• Revenue indicators per employee</li><li>• Performance management systems</li></ul>
3. Institute formal and informal training for all employees.	<ul style="list-style-type: none"><li>• Hours of training per employee</li><li>• Networks to share expertise across venues and workgroups</li></ul>
4. Encourage open, two-way communications.	<ul style="list-style-type: none"><li>• Roles and responsibilities defined and communicated</li><li>• Internal communication plan developed and implemented</li><li>• Program for regular employee input and feedback established</li><li>• Intranet for employee communications</li></ul>

Communication

Energy

Leadership

METROPOLITAN EXPOSITION RECREATION COMMISSION

STRATEGIC BUSINESS PLAN  
2007–2012

*Implementation Plan*



# Implementation Plan

The following 18-month Implementation Plan will take effect in January, 2007. The Plan summarizes the strategic business goals and strategies previously listed and includes short-term implementing actions designed to achieve desired outcomes. The Plan also identifies parties responsible for each action item. This Implementation Plan will be reviewed on an annual basis beginning in June, 2008.

## Key to Abbreviations:

Admin – Administration

Commission – Commissioners

Expo – Portland Metropolitan Exposition Center

Metro - Metro

OCC – Oregon Convention Center

PCPA – Portland Center for the Performing Arts

Venues – Expo, OCC, PCPA

### GOAL 1: MAXIMIZE THE POSITIVE IMPACT OF MERC VENUES ON THE ECONOMY AND LIVABILITY OF THE REGION.

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 1. Exert leadership to strengthen MERC's impact on public assembly venue development and management.</b>	
Action 1. Create board development plan to strengthen the Commission's leadership capacity.	Commission/Admin
Action 2: Provide leadership in research and planning for regional public venue development.	Commission/Admin/Venues
Action 3. Champion public venue development activities that provide regional benefit .	Commission/Admin/Venues
Action 4: Develop and implement an advocacy plan that supports MERC priorities.	Commission/Admin/Venues
Action 5: Evaluate and strengthen capacity of venue advisory committees to be effective advocates.	Admin/Venues
Action 6: Serve as consultants and advisors for best practices of public assembly venue management.	Admin/Venues
Action 7: Increase participation in industry and professional associations.	Admin/Venues
Action 8: Support the efforts of Friends groups to advocate for PCPA.	PCPA

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 2. Strengthen relationships and build alliances with business and community partners.</b>	
Action 1: Increase outreach activities with targeted business and community groups.	Commission/Admin/Venues
Action 2: Seek leadership roles in business and community organizations.	Commission/Admin/Venues
Action 3: Participate in local, regional and state coalitions and commissions.	Commission/Admin/Venues
Action 4. Conduct regular briefings with government, business and industry stakeholders.	Commission
<b>Strategy 3. Promote opportunities for small, minority, women-owned and emerging businesses to provide services and products.</b>	
Action 1: Promote certified business opportunity purchasing program.	Admin
Action 2: Attend business contracting tradeshow.	Commission/Admin/Venues
Action 3: Track and report purchasing and contracting results with M/W/S/B/E businesses.	Admin

**GOAL 2: EXERT LEADERSHIP TO ENSURE CONSTRUCTION OF A CONVENTION HEADQUARTERS HOTEL AT THE OREGON CONVENTION CENTER.**

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 1. Transfer leadership of the convention headquarters hotel project from Portland Development Commission to Metro.</b>	
Action 1. Secure Metro acceptance of PDC's developer selection process and recommendations.	Commission
Action 2. Assist Metro with public engagement process.	Admin
Action 3. Manage predevelopment activities.	Admin
Action 4. Facilitate creation of development and disposition agreement between Metro and the development team.	Commission/Admin/OCC
<b>Strategy 2. Develop a financing plan and secure funding for construction of a publicly owned convention hotel.</b>	
Action 1. Conduct a comprehensive financial model study.	Metro/Admin/OCC

Action 2. Develop and secure approval for financial model. Metro/Admin/OCC

Action 3. Secure commitments from funding partners. Metro/Admin/OCC

Action 4. Complete due diligence work for bond issuance. Metro/Admin/OCC

**Strategy 3. Determine the organizational structure to manage and operate the hotel.**

Action 1. Evaluate appropriate ownership and management structures. Metro/Admin/OCC

Action 2. Determine ownership and management entities. Metro/Admin/OCC

**Strategy 4. Construct and open a first class convention hotel adjacent to the Oregon Convention Center.**

Action 1. Develop construction project management team. Metro/Admin

**Strategy 5. Advocate for implementation of OCC Blocks Vision Plan.**

Action 1. Develop advocacy plan with partners. OCC

**GOAL 3: EXPERTLY MANAGE WORLD CLASS PUBLIC ASSEMBLY VENUES.**

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 1. Deliver an exceptional customer experience for customers and attendees.</b>	
Action 1: Develop valued-based customer service standards.	Admin/Venues
Action 2: Provide a well-trained, professional and responsive staff.	Admin/Venues
Action 3: Improve quality and usability of client customer survey process.	Venues
Action 4: Consistently demonstrate appreciation of customers and clients.	Admin/Venues
Action 5: Evaluate event support service to increase effectiveness and enhance customer satisfaction.	PCPA
Action 6: Deliver enhanced services and streamlined business processes to meet customer needs.	Admin/Venues
<b>Strategy 2. Effectively market and sell MERC venues and services.</b>	
Action 1: Upgrade web sites to enhance marketing and sales capacity.	Admin/Venues
Action 2: Work with POVA to align goals and sales activities to maximize national marketing and selling results.	Commission/Admin/Venues
Action 3: Secure adequate funding for national sales and marketing.	Commission/OCC

STRATEGY/ACTION	RESPONSIBILITY
Action 4: Consistently monitor and report on industry trends and research.	Admin/Venues
Action 5: Develop an integrated sales approach and event relocation plan.	Expo/OCC
Action 6: Refocus marketing resources to relationship building program.	Expo/PCPA
Action 7: Reorganize sales and events staffing and resources to enhance sales capacity.	Expo
Action 8: Build collaborative forum with local tourism and hospitality businesses to promote the Delta Park area.	Commission/Expo
Action 9: Update five-year marketing plan that includes cross marketing of MERC venues.	OCC
Action 10: Increase funding for local marketing and sales activities to increase bookings for non-convention dates.	OCC
<b>Strategy 3. Upgrade and maintain existing facilities.</b>	
Action 1: Create capital improvement plans to enhance operational capacity and efficiencies.	Admin/Venues
Action 2: Develop strategies to optimize use of existing space.	Admin/Venues
Action 3: Invest in facility improvements to enhance customer and attendee experience.	Venues
Action 4: Secure funding and implement external way-finding enhancements.	Expo
Action 5: Implement landscaping improvements to reduce maintenance and support natural resource requirements.	Expo
<b>Strategy 4. Optimize business and operational efficiencies and effectiveness.</b>	
Action 1: Analyze staffing and volunteer resources to more effectively support mission and strategic business goals.	Admin/Venues
Action 2: Increase information technology and business systems knowledge and competency.	Admin/Venues
Action 3: Ensure operational readiness to expand public assembly venues management role.	Admin/Venues
Action 4: Create information exchanging process for best practices and technology use among peer facilities.	Admin/Venues
Action 5: Develop technology services, systems and management plan.	Admin
Action 6: Develop a central purchasing program for materials, supplies and equipment.	Admin

STRATEGY/ACTION	RESPONSIBILITY
Action 7: Improve integration of information management systems with operational processes.	Venues
Action 8: Develop white papers for Identify industry best practices and issues., develop white paper responses to issues and	OCC
Action 9: Enhance benchmark development, tracking and reporting.	Venues
<b>Strategy 5. Attain and maintain sustainable, diversified funding.</b>	
Action 1: Explore and advocate for new or enhanced public support.	Admin
Action 2: Explore and advocate for a balanced fiscal relationship with Metro.	Admin
Action 3: Establish long-term capital renewal and replacement reserve.	Admin/Venues
Action 4: Establish and maintain a strategic fund balance.	Admin/Venues
Action 5: Allocate MERC strategic funds for maximum value.	Admin
Action 6. Create and support innovative opportunities to generate net revenue, such as sponsorships and event promotion.	Admin/Venues
<b>Strategy 6. Incorporate sustainable practices into all aspects of the organization.</b>	
Action 1: Increase recycling and composting recovery rates.	Admin/Venues
Action 2: Increase use of recycled and environmentally sensitive products.	Admin/Venues
Action 3: Promote awareness of sustainable values and practices with clients and customers.	Admin/Venues
Action 4: Increase use of electronic documents to reduce paper use.	Admin/Venues
Action 5: Evaluate and implement ways to increase energy efficiency.	Admin/Venues
Action 6: Use capital projects as a catalyst to promote sustainable practices.	Admin/Venues
Action 7: Explore feasibility of using rainwater for non-drinking water needs.	Admin
Action 8: Make facility investments and operational changes to achieve LEED™ EB Silver level certification.	OCC
Action 9: Explore funding opportunities for LEED™ certification study.	PCPA
<b>Strategy 7. Prepare to respond to disasters and major crises.</b>	
Action 1: Update venue emergency and security plans and procedures.	Admin/Venues
Action 2: Conduct annual venue emergency management drills.	Admin/Venues

STRATEGY/ACTION	RESPONSIBILITY
Action 3: Participate in industry training and forums on facility emergency and security management.	Admin/Venues
Action 4: Participate in regional and national security and disaster planning efforts.	Admin/Venues
Action 5: Obtain current CPR/First Aid/AED certifications for all staff.	Admin/Venues
Action 6: Enhance the effectiveness of MERC safety committees.	Admin/Venues
Action 7: Develop an information technology disaster recovery plan.	Admin
Action 8: Develop crisis communications plan.	Admin

**GOAL 4: EFFECTIVELY COMMUNICATE MERC'S ROLE AND VALUE.**

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 1. Document the value MERC provides to the region.</b>	
Action 1: Conduct annual economic impact studies for MERC venues.	Admin/Venues
Action 2: Partner with other industry and community organizations conducting research.	Admin/Venues
Action 3: Publish a MERC annual report.	Admin
Action 4: Coordinate with POVA to report the benefits and impact of the hospitality/tourism/convention business on the region.	OCC
Action 5: Publish an annual OCC business and sustainability report.	OCC
<b>Strategy 2. Clarify MERC's identity.</b>	
Action 1: Develop a process to evaluate MERC's identity.	Admin/Commission
Action 2: Create agency graphic identity standards.	Admin
<b>Strategy 3. Promote greater awareness about MERC's role and value.</b>	
Action 1: Develop an integrated strategic communications plan.	Admin/Commission
Action 2: Create an employee communications plan and structure.	Admin/Venues
Action 3: Build the public affairs and communication program service capacity to effectively support strategic communication goals and priorities.	Admin
Action 4: Strengthen and expand media relationships.	Admin/Venues

STRATEGY/ACTION	RESPONSIBILITY
Action 5: Consistently produce quality information resources and materials showcasing expertise and feature news, issues and results.	Admin/Venues
Action 6: Enhance communication value of MERC's web sites.	Admin/Venues
Action 7: Develop and manage public relations strategies for MERC venues.	Admin/Venues
Action 8: Expand the role of the volunteer speakers' bureau.	PCPA
<b>Strategy 4. Keep government, industry, business and community partners informed.</b>	
Action 1: Develop outreach strategies to engage commissioners, employees, and advisory board members.	Commission/Admin/Venues
Action 2: Develop and maintain a key stakeholder contact database.	Admin/Venues
Action 3: Conduct regular briefings with government, business and industry stakeholders.	Commission/Admin/Venues
Action 4: Seek opportunities to engage in task forces, committees and other projects of interest.	Commission/Admin/Venues

**GOAL 5: ENGAGE EMPLOYEES IN CREATING AN EXCEPTIONAL WORKPLACE.**

STRATEGY/ACTION	RESPONSIBILITY
<b>Strategy 1. Hire and retain a motivated workforce committed to MERC Values.</b>	
Action 1: Develop and approve agency values.	Commission/Admin/Venues
Action 2: Educate employees about performance standards and expectations that support values driven-culture.	Admin
Action 3: Evaluate and enhance MERC's compensation program.	Admin
Action 4: Develop employee recruitment strategies and materials.	Admin
Action 5: Monitor turnover volume and conduct exit interviews and analysis.	Admin
Action 6: Conduct regular work force surveys.	Admin/Venues
<b>Strategy 2. Employees demonstrate performance excellence.</b>	
Action 1: Develop procedures for setting and clearly communicating expectations for performance.	Admin/Venues
Action 2: Develop policy and procedure guidelines for organizational standards of operations.	Admin/Venues

Action 3: Enhance and expand employee recognition programs.	Commission/Admin/Venues
Action 4: Develop procedures to provide consistent feedback.	Admin/Venues
<b>Strategy 3. Institute formal and informal training for all employees.</b>	
Action 1: Increase funding for professional development training.	Admin/Venues
Action 2: Develop an agency training needs assessment.	Admin/Venues
Action 3: Bring Metro training to MERC.	Admin/Venues
Action 4: Increase management/supervisor training to support values-driven culture.	Admin/Venues
Action 5: Develop criteria and metrics for successful training.	Admin/Venues
Action 6: Develop and implement employee orientation training.	Admin/Venues
Action 7: Develop a job shadowing program for professional development.	Admin/Venues
Action 8: Develop a continuous technology training program.	Admin/Venues
Action 9: Conduct a minimum of two all-staff retreats each year.	Admin/Venues
Action 10: Create means of sharing information about professional development opportunities within MERC.	Admin
Action 11: Establish intra-agency trainings and networking opportunities.	Admin
<b>Strategy 4. Encourage open, two-way communications.</b>	
Action 1: Involve employees in organizational planning.	Admin/Venues
Action 2: Build an environment that supports and recognizes collaboration between managers and employees.	Admin/Venues
Action 3: Actively participate in Metro initiatives and workforce committees.	Admin/Venues
Action 4: Develop employee intranet for MERC policies, procedures and business information.	Admin
Action 5: Communicate timelines, decision processes, and plans for developing and implementing new administrative policies, procedures, and information system changes.	Admin





# VISION

**To be the acknowledged leader in public assembly venue management in the region.**

# MISSION

**To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly venues.**

# VALUES

## *Respect*

We embrace diversity within our workplace and our community. Employees, customers and guests are treated with care and appreciation. We promote an atmosphere of equality and personal integrity and seek to understand the perspective of others. We strive for a culture supported by honesty and trust. Above all, we demonstrate respect for each other.

## *Excellence*

We aspire to achieve exceptional results and do not compromise quality. We practice continuous improvement and reflect on how we can improve in the future. We face problems head on and focus on finding the best solutions. Our goal is to meet or exceed the expectations of our customers. We promote employee development and encourage them to be their best.

## *Teamwork*

Teamwork forms the essence of our work environment. Through collaboration and commitment to common goals, we achieve greater outcomes. We value positive relationships and nurture them with cooperation and honest communication. Individually, we contribute to the greater whole by being dependable and accountable for our actions. We have fun and enjoy one another!

## *Innovation*

We understand the importance of taking appropriate risks and learning from our successes and setbacks. We encourage flexibility and embrace creativity and new ideas. We respond mindfully when challenges come our way and address obstacles with ingenuity. We are adaptable and strategic in the face of change. We serve our customers better as a result of anticipating and solving problems.

## *Community*

MERC plays an important role in the economic and cultural vitality of the region. We build strong relationships, alliances and partnerships in the community to better serve our citizens and visitors. We generously share our expertise and wisdom to promote community enhancement and development. We strive to make a positive difference through leadership and by taking action.