Strategic Plan for the Louisville Zoo

theZOO LOUISVILLE

Mission: Better the bond between people and our planet.

Vision: To be the region's leading zoological and botanical resource for conservation, education and scientific study and the top choice for quality family fun.

City Values: Life-Long Learning, Compassion and Health

Fischer Team Values: Integrity and Transparency, Trust and Respect for All, Teamwork and Partnerships, Improvement and Innovation, Positive People Living to Full Potential in a Healthy and Resilient Community, Sense of Urgency

Themes: Our strategic topics of focus

Theme	Definition
Guest Experience	Refers to the attractions, events, rides and activities relating to providing a transformational guest experience.
Business Model	Refers to how the Zoo operates and includes but is not limited to funding, governance, attendance, new attractions, business intelligence tools, data collection and more. The Zoo would like to implement creative strategies for underserved youth.
Collections & Animal Welfare	Refers to the core business of the zoo and all work involved in animal welfare and botanical attractions.
Marketing and Communications	Refers to the communications, marketing, digital media, statewide outreach for new and return visitors and other forms of public advocacy.
Facilities / Master Plan	Refers to the facilities operated by the Zoo and the Zoo's Master Plan, the Zoo's business plan and plan for overall campus physical development. New construction, safety (patron, animal and employee) and sustainability are included in this theme.
Conservation and Education	Refers to all work relating to helping the public understand wildlife and the need to conserve places where animals live.
Engaged Staff & Winning Culture	Every employee should thrive and be engaged in a winning culture. This theme refers to all activities relating to workforce engagement and the Zoo's ability to strengthen its culture of excellence. The Zoo has developed a culture of strong staff engagement; yet the Zoo desires to take employee engagement to the next level.

Zoo Goals:

Goal 1: Increase Attendance to 1 Million Visitors Per Year by FY2020

Goal 2: Increase the Membership Renewal Rate from the Baseline to Target (TBD)

Goal 3: Increase Underserved Youth by 30% with Fieldtrip and Outreach Programs

Goal 4: Provide Animal Welfare Training for all Staff

Goal 5: Increase Awareness of the Zoo's Brand Pillars Statewide within Select Counties by 10% among Families and Students in Three Years

Goal 6: Increase Major Donors Who Give $500 or More to the Zoo by %100 before December 2019

Goal 7: Increase Informal Education to Guests

Goal 8: Increase Employee Engagement Such that 85% of Employees have an Employee Engagement Score of 3.5 out of 5 by 2019

Goal 9: Every Employee Spends a Minimum of Five Hours Per Year in Conversation Programs by the End of 2019

Goal 10: Achieve 80% of Planned Maintenance and Reduce the Deferred Maintenance Backlog by $2.7M for High Priority Projects

Updated 1/6/18

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Strategic Work Table (How the goal is accomplished)

Goal 1: Increase Attendance to 1 Million Visitors Per Year by FY2020

Goal Owner: Stephanie Moore

What	Who	Why	When	Check-Step	Resources Needed
Implement the Master Plan	John	Patrons want to see new attractions	In progress / need $80 Million by 2022	$79 million by 2022	$80 Million
Implement The Business Plan	Stephanie	To produce good numbers	In progress	Annual surplus	TBD
Determine the Audience Makeup	Maureen, Kelly, Stephanie and Kim	To direct planning efforts	End of February 2018	Final target of audience makeup	None
Get Good Data	Stephanie	Need to make good decisions	In progress	Confidence in data	TBD
Analyze Business Metrics	Stephanie or Aaron Jackson (OMB)	Need real time insights	Daily (pre-budget)	Dashboard	TBD
Create Engagement Marketing Plan	Maureen, Kim and others	Reach target audiences	Post-February	Increased attendance	TBD

Goal 2: Increase the Membership Renewal Rate from the Baseline to Target (TBD)

Goal Owner: Maureen Horrigan

What	Who	Why	When	Check-Step	Resources Needed
Confirm Current Renewal Rate	Membership supervisor	Establish baseline	By Feb 1, 2018	% rate	None
Survey Members	Membership supervisor and marketing director	Target goal	By Feb 28, 2018 (budget FY19)	% rate annually	None
Research Best Practices	Membership supervisor	Efficient, effective	By Feb 15, 2018	Potential strategies	None
Determine Strategies for FY19-20 and Plan	Membership supervisor and marketing director	Clear direction	By Feb 20, 2018	Completed strategy	None
Develop Detailed Plans and Budgets	Same as above	Clear marching orders for team	By Feb 28, 2018 (budget FY19)	Detailed plan	None

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Goal 3: Increase Underserved Youth by 30% with Fieldtrip and Outreach Programs
Goal Owner: Kim Allgeier

What	Who	Why	When	Check-Step	Resources Needed
Identify Underserved Audiences	Kim, John, Steve, Kelly	To be on the same page	30-60 days from 12/22/2017	Accepted definition	TBD
Inventory Current Programs and Identify % Population	Kim and team	To get baseline	3 months after identifying audience	An inventory	TBD
Create Plan for Access / Pathways	Kim, Kelly, Steve	To determine ways to get target audiences to show up	November 2018	Plan	TBD
Add or Remove Programs (implementation)	Kim	To meet the 30%, need	November 2018	New or refined list of programs	TBD
Market Critical Programs	Kim	To ensure participation	November 2018	Marketing plan	TBD

Goal 4: Provide Animal Welfare Training for all Staff
Goal Owner: Steve Taylor and Zoli Gyimesi

What	Who	Why	When	Check-Step	Resources Needed
Develop Training Plan	Steve / Zoli	Number one guest concern, AZA emphasis	June 2018	Dedicated time	None
Implement Plan	Steve / Zoli	To raise staff awareness and grow skill sets	December 2019	Dedicated time	None
Integrate into SOPs	Steve + Animal managers	To take best care of animal collection	December 2019	Dedicated time	None

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Goal 5: Increase Awareness of the Zoo's Brand Pillars Statewide within Select Counties by 10% among Families and Students in Three Years
Goal Owner: Maureen Horrigan

What	Who	Why	When	Check-Step	Resources Needed
Determine What Specifically We Want People to be More Aware of	Marketing & PR team, Ad agency, Education	Know focus, clear objectives	June 2018	Specific objective	TBD / time
Determine Target Audiences (Scope)	Marketing & PR team, Ad agency, Education	Clear research parameters and targets for message	June 2018	Target set	TBD / time
Establish Baseline Among Target Group (research)	Marketing & PR team, Ad agency, Education	Starting point	July 2018	Data	TBD
Develop Communications Plan with Associated Budget	Marketing & PR team, Ad agency, Education	Clear marching orders	June 2018	Working plan	TBD
Executive Plan	Marketing & PR team, Ad agency, Education	Increased awareness	2019 (50th Anniversary)	Increased awareness	Tools and travel, props / collateral, travel – state?

Goal 6: Increase Major Donors Who Give $500 or More to the Zoo by %100 before December 2019
Goal Owner: Kelly Grether

What	Who	Why	When	Check-Step	Resources Needed
Improve Communication Channels	Development Director and staff	Increase revenue	Quarterly	Annual Report and newsletter	$50,000-$100,000
Formalize Stewardship Plan	Executive Director, Development Director	Increase engagement and revenue	June 2018	Produce plan	None
Implement	Stewardship Manager	Increase engagement	December 2019	% of donors moving	$20k-$50k/year for

Stewardship Plan	(new)	and revenue		upward, giving level, retention rate	consultant, ~$50k/year for employee, $10,000/year for program
Cultivate New Donors	Development staff and leadership	Increase revenue	June 2019	# of new donors growth year over year	Shared costs

Goal 7: Increase Informal Education to Guests
Goal Owner: Kim Allgeier

What	Who	Why	When	Check-Step	Resources Needed
Increase Keeper Interactions	Steve	Personal interaction / animals for guests	March 2019	Schedule for facetime keeper talks with guests on set schedule	Staff time
Signage and Graphics	Charlie, Maureen	Update outdated info and look/appeal of new graphics	5 years	All graphics updated and replacement plan park-wide	TBD
Marketing / Media / Communications	Maureen, social media person	Mass distribution of Zoo message	?	Social media position	Data collection
General Staff Education to Ensure Zoo Message Gets Out Constantly	Stephanie, Steve	Consistent message and no misinformation	March 2019	Staff training program	Staff time
On Site Interpretation	Kim	To increase patron understanding, awareness and guest satisfaction	Spring 2018	Guest surveys	TBD

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Goal 8: Increase Employee Engagement Such that 85% of Employees have an Employee Engagement Score of 3.5 out of 5 by 2019

Goal Owner: Michele Whiteside

What	Who	Why	When	Check-Step	Resources Needed
Charter Culture Engagement Committee	Leadership team	Create baseline and new engagement questions that are deeper	July 1, 2018	New engagement survey	None
Create Clear Committee Goals and Accountability	Leadership team	Create a diverse grouping of EE's who want to improve the culture	September 30, 2018	Plan structure	None
Develop Communication Plan Internally	Michele (HR)	Informed employees can be happier employees	May 31, 2018	Plan	TBD
Increase Involvement	Michele (HR)	Higher employee morale, improve EE attitude	June 30, 2018	Greater job performance reflected	TBD
Engage Union	HR and leadership team	Potentially create better goodwill with Zoo	March 31, 2018	Building of better relationships with union and zoo	None

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Goal 9: Every Employee Spends a Minimum of Five Hours Per Year in Conversation Programs by the End of 2019

Goal Owner: Steve Taylor

What	Who	Why	When	Check-Step	Resources Needed
Join an effort to work 5 hours, help surveys	All staff	To engage in the mission	June 2019	Can we afford time?	$
Animal Program Leaders (80 hours per year)	Animal staff	To further species conservation, engage with AZA	June 2019	Can we afford time?	$10k?
Botanical Program Leaders (80 hours per year)	Botanical staff	To further species? further our efforts and brand	June 2019	Can we afford time?	$5k? and staff
Project Leaders (40 hours/year)	Sustainability leaders	To walk the talk and be a sustainability leader	June 2019	Can we afford time?	Less than $10k
With On-Site Component Projects (100 hours/year)	Internal grant recipients	Inspire front line conservation (all staff)	June 2019	We have the $	None

Goal 10: Achieve 80% of Planned Maintenance and Reduce the Deferred Maintenance Backlog by $2.7M for High Priority Projects

Goal Owner: Sean Woods

What	Who	Why	When	Check-Step	Resources Needed
Reduce Backlog of Deferred Maintenance	Leadership	Need to maintain what we have	Within 10 years	Budget, no backlog	$3M high priority $12M for portfolio
Develop Living Deferred Maintenance Budget	Sean	Quantify the need	July 2019	Plan	About $200,000
Develop Operation Plan	Sean	To take care of animals and maintain facility	Six months after backlog	Plan	None