

PLAN AHEAD

A Short Overview of the Planning Process

“The future is not some place we are going to, but one we are creating. The paths to it are not found but made, and the making of these pathways changes both the maker and the destination.”

Dr. Peter Ellyard “Commission for the Future”

What is a Planning Process?

- Planning is a dangerous journey into the future – not planning is even more dangerous!

- Master Plans are like road maps
 - Chart a hopeful, uncertain course
 - Planning is an adventure
 - The journey changes people and their plans

- Master Plans are *not* blueprints
 - Must be flexible, living guidelines
 - Self-correcting and evolving

Benefits of Planning

- Anticipate and shape future
- Prioritize actions
- Budget time and money
- Improve communication and integration
- Sell your agenda internally and externally
- Evaluate progress

Why do Plans Fail?

- Unrealistic and unachievable
- Superimposed from above
- No support from below
- Not “business-like”
- Planning paralysis
- Principal advocate leaves

When is Planning Needed?

- Tool of responsible management
- At times of major change
 - New leadership
 - New opportunities
 - New challenges
- Update plans on a regular schedule

What Type of Plan?

□ Physical Planning

- Land
- Structures
- Tangible assets
- Landscape
- Collections
- Phasing

□ Operational or Management Plan

- Communication
- Goals and objectives
- Resources vs. obligations
- Phasing
- Organizational structures
- Job descriptions
- Incentives

What Type of Plan?

□ Business/Strategic Plan

- Goals and objectives
- Assets versus liabilities
- Cash flow
- Market
- Return on investment

□ Comprehensive Plan

- Physical Plan
- Operation and Management Plan
- Business Plan

Stages of Planning

For all types of plans

- Vision Workshop
 - Create shared vision for next 10-20 years
- Inventory and Analysis
- Program Brief
- Concept Plan
 - 80% of decision making with 20% of the effort
 - Extensive but not intensive
 - Balanced
 - Action-oriented

Stages of Planning

For all types of plans

□ Master Plan Document

○ Introduction

- Summary of findings
- Set the scene, history, etc.

○ Visions, goals and objective

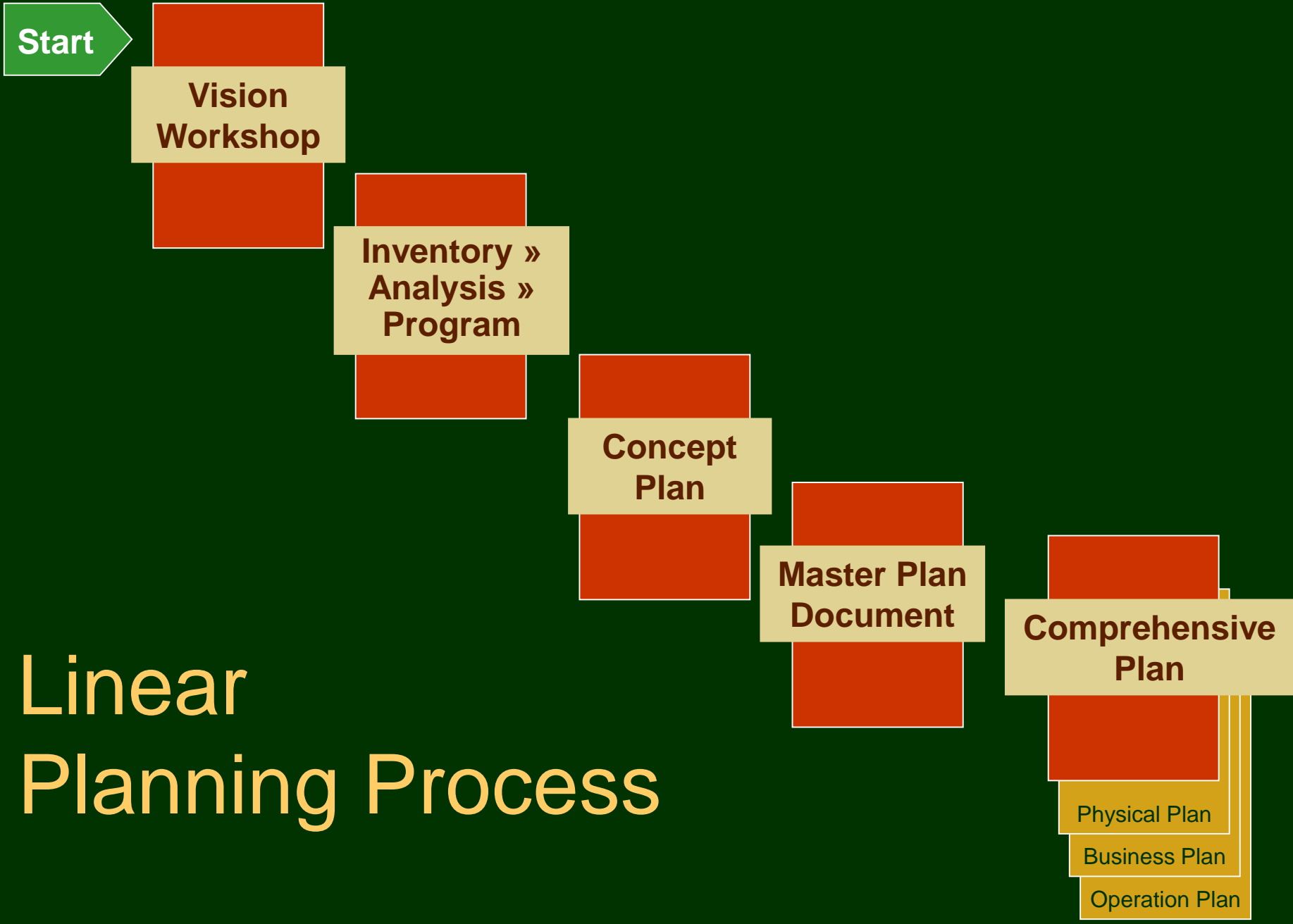
○ Plan elements and development guidelines

- Theme concept
- Circulation concept
- Exhibit concept
- Landscape concept
- Infrastructure concept
- Education and visitor experience
- Researches
- Conservation
- Operations
- Development, phasing, budgets

○ Appendix

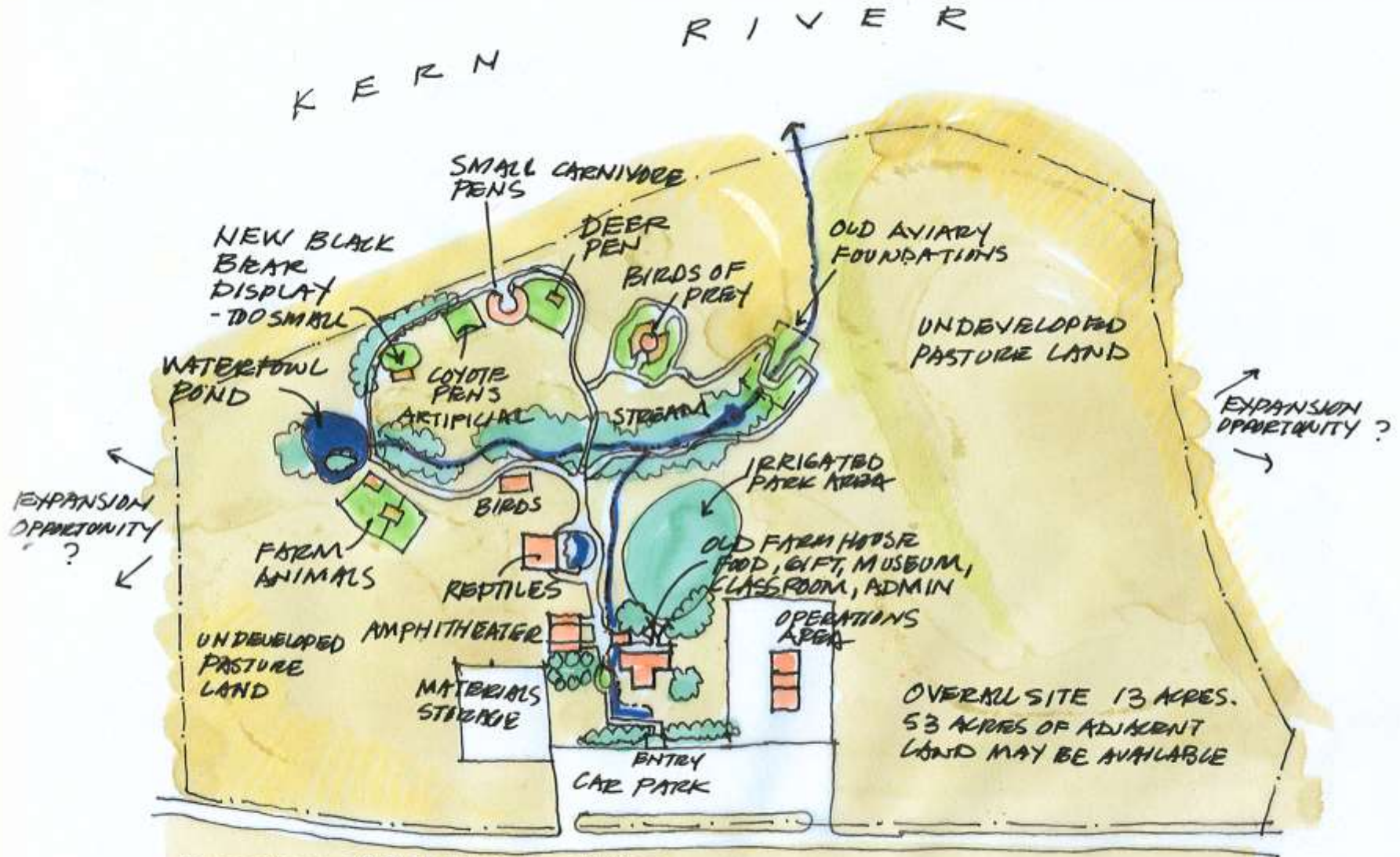
□ Comprehensive Plan combines:

- Physical Plan, Operation and Management Plan, Business Plan



Linear Planning Process

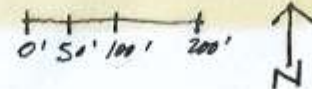
Typical Master Plans Stages



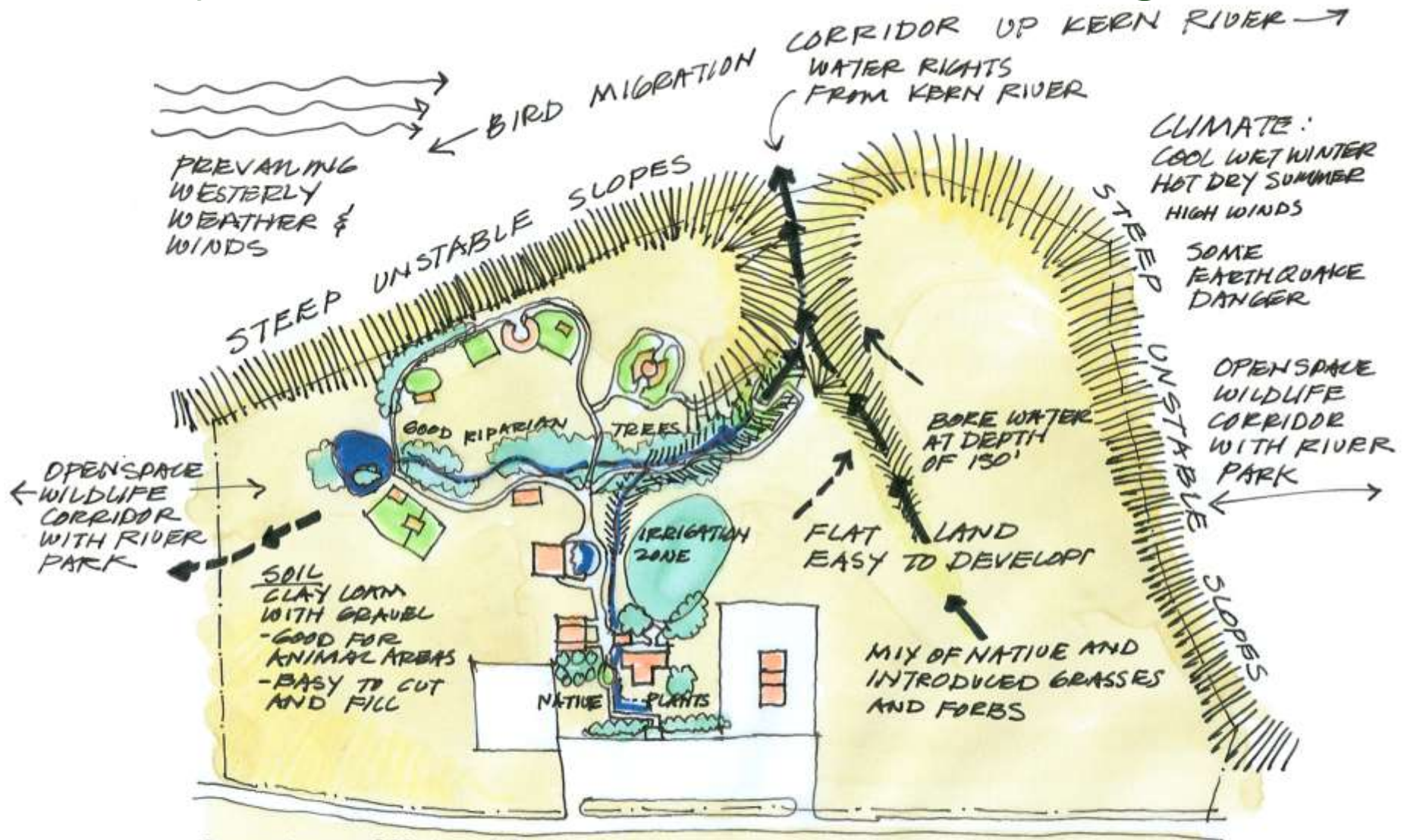
Inventory of Existing Facilities

California Living Museum
Bakersfield, California

Recreated from CLRdesign, inc. 1998 Master Plan



Typical Master Plans Stages

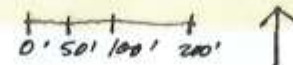


Inventory of Natural Systems

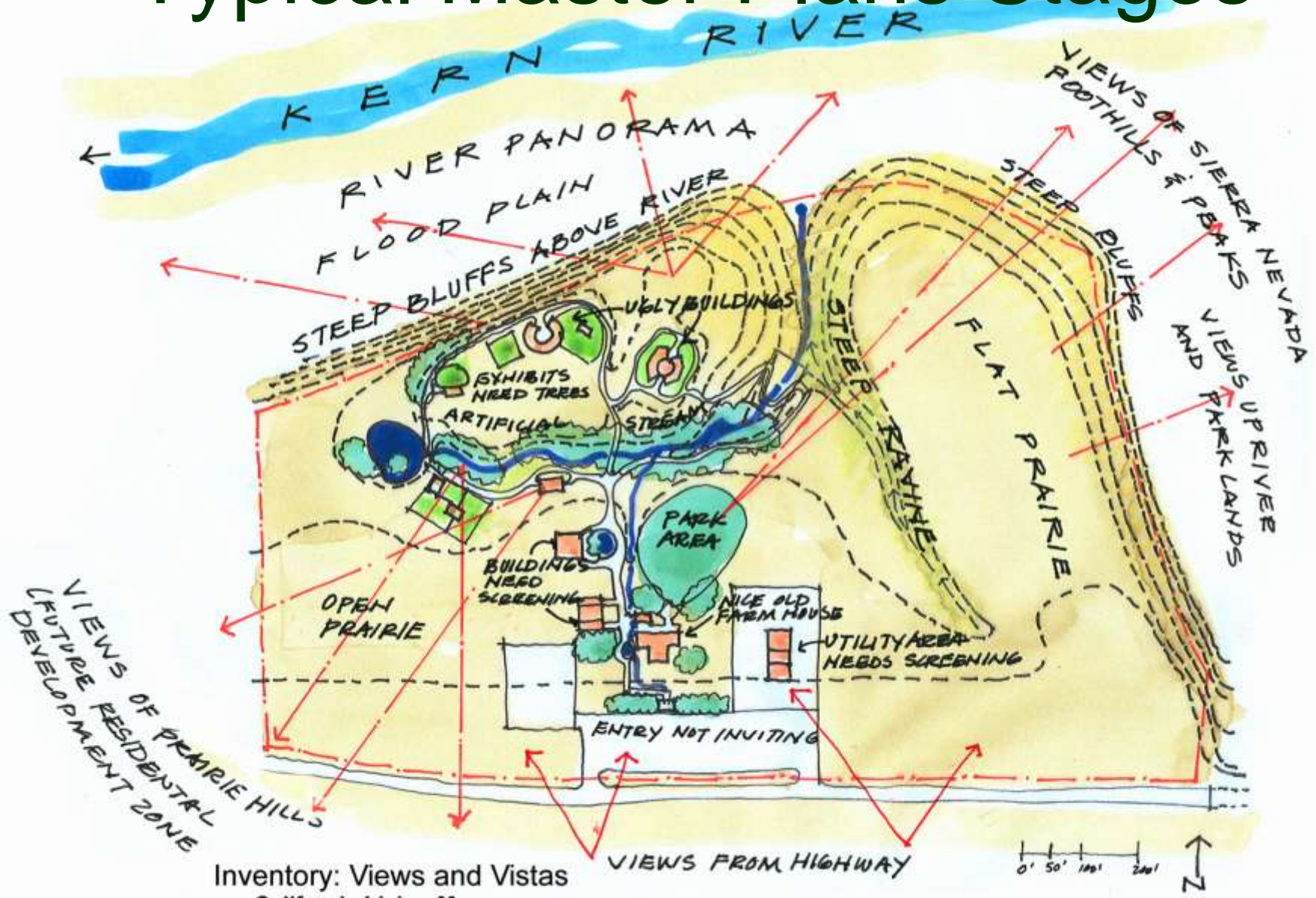
California Living Museum

Bakersfield, California

Recreated from CLRdesign, inc. 1998 Master Plan



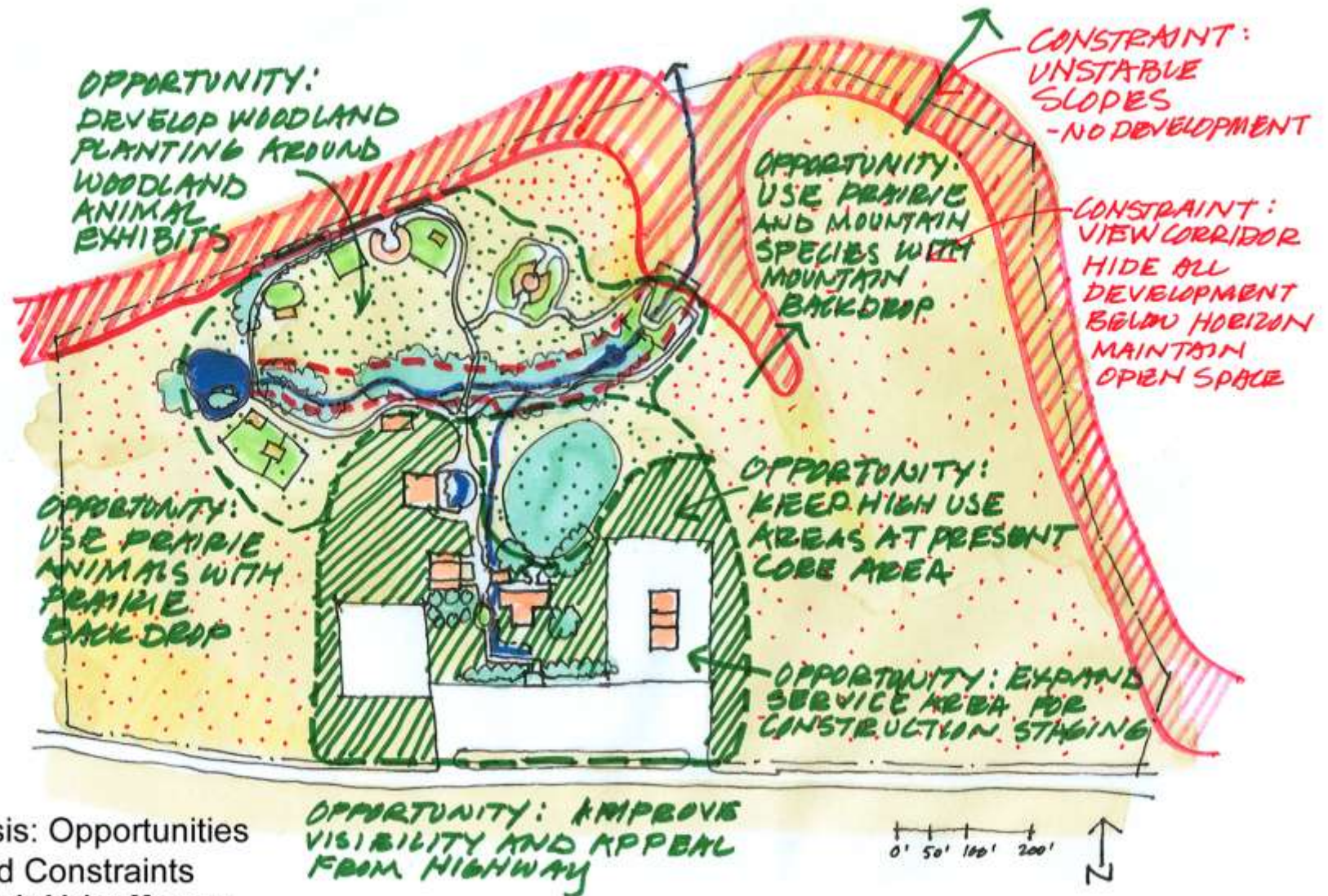
Typical Master Plans Stages



Inventory: Views and Vistas
California Living Museum

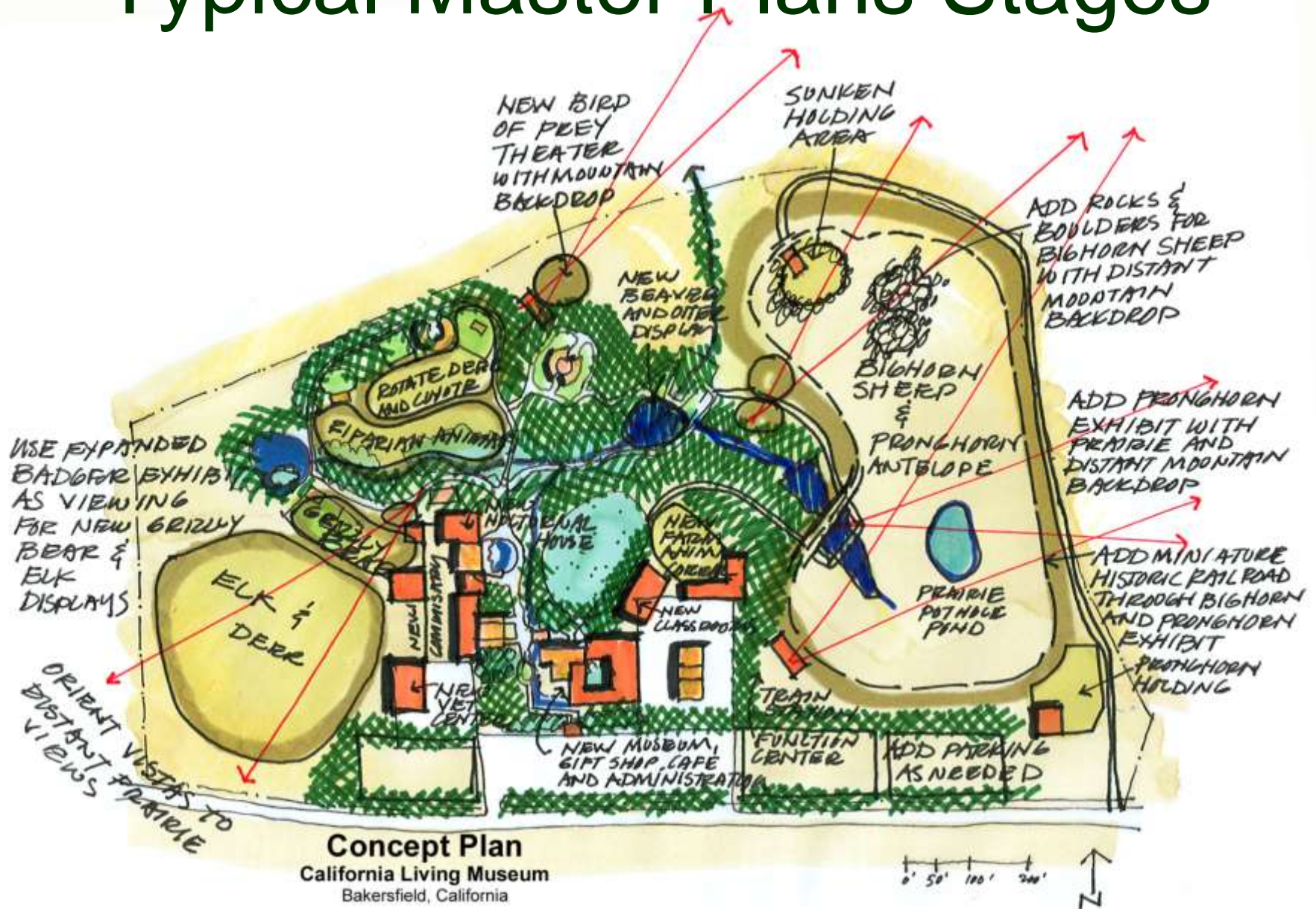
Bakersfield, California
Recreated from CLRdesign, inc. 1998 Master Plan

Typical Master Plans Stages



Analysis: Opportunities
and Constraints
California Living Museum
Bakersfield, California

Typical Master Plans Stages



Concept Plan
 California Living Museum
 Bakersfield, California

Typical Master Plans Stages

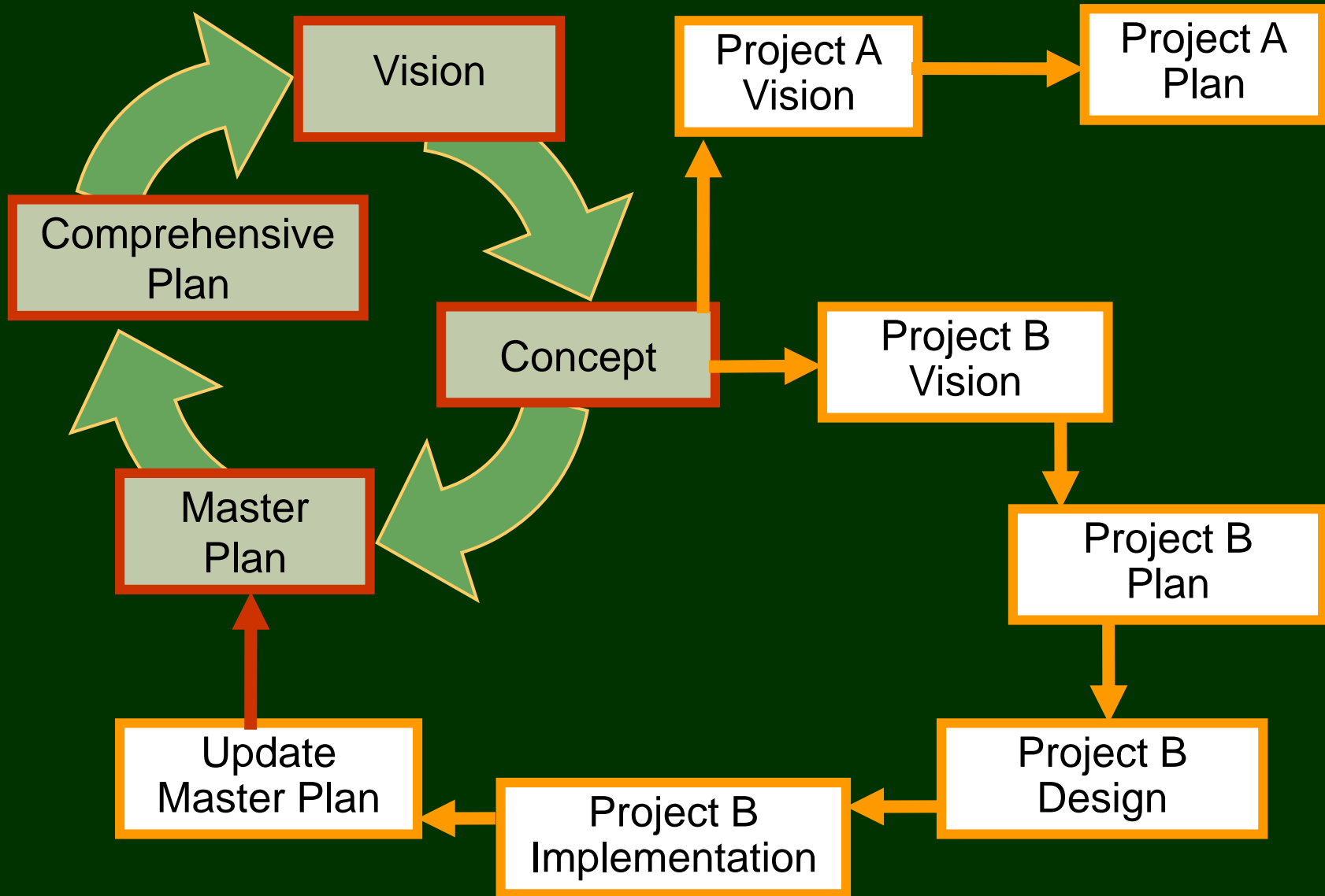


Illustrative Site Plan

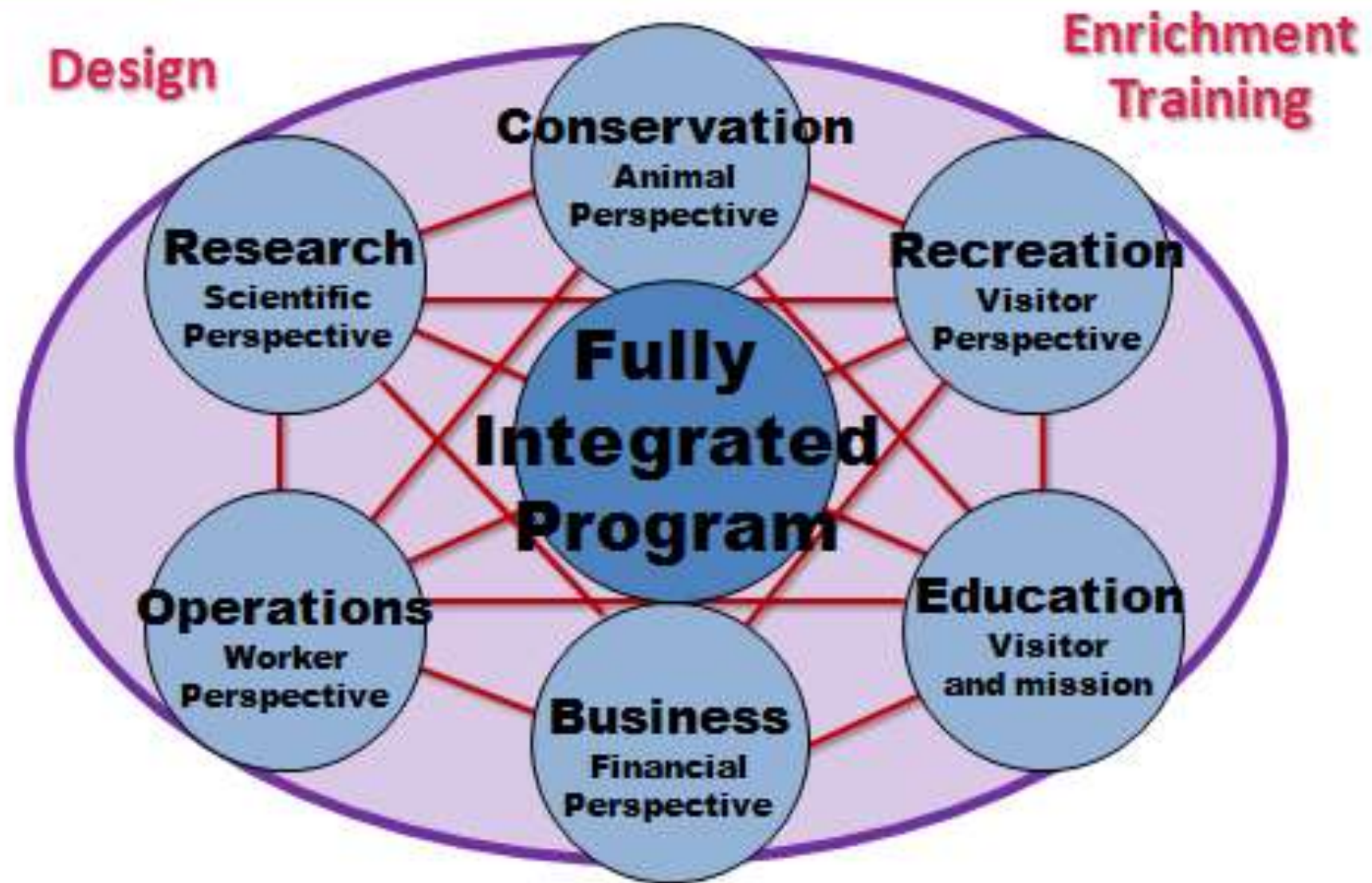
Typical Master Plans Stages



Actual Circular Process



Update: Six Objectives of Zoos



Draft FIP Outline

Greater One-Horned Rhinoceros Exhibit, Woodland Park Zoo, 2004

- Excellent Animal Care
 - Overview
- Outstanding Exhibit
 - Physical Environment
 - Research
 - Overview
- Effective Education
 - Needs Assessment
 - Overview
 - Space and function balances husbandry, operations, horticulture and education values.
- Meaningful Calls to Action
 - Formal, Informal Education and Informal Visitor Contacts
 - Supports aesthetics, educational and visitor service objectives.
 - Field Conservation
 - Actions directly supporting project
- Clear Links to Field Work
 - Overview
 - Metrics
- Efficient, Effective Operations
 - Overview
 - Metrics
 - Overview
 - Manage long-term operational costs
 - Accessibility
 - Space for zoo rental and functions.

In-House Planning Team

The value of a master plan is only as good as the constituency formed to support its implementation

- Reflect hierarchical organization chart
- Diverse representation – all major stake-holders
- Interactive, open process “workshop”

Planning Tips

- ❑ Success depends upon the quality of people involved
 - Staff, Consultants and Advisors
- ❑ Zoo must lead consultants, not vice versa
- ❑ Staff heavily engaged in planning should:
 - Receive special training
 - Be compensated for extra time put in or have some other staff take over some of their regular duties
- ❑ Zoo requires trained facilitator to keep things moving
- ❑ Planning efforts must be supported by management
- ❑ Need firm deadlines and milestones

Planning Tips

- ❑ Seek help from consultants, universities, etc. but do not give up leadership
- ❑ Think about sustainability
- ❑ Support your message
- ❑ Do not allow architecture to dominate animals or landscape
- ❑ See your zoo as others see it
- ❑ See your exhibits as the animals see them

Planning gives Good Value

However much you spend on planning, if it is good planning, it is good value:

- Planning typically costs 1% to 10% of the cost of a single major project
- Allows you to test ideas before building them
- Helps insure an orderly development process
- Saves costly mistakes
- Build support for fund-raising and project development

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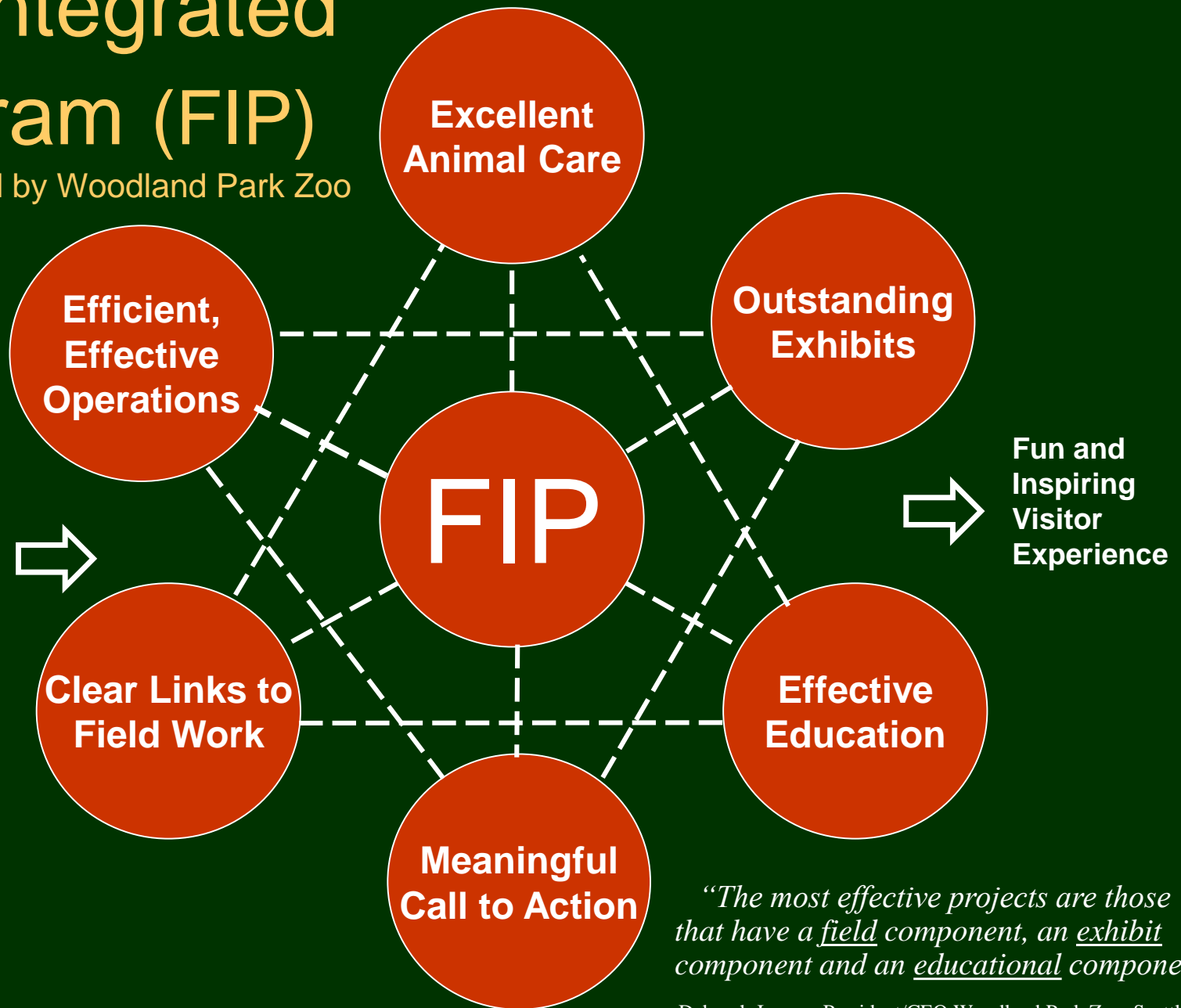
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Full Integrated Program (FIP)

as developed by Woodland Park Zoo



“The most effective projects are those that have a field component, an exhibit component and an educational component.”

Deborah Jenson, President/CEO Woodland Park Zoo, Seattle, USA