



## Strategic Plan – Vision 2020

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## Introduction

In July of 2017, employees and Board of Directors of World Bird Sanctuary began a strategic planning process to determine future goals and direction. This process was conducted in small and large group meetings with an emphasis placed on involvement by all.

The strategic planning process was difficult for World Bird Sanctuary, as the sanctuary experienced a great change cycle during the fall of 2017 through January of 2018. In addition to a change in directorship, the original company hired to create the strategic plan proved incapable of completing the project.

While this plan may have been more than a year in the making, all World Bird Sanctuary staff can take pride in the fact that every goal of this plan originated from meetings with all of the staff, whether in a group, or individually with the Executive Director or members of the Board of Directors.

## SMART goals

To help ensure success, World Bird Sanctuary has chosen to use SMART goals to aid the staff responsible for carrying out this plan. To have the greatest opportunity for success, each goal should be: Specific, measurable, attainable, realistic, and timely. These goals will be listed in the Action Plan segment of the Strategic Plan.

## Plan Design

The plan is divided into six different key areas: Flock, Nest, Mantle, Imprint, Defend and Soar

Each area has a guiding strategy statement. This strategy statement summarizes the essence of importance of the area as it relates to the sanctuary fulfilling its vision and mission statements.

Each area of the plan has been assigned a champion. It is the responsibility of the champion to provide oversight for the action plan of that area. Each champion will be evaluated annually during his or her annual performance review as to how well they are affecting the implementation of the plan.

Each area of the plan has an action plan that prioritizes SMART goals that the sanctuary needs to complete to fulfill the needs of the plan area. Ultimately, a tactical action plan will be created for each goal. The tactical plan will state a date for completion and will estimate a cost for implementing the goal. The budget summary for each area will project the total estimated budget impact to implement that goal for the current year and one year out, and any costs already identified in the operating budget of the sanctuary. For example, other budgets will have to be adjusted or other revenue sources identified to meet the plan objective.

## Evaluation Process

Plan progress will be reviewed monthly during sanctuary leadership team meetings. The plan, as a whole, will be reviewed by the WBS leadership team and Board of Directors on an annual basis. Detailed plan execution will be evaluated individually during annual performance reviews of the plan champions.

This plan is intended to be a living, working plan. During the annual review process, the plan will be updated in a way that reflects the progress of the sanctuary as it works towards fulfilling its vision.

# **The Strategic Planning Process**

**Research / Environmental Scan**

**Internal and External Consultation**

**Establishment of Key Issues and Strategic Direction**

**Strategic Directions Workshop**

**Plan and Evaluation**

**Presentation of Draft  
Strategic Plan Highlights to Staff and Board**

**Board Approval of Draft Plan**

**Champions Create Action Plans**

**Final Strategic Plan**

## Where have we come from?

It all began in 1977 when Marlin Perkins, renowned wildlife conservationist and educator, encouraged Walter Crawford to establish a raptor center. There, Crawford could realize his vision to impact wild raptor populations. There were growing concerns that many raptor species were endangered and might become extinct.

Initial efforts of the center, known as the Raptor Rehabilitation and Propagation Project, Inc (RRPP), focused solely on severely endangered raptors within Missouri. Gradually, its scope broadened to include endangered raptors worldwide. In its initial years, RRPP relied heavily on a small base of funding sources, primarily individuals. A frugal base of operations evolved over the years within the grounds of Washington University's Tyson Research Center. Eventually it grew to a full-time staff of 13 and a dedicated group of volunteers.

By 1987, ten years after its beginning, annual revenues were approximately \$350,000, a reserve fund had grown to over \$200,000, and RRPP was reaching over one million people each year through its environmental education and awareness programs. Restricted public access to the Tyson Research site was becoming a limiting factor to expanding RRPP's outreach.

At that point, having built a solid record of performance and achievement, the staff and Board of Directors looked to the future. They developed a collective vision based on a shared belief that the organization was poised to move to a broader arena and that it could achieve real leadership and sustained impact in avian conservation. They also believed that the primary thrust of the organization should be environmental education and awareness. But to do so successfully, they had to achieve some very challenging goals.

Establishing a permanent base of operations with public access was a critical component of that vision. Seasonal educational shows were expanded to out-of-state sites to reach more people and to increase the revenue stream. In 1992, the name of the organization was changed to World Bird Sanctuary, (WBS), to reflect its increased focus and work with all bird species, and their habitats, worldwide. Stronger management systems were developed to support a growing organization.

In 1993, WBS entered a 25-year lease with the Missouri Department of Natural Resources and relocated in 2001 to a 135-acre site known as Castlewood State Park – South. This move assured a permanent site for WBS with public access so educational programs could be conducted on site. Years later the lease from DNR was extended to 2043, securing its long-term future at this site. Further, it entered into a lease agreement with St. Louis County that increased its acreage up to an additional 171 acres.

## Where are we now?

WBS is now nationally recognized as an influential authority in the field of environmental education. Through its educational programs, WBS now reaches more than one million people each year with messages about how human beings impact the environment. Through its consulting services, it is helping organizations protect and enhance the natural habitats surrounding their operations. Through captive breeding programs, rehabilitation efforts, field studies and habitat management research it is improving and gaining ground daily due to the talents of new staff and the adoption of modern techniques and scientific advancements.

Annual budgeted revenue averages more than \$1.4 million. WBS operates with a full-time staff of 27, a part-time staff of one, and hires approximately ten seasonal employees each year. In addition, it is fortunate to have approximately ten interns annually, over 100 volunteers, and an active Board of Directors. Our permanent headquarters in Valley Park, MO is operational with a steady stream of visitors every day.

WBS has a long history of covering a large part of its operating costs through earned revenue and in-kind donations. On the positive side this strength provides stability for the revenue stream. On the negative side, WBS fund raising skills are underdeveloped for tapping sources that normally support non-profit endeavors. Using this operating strategy, the growth of revenues has plateaued, and the organization is struggling not only with maintaining daily operations, but also with attempting to address the backlog of issues caused by complacency concerning basic maintenance and advancements over the past 15 years.

## Our Vision for the Future

The original intentions and values that led to the creation of WBS will remain central in our future. Our mission will continue to be . . . *to preserve the earth's biological diversity and to secure the future of threatened bird species in their natural environments*. The primary priority for the years ahead will be to solidify the gains of the past forty years – to ensure that WBS is a vital and leading force as it pursues its mission. Strategies will focus on ensuring financial and organizational continuity and on building its leadership in avian and habitat conservation issues.

**Continuity** -- Management and operational continuity is essential. The energy, commitment and leadership skills of Walter Crawford should serve as a springboard for the future growth and success of WBS. The long-term commitment of a dedicated staff has been an important strength of WBS. An effective means for developing a pool of qualified upper level managers and for sustaining a high level of dedication by all employees is essential to ensure long term continuity for the organization. This will require a commitment to continuous training and appropriate compensation.

**Education** -- World Bird Sanctuary is poised to deliver its mission to helping make people more aware of threats to the environment and how they can be solved for everyone's benefit. Educational programs that provide close-up experiences with creatures will be the largest part of our efforts, along with expanded conservation efforts. Our educational programs will follow S.T.E.M. guidelines and meet state education standards.

**Animal Care** -- Facilities will be upgraded to meet or exceed International Association of Avian Trainers and Educators (I.A.A.T.E.) standards for avian care. WBS is at a critical point. It has proven successful in its current home, but now has much work to do to improve the facilities that were built starting in 1998. Honest, independent reviews by multiple professionals have revealed that most of WBS facilities are inadequate for proper care of the birds. A closely related and equally important goal is to bring the avian medicine practices up to industry standards. Training techniques will be consistent with industry standards.

**Partnerships** -- WBS will strengthen and expand partnerships with private and public organizations to improve management of habitats for preservation and enhancement. Field research will be an integral part of these efforts. Securing new partnerships with like organizations will allow our mission to grow and will strengthen our profile in the community and beyond

**Public Awareness and Fundraising** – We will work in creative ways to elevate the profile of WBS programs and site presentation to the public. This will directly affect our ability to market programs to more schools and organizations and take our fundraising to a higher level. Establishing planned communication strategies, building an even stronger internet presence, and continuing to drive marketing programs are all strategies to be pursued. The visitor experience at our site must be improved to properly relay our true mission and draw repeat visitors and positive reviews. WBS must build a stronger, balanced revenue and funding base. The efforts to build a larger group of individual supporters will continue along with building a broader base of support from foundations and corporations.

This vision is not an extreme departure from the present, nor it is it simply floating with the tide. It is a commitment to build on the best of what we have and who we are. It is a resolution to strengthen and solidify the organization to ensure its long-term vitality. This vision will become reality if the needed resources are obtained and the issues at hand are resolved.

### What must now happen to produce our future?

*Vision without action is a dream. Action without vision is simply passing the time.*

*Action with Vision is making a positive difference.*

## Our Mission

The World Bird Sanctuary's mission is to preserve the earth's biological diversity, and to secure the future of threatened bird species in their natural environments. We work to fulfill our mission through education, propagation, field studies, and rehabilitation.

## Our Vision

We envision a world in which World Bird Sanctuary contributes significantly to protecting and preserving the avian species of the world while inspiring others to do the same.

## Our Values

**Excellence** – We ensure the highest standard of animal and wildlife care, provide excellent guest service and create fun and transformational experiences that connect people to nature.

**Conservation** – We are committed to practicing, promoting, and initiating activities and actions that best benefit wild bird populations and the environment in which they live.

**Integrity** – We are transparent and committed to best practices, acting in a manner consistent with our core values and mission. We uphold the highest standards of honesty and ethical behavior. We treat others with respect and dignity. We believe in rigorous assessment of our work and tangible measurement of our impact, and in sharing those results transparently.

**Diversity and Inclusion** – We embrace diversity and promote inclusion in all we do. We believe that nature is for everyone and all individuals should have an opportunity to engage and enjoy it.

**Collaboration** - We embrace teamwork and play an active and positive role in all the communities of which we are a part, including our town, the State of Missouri, and our national and worldwide partners.

**Passion** – We are proud, energetic and passionate about saving birds, and will inspire others to value the critical roles of birds in the environment.

**Education** - We believe that immersive experiences with animals, and programs of science and exploration based upon leading-edge educational approaches, provide powerful and influential inspiration for people to care, be inspired and empowered to act on behalf of wildlife conservation.

# Flock – The People

Champion – D.Griffard

## Guiding Strategy Statement

Create a culture that attracts, engages, and retains highly motivated staff and volunteers who inspire community partnerships and positive relationships with our supporters. Support and enable our staff and volunteers to achieve World Bird Sanctuary’s vision and strategic objectives.

## Strategic Goals

| GOAL                        | STEPS  |
|-----------------------------|--|
| 1. Forge champions          | <p>Build and support a capable, motivated, and engaged team that consistently performs at their highest potential.</p> <p>The best people are on the team, and they are in the right roles. Each position is clearly defined, and expectations are clear.</p> <p>Subject Matter Experts – Each staff member will be groomed as an “expert” in a subject, be it bird training, rehabilitation, development, or other mission-critical functions.</p> <p>Succession planning – All senior staff members will mentor junior staff members to teach them the skills necessary to move up into senior level positions when they are ready.</p>  |
| 2. Create a healthy culture | <p>Engage every World Bird Sanctuary employee and volunteer in embracing their roles as ambassadors and stewards. They speak of World Bird Sanctuary with knowledge and admiration in both public and private. They understand and embrace the institutions Vision and goals as their own and do everything in their power to ensure the success of the Sanctuary.</p> <p>Build a creative, supportive and caring work environment at the Sanctuary. Employees and volunteers choose joy each day and hold one another accountable for maintaining the standards set by all. The work experience at World Bird Sanctuary is unique in that it is a joyous place to work, where each employee and volunteer contributes their best daily.</p> <p>Leadership creates an atmosphere that encourages employees to make excellent choices every day. The leadership team works together as a seamless machine, bringing out the best in one another. We are focused, and work together to ensure that the Sanctuary achieves its potential.</p> |

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| <p>3. Maximize existing partnerships and identify new opportunities</p>    | <p>Continue to work on relationships and collaborations with partnering organizations where it can benefit both institutions.</p>  |
| <p>4. Enable strategic leadership of the Board of Directors</p>            | <p>Engage board members in our daily mission as much as possible.</p> <p>Train board members to handle birds and interact with our visitors and clients. Renew our board bylaws and adhere to them.</p> <p>Train board members in key messaging and donor stewardship responsibilities.</p>                                    |
| <p>5. Provide advanced learning opportunities for staff and volunteers</p> | <p>Volunteer certifications - Continue and strengthen training and testing of volunteers to assure volunteers are up-to-date on best practices within WBS.</p> <p>Offer professional development opportunities for staff, and mentor individuals with career-building special projects to suit their interests and skills.</p> |

# Mantle – Animal Care and Protection

Champion – K. McCord

## Guiding Strategy Statement

Be a leader in the care and presentation of wildlife, providing positive welfare, dignity and respect for all.

## Strategic Goals

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| 1. Work towards AZA certification  | Work towards AZA certification protocols with all new animal training, husbandry, policies and procedures.   |
| 2. Advance husbandry practices for our animal ambassadors  | <p>Continue to enhance animal husbandry and training techniques, consistent with the latest I.A.A.T.E. standards.</p> <p>Animals at World Bird Sanctuary should experience a world class captive existence. Exhibits must honor their natural habitat to the best of our ability, with innovative designs that work flawlessly. Enrichment, training, and husbandry are the responsibility of every employee and volunteer. The animals are engaged in creative ways, with the staff consistently focused on innovation.</p> |
| 3. Ensure best practice health care and nutrition for animals in our care  | <p>Yearly physicals for all permanent resident animals</p> <p>Establish a “Wellness Committee” of staff, veterinarians, and public members</p> <p>Maintain newly established animal record system</p> <p>Establish best food sources and supplements</p>   |
| 4. Deliver an effective wildlife rehabilitation program measured by species survivability and release back into the wild | <p>Further build our Veterinarian Advisory Board of board-certified professionals</p> <p>Improved training for hospital volunteers</p> <p>Provide any needed support for Bethany Spiegel</p>   |
| 5. Guide the designers and builders of the enclosures on best practices with the individual species of birds in mind.    | <p>Perching, Substrate, plantings</p> <p>Environmental enrichment</p>  |

# Nest – Home Repair

Champion – R. Holloway

## Guiding Strategy Statement

Rebuild what works, and redesign what doesn't, based on careful observation, collaboration and best, cost-effective practices to bring cohesion to all facilities.

## Strategic Goals

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| 1. Create a Master Site Plan for the sanctuary - incorporating a craftsman/prairie architectural style   | Create a Facilities/Master Site Plan committee with board members, community members and staff  |
| 2. Work towards AZA certification  | Include AZA certification guidelines in all future design decisions for the sanctuary grounds.  |
| 3. Invest in renewal of facilities and infrastructure to meet and exceed standards and regulations and provide more enriching environments for our birds and people. | Rebuild all avian enclosures to AZA standards, with avian safety and enrichment as well as visual aesthetics in mind.   |
| 4. Build our hospital into a state-of-the-art rehabilitation facility  | Continue improvements and upgrades in our hospital so that we may better care for the wild patients that come in for short term care and our permanent resident animals.  |
| 5. Improve site signage to guide visitors around our site more effectively   | Create new consistently branded signage to direct visitors through the site in a purposeful way, allowing them to benefit from a "self-guided" experience.<br><br>Interpretive signage will be informative and consistent in design                         |
| 6. Beautify the sanctuary grounds with a focus on horticulture and landscaping   | Use community service, partners and master naturalist power to supply labor for landscaping improvements.<br><br>Choose plants properly according to our land and soil types<br><br>Consider Master Site Plan in all landscaping and horticulture planning. |
| 7. Improve our sanctuary hiking trails   | Leverage grant and gift funds to create hiking trails that will attract people to our sanctuary for hiking and engage them in our mission.  |
| 8. Consider environmental sustainability targets in all business planning processes  | Investigate the installation of solar panels on lower site buildings.<br><br>Reduce our power consumption.<br>Begin composting practices.   |

# Imprint – Education of the Public

Champion - D. Griffard

## Guiding Strategy Statement

Attract an increasing number of guests to our sanctuary and inspire action through experiences that increase knowledge and change people’s attitudes and behaviors.

## Strategic Goals

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| <p>1. Enable and support WBS program personnel to operate as high-level professionals, and to be as effective as possible in delivering education programs and interacting with the public.</p>            | <p>Utilize WBS’s upgraded animal handling/training protocols to showcase the animals as professionally as possible</p> <p>Develop a Program Manual as a guide for department policies and objectives, and conduct workshops to help personnel improve their programming and public speaking skills.</p>   |
| <p>2. Conduct education programs with the goal of inspiring passion and protections for birds of the world. Inspire current and future generations to become active stewards of wildlife conservation.</p> | <p>Educational programs will be re-created to follow S.T.E.M. guidelines, as well as state and national education standards. Our goal is to create a program curriculum that inspires independent and continual learning.</p> <p>Program effectiveness will be enhanced by the addition of educational components, including new and improved bioartifacts, multimedia content, and pre/post-program learning activities for teachers to use in their programs.</p> |
| <p>3. Expand the reach of educational programming, exposing individuals to nature through WBS’s unique offerings who may not have previously had opportunities.</p>  | <p>Increase programming for underserved communities, building on partnerships with the MDC and creating sponsorship opportunities for private donors.</p> <p>Increase programming for individuals with disabilities by way of enhanced accessibility initiatives, including new program formats, added support for visitors onsite.</p>   |
| <p>4. Guest experiences at our site increase knowledge and transform human behaviors to achieve positive outcomes for wildlife.</p>  | <p>Every visitor is treated like an invited Guest. Everyone smiles and welcomes each Guest to the Sanctuary. Every Employee understands and executes their responsibility to delight, inspire, and engage each Guest in the wonders of the Sanctuary and the natural world.</p>   |
| <p>5. Augment educational opportunities and guest experience with WBS’s new offsite, auxiliary property space (Project F.O.X.)</p>   | <p>Develop unique programs designed to guide students and visitors through the experience of viewing birds performing a greater range of natural behaviors than our current facility can.</p>   |

# Defend – Conservation Impact

Champion – D. Cone

## Guiding Strategy Statement

Increase conservation efforts for birds of the world. Actively participate in wildlife conservation initiatives that ensure the long-term security of wildlife in sustainable ecosystems and habitats

## Strategic Goals

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| <p>1. Recruit a conservation army – educate and Inspire passion and protections for birds of the world. Inspire current and future generations to become active stewards of wildlife conservation.</p> | <p>Educational programs, including our zoo shows, will include messaging about our conservation initiatives.</p>  |
| <p>2. Build strong awareness and participation in WBS community conservation campaigns as part of a visit to our sanctuary, website, and social media visitors.</p>                                    | <p>Create signage for our exhibit line will about our conservation campaigns, and their impact on our priority species.</p>   |
| <p>3. Announce our priority conservation species</p>   | <p>Ensure that all species in our care have a clear role that contributes to conservation or education outcomes.</p> <p>Propagation efforts are focused on endangered species.</p>                            |
| <p>4. Work to reverse human-caused damage to bird populations</p>  | <p>Partner with many conservation organizations around the world to combat damage done to many raptor species, especially African and Asian vultures</p>  |
| <p>5. Investigate, communicate and implement collaborative scientific programs that inform key environmental issues, improve conservation planning and optimize wildlife management</p>                | <p>Join and support the work of the International Union for the Conservation of Nature and the United Nations' Convention of Migratory Species to leverage our resources with the conservation community.</p> |

# Soar – Development, Marketing and Finance

Champion – S. Unnerstall and L. Liderer

## Guiding Strategy Statement

Build an organization that is fiscally sustainable for the long term. Engage, grow and mobilize our members, supporters and networks to achieve positive outcomes for wildlife

## Strategic Goals

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| <p>1. Build our capacity to thrive and identify ways to “Close the gap” between Income and expenses</p>               | <p>Improve financial performance year to year through effective cost management and revenue growth to support WBS operations</p> <p>Raise programming pricing for Zoo Shows, Eagle Flights and specialty programming such as Owl Prowls.</p> <p>Apply for four grants per month on average</p> <p>Increase major donor base by identifying new individual and corporate sponsors through Donor Prospect List and Engagement Plan</p>                                     |
| <p>2. Refine materials and public message</p>   | <p>Collect specific data points annually for public use</p> <p>Evaluate and standardize all general key messaging as well as develop more specific, themed messaging (educational/conservation/hospital focused)</p> <p>Renew our brand</p> <p>Capture individual stories to share</p>   |
| <p>3. Increase the sanctuary’s visibility and promote understanding and support of our critical conservation role</p> | <p>The Sanctuary recognizes its role within the community, and consistently delivers world class experiences to its Guests. Guests become lifelong cherished Friends who visit often and feel compelled to support the Sanctuary and its vision and mission.</p> <p>WBS is an active member of the St. Louis non-profit landscape and actively collaborates with other organizations to achieve mutual goals and maintain our standing as a leader in the community.</p> |
| <p>4. Update the membership and Adopt-A-Bird programs to build “ownership” of the sanctuary</p>                       | <p>Membership and Adopt-A-Bird programs will be updated and modernized to better engage those donors and improve their experience.</p> <p>A monthly giving club will be created to provide a steadier, planned income stream.</p> <p>All other campaigns and donation avenues will be reviewed for fiscal feasibility and donor experience and updated accordingly.</p>  |

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|   | Increase focus on facilitating more Planned Giving, Estate and Endowment giving.  |
| 5. Develop a “culture of philanthropy”  | <p>Create an environment where all people associated with WBS understand the role and importance of Development and can act as a knowledgeable steward for our organization.</p> <p>Regular training of all new and existing staff, volunteers, and Board of Directors regarding key messaging and donor stewardship responsibilities.</p> <p>Re-engage current and lapsed donors</p> |
| 6. Maximize all Development operational efficiencies and increase the quality of the donor experience.              | <p>Increase the quality of the donor experience.<br/>Database cleanup</p> <p>Standardized mailing lists</p> <p>Develop Standard Operating Procedures for a Development processes</p> <p>Ensure all development personnel have clear, measurable goals clearly communicated and reviewed regularly.</p>  |
| 7. Understand the full scope of the audience we serve and increase access to those groups we do not currently reach | <p>Capture more contact information from groups we do not currently serve</p> <p>Research new Development opportunities</p> <p>Diversity and inclusion efforts</p>  |
| 8. Begin work on a Capital Campaign   | Together with the Board of Directors, decide whether to embark on a capital campaign, or fundraise as the funds are needed.   |

## The Pillars of Operations for Action Plans:

- Infrastructure and Site Planning
- Conservation and Field Studies
- Hospital / Rehabilitation
- Community Partnerships
- Staff and Volunteer Development
- Education Programming
- Policy and Procedure
- Animal Management
- Branding
- Development and Fundraising