

Plan Ahead:

A Short Overview of the Planning Process

Jon Coe

Jon Coe Design P/L

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Introduction

Planning involves an imagined journey into the future, where all outcomes are uncertain and where opportunity and peril co-exist. The only thing more dangerous than planning is not planning; facing the future without preview or preparation.

Master plans are like road maps. They chart a hopeful course between the present and some intended destination, with milestones along the way. However, road conditions are unpredictable and detours common. Planning is an adventure in communication as well as in design and policy development. It is a process of compromise and collaboration in support of valued goals. It is a frustrating yet hopeful and fruitful search.

Planning documents are not blue prints. Any plan as specific and inflexible as a blueprint is doomed to failure. Good plans are flexible, living guidelines and policies, self-correcting and adaptable to change.

There seems to be some confusion over the meaning and scope of “master planning.” Indeed both the activity and process continue to evolve. In my forty years as a student and practitioner of zoo planning and design I have developed some thoughts and definitions which I hope may prove useful.

Benefits of Planning

Planning allows institutions to make the most use of all their resources. Benefits include the ability to:

- Anticipate and shape their future,
- Prioritize actions,
- Budget time and dollars
- Improve internal communications,
- Improve coordination and cooperation,
- Sell their agenda internally and externally,
- Raise funds,
- Evaluate their programs later.

Why Do Plans Fail?

Planning may have unfairly acquired a tarnished reputation. Master plans fail when:

- They are unrealistic and unachievable.

- They aren't supported by business and implementation plans.
- They are superimposed from above without involvement and support of those responsible for their implementation.
- When their chief supporters leave the institution.
- When they can't adapt to changing times.
- When a poorly managed process leads to "planning paralysis", unnecessarily delaying needed actions.

When is Planning Needed?

Planning is an essential tool of responsible management. It should be undertaken or updated whenever needed. For example:

- At times of major change, such as when your institution acquires a new director, change in governance or ownership.
- When new opportunities present themselves, such as preparation for major expansion, funding initiatives, redevelopment programs.
- When changing market conditions, demographics, conservation challenges, technology or environmental conditions require your institution to evolve creatively.

Some institutions update or reconfirm their master plans every five years or more frequently to maintain an atmosphere or culture of change and renewal in response to a rapidly changing world.

Integrated Planning

Many so called "master plans" are in fact only physical development plans. Some institutions have invested in detailed plans only to find they were not financially supportable. An integrated approach yields a successful document.

The process I have found most successful begins with the vision workshop to set basic goals, philosophy, priorities and direction. The draft concept plan (physical development) is then prepared outlining major new attractions and programs. The draft business/strategic plan then tests these ideas against the realities of market conditions and potentials. Finally, the two plans are rationalized, coordinated and completed. Since both plans are checks on each other, they should be done by separate consultants or departments to avoid conflict of interest or bias.

Once the concept and business plans are developed at a conceptual level of detail initiatives such as capital campaigns and early action projects can commence.

If the institution chooses to continue planning to develop a detailed physical development master plan, it should also continue to develop its strategic or business master plan and to coordinate the two plans. These can be combined into a single comprehensive plan.

Once institution-wide plans in areas like physical development, business and management are approved, planning should continue within major segments of the institution. For example master plans for horticulture, education, guest services, assets and operations, animal collections, conservation outreach, etc. can be developed, coordinated and continuously updated. Woodland Park Zoo (Seattle, Washington, USA) has initiated a "fully integrated planning" (FIP) process to coordinate these outcomes. This is analogous to computer "software" integrating the operation of the zoo's "hardware" assets and staff activities to optimize performance and to advance the zoo's goals.

Planning, Large and Small

Planning can vary from a simple “vision” workshop to a long process involving many stakeholders. It works best as a consecutive process working from simple/philosophical to detailed/comprehensive. Costs are commensurate with required effort.

- **Vision Workshops** gather key stakeholders and are best done while sharing good food and wine in memorable and compelling venues. “Visioning retreats” are not uncommon. They focus upon creating a shared vision for the future in 10-20 years.
- **Concept Plans** provide 80% of the decision making with 20% of the effort of a full master plan. The idea is to do an *extensive* rather than an *intensive* study. That is to look at all relevant subjects without getting lost in the details of any one subject. Maintain balance while confirming which subjects and issues are critical to your own situation. Many institutions prefer concept plans to full master plans because they make less cumbersome, more flexible working documents. They feel the more detailed work can be done as part of new projects as they come along. Sometimes concept plans “spin off” new projects even though the institution will continue on to develop full master plans; why wait?
- **Physical Development Master Plans** outline staged development guidelines and usually include sections on site analysis, public precincts and circulation, exhibit precincts and storylines, service precinct and access, and educational and administrative facilities. Phased development budgets are also included.
- **Business/Strategic Plans** survey market demand and fund raising potential, provide operational analysis and recommendations and test the feasibility of physical and program development ideas. The strategic plan can chart projected income and costs throughout the redevelopment process to optimize sustained growth and avoid “boom and bust” cycles often associated with rapid uncontrolled growth.
- **Comprehensive Master Plans** integrate physical development, program development, operations, business and other activities into a strategic roadmap for institution-wide renewal and growth. Comprehensive master plans are useful when institutions need substantial support and approval from regional authorities and when seeking blanket approval to proceed with a series of major projects.
- **Update Plans.** All of these types of plans must keep ahead of changing economic, market, social and environmental trends. Update plans are intended to check progress, validate and update existing plans. Think of them as mid-course corrections. These are relatively inexpensive ways to get the most out of previous investments in planning.

*Recommended Planning
Process Diagram:*



Animal Collection Planning

Some institutions believe they should have their animal collection plans in place before beginning master planning. In fact, collection plans not only inform the concept or master plan, but are also shaped by the planning process. Thus preliminary goals and objectives of the collection plan are needed at the “vision” stage before overall planning begins. However, detailed collection planning is best done along with other planning work to avoid unnecessary effort.

The In-House Planning Team

Nowadays the ecological value of bio-diversity is widely recognized. Diversity of background and perspective is also needed on the planning team to achieve balanced plans. While in-house planning teams reflect the hierarchical management structure of their institution, wide stakeholder representation is essential for success. The value of a master plan is only as good as the constituency formed to support its implementation.

In-House Planning versus Planning Consultants

Either in-house or outside planning consultants can be successful depending upon the skills, resources and priorities of each institution, as well as upon the availability of qualified consultants.

In-house planning is a good method to improve internal communication and coordination as well as provide for skill development. This approach works best when staff experienced in planning is available to manage the work. However, the use of staff skilled in animal management, for example, to work as planners and meeting facilitator's, work for which they have no qualifications, can lead to unnecessary work and frustration. Often zoos expect staff to undertake planning work in addition to their ongoing responsibilities without additional compensation or "backfilling" of staff support. I suspect zoos and aquariums which undertake in-house planning to "save money" will find this is a false economy if the true cost is evaluated.

Specialist consultant planners offer a number of advantages:

- They can advise on major trends and "cutting edge" opportunities zoo staff may be unaware of;
- With workshop facilitation and planning skills, they can advance the process while making the most of staff time;
- Communication and graphic skills allow consultants to help staff envision opportunities quickly;
- Experienced consultants can help staff envision the long-term outcomes of planning decision beyond their experience. While key zoo staff may participate in one planning process in their professional life, experienced consultants will have learned from dozens of such experiences.

It must be remembered that consultants vary widely in experience, knowledge, bias and style. Each institution and consultant must seek the best "fit". Above all, the client institution must manage the planning process, insuring the consultants serve the institution and not vice-versa.

Good Value

Some master plans become classics. The Woodland Park Zoo Long-Range Plan not only introduced immersion design, but guided the zoo through 25 years of extensive renewal and development. Over 80% of the original 1976 plan was kept when it was updated in 2004.

A well conceived master plan is good value for money. For example, an investment of \$100,000 in a concept plan is only 1% of the cost of a \$10,000,000 multi-project redevelopment initiative. Yet how successful would the new improvements be if they didn't all work well together? Make sure your planning expectations meet your available budget. Even a small vision or planning workshop can help you move forward.

But regardless of the economics, don't you really want to have a clear idea of where your institution is going and why it is headed in the right direction? After all, we all want our hard work to count for something worthwhile and significant; with good planning you can move forward together with confidence.