



OREGON ZOO FOUNDATION
Annual Report

2015-2016

WELCOME

Community: share the vision, amplify your voice

The Oregon Zoo and the Oregon Zoo Foundation (OZF) share a vision for the zoo and a passion for its mission: creating a better future for wildlife.

The dollars that fund this mission come from many sources—member households, individual donors, corporate sponsors, grants, planned giving and special events—in quantities both large and small. It's the combined generosity that amplifies the voice of our community and the power of the activities undertaken on behalf of the zoo's ever-changing population of more than 1,800 animals.

Our community support is the envy of zoos across the country and one of the reasons an organization of our size is able to contribute so much to education, species conservation and animal welfare at home and around the world.

- In fiscal year 2016, in addition to administering the membership program, the foundation gave \$3.1 million to the zoo and funded a \$1 million endowment for Asian elephant conservation.
- Advocacy efforts saw major successes: OZF supported the passage of Measure 100, which bans trade in products from certain endangered animals, and Measure 26-178, which renews funding for restoring fish and wildlife habitat and connecting people with nature across 17,000 acres of parks in the region.
- Polar Passage, the next community-supported bond project, is on schedule. This polar bear habitat will drive the foundation's next major fundraising campaign, and a new generation of bears will call it home.

Our zoo is a treasure—one of Oregon's most popular destinations—and generates important economic benefits for our city, county, region and state.



Don Moore, Rob Erickson and Mark Loomis in front of the new Oregon Zoo Education Center

We're immensely proud of the accomplishments highlighted in the following pages. The vision, planning and hard work that place the Oregon Zoo at the forefront of environmental literacy and conservation science continues with your support.

With sincere thanks,

A handwritten signature in black ink, appearing to read "Rob Erickson".

Rob Erickson
Chair, Board of Trustees, Oregon Zoo Foundation

A handwritten signature in black ink, appearing to read "Mark Loomis".

Mark Loomis
Interim Director, Oregon Zoo Foundation

A handwritten signature in black ink, appearing to read "Don Moore".

Don Moore
Director, Oregon Zoo

The mission of the Oregon Zoo Foundation is to foster community pride and involvement in the Oregon Zoo and to secure financial support for the zoo's conservation, education and animal welfare programs.

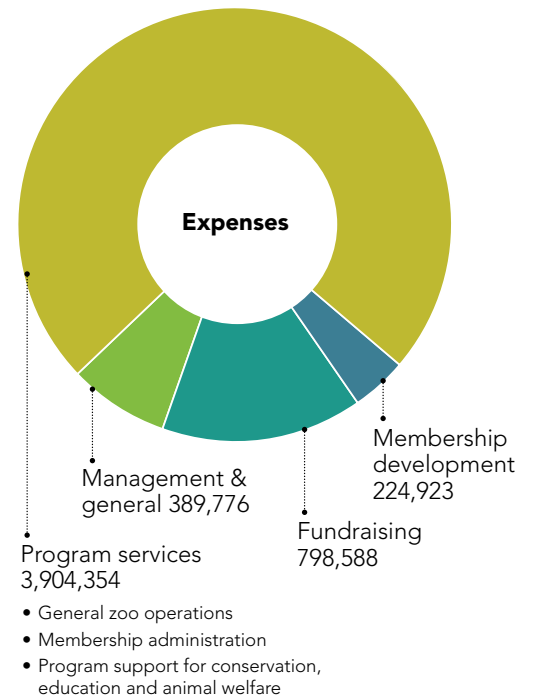
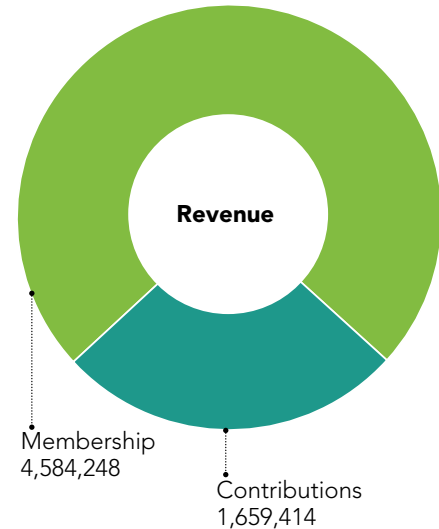
OZF is a private 501(c)3 non-profit foundation governed by a volunteer board of trustees composed of community leaders and representatives from leading businesses and organizations. OZF—14 staff led by the director—performs activities such as the administration of more than 42,000 member households; advocacy in support of our mission of conservation, education and animal welfare; and fundraising on behalf of the Oregon Zoo. Since 1997, the foundation has contributed more than \$60 million to the Oregon Zoo.

Oregon Zoo Foundation financials

Through the generosity of individuals, families, foundations and corporate partners, OZF advances the zoo’s mission of inspiring the community to create a better future for wildlife. The foundation manages five board-designated endowment funds and maintains unrestricted investments for unforeseen needs, acting as fiduciary and monitoring investment performance and compliance with foundation investment policy.

Statement of Financial Position		
June 30, 2016 and 2015	2016	2015
Assets		
Cash & equivalents	1,020,425	1,967,255
Investments	12,194,257	10,186,826
Receivables	669,293	837,722
Other assets	81,364	121,040
Total assets	13,965,339	13,112,843
Liabilities & Net Assets		
Accounts payable	19,706	42,717
Deferred revenue	—	135,450
Grants payable to the Oregon Zoo	1,745,683	1,575,852
Gift annuities payable	61,692	64,496
Total liabilities	1,827,081	1,818,515
Net Assets		
Unrestricted		
Undesignated	3,801,541	3,744,655
Board designated—operating reserve	2,700,000	2,900,000
Board designated—endowments	5,128,445	4,329,749
Total unrestricted	11,629,986	10,974,404
Temporarily restricted	426,459	240,708
Permanently restricted	81,813	79,216
Total net assets	12,138,258	11,294,328
Total liabilities & net assets	13,965,339	13,112,843

Statement of Activities		
For years ended June 30, 2016 and 2015	2016	2015
Public Support & Revenue		
Membership	4,584,248	4,261,446
Contributions	1,659,414	1,784,676
Special events	137,181	172,168
Investment return	(219,272)	(20,004)
Total public support & revenue	6,161,571	6,198,286
Expenses		
Program services	3,904,354	6,074,879
Management & general	389,776	399,754
Membership development	224,923	253,969
Fundraising	798,588	833,867
Total expenses	5,317,641	7,562,469
Increase (decrease) in net assets	843,930	(1,364,183)
Net assets at beginning of year	11,294,328	12,658,511
Net assets at end of year	12,138,258	11,294,328



- General zoo operations
- Membership administration
- Program support for conservation, education and animal welfare

OZF’s program expense ratio for FY16 was 73 percent. This means that 73 cents of every dollar the foundation spent went to funding the zoo and administering the zoo membership program. The nonprofit industry standard is 65 percent or higher.

OZF’s fundraising efficiency ratio for FY16 was 17 percent. This means that it cost the foundation 17 cents to raise one dollar. The nonprofit industry standard is 35 percent or less.

RECOGNITION

Oregon Zoo Foundation donors

With deepest gratitude, we honor those who support the Oregon Zoo's commitment to conservation, education and animal welfare. The following individuals and organizations helped advance the zoo's efforts in these areas with generous gifts to the Oregon Zoo Foundation between July 2015 and and June 2016.

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RECOGNITION

Oregon Zoo Foundation donors, continued



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RECOGNITION

Corporate donors

From our comprehensive sponsorship program to corporate membership and workplace giving, our partners help create a better future for wildlife.

With thanks to our signature partners



Corporate partners

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- Banfield Pet Hospital
- Casa For Children, Inc.
- Chevron
- Columbia Sportswear
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- Portland General Electric
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- Salesforce.org
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- Umpqua Bank
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Wildlife Legacy Society

Members express their commitment to the Oregon Zoo Foundation by naming the foundation as the beneficiary of a planned gift.

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- Kathy Bartholemy
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SUPPORTING THE MISSION

Conservation

In 2016, essential support from members, donors and sponsors enabled OZF to support the Oregon Zoo's work saving species and preserving ecosystems through on-the-ground recovery efforts, research and education.

Oregon Zoo's Polar Bears Advance Critical Scientific Research

This year, the Oregon Zoo Foundation raised \$62,000 to create a swim flume and metabolic chamber for the zoo's polar bears. The chamber, in which a polar bear swims against the current, enables conservation scientists to collect data that would be impossible to gather in the wild. This helps them gain a better understanding of the effect of body size on metabolic rate, the relationship between oxygen consumption and metabolism, and the relationship between surface area and volume. In a recent interview with National Geographic's "Explorer," a USGS Alaska Science Center research biologist cited Oregon Zoo studies measuring the energetic costs of walking and swimming in polar bears.

Polar bears, a threatened species under the Endangered Species Act since 2008, are a priority for zoo conservation efforts. The Oregon Zoo Foundation's next targeted fundraising campaign will support Polar Passage, a new habitat set to open in 2019. This state-of-the-art home for polar bears will provide visitors with a view into scientists' activities, helping them gain a greater appreciation for the bears' conservation status and dwindling Arctic habitat. [Learn more »](#)

OZF Grant Supports Condor Center Security

When security issues became evident at the Jonsson Center for Wildlife Conservation in rural Clackamas County, the zoo requested a grant from OZF to help protect the facility. The remote location hosts the zoo's acclaimed condor recovery program, minimizing the exposure of young condors to people, thereby increasing the chances for captive-hatched birds to survive and breed in the wild. The grant award of \$35,000 provided needed improvements. A major contributor to the repopulation efforts of the California condor, the Jonsson Center has raised and released more than 40 wild-bound condors. [Learn more »](#)

OZF Sends Milk-Relacement Formula to Borneo Elephant Orphans

The Sepilok Orangutan Rehabilitation Centre, located in Sabah, Borneo, sent out a call for immediate help in March 2016 when it found itself fostering several orphaned Borneo elephant calves. Palm oil plantations in Borneo have clear-cut native forests, creating a destructive conflict between farmers and elephant herds. As a result, the center was scrambling for milk-replacement formula. OZF's Endangered Species Justice Fund contributed \$10,000 to support the center's efforts. [Learn more »](#)

OZF Kicks Off Endowment for Asian Elephant Conservation

The Oregon Zoo Foundation has earmarked \$1 million to establish an endowment fund supporting Asian elephant conservation.

"We're proud to establish this new endowment, and we hope to see it grow," says Rob Erickson, chair of the Oregon Zoo Foundation board of trustees. "Our community feels a strong connection to Asian elephants, and with the challenges these animals are facing in their native lands, the need for support of elephant research and conservation efforts that impact the survival of the species is greater than it's ever been. This endowment enables people to make a difference for elephants here and in their own range countries."

The Oregon Zoo is recognized worldwide for its Asian elephant program, which spans more than 60 years. Considered highly endangered in their range countries, Asian elephants are threatened by habitat loss, conflict with humans and disease. It is estimated that just 40,000 to 50,000 elephants remain in fragmented populations from India to Borneo.



SUPPORTING THE MISSION

Education

In 2016, OZF marked important milestones in education initiatives, including major grant awards and the near-completion of the campaign in support of the zoo's new Education Center. By offering visitors the knowledge and tools to take action for wildlife, the zoo is creating engaged, empowered advocates.

Title 1 Grant Enables More Portland-area Kids to Experience the Wonder of the Zoo

In response to a grant request on behalf of Portland-area Title 1 schools, OZF awarded \$97,000 to the zoo's education department. Although federal Title 1 designation provides additional support to schools serving children with risk factors such as poverty and instability, field trips to the zoo or in-school presentations featuring live animals are typically well outside the reach of Title 1 schools.

The Oregon Zoo is committed to reaching all Portland-area students and understands the financial strains that can prohibit classes from visiting the zoo. In a recent survey, Title 1 educators overwhelmingly described

the budgetary impossibility of allocating funds for transportation to the zoo and admission costs, which were already greatly reduced for schools. Many teachers and principals from schools that send students to the zoo cover expenses out of their own pockets.

OZF's award will provide local third-graders with transportation and admission assistance to the Oregon Zoo and its phenomenal educational opportunities. The grant will also help provide access to Zoo School programs and in-class animal presentations. OZF and the zoo are proud that more children in our community will experience the joy of engaging with animals and learn the important roles science and conservation play in animal welfare.



OZF Donors Give \$1.7 Million to Enhance the Oregon Zoo Education Center

The Oregon Zoo's new education center, which broke ground in the fall of 2015, is scheduled for completion in March 2017. Serving 200,000 education program participants, it will provide increased capacity for camps and classes, teen programming and public conservation education.

While most of the building costs are covered through the 2008 community-supported bond measure, OZF launched a \$1.5 million campaign to further ensure the center is a world-class educational resource for the community and that it is fully staffed and operational in its opening year. Funds from the campaign support equipment and furnishings in new classrooms, interactive interpretation for family visitors and the expansion of teen programming. OZF is proud that it exceeded its campaign goal by raising a total of \$1.7 million. [Learn more »](#)

Many thanks to our generous donors—we look forward to welcoming you to the center this spring!

SUPPORTING THE MISSION

Animal welfare

Animal welfare is the heart of the Oregon Zoo's mission. Providing the best possible care means tending to the physical, social and emotional health of each animal, while also sharing knowledge and best practices with partners around the globe.

Advancement Grants Help Zoo Staff Lead the Pack

In 2016, OZF allocated \$10,000 toward Advancement Grants for zoo staff, supporting innovative practices that directly impact the well-being of animals in the zoo's care. Activities such as professional development training, conference participation, collaborative initiatives, team-building events, and travel expenses all qualify for awards. Dedicated volunteer ZooGuides also provide funds to support this program.

Any zoo staff member can submit a proposal. OZF funded eight projects in FY 2016, vetted and approved by zoo leadership:

- **Crocodilian Husbandry Workshop**
Steve Hash, *Herps and Fish Keeper*
- **Education Tablets**
Tom Gaskill, *Education Programs Supervisor*
- **Invertebrates in Education & Conservation Conference**
Tanya Paul, *Program Animal Supervisor*
- **Life Support Laptops**
John Sterbis, *Facilities Manager*
- **Otter Keeper Workshop** (funded by ZooGuides)
Renee Larison, *North America Keeper*
- **Teambuilding Trip to Wildlife Trek**
Blaine Peters, *Restaurant Manager*
- **Wildlife and Lead Program**
Leland Brown, *Wildlife & Lead Outreach Coordinator*
- **ZooGuide Diversity Training**
Jennifer Payne, *Volunteer Manager*

Giraffes Receive Long-term Payoff of the Foundation's Advancement Grants

OZF awarded the zoo a \$40,000 grant for a key upgrade to the giraffe barn: resurfacing the concrete floor with rubber matting, a better surface for hoof and joint health. When curator Rebecca Van Beek, an Advancement Grant recipient, went to Cheyenne Mountain Zoo for a giraffe-care workshop, she was impressed by modifications they had made to their facility.

She brought the innovation back to Oregon, helping provide the best possible environment for the zoo's resident giraffes.

Giraffe populations have suffered major losses in their native habitats, making it imperative to maintain the health and longevity of the zoo's resident giraffes, as they may be called upon to serve as conservation ambassadors as well as a "safeguard population."

Almost-Extinct Sierra Nevada Red Fox Family Caught On Camera

Early spring found High Desert Museum wildlife curator Jon Nelson capturing never-before-seen video footage of two threatened Sierra Nevada red fox (SNRF) parents with their three kits in the Deschutes National Forest. OZF's Future for Wildlife program helped fund Nelson's research and the purchase of strategically placed motion-activated cameras. "Not only is it the first natal den of the animal ever discovered in the region," Nelson said. "It's the first time that pups have been recorded on video."

Recent genetic studies indicate that SNRF populations extend into the mountains of southern Oregon and western Nevada. The SNRF is one of the most rare mammals in North America, possibly consisting of fewer than 50 individuals. If this number is correct, the population is likely too small to survive for long—one reason why the discovery of SNRF dens is so important. [Learn more about NW Conservation Grants »](#)

Spotted in Oregon:

- 2 fox parents
- 3 fox kits

This is great news because there are possibly as few as 50 Sierra Nevada red foxes remaining in North America. [Learn more »](#)

RECOGNITION

Conservation Circle Giving Society

Members support wildlife conservation, education, environmental sustainability and a financially strong future for the zoo.



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AT A GLANCE

FY 2016 by the numbers

- 1,800+ animals
- 1,494,316 visitors
- 1,458 total volunteers
- 101,561 total volunteer hours
- 373 youth volunteers
- 38,393 youth volunteer hours
- 3,762 zoo camp attendees
- 3,524 Headstart and senior zoomobile attendees
- 39,655 member households
- 5 OZF-managed endowments
- \$1 million to Asian Elephant Conservation endowment
- \$3.1 million from OZF to the zoo
- 193 Conservation Circle Giving Society members
- 82 Wildlife Legacy Society members
- 503 donors gave more than \$500
- \$47.2 million spent locally for zoo operations and capital improvements
- \$1.9 million in fiscal benefits to state and local governments



Staff

Christine Alexander
Associate Director, Membership & Development Systems

Kym Amador
Membership Supervisor

Connie Apa
Strategic Partnerships Manager

Tony Amell
Annual Giving Manager

Katie Ash
Corporate Partnerships Coordinator

Jody Brassfield-English
Associate Director, Finance & Operations

Kristine Caldicott
Staff Accountant & Personnel Specialist

Susan Daigle
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Mavia Haight
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