

Request for Information
Management and Operations of the Louisville Zoological Garden
Issued by Louisville Metro Government

Louisville / Jefferson County Metro Government (LMG) is issuing this Request for Information (RFI) to gauge interest and seek information for the potential independent operation of the Louisville Zoological Garden (LZG). The “Operator” would have fiscal responsibility for operations and management oversight of Zoo.

I. BACKGROUND

The LZG is an *Association of Zoos and Aquariums* (AZA) accredited facility situated on 133 acres (approximately 90 developed) caring for approximately 1,100 animals and the botanical gardens. It is the largest non-profit attraction in the region drawing between 760,000- 945,000 guests per year for the last 10 years. The LZG has averaged more than 30,000 household memberships during this same period. The LZG also manages 17 acres of green space north of Trevilian Way, contiguous with the Kentucky state nature preserve and LMG Creason Park. The LZG is an agency of LMG supported by two not for profit organizations: “The Louisville Zoo Foundation” (Foundation); and “The Friends of the Zoo” (FOZ). The Foundation is a non-management fund raising and advisory board whose members serve by Mayoral appointment. The FOZ is a self-governed not for profit whose sole mission is the support of the LZG. The LZG is also The State Zoo of Kentucky.

The Mission of the LZG is “*to Better the Bond Between People and Our Planet*”. The LZG pursues this mission by striving for excellent guest experiences, engaging education programs, front line conservation work and providing the very best animal care and welfare. Excellence has been achieved in all these areas as demonstrated in the numerous awards and recognition received including:

- The LZG’s partnership with the Diane Fosse Gorilla Fund International received the 2017 AZA International Conservation award for conservation of the Eastern Gorilla.
- The 2013 AZA Significant Achievement in Education Award for “School at the Zoo”
- The last three major exhibits created, Islands (1997), Gorilla Forest (2003), Glacier Run (2011), were the top scoring award winning exhibits recognized for excellence by the AZA
- The LZG’s partnership with the Black Footed Ferret Recovery Program received the AZA’s North American Conservation award. The LZG has reproduced more black footed ferrets than any Zoo in the world.

- The LZG received the 1988 AZA Bean award for its husbandry excellence and propagation success of the Woolly Monkey.
- Numerous Tourism, Advertising, Architectural, Accessibility and Community awards

The business success of the LZG has grown since 1989 when attendance that year grew from 428,000 to more than 538,000. This was accomplished with the opening of the HerpAquarium and expansion of the group sales program. This trend has continued with the opening of:

- Islands (1997) - 635,000 guests
- Gorilla Forest (2002) - 782,000 guests
- Splash Park (2007) - 811,000 guests
- Glacier Run (2012) - 946,000 guests

Events and attractions also critical to this success include The World’s Largest Halloween Party (October), Earth Month (April), Thru the Zoo Run (May), Zoofari (June), Brew at the Zoo (August), the Conservation Carousel, the Splash Park, the High Adventure Ropes course, camel ride, pony ride and the Zoo train. LZG self-earned revenue percentage of budget has grown from 35% in 1988 to 84% in 2012.

The LZG has invested more than \$40 million in exhibit & facility expansion renovation in the last 15 years. Most of these funds have been raised from private donations. The latest capital campaign ending in 2016 created new penguin, snow leopard and African monkey exhibits, an early childhood development classroom, major elephant exhibit expansion and renovation, and many other Zoo wide improvements.

• **Operational Areas**

Animal Management	Animal Health	Conservation and Research
Education	Facilities Management and Horticulture	Construction*
Guest Services, Special Events and Rides	Human Resources*	Volunteer Services
Information Technology *(Point of Sale, Fund Raising, Facility Management, and Animal Management)	Ticketing and Admissions Sales and Processing	Operational and Capital Fund Raising
Sponsorship	Marketing, Communications and Public Relations	Membership Services

* Indicates additional operational and staff support provided by other Metro Government departments

Services Provided by other Metro Government Departments

Operational funding comprising 16-36% of total budget**	Fiscal Contingency*	Accounting and Budgeting*
Accounts Payable and Receivable*	Purchasing*	Insurance and Risk Management**
Human Resources*	Legal Services*	Information Technology (including all financial, human resources, security, purchasing and Microsoft software) **
Police	Fire Protection & Rescue	Emergency Medical Services
Water and Sewer Service**	Internal Audit*	Performance Improvement*

**Indicates services to be provided by Operator*

***Indicates Services that would be negotiated*

CURRENT CONTRACTUAL OBLIGATIONS

The LZG has contractual relationships with many vendors for a variety of goods and services. Some notable contracts include, but are not limited to:

- Service System Associates: Manages the food concessions, catering, facility rental and gift retail operations
- Kaman’s Art Shoppes: Provides photo souvenirs, face painting and “Handables” art
- Jefferson Community and Technical College: Provides staff for the Boma Petting Zoo and Australia Exhibit

Business Awareness

- The LZG is staffed by approximately 120 full-time, 16 part-time and 115 seasonal employees. Approximately 80% of the regular non-seasonal staff are represented by the American Federation of State, County and Municipal Employees. This contract is active to June 30, 2023. Seasonal staff are non-union. All full-time regular employees participate in the County Employee Retirement System of the Kentucky Retirement Systems.
- Approximately half of the LZG property is above a former mine complex now housing the Mega Cavern business. These areas have varying deed restrictions and conditions of ownership between the LZG and Mega Cavern. The LZG experienced a subsidence in an undeveloped area on March 6, 2019 which has currently impacted train usage.
- The new operator would be replacing several support services currently provided by LMG.
- Property leasing or ownership would be negotiated, subject to deed restrictions.
- Water and Sewer Services are currently provided at no cost.

- Operations are regulated through local, state and federal laws.

II. OBJECTIVE

1. LMG is seeking interest from firms / organizations with experience successfully managing and operating an accredited zoological park or similar attractions.
2. LMG seeks to cap its operational investment to the LZG at the current 2020 fiscal year amount of \$5,279,100.
3. LMG is seeking information about market dynamics, operational requirements, approach, and strategies that would result in achieving a world-class zoological attraction.

LMG will use the information obtained from the RFI process to evaluate the feasibility of working with qualified firms or organizations to operate and manage the LZG. Information obtained through this RFI may be used to inform and develop subsequent Request for Proposals. This RFI is issued for information gathering purposes only.

III. REQUESTED INFORMATION

1. To meet the first objective of this RFI, please provide information that can address the following:
 - a. A description of your organization and the nature of your business. Explain core competencies and the for profit / not for profit status.
 - b. If applicable, the mission, vision, culture, and value statement for your organization
 - c. The strategic plan for your organization relevant to the operation of the LZG along with all support plans including business, marketing and master facility concepts
 - d. Sponsorship experience and relationships
 - e. Indicate all applicable experience in:
 - i. operating an AZA accredited facility.
 - ii. operating a major tourist attraction
 - iii. growing economic impact
 - iv. managing a USDA licensed animal exhibit facility
 - v. growing and managing a Zoo or Aquarium
 - vi. fulfilling permitting requirements of the US Fish and Wildlife Service, Kentucky Fish and Wildlife Service
 - vii. collection planning
 - viii. managing dangerous animals
 - ix. species and habitat conservation

- x. sustainability practices and plans
 - xi. acquiring and deaccessioning animals
 - xii. meeting animal exchange requirements of various organizations
 - xiii. support from and relationships with not for profit organizations
 - xiv. for profit experience
 - xv. support from and relationships with government organizations
 - xvi. relationships with education institutions
2. Please provide a response to information sought in objective #2. Questions that may assist in stimulating answers include:
- a. Is continued governmental financial support necessary for a successful operation? If not, why? If so, what level?
 - b. Is land ownership critical to any proposed future state of zoo operations?
 - c. How do operators finance growing physical facilities, and do they retain desire ownership of the physical assets?
 - d. Is continuing AZA accreditation important to future zoo operation? Explain.
 - e. Is it important to seek new accreditations? Explain.
 - f. Given the limited background information provided, is there an ideal staffing matrix for the operation? How would this ideal staffing matrix impact current staff?
 - g. What are concepts for managing staff and the Collective Bargaining Agreement?
 - h. What are some ways to manage current employee retirement obligations?
 - i. What health insurance concepts would be offered?
 - j. Are there potential operational concepts that deviate from the current accredited zoological park attraction?
 - k. What are some concepts and plans for maintaining accessibility to low income audiences?
 - l. What are some concepts for revenue growth and business expansion? Would these concepts result in major changes to the current business concept and brand? Explain.

IV. REVIEW OF SUBMISSIONS

Submissions will be reviewed by LMG, LZG staff, and representatives from the Foundation. The review process may include meetings, interviews, or discussions with respondents to gain additional information and insight into the various approaches to operations and management services.

V. RFI SUBMISSION

Submissions are limited to a total of 20 pages no smaller than a 12-point font size. Supporting documentation (such as lists, photographs, statistics, charts, etc.) will not be counted as part of the 20-page limit.

Cost of Developing Responses: All costs related to the preparation of the response and any related activities are the sole responsibility of the respondent. LMG assumes no liability for any costs incurred by respondents throughout this process.

Response Ownership: All submissions, including attachments, supplementary materials, etc., shall become the property of LMG and will not be returned to the respondent.

Questions: All questions requesting clarification or interpretation of any section of this RFI must be submitted on-line through the Bonfire website.

VI. OPEN RECORDS

In general, under the Kentucky Open Records Act (Kentucky Revised Statutes, sections 61.870 – 61.884), public records of the Metro Government are subject to disclosure to a requesting party. Any material that a vendor considers as confidential but does not meet the disclosure exemption requirements of the Kentucky Open Records Act (“KORA”), should not be included in the vendor’s Proposal, as it may be made available to the public. If a vendor’s Proposal contains materials noted or marked as confidential and/or proprietary that, in LMG’s sole opinion, meet the disclosure exemption requirements of the KORA, then that information will not be disclosed in response to a written request for public documents. If LMG does not consider such material to be exempt from disclosure under the KORA, the material may be made available to the public, regardless of the notation or marking. If a vendor is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the KORA, then it should not include such information in its Proposal because such information may be disclosed to the public.

VII. RELATED REGULATORY REQUIREMENTS

Local Ordinance
Kentucky Revised Statute
USDA-APHIS
USDI-USFWS
Kentucky Fish and Wildlife

VIII. OTHER REFERENCE INFORMATION

Attachment A: Financial Summary

Attachment B: Organizational Chart

Attachment C: Deeds

Attachment D: Master Plan

Attachment E: Collective Bargaining Agreement