Wild Animal Initiative's Reporting of Leadership, Strategy, and Culture (2020)

This document contains responses written by the charity. ACE has made no content changes other than the removal of confidential information.

Workplace Culture

How would you describe your organization's culture?

We strive to foster a work culture that enables mastery, finds the truth, and creates belonging.

Enabling Mastery
The evidence[1] suggests that people do their best work — and enjoy doing it more — when they have a sense of mastery: the ability, authority, and accountability to apply and improve their skills. We ask staff to lead the development of their projects and take ownership over their execution. We recognize them as the experts they are and defer to them on any decisions that fall within their domain. Managers follow a servant leadership model, where their primary responsibility is removing obstacles and providing coaching to support the success of their direct reports.

We also designed our internal systems to encourage work habits that support mastery. Our workplace has always been remote, allowing employees maximum freedom to choose their work hours and location. To have mastery over their work, employees also need mastery over their attention, including the freedom to focus for long periods of time on a project without unnecessary interruptions. We have taken several steps to make that kind of deep work[2] possible: we only use Slack for optional communication; we discourage staff from checking their email frequently; and we ask staff to be accessible by phone or the texting app of their choice, so that anyone can reach them urgently if they need to (giving them peace of mind to ignore everything else). For more detail, see our Internal Communications SOP.

Finally, we encourage staff to request support for professional development opportunities (and managers to propose them). So far, we have never denied one of these requests.

Finding Truth
Finding the truth isn't just a part of our research — it's central to how we collaborate. On our team, finding the truth is more important than winning arguments, seeming confident, or not making mistakes.

Because it can be hard to find the truth with just one perspective, we frequently ask each other for feedback and proactively share our thoughts with others. To make it as easy as possible to hear all voices, we've diversified our feedback systems across media (spoken and written) and social contexts (with and without managers, in pairs and in large groups). These formal systems contribute to a pervasive understanding that team members are safe to share mistakes and receive support to learn from them. For more detail, see our Feedback Methods SOP.

At Wild Animal Initiative, we seek out disagreement and appreciate it as another chance to find the truth. We clarify our arguments by stating our level of certainty in them. We feel proud when we change our minds in response to new evidence. It's common to hear one team member thanking another for changing their mind. To evaluate ideas on their merits, we remove organizational hierarchy as a factor in group discussions as much as is practical.

Creating Belonging
We strive to give our team members a sense of belonging by applying compassion at every scale.[3]

Our team has always been characterized by a baseline of kindness that exceeds simple professionalism. But our systems are designed to ensure that compassion is backed up by a work culture that recognizes people as whole humans with needs beyond the immediate strategic interests of our organization. We fiercely defend work-life balance, discouraging people from working on weekends or holidays and asking that, if they do, they schedule emails to send during their normal work hours (to minimize the chance that others feel peer pressure to work more than is asked of them). We also offer fair compensation and benefits, including a vacation policy that allows staff to completely disconnect from work and re-energize themselves, sick leave that can be used to care for human and nonhuman family members alike, and readily available funding for professional development.

Because good intentions aren't enough to make people feel like they belong, we are continuously exploring ways we can increase our team's representation of people with different identities and different modes of thinking, while building an inclusive environment that allows different perspectives to thrive.

Finally, we consider the ways we can contribute to a shared sense of belonging in the organizations we work with, in the movements we are a part of, and in the broader social contexts within which we operate. Our team shares a commitment to improving the lives of wild animals without compromising on compassion for humans. For example, we declined to collaborate with an organization that didn't address the concerns we voiced with its response to claims of harassment.

<u>Supporting Evidence for Our Culture Claims</u>
This description of our work culture reflects the aspirations that we believe we have been largely successful in achieving. Anonymous exit interview forms submitted by all three research interns and fellows in 2019 offer some support for the accuracy of our claims.

When asked "How would you describe the culture of our company?" representative responses included: "thoughtful," "empirical," "funny," "very inclusive and open to new ideas," "academic yet practical," "non-hierarchical," and "effective at creating a work environment despite the remote positions." One respondent added: "I felt valued and respected as a colleague despite being very early in my career."

When asked "Based on your experience, what qualities do you feel are valued at Wild Animal Initiative?" representative responses included: "good epistemics," "kindness," "honesty," "intellectual curiosity," "a desire to grow as an organization," and "candidly sharing my perspective."

We are considering more systematic ways to evaluate our work culture. We expect participating in ACE's culture survey will inform our estimates of the costs and benefits of adding such a survey to our existing feedback mechanisms.

[1] See "Drive" (Pink 2009) for an overview. Note that our concept of "mastery" combines Pinks' concepts of "autonomy" and "mastery." Pink contends that these combine with "purpose" — which we find easily in the pursuit of our mission — to produce the internal motivation necessary for professional success and personal fulfillment.
[2] See "Deep Work" (Newport 2016) for more on the value of deep work.
[3] For more on how a sense of belonging can contribute to an effective work environment, see the discussion of "psychological safety" in "Crucial Conversations: Tools for Talking When Stakes Are High" (Switzler, Grenny, & McMillan 2012).

Do you regularly conduct surveys to learn about staff morale and work climate?

Understanding and responding to our team members' needs is central to how we do our work. Our culture of feedback includes:

1) As needed: A form to anonymously submit feedback to the executive director
2) Weekly: One-on-one meetings between managers and direct reports, the agendas for which always include an open call for both participants to give or request feedback
3) Weekly as necessary (typically 1-3 times per month): Part or all of weekly staff meetings devoted to soliciting input on programmatic decisions (e.g., under what conditions to carry out a field experiment ourselves), morale issues (e.g., the challenges of living and working in quarantine), or current events (e.g., the murder of George Floyd and how our organization engages with other causes)

4) Monthly: Informal meetings between randomized pairs of coworkers, in which staff are encouraged to socialize and discuss any issues that arise in their work
5) Four times per year: All-team meetings without managers
6) Three times per year: Town hall meetings where leadership answers questions or facilitates discussions on topics submitted by staff
7) Once per year: 360 reviews where everyone in the organization gets feedback from each person they work with (anonymized and summarized by a facilitator)

These feedback systems were informed by a 2019 staff survey on the types and frequency of feedback that would be most useful. All participants in the August 2020 town hall meeting confirmed they feel the formats and frequency of feedback are effective.

For more information, see our [Feedback Methods SOP](#).

(How) do you integrate and encourage diversity practices within your recruitment and hiring process?

Our commitment to increasing the diversity of the staff informs every stage of our recruitment and hiring process.

Writing the Job Post
General goal: make all applicants feel welcome.

- Only list requirements that are strictly necessary to excel in the role.
- State our commitment to diversity in every job post and encourage people of every identity to apply.
- Test our job descriptions for gender-coded language using the tool at http://gender-decoder.katmatfield.com/, which is based on evidence from Gaucher, Friesen, & Kay 2011 (Journal of Personality and Social Psychology).
- Minimize jargon, buzzwords, slogans, or other forms of in-group signaling that might appeal to certain activist communities while putting off people who don't identify with those communities.
- State our salary range and benefits upfront. Once we have completed our new salary algorithm, we will calculate probable offers for applicants upon request.

Advertising
General goal: cast a broad net and counteract the homogeneity of our existing networks.

- Post ads in broad, well-known job boards and set aside extra time to screen through the unusually high proportion of unqualified applicants we get through these ads.
- Budget, pay for, and post ads in job boards tailored to people of color (e.g., professional groups for people of color, alumni networks of historically Black colleges and universities)

- In the future, we plan to track the impact of these efforts on increasing the diversity of our applicant pool and our hires. We attempted to do this in our summer 2020 hiring round but lost our data because of a technical issue.
- In the future, we plan to share job openings with groups dedicated to increasing diversity, equity, and inclusion in the animal advocacy movement. We attempted to do this in our summer 2020 hiring round but learned those groups had not yet implemented those systems.

Application Review
General goal: minimize opportunities for unconscious bias.

- Do not anonymize resumes. This allows reviewers to contextualize differences in experience within plausible differences in opportunities.
- Review all applications for a given role at one time (or in batches, if necessary) rather than reviewing on a rolling basis. This makes it easier to apply evaluation criteria consistently.
- Assign semi-finalists work tests representative of the work required for the role. This makes it easier to assess applicants on their merits.
- Only interview candidates live in the final stage of the process. Live interviews offer the greatest chance for bias based on intangible factors like likeability. Leaving them till the final stage reduces the impact of those biases because interviewers have already anchored their opinions on the merits of the finalists' written application materials.
- Standardize interviews so they all follow the same format and the majority of the questions are asked of specific candidates.
- Decide ahead of time what skills or knowledge we want to assess with each interview question.
- Score candidates on likeability regardless of whether it is directly relevant to the role. This gives interviewers a chance to reflect on the extent to which likeability might have influenced their overall assessment of the candidate.

Offer

- Offer competitive wages and benefits that also allow people to easily cover their basic needs and leave some left over.
- Start with a final salary offer and do not negotiate. People with different identities may have different levels of comfort with and success at negotiating, so removing that step reduces the likelihood of unequal pay. We are developing a salary algorithm to more consistently and transparently determine how much we offer each candidate.

What areas of your organizational culture have room for improvement?

1) The racial and age diversity of staff and board. Our staff and board are disproportionately white and young. Because several of our allied movements suffer from similar overrepresentation, we plan to devote extra money, time, and energy to diversifying our applicant pools.

2) Organizing decision making. We are proud of our culture of open debate with minimal hierarchy. For the sake of efficiency, we are paying more attention to how we balance input-gathering with efficiency. That will also help us set expectations about how input will be used and what the process will look like from start to finish.

3) Loneliness or lack of motivation while working remotely. At the beginning of the pandemic, several members of our team had lower morale or motivation than usual. At our August town hall, all present team members (7 of 10) said they were comfortable with working remotely and able to manage its challenges. However, we expect remote work to present challenges when personal circumstances change or when we hire new staff who are less comfortable working remotely. We are experimenting with different kinds of social activities on different platforms (best so far: playing fast-paced conversation games on https://icebreaker.video/, compiling a list of live wildlife cams and watching them together while on Google Hangouts, and holding weekly optional informal philosophy discussions). We are encouraging team members to shift conversations from email to impromptu phone calls and video chats when possible, because those media allow for more human connection. When the pandemic is under control, we plan to evaluate the room in our budget to at least partially cover the costs of coworking spaces.

4) Racial and cultural inclusivity. We don't have evidence that this is a problem yet, and we are actively trying to prevent it, but as we diversify our team we expect to identify more areas for improvement here.

5) Geographic inclusivity. As of September 2020, our team spans two continents, four countries, five time zones, and a nine-hour time difference. We don't have evidence that this is a problem yet, but as we continue to grow we are looking for ways to systematically guard against feelings of exclusion, disconnectedness, or underappreciation due to the disproportionate centralization of decision-making in one region. For more, see Wild Animal Initiative Special Projects Advisor Stien van der Ploeg's article "International Animal Protection Is Stronger When It's Antiracist" .

Do you have a workplace code of ethics or a similar document that clearly outlines expectations for employee behavior?

Yes. Please see our Code of Conduct for general guidance on our values and expectations. Please see the Standards of Conduct in our Employee Handbook for specific guidance on behavior in selected situations.

How much time and funding is allocated for the professional development of staff?

We encourage staff members to pursue professional development opportunities and we provide reasonable support upon request. We do not have a predetermined allotment of time or funding for this use. In the past year, our staff has cumulatively spent 62 hours of paid time and $287 in expenses on professional development. So far, we have granted every request to make

purchases or spend work time on professional development. However, three out of six staff members hired before 2020 did not make any such requests. We think that every employee can benefit from investment in their skills and knowledge outside the course of normal work duties, so we plan to encourage broader use of our support for professional development going forward.

Do you offer a health care plan or a healthcare reimbursement account?

Yes. Full-time employees can choose between four comprehensive healthcare plans, two vision plans, and one dental plan. Wild Animal Initiative contributes 100% to the employee's premium for the medical and dental plans.

How many days of paid time off, sick days, and personal leave do you offer full-time employees per year?

We offer:

- 12 days of paid flexible holidays
- 20 days of paid vacation
- 10 days of paid sick/safe leave (available for employees who are ill, victimized, or have human or nonhuman family members in these circumstances)
- 10 days of bereavement leave
- 30 days of family or medical leave (with an additional six weeks of unpaid leave available)

Part-time employees are eligible for leave proportionate to the amount of time they work.

For more information about our leave policies, see our [Employee Handbook](#).

List of Policies
Please indicate which of the following policies your organization is committed to, in writing.

Please note: while we think it is generally better to have more of these policies rather than fewer, we do not expect every organization to have all or even most of these policies in place. We do not currently require organizations to have a certain number of these policies in order to receive a recommendation from us.

Checklist:

- ✔ Regularly scheduled performance evaluations

- ✔ All positions have clearly defined essential functions with written job descriptions

- ✘ Staff salaries are determined by a formal compensation plan

✔   A written statement that your organization does not discriminate on the basis of race, sexual orientation, disability status, or other characteristics

✔   A written statement supporting gender equity and/or discouraging sexual harassment

✔   A simple and transparent written procedure for filing complaints

✔   An optional anonymous reporting system

✔   Mandatory reporting of harassment or discrimination through all levels of the managerial chain, up to and including the board of directors

✔   Explicit protocols for addressing concerns or allegations of harassment or discrimination

✔   All reported instances of harassment or discrimination are documented, along with the outcomes of each case

✔   Regular, mandatory trainings on topics such as harassment and discrimination in the workplace

✔   An anti-retaliation policy protecting whistleblowers and those who report grievances

✔   Flexible work hours

✔   Internships are paid (if your organization has interns; leave blank if it does not)

✔   Paid family and medical leave

✔   Simple and transparent written procedure for submitting reasonable accommodation requests

✔   Remote work option is available

✔   Audited financial documents (e.g. for U.S. organizations the most recently filed IRS form 990) are available on the charity's website

✔   Formal orientation is provided to all new employees

✔   Funding for training and development is consistently available to each employee

✔   Funding is provided for books or other educational materials related to each employee's work

✔   Paid trainings are available on topics such as: diversity, equal employment opportunity, leadership, and conflict resolution

✘   Paid trainings in intercultural competence (for multinational organizations only)

✔   Simple and transparent written procedure for employees to request further training or support

Does your organization have any other important or unusual policies you'd like us to know about?

Our [Internal Communications SOP](#) supports collaboration, deep work, and work-life balance in our remote workplace.

We are in the process of developing an algorithm to determine staff compensation.

If your organization has an employee handbook or written list of policies, please provide a link here or email it to us.

Please see our [Employee Handbook](#).

Is there anything else you'd like us to know about your organization's human resources policies?

We have always understood creating an effective and enjoyable workplace to be foundational to our mission of cultivating a research community dedicated to responsibly improving the lives of wild animals. Therefore, despite being a young organization with a small team, we have generally succeeded at putting thoughtful policies in place before anyone needed to use them. We continue to expand and improve our human resources policies to best position ourselves to rapidly scale our team and our impact.

We welcome any additional questions you have about our human resources policies, and we are eager to hear any suggestions you may have on how to improve them.

Leadership and Strategy

Please identify 1–5 key members of your organization's leadership team.

Leader 1
Please list this leader's: (1) name, (2) role, (3) the number of years they've been with your organization.

1. Michelle Graham
2. Executive Director
3. 1.5 years

Leader 2
Please list this leader's: (1) name, (2) role, (3) the number of years they've been with your organization.

1. Cameron Meyer Shorb
2. Deputy Director
3. 1 year

Questions for Primary Leader:

What do you consider to be your organization's major strengths?

Our greatest strength as an organization is our scientific experience. We have staff with PhDs or other advanced degrees in a range of academic fields relevant to our work. While qualifications are not everything, the level of training is relatively high for an animal advocacy organization and especially important for a group working within academia. Our staff's scientific experience gives us flexibility in terms of research lines we pursue and whether we accomplish particular research lines ourselves or seek outside collaborators. For the latter, our staff's strong connections not only in academia, but also in wildlife rehabilitation, veterinary sciences, and other communities makes networking more effective. Finally, I believe we also have a particularly strong emphasis on theory of change, strategy, and tracking impact that will help us perform more effectively as an organization.

In terms of the mission we pursue, the great strength of wild animal welfare work compared to other forms of advocacy is the rich unexplored territory of potential problems to solve, and the huge numbers of animals that could benefit if we succeed.

What do you consider to be your organization's major weaknesses?

The weakness of wild animal welfare work as a whole is its uncertainty and timeline. Helping animals in the wild will not be easy, and we are in a primarily research-focused stage. We may do quite a lot of research only to find that the vast majority of the work is not technologically or practically possible. That being said, even chipping off a tiny piece of the overall problem and fixing that (such as directly human-caused harms) could help huge numbers of animals.

As an organization, our two major hurdles are funding constraints and a lack of managerial experience. I am particularly worried about this lack of managerial experience in myself, particularly as the organization grows and I begin to need to train other managers in how to manage. If I am not good at it, I risk passing poor practices on to others. I am planning to take a management course soon to help address this, and our Special Advisor Stien van der Ploeg has significant managerial experience I plan to tap. I also plan that our next hire will have such experience. On the financial side, we have a wide range of potential programs that we believe should be tried and tested, many of which would require more staff and more financial

commitments. We would be in a much better position to accomplish our mission if we had more money.

What's the best decision you've made as a leader?

I'm not sure I've had a long enough trajectory to know what my best decisions or biggest mistakes have been, as I generally assess what is a mistake or success on the basis of both long- and short-term consequences. If I had to guess, I believe my best decision so far would be integrating our research and academic outreach strategies by using research funding and advising as both an explicit outreach strategy to get more scientists thinking about wild animal welfare, and also to improve our research outputs by leveraging existing, external scientific expertise. Through our grant advising program and advisory panel, research quality is improved (by the input of our advisors on our own work or by getting non-staff to perform important research) and more scientists are engaged more effectively.

What's the biggest mistake (or maybe hardest decision) you've made as a leader?

Similarly to the previous question, I think I will be better able to answer this in a few years. A few things I wonder about (i.e. that may have been mistakes but I don't have the data yet to know) are whether I should have taken this job before finishing my PhD, whether we haven't focused enough attention on invertebrate issues, or whether academic outreach will in the long run turn out not to be the right approach for this work.

In the first case, I have been frustrated significantly at times by not working full time on WAI as I try to finish my PhD, and worry that I am holding the organization back. So far, it appears to be okay, and we have mitigated some issues by improving other staff's ability to contribute without my direct oversight. I also think it is worth continuing to the end of my PhD for WAI, because having more credentialed staff has benefits for outreach. But I could be wrong about this.

In the second case, I have focused less attention (although not no attention) on invertebrate issues because I think pushing care for wild invertebrates involves two changes: caring about problems that aren't explicitly caused by humans, and caring about animals that are currently largely despised. My thinking is that it is easier to tackle one of these changes at a time, and vertebrate-focused research could still benefit invertebrates by developing taxon-agnostic theory and methods. I have hoped to see an invertebrate welfare org separately come into existence. If that never happens and if we are continually held back in our mission because funders and land managers don't care about invertebrates, this approach may have been a mistake.

Similarly, in the third case, using an academic-outreach focused approach is useful for leveraging additional resources (financial or otherwise) but does release some control of the outcomes. If we try to single handedly tackle wild animal welfare it would take a long time, but we would have quite a lot of control of the final products. If we cannot effectively get outsiders on board with our moral values, we risk people doing "wild animal welfare" in ways that don't actually improve

welfare by our lights. I am not currently very worried about this, but it is a significant risk to keep track of.

Finally, in terms of mistakes I have evidence for now (as opposed to possible mistakes): I believe we conducted hiring a little quickly immediately after the merger of WASR and UF, and particularly after I was hired as executive director. Given my uncertainty about what areas I would need help with, and what direction would ultimately be most promising for the organization to take, it would have been worthwhile to wait longer and make fewer hires right away. In particular, it would have been valuable to hire someone with prior nonprofit management experience earlier in the process, particularly after the departure of Abraham Rowe (our founder and first executive director). I believe I have largely corrected this problem by growing my own skills, and working with staff to transition their responsibilities toward the most promising projects and the areas they have the most talent for.

What changes have you made to your organization as a result of past successes?

Some effective altruists debate the value of publishing in academic journals due to the expense and time commitment required. We can accomplish some of the value of publishing our work by self-publishing it after conducting our own peer review process, but it is less likely to be seen as rigorous or inspire additional work by outside academics if published this way. That being said, the expense and time commitment should be minimized if possible. We had a great success with the ease of publishing our first work, a piece by Jane Capozzelli, Luke Hecht, and advisory panel member Samniequeka Halsey in the journal Restoration Ecology. This piece was very easy to publish because it was a response to a call for papers. Calls and invited papers are generally easier to publish, and since this success we have explicitly pursued an approach of looking for such calls that suit our work, in order to get the benefits of publication with fewer costs.

Another past success was the hiring (by former executive director Abraham Rowe) of our current research staff, who had as much scientific experience as he could find. The input of trained scientists on our approach has been invaluable, both for the quality of our research products and our outreach. This success has led to changes in our outreach approach and research priorities as a result of their expertise. In particular, we have pursued closer connections with other advocacy and research areas (like conservation, the One Health movement, and veterinarians), we have a better understanding of what is known and unknown about wild animal lives, and we integrate requests for assistance or offers of assistance into our outreach approach.

What changes have you made to your organization as a result of past failures?

As I mentioned above, we have shifted from previous iterations of wild animal welfare organizations in terms of our outreach strategy. Previous outreach was ineffective because it did not ask anything of the outreach targets. People were happy to comment their thoughts in a phone call, but without further engagement opportunities the outreach didn't go anywhere. Also, by targeting experienced scientists with established labs, there was little hope of shifting the

work that was being done. By integrating out outreach with requests for assistance or offers of assistance, we are able to establish ongoing relationships. Some examples are inviting people to participate in our advisory panel, asking them to give talks to our research group, or trying to help them secure funding for relevant projects. I believe our outreach is much more effective now.

Another past failure was our failure to hire a diverse staff. The organization went from having no full time staff and basically no money to having lots after the integration of Wild-Animal Suffering Research and Utility Farm. This led to a speedy hiring round that focused on getting academic expertise and not a wide range of backgrounds. We have changed our hiring process and also incorporated a stronger emphasis on diversity, equity, and inclusion in response to this failure. Please see my recent article for the Encompass Essay series on Sentient Media for more detail.

Another past failure was the failure to provide an adequate human resources mechanism early in our existence. This is a common problem on small staffs, and became more acute when one employee was uncomfortable working with another , and we did not have an appropriate mechanism for handling interpersonal issues that did not rise to the level of harassment. We were not able to satisfactorily resolve this issue at the time, but now have an improved HR mechanism in place.

Finally, a significant past failure of the entire wild animal welfare movement is to suppose that wild animal welfare is something really weird. I believe this is a result of the heavily suffering-focused, heavily utilitarian way it was first introduced in the effective altruism landscape. In fact, millions of people care about the welfare of wild animals, but either do so in small-scale ways (such as wildlife rehabilitation) or view biodiversity conservation as the best mechanism for improving their welfare. The failure to recognize this is alienating. We have changed the way we talk about wild animal welfare work to acknowledge existing contributions to wild animal welfare, and to explicitly highlight what is and is not new about our approach.

What does your organization do differently from other animal organizations? How does your organization stand out?

As far as I am aware, we are the only advocacy organization dedicated exclusively to the welfare of wild animals. There are, of course, conservation groups and wildlife rehabilitation centers, but few organizations approach animal welfare with a welfare-maximizing approach of helping as many animals as possible live as good lives as possible. Of those that do, we are the only group entirely focused on that mission.

One major way we stand out is our access to talented scientists with relevant training to pursue promising wild animal welfare research. Our research team and advisory panel provide a fabulous talent base, and give us a strong foundation to pursue our focus on promoting a field of wild animal welfare research within academia. We are also consciously pushing to integrate our work with other movements that care about wild animals, including seeking to grow our funding pool outside of its current base (which is predominantly effective altruists). I believe this is

somewhat unusual for an EA-aligned organization, and will make us more cost effective in terms of allowing us to convert dollars used for lower priority projects into high impact charitable work.

Have you had a leadership transition since the beginning of 2019? If yes, please describe the transition process.

Yes. Abraham Rowe was our executive director at the beginning of 2019. In March of 2019, Abraham announced that he would be stepping down as executive director due to personal circumstances that made him feel that he was unsuited to continue in a leadership role. The board began a leadership search by announcing that we were hiring a new executive director and set up a hiring panel comprising a member of staff (Hollis Howe), the board (at the time: Ari Benjamin, Kai Mayer, Flor Serna, Josh You, Emily Hatch), and an outside advisor (Persis Eskander). Neither Abraham nor I were involved in hiring decisions, although Abraham did assist with some of the scheduling and anonymizing of materials. I was the only internal candidate, and at the time I was also providing some management assistance to Abraham as he prepared to leave.

I accepted the offer to become executive director in late June and started in early July. At that time I hired Deputy Director Cameron Meyer Shorb on the basis of his application materials for the executive director position (he consented to have these shared with me). Abraham remained on staff as a special advisor for approximately 1 month after this time to train both Cameron and me in our roles before leaving the organization. I am happy to provide more detail about this process if you have further questions.

Please provide a list of board members and brief descriptions of their occupations or backgrounds.

https://www.wildanimalinitiative.org/transparency/#board

What does your organization do to create or revise your strategic plan? How often do you revise your strategy?

Annual Review
We set aside time at the beginning of each year for a complete review of our strategic plan. This process includes:

- Reviewing our progress in the previous year relative to our goals.
- Revisiting the assumptions we made. What evidence did we find to support or challenge those assumptions? How could these assumptions turn out to be wrong in the future?

- Creating space for blue-sky thinking. What would a shocking rate of success look like? What totally different projects, accomplishments, or institutions could advance our mission?
- Revising our theory of change as necessary, recording the assumptions that underlie it and considering what evidence would change our minds about those assumptions.
- Setting realistically ambitious goals for the year.
- Documenting our final decisions and reasoning.

Mid-Year Revision

As a nimble organization operating in a low-certainty environment, we often adjust our goals mid-year to respond to new opportunities or challenges. This happens ad hoc or during planned mid-year goal check-ins. In 2020, we performed mid-year goal check-ins as part of our performance evaluation process. In 2021, we plan to add a mid-year staff retreat (virtual if necessary) to facilitate additional group discussions of big-picture questions like those in our annual review.

How are the board and staff involved in the strategic planning process?

Annual Review

1) All staff members individually reflect on strategic planning questions before the staff retreat at the beginning of the year.
2) All staff members discuss big-picture strategic planning questions at the staff retreat. These discussions are non-hierarchical so as to allow everyone to contribute ideas freely and judge those ideas solely on their merits.
3) The executive director consults with board members as needed to leverage their specific areas of expertise.
4) Staff members participate in follow-up discussions as needed to achieve consensus on the proposed strategic plan.
5) If consensus is not possible, the executive director makes the final decision. So far, we have always achieved consensus on our proposed strategic plans.
6) The executive director presents the proposed strategic plan to the full board for discussion and revision.
7) If the board suggests major revisions, staff members will be consulted as needed.
8) The board approves the final strategic plan.

Mid-Year Revision
- Whenever necessary and during their annual performance reviews, staff members work with their managers to revisit their personal goals for the year.
- Several times a month, we hold departmental or all-staff meetings to brainstorm ideas, solicit input, debate ideas, or reach consensus.
- As necessary, leadership consults board members with relevant expertise.
- The board reviews any major changes to the strategy or the budget.

- Beginning in 2021, we will hold an annual mid-year retreat to facilitate group reflection on big-picture strategy questions.

How do you set goals and monitor progress towards those goals?

1) We set organizational and individual goals during the annual strategic planning process. The process is only complete once each goal meets the SMARTIE framework: specific enough to measure, ambitious, realistic, time-bound, and advancing inclusivity and equity as much as possible.
2) We monitor progress toward individual goals during weekly one-on-one meetings between managers and direct reports, at the end of projects, and in annual performance reviews.
3) Leadership monitors progress toward organizational goals during leadership meetings, at the end of projects, and when relevant circumstances change. Beginning in 2021, all staff will discuss progress toward organizational goals at the mid-year staff retreat.

We are currently working on making this process more systematic. Our Impact Measurement Plan is a central document that outlines the relationships between our theory of change, mission objectives, organizational goals, individual goals, and metrics of counterfactual impact. During our 2021 strategic planning process, we will integrate our new impact assessment procedures into an objectives and key results (OKR) framework.

Has your organization engaged in any formal self-assessments? How, when, and how regularly?

We assess our organization through our multiple feedback methods, our annual strategic plan review, and our post-mortem meetings for individual projects. Our Impact Measurement Plan describes procedures to regularly track our output and impact metrics. Our board aims to implement a formal assessment of its own activities within the next year.

Does your organization have retrospective or "post-mortem" meetings following major projects?

Reflection and improvement are core to our culture. Project leads and their managers or other core collaborators review outcomes and lessons learned after every major project and many minor projects.

International Operations

Do you operate in more than one country?

We are legally incorporated in the United States. Two staff members (contracted through international employers of record live outside the United States (England and Sweden). We often engage with international researchers.