



Minnesota State Zoological Board.  
Zoo-Related Organizations Files.

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## MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
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TO: Development and Marketing Committee  
FROM: Bob Ramin, Director of Development and Marketing  
DATE: 26 March 1997  
SUBJECT: Minutes from Memphis Meeting

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Thanks to all who made the "pilgrimage" to Memphis. Our "field trip" to Graceland was great, and we discovered a new hot item for our gift shops -- guitar nail-clippers! Seriously, we had a long and very productive meeting. Thanks to Erich Hunker for the attached minutes. Please note Committee assignments in bold.

I have also enclosed the notes from Proprietary Media -- the marketing team that is developing "Aza" the platypus. As you will note, we are developing subcommittees to more efficiently respond to sponsor questions. Erich is handling subcommittee assignments and will be in touch shortly.

Thanks again, and best wishes for a jam-packed spring at all of your institutions!

enclosures

*also we send to  
AZA Mbr  
Pres. 10/7  
I don't think  
we have to*





MINUTES OF THE AZA DEVELOPMENT AND MARKETING COMMITTEE  
March 19, 1997  
Memphis, Tennessee

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
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7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
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Present: Syd Butler (AZA), Gail Eaton, Glenn Ekey, Erich Hunker, Steve Ordahl (Licensing Co-Chair), Bob Ramin (AZA), Gayle Rathbun, Dr. Kathryn Roberts (Chair), Jan Schweitzer (Board of Directors), Kathy Sher, Kris Vehrs (AZA)

Guests: Rick Biddle (Schultz and Williams), Jeff Moritz, Natasha Rabin, and Janet Weiss (Proprietary Media)

Introduction and Welcome

Chairperson Roberts called the meeting to order at 12:10 p.m. Bob Ramin welcomed the Committee's newest member, Gail Eaton from Zoo Atlanta, as well as stated that Dennis Baker from the Wildlife Conservation Society/Bronx Zoo also had joined the Committee.

Proprietary Media

Bob introduced Jeff Moritz, Natasha Rabin, and Janet Weiss from Proprietary Media (PM). Proprietary Media has established a contractual relationship with the AZA to be a marketing "arm" (or national marketing system) for the AZA and, specifically, to handle the creation, production, and distribution of all aspects of the AZA's spokesperson, Aza the platypus. PM made a minimum guarantee of \$225,000 to be paid to the AZA, over the next three years, to be able to have the right to represent AZA in this matter. PM has already spent \$1,000,000 to develop the Aza character and sees its potential to bring hundreds of millions of sponsorship dollars to the AZA and member institutions.

Ms. Rabin has been responsible for some off the record discussions with potential sponsors who are very excited with the concept and Ms. Weiss is the Executive Producer and zoo/aquarium liaison. Their next steps are to explore the level of fees that are appropriate and recommend benefits to the sponsors - all of which they will need help from the Committee. They also encouraged and pleaded with all members to return to them the questionnaire which PM recently sent, which will help PM identify any potential conflicts with zoos and aquariums who are using sponsors and their relationships with them.



PM has been working on how to introduce Aza to kids and has secured the help of Kermit Love, who was instrumental in the creation of Big Bird. He will be guiding PM on the possible television show on Aza and the production of Aza as AZA's spokesperson. In addition, PM plans on PSAs and other avenues to get wide exposure for Aza.

Ms. Rabin discusses the need for the following sub-committees of the Development and Marketing Committee to be formed to help PM:

1. Project approval/review
2. Category exclusivity (sponsor benefits, etc.)
3. Clearance (set fee parameters, etc.)
4. Alternative distribution opportunities (licensing)
5. Trade/consumer communications

**Chairperson Roberts asked Bob Ramin and Erich Hunker to recommend and assign people to be on each of these committees.**

#### Conservation Excellence Campaign

As part of the efforts to raise more money for the CEF, Gayle Rathbun and Kathy Sher are co-chairing the annual CEF auction. Its 1997 goal is to raise \$25,000. They both believe it is time for some new ideas to generate more awareness, interest and income for the CEF auction. Among many ideas, the following were suggested:

1. Pre-publicize the live auction items through *Communiqué*.
2. Attempt to secure more domestic trips, weekend get-aways and other items of interest to the constituents (a foursome at an exclusive golf/country club, high-end sports merchandise and wildlife art, etc.).
3. Provide incentives for the institutions who are contributing items (item that fetches the highest bid, most items donated, etc.).
4. Move the silent auction to the conference hotel and have it displayed during the daytime while the sessions are occurring.

**Gayle and Bob will write an article for *Communiqué* about the unique auction items/ideas and the Committee is responsible for securing two items each.**

Bob Ramin reported that the CEF Campaign continues to move along and that \$250,000 will be given away in CEF grants (\$100,000 from the fund, \$100,000 from the Disney grant and \$50,000 from the Munson Foundation for the two aquatic education awards). In addition, a \$50,000 Bob Wagner startup fund has been established (for management school) and already \$30,000 has been pledged toward it.

### Licensing Update

The K&M Plush deal has just begun to be publicized and information is being sent to all institutions. The income generated from the sales of the plush benefits the AZA and the CEF.

### Marketing Updates

Bob Ramin reported on the following:

- a) NOVUS/National Alliance For Species Survival
  - 83 organizations have signed up and 70 was the target.
  - over \$75,000 has been raised to date
  - a 1 million direct mail piece is going out soon
- b) Barnum's Animal Crackers
  - on board for \$100,000 sponsorship fee and the offer of a coupon on the box
- c) Borden's
  - will be back in '97 as a sponsor
- d) Round-Up
  - Joan Embry has been brought on board as a spokesperson and Round-Up is holding some events across the country
- e) Baskin-Robbins Ice Cream
  - Bob is in negotiations with them about a promotion and more details will follow

### Foundation Activity

Bob reported that the AZA has secured the Munson Foundation for the two aquatic education awards, as well as some funding for coral reef initiatives. There will be an Exxon traveling exhibit on tigers and tiger conservation (more information to follow) and his staff will be applying to IMS, Chevron and others.

### Annual Conference

Jo Ann Keirseay and Natasha Collura are co-chairing the sessions for the Committee this year and Bob reported they have done an excellent job organizing our "platform" for this year's conference in Albuquerque. There will be sessions on merchandising, marketing, membership and events. Proprietary Media also offered their services to put together a session on sponsorship packages and packaging (proposals, benefits to offer, etc.).

### Miscellaneous

Bob relayed that Fran Bernstein will lead the effort to take over reciprocity from Judy Blackstock (who will still do it in 1997).

Glenn Ekey reported that about one-half of the institutions he asked for help on his recent survey regarding membership and public/private partnerships have returned their responses, which has been extremely helpful to him and the Zoological Society of Florida. He will distribute the results at the annual conference.

The Columbus Zoo (Patty Cupps) is interested in resurrecting the "Connections" publication Judy Blackstock used to manage. More will follow on this, if the Columbus Zoo decides to undertake it.

The AZA is working on their 25th anniversary. Bob thanked Jo Ann Keirse and the Oklahoma City Zoo for developing a 25th anniversary logo.

*The Chronicle of Philanthropy* is interested in writing an article about fundraising at zoos and aquariums. Jane Ballentine and Bob provided them with the list of Development and Marketing Committee members to contact for stories and interviews.

There being no further new or old business, the meeting was adjourned at 3:00 p.m.

(Minutes respectively submitted by Erich Hunker)

PRESENTATION TO MARKETING & DEVELOPMENT COMMITTEE  
MARCH 19, 1997, AT EASTERN CONFERENCE BY PROPRIETARY MEDIA:  
JEFFREY MORITZ, NATASHA LYNN RABIN & JANET WEISS

• *Jeffrey Moritz*

*"...thank you, Bob.*

I'm one of four partners at Proprietary Media. Since I'm meeting some of you for the first time, I'll provide a quick recap of who we are and what we have done to date to create a context for today's report. If possible, please hold questions until the end.

Proprietary Media is a for-profit company which studied the phenomenon of zoo-going for six years and funded an internal feasibility study as to the potential for a "national marketing network" of zoos and aquariums.

On October 16, 1996, Proprietary Media executed a three year contract with the AZA—after the terms were unanimously ratified by the AZA Board. Proprietary Media has contracted to pay a minimum guarantee for the right to finance and build a PNMS (Proprietary National Marketing System) for Z/A. Proprietary Media believes that within the first ten years of launch, this PNMS can generate \$200,000,000 per year in incremental dollars for Z/A.

On January, 18th, at the annual Directors' Retreat in New Orleans—Proprietary Media's coming out party—Proprietary Media described the models which support our preliminary assessments (NASCAR Properties—a for-profit on one end of the spectrum, and Children's Miracle Network, a not-for-profit on the other end. Both realized in excess of \$200,000,000 by or before their tenth year of operations.)

Prior to that presentation, we were warned by some of our Z/A friends that the Directors' meeting can be a tough house—and we better not have thin skins. After that caution, we observed the NOVUS and Microsoft question and answer sessions—and certainly saw the accuracy of the advice. Despite the warning, we received an unbelievably warm and enthusiastic response.

We are a marketing firm. To conduct the R & D that has gotten us here, we have spent \$1,000,000 and will spend another \$4-5 million during the next two years to develop properties supporting AZA/Aza. Our challenge is to plan and execute national relationships with major marketers so as to optimize the return for you—our clients—without conflicting your mission, without conflicting your own sponsor arrangements, and, without confusing existing AZA situations, such as

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

...CONTINUED

NOVUS and Microsoft. But, I must say that as the Z/A network flexes its muscles, every national contract must "make market" for you.

My partner, Natasha Lynn Rabin, will describe the existing dynamics in today's surging sponsor market—and what that can mean to you. We will cover the database questionnaire response to date—and finally—Proprietary Media's specific results in our audience development plan for the AZA, Z/A and for Aza—your spokesperson for animals to children.

My partner, Natasha Lynn, has enjoyed a twenty year career pioneering the largest and best examples of national promotions for marketing giants such as Coke, McDonalds, Kodak and Nissan...for unique properties such as "Comic Relief" and "Glory", the motion picture.

These sponsored programs ranged from several millions of dollars to tens of millions of dollars—and many of her programs ran for years. I competed with her work—and as I said to the directors, I'm glad she's on our side of the table. Here's Natasha!

• *Natasha Rabin*

"Jeff, I think you underestimate the opportunity!

PNMS (Proprietary National Marketing System)...or the Aza Network, will be built with you to provide an effective way for sponsors to reach their audience in the context of your mission. In this Network model, you are the affiliates. Just as in broadcast networks, affiliates have the ability to accept or turn down programming. However, the stronger the affiliate participation, the stronger the Network. So too with the PNMS. And I do believe, to use one of my favorite motion picture quotes: "If we build it, they will come."

In the past two months since the Directors' meeting, I have spent time engaging in off-the-record\* conversations with people with whom we have long-standing relationships. The purpose of these inquiries has been to assist us in sizing national sponsor opportunities for you. Given that theme parks are also family-oriented in audience, I have spoken with sponsors of such properties to develop parameters, concentrating on those parks which have a national presence.

\* Please keep specifics offered confidential.

**PRESENTATION TO MARKETING & DEVELOPMENT COMMITTEE**

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Universal Studios, as you know, has two facilities...one in LA, one in Orlando. Their combined yearly attendance is 12,000,000. As an example, in the long distance telephone category, they negotiated a \$20,000,000/ten year contract.

Disney, who has been at sponsorship for 25 years, and provides corporations with exclusives that include their parks, motion pictures and cable network, has a relationship in the photographic film category with a fee of 10's of millions of dollars a year, not including marketing support and budgets related to attractions.

But the deal—which many of you may have read about—that redefines sponsorship potential is the 10 year/\$1 billion agreement between McDonald's Corporation and Disney.

I do not know the top end of what we can achieve for you, but the extensions of your mission via the products Proprietary Media is investing such as the TV series, comic books, licensed merchandise, etc...will bring us beyond \$200,000,000, and faster than the examples Jeff cited.

In sizing sponsor opportunities, there is something we have that exceeds Universal and Disney, besides your unique mission and the significance of 120,000,000 people per year through your gates. It is the value of having 177 facilities nationwide—as opposed to 2 facilities at either end of the country—with which retailers, dealers, franchises can cross-promote.

Twenty years ago, national marketers spent 70% of their marketing budget on advertising and 30% on promotion. These numbers have reversed because promotion dollars support sales-oriented programs. Promoting on the local, grass roots level is valuable to national marketers because it assists them in selling-in to the trade and selling-through to consumers. Similarly, the PNMS will provide an audience awareness building mechanism for Aza-branded properties.

In addition to the dollars and marketing support AZA institutions will receive from category exclusive fees, it will enable us, on your behalf, to establish for the first time a national campaign to promote zoo/aquarium-going to consumers.

Our next steps with regard to category sponsorships is to continue extensive exploration of appropriate fee levels and contract durations and to develop recommendations—with your input—as to what sponsors get for what they give.

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

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We have already begun—by contracting a national research firm—to put together quantitative and qualitative numbers on your audience. We have spent \$10,000 initially for this feedback, and will continue to invest in such tools to market the Network. This confidential work-product-in-progress, combined with our expertise, and yours via the questionnaire answers you are providing, are what we need to build the Network...and they *will* come.

I would like now to introduce Janet Weiss, Proprietary Media's Vice President, Executive Producer of promotion events, and the liaison to your marketing departments. I have worked together with Janet for six years at my prior company, where she oversaw the Kodak/*Glory* project Jeff mentioned. Subsequently, she created the entertainment division for one of the largest ethnic advertising agencies in the country. For the past several years, Janet has had her own agency, representing clients in music, publishing, dance and particularly film, where she was a consultant to Mirimax, who after Monday night's Academy Awards, will put all of Hollywood to shame."

- *Janet Weiss*

"As you are all aware, last month the AZA sent out our marketing questionnaire to all 177 member institutions.

At this juncture, we have just 23% in returns, so to better gauge where everyone is at in terms of reviewing the materials, I've spent the better part of the last two weeks calling all the members. Of the 100 facilities I've called thus far, I've made contact with about 60%, including some of you here today. Of those, over a dozen never got the questionnaire, and needed it re-sent, and many more just got it on their desks, so our first hurdle was simply a logistical one, in that it took some time for the surveys to get into the right hands. I'm comfortable that at this point, the majority of the members are in the process of filling out and returning the surveys.

Of the 40 we have received, some of the results are as follows: attendance has risen at 15, dropped at 22, and remained flat at 2. We have incomplete numbers for the final respondent. As for sponsor relationships, there already is a diversity of responses, with both exclusive and non-exclusive relationships in some categories.

Because the surveys did come back more slowly than we expected, I have concentrated my calls on those that had not yet responded. I will

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

...CONTINUED

though, be re-interviewing everyone after we've had a chance to review all the completed surveys.

I have had to explain Proprietary Media's role vis-à-vis the AZA, and in several instances, was surprised that I had to clarify which survey I was calling about. I didn't realize other surveys were being disseminated as well. But the vast majority of my initial conversations have been quite pleasant. The AZA can pride itself on the politeness of its members. I am, after all, used to dealing with Hollywood, so this has been a refreshing change. The range of enthusiasm has certainly varied widely, but if I had to define just one overall tone—I'd say cautious compliance.

It is my mission to build a Network of partnering relationships, and it is the *partnering* aspect of that Network, that I am particularly mindful of. This is a nurturing process, and I understand that it is something that needs time to grow and develop. I don't expect it to happen overnight. That said, I see my first task as creating a level of comfort, not only in terms of Proprietary Media's expertise and ability in achieving our very ambitious goals, which we *will* prove indisputably over time, but more immediately, with regard to our understanding and addressing any concerns that may arise as a result of our initial efforts.

For instance, I've had some members express concern about our use and disclosure of this information, in particular in relation to sponsorship deals. We are building a database and utilizing this information in our efforts to generate national programs, but the information you provide is confidential—we will use it in general terms, but no institution will be identified. Nor will any institution be able to access specific information about any other institution's deals. But you will all have access to an incredibly valuable tool—the database we are funding and developing—to get an overview of the entire Z/A network. We will be sending out thank-you letters to everyone for responding to the survey and assuring the proprietary nature of this information—a non-disclosure agreement of sorts—to hopefully allay any concerns.

Nevertheless, we want everyone to understand that the more information we have, the more specific our database, the more intelligently we will be able to reach sponsors and create appropriate programs. The cooperation we get will absolutely impact our ability to serve your needs. In generating programs on the national level, we need to know where there are potential conflicts, where there are gaps, and what deals you are already generating locally, that we need to better. Furthermore, on the execution side, as Natasha mentioned, I will also be serving as Executive Producer of all our national promotions. The more

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

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information I have about each facility, the better I and my staff will be able to foresee and oversee your particular needs.

In closing, yes, I am very cognizant of the needs to nurture and develop this unique partnering arrangement. I am toning down my aggressive, New York cut-to-the-chase mentality—and relying on my true Midwestern sensibilities of patience and tolerance...tempered by my New York persistence.

If we're going to talk about aggressive tactics, I think it would be appropriate now for Natasha to speak of her discussions with sponsors."

- *Natasha Rabin*

"While Janet is building relationships with zoos and aquariums...I will be doing so with national marketers. I will be working through their political and organizational issues as I did for 1 1/2 years to bring together 5 separate operating divisions of Kodak in support of the motion picture *Glory*.

Seven years later, teachers are still using the Kodak/*Glory* study guide and video as part of their curriculum. We are certain that the programs we develop with you will have similar success and longevity.

To build such effective programs and relationships with sponsors, we need your assistance. Last night we had dinner with three of our mutual colleagues at Automatic Slims Tanga Club—whose "not spicy" was still too spicy for me! I had the occasion to learn three totally different experiences in relation to the same sponsor product category. Such information is invaluable as we pursue sponsorships.

On February 27th and 28th, I made the first Proprietary Media presentations on behalf of the AZA. Because of my special relationship with them—and because of their stellar client list, which includes Visa, McDonald's, US Post Office, Target Stores, Nestle, etc.—I selected Frankel & Co.

The normal turn around as you well know, on a sponsor presentation, can take months or even years. But given their professionalism and our homework...they came back to us 7 days later with a test for a national roll-out...which was the assignment given to us last June: Execute well on a test basis, and learn all the kinks before moving national.

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

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The company is Oldsmobile. The product is their new model Silhouette mini-van. Their proposed plan—which awaits client budgetary approval next week—is a 6 market test in their “leadership” areas, with a view towards 12-18 more markets by end-of-year. All discussions take into account your mission.

Next week, I will be meeting with the McDonald's marketing agency that develops their children's programs. What has come up for discussion is their commitment to the Disney Zoo and how, by working with the AZA, they can extend it to the total zoo and aquarium audience. I will come back to you with a post-meeting report. What we seek to do is determine how to make McDonald's commitment to Disney work for the Network.

Disney's strategy—to accomplish far-ranging sponsor relationships—is realized through their tactic of offering a full compliment of properties that respond to a sponsor's needs. Jeff will fill you in on Proprietary Media's plans to move the AZA towards such a position.”

- *Jeffrey Moritz*

“Even as Natasha is negotiating with sponsors, and as Janet is building the relationships for intra-institutional cooperation, Proprietary Media is designing market-entry and market development tactics. The most prominent tactic is to produce a PBS daily “*Sesame Street*”-type television show for pre-school children to promote the love of wildlife to them. This show is projected to air in January, 1999.

We have been extremely fortunate to contract with individuals and companies which helped make “*Sesame Street*” into the 30-year success which it is.

Ms. Valeria Lovelace was the Senior Director of Research at “*Sesame Street*” for 14 years during which time she assessed the erosion of Big Bird's market share to Barney and in turn, how to reposition Big Bird—or another character—to attract market share from Big Bird and Barney!

ARC Consulting is the leading consultant in the arena of Children's Educational Television and advises PBS, the Corporation for Public Broadcasting, Children's Television Workshop, “*Sesame Street*”, Nickelodeon—and just about every major firm on how to educate America's children. ARC has agreed to represent Aza the Platypus

## PRESENTATION TO MARKETING &amp; DEVELOPMENT COMMITTEE

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(and the show) to PBS. This is the first time ARC has ever agreed to be an advocate for a particular show.

Next is Mr. Kermit Love—the Dean of Puppetmakers. At 81 years of age, Mr. Love's creations include Big Bird, Snuffelopagus and the "Sesame Street" characters for all thirteen foreign language versions of the show. Big Bird averages \$200,000,000 per year at retail. Kermit has agreed to create the physical character of Aza and the six Elders.

The prospect of this team creating the show, inventing the character—and positioning Aza as the next Barney or Big Bird is, candidly, unbelievable. Imagine, that the millions of children who visit your institutions will actually be able to point to a plush at your concession stands and recognize it by name!

During the next 24 months, Proprietary Media will engage in a wide range of national tactics to introduce Aza to America's children—including our plans to create six Azas which will be made available regionally for on-site appearances, much like the recent success of Kratt's Creatures.

Each time we engage such tactics as the TV Show, or other audience building projects, the AZA is paid—and your institutions are paid. In fact, we only earn money when you earn money. We only succeed when you succeed.

In the interest of time, we should begin to take questions. Let me start by asking Natasha, how can this Committee help you accomplish the things you've spoken about today?

• *Natasha Rabin*

"The way that MDC can assist Proprietary Media most, as we begin working in a diversity of areas and need to address myriad issues on an ongoing basis, is to create sub-committees that (1) make communication less difficult (than gathering 16 people each time we need feedback), (2) lessen the load of correspondence, memos and proposals that each MDC member needs to review, and (3) will enable us to work with small groups who may have a special affinity for the particular sub-committee. Thereby, each sub-committee would include Bob and three MDC members.

**PRESENTATION TO MARKETING & DEVELOPMENT COMMITTEE****...CONTINUED**

Those areas we foresee as the focus of each of the 5 Sub-Committees include:

**(1) Project Approval Sub-Committee**

- For example, we will come back with an Oldsmobile proposal...subsequent creative...pre & post research objectives, etc. Each Project would follow this same procedure.

**(2) Category Exclusivity Sub-Committee**

- Recommendations for your review re: sponsorship fee parameters.
- Recommendations for your review re: what should be provided to sponsor in return.
- Multiple sponsor offers for evaluation whenever possible.
- Review of contract deal points prior to legal review.

**(3) PMNS Clearance Sub-Committee**

- Development of distribution fee schedule for members re: Aza audience-building materials (i.e. comic book, magazine), for input and review.
- Issues re: gaining insitution clearance for specific projects.
- Review Z/A Index which will determine on-site fee parameters, once developed.

**(4) Alternative Distribution Opportunities Sub-Committee**

- Could include opportunities in relation to gift shops, concessions, franchises, kiosks or Proprietary Media products developed for the AZA.

**(5) Trade and Consumer Communication Sub-Committee**

- Review of all marketing, promotion and PR campaigns to consumers and/or corporations which will be developed to promote zoo/aquarium going or sponsor relationships."

**Subject: Review of Proprietary Media Meeting  
With Marketing & Development Committee  
March 19, 1997, at Eastern Conference**

**Attendees:**

<b>MDC</b>	<b>AZA</b>	<b>PM</b>
Kathryn Roberts	Bob Ramin	Natasha Rabin
Kathy Lloyd Sher		Janet Weiss
Gail Eaton		Jeffrey Moritz
Glenn Ekey		
Erich Hunker		
Gayle Rathbun		

**Agenda:**

Presentation by PM (see attached) as to overall relationship, results to date, key challenges anticipated, specific recommendations.

**What follows are the major questions which arose in the meeting:**

**Q: Please explain how you would deal with category exclusivity in relation to Coke/Pepsi?**

**A: (Covered in separate memo attached.)**

**Q: How many actual Aza's will be available for on-site appearances?**

**A: PM will be spending approximately \$200,000 to have Kermit Love's workshop create six Aza's. These costumed actors will be made available on a regional basis. As we get further along, budgets will be specified in relation to appearances. In some instances, Kermit Love will be available to accompany Aza.**

Q: Will AZA Members have access to survey results?

A: **Once our database is available, all AZA members will receive an overview of the information across all institutions.**

Q: Can you elaborate on sponsored promotions such as the Oldsmobile test you mentioned?

A: **The sponsor, based upon their marketing objectives, will select in most cases a group of markets for a test. We will work with them on creative that is consistent with your mission. Once their budget and creative is approved, we will then approach institutions in the selected markets for clearance of dates, and confirmation to them of budgets being made available. A complete execution kit will be created by PM to walk Z/A marketing staff through the promotion and make suggestions as to how it can be maximized. It will be our recommendation to all sponsors that pre and post-event research be conducted, so that results can be quantified.**

#### **Other Areas of Discussion**

- **PM was invited to participate in the MDC's other agenda items as an invited (but vocal) visitor.**
- **Novus Issue:** It was determined that it is okay for PM to follow-up with them, indicating what we believe the financial institution category should be providing to the AZA, based on our discussions with Visa and others.
- **Alliance for Species Survival:** We engaged in discussion of what the AZA can give to members to provide value and sustain their interest and support, separate from the affinity card.
- **Value-Added Opportunity:** In relation to the above, PM outlined that we are exploring different formulas for an AZA magazine, which would be non-competitive with existing Z/A publications.

- **Auction for National Conference:** Possibility (subject to timing and discussions with Kermit Love) of PM arranging for contribution of some of the original artwork for Aza.
- **Gift Shop Minimum Order Requirements:** Several members indicated difficulty in ordering items they desire because of minimum order requirements. PM advised that we can assist in resourcing items on a national basis, and would like to pursue with Bob when he is in New York.

### Sub-Committees and Policy Questions:

#### I. PROMOTION APPROVAL SUB-COMMITTEE

- A. Chairperson \_\_\_\_\_
- B. \_\_\_\_\_, \_\_\_\_\_, Bob
- C. Major policies on horizon:
  - Oldsmobile test and roll-out
  - McDonald's/Disney Zoo and the AZA

#### II. CATEGORY EXCLUSIVITY SUB-COMMITTEE

- A. Chairperson \_\_\_\_\_
- B. \_\_\_\_\_, \_\_\_\_\_, Bob
- C. Major policies on horizon:
  - The "give-and-the-ask" (pricing vs. delivery)
  - **Special situations**
    - Coke-Pepsi
    - Kodak-Fuji
  - **Existing matters**
    - Novus follow-up plan
    - Microsoft follow-up plan

**III. PNMS CLEARANCE SUB-COMMITTEE**

- A. Chairperson \_\_\_\_\_
- B. \_\_\_\_\_, \_\_\_\_\_, Bob
- C. Major issues on horizon:
  - Possible assistance with Oldsmobile roll-out market selection
  - Assistance in development of distribution fees for Aza properties as distinct from sponsor distribution needs (i.e. comic book of Aza's mythology for Fall)
  - Dialogue based on PM development of Z/A Index to provide sponsors with site fee parameters.

**IV. ALTERNATIVE DISTRIBUTION OPPORTUNITIES SUB-COMMITTEE**

- A. Chairperson \_\_\_\_\_
- B. \_\_\_\_\_, \_\_\_\_\_, Bob
- C. Major issues on horizon:
  - Kodak on-site question
  - Fast food potentials
  - Concession stands
  - Other on-site concessions (stamping stations; passport photo ops)
  - Possible resourcing of products for gift shops on a national basis

**V. TRADE & CONSUMER COMMUNICATION SUB-COMMITTEE**

- A. Chairperson \_\_\_\_\_
- B. \_\_\_\_\_, \_\_\_\_\_, Bob
- C. Major issues on the horizon:
  - Initial press releases that PM will issue to announce relationship with AZA (to financial and marketing press).
  - More detailed discussion of national consumer zoo/aquarium-going campaign that will be developed from a percentage of exclusive sponsor fees.

PM will be in direct touch on an on-going basis with all sub-committees as issues arise. Reports on progress will be available from PM if any MDC member is interested in activities of other sub-committees.

**PROPRIETARY MEDIA, INC.** 2 Penn Plaza Suite 1500, New York, NY 10121 Telephone (212) 292-4867 Fax (212)292-4846

DT: March 24, 1997  
TO: Kathy Cloyd Sher  
FR: Natasha Lynn Rabin  
CC: Marketing Development Committee

It was a pleasure meeting with you and your associates in Memphis. Janet, Jeff and I all look forward to working together with all of you to develop beneficial and creative programs with national marketers.

It is interesting that your query in the meeting, regarding how we foresee working with sponsorship situations such as Coca-Cola vs. Pepsi, should be so timely. Although my response to you in the meeting was that it would probably take several years to work through the soft drink category vis-à-vis exclusive sponsorship, I offer the attached article...which you may have already seen...as having the potential to greatly accelerate our efforts on the AZA's behalf with regard to this category. Obviously, it also opens the door for significant opportunities in all categories where there may be a conflict on the local level.

It is our initial reaction that the AZA has, especially in the area of education, an extraordinarily deep wealth of resources that it can offer to a national exclusive sponsor when combined with Aza and the ancillary properties we are developing on behalf of all the institutions.

What is most exciting about this national development is that it will greatly enhance what member institutions can ask for in their own markets, as a result of the significant national sponsorship deals that the AZA will begin to enjoy.

A transcript of our presentation and corresponding "call-report" reviewing the Q & A that followed will be forwarded to you from Bob's office in the next day or so.

Regards,



# Pepsi Gets \$50 Million Deal For Major League Baseball

## Coke Holds Rights in Many Local Markets

By RICHARD SANDOMIR

The Pepsi-Cola Company signed up as a national sponsor of Major League Baseball yesterday, hoping to link its youth-oriented marketing to baseball's young stars like Ken Griffey Jr. and Derek Jeter.

The deal is valued at an estimated \$50 million over five years, with \$1 million annually in licensing fees to be divided among the teams.

"Baseball is a sleeping giant with a vast amount of untapped potential," said Rick Rock, vice president of media and entertainment for Pepsi, a unit of PepsiCo Inc. "This will let us connect with our consumers in a big way."

Baseball officials viewed the deal as a triumph, coming more than two years since signing other national sponsors and several months after owners vetoed a 10-year footwear and apparel deal with Nike and Reebok.

Recent baseball marketing has been concentrated in local markets, not national. The Coca-Cola Company declined to pursue a deal similar to Pepsi's, preferring to market itself as the exclusive soft drink in 24 of the 28 major league ball parks.

Greg Murphy, president of Major League Baseball Enterprises, said that having Pepsi market baseball nationally and Coca-Cola market locally "is an enormous lift for Major League Baseball."

"It gives us two teams on the field," he said.

Despite surveys in recent years that showed other sports like professional basketball were more popular with young consumers, Pepsi is convinced that it will tap into the buying habits of young baseball fans.

"If you go to the parks, you see a lot of kids," Mr. Rock said. "Millions of them are watching baseball on TV. And they're playing it in the parks. Sports is something we're interested in at all times of the year, but baseball is played smack in the middle of our key selling season."

Pepsi's baseball deal is small compared with the \$250 million five-year sponsorship agreement between Coca-Cola and the National Football League. In addition, to get the N.F.L.'s telecommunications sponsorship, the Sprint Corporation pays a \$24 million annual licensing fee, before spending anything on media, promotions or marketing.

Officials at Coca-Cola said bluntly

that the N.F.L. and the National Basketball Association, which it also sponsors, offer far greater value in a national sponsorship. Coca-Cola had a national sponsorship with baseball that ended after the 1992 season. At that point, the company increased its local efforts, which now include discount tickets, concession programs and special fan sections at Turner Field in Atlanta, Tiger Stadium in Detroit and Fenway Park in Boston.

"Consumers tell us that there is no equity to Major League Baseball as a national property," said Scott Jacobson, a Coca-Cola spokesman.

By becoming the official soft drink of baseball, Pepsi receives the rights to use all of baseball's trademarks and team logos in its marketing. The deal commits it to buying commercial time on nationally telecast games; produce advertising spots with baseball themes; create sweepstakes and product giveaways, and sponsor the All-Star voting on its Internet site and in 5,500 7-Eleven stores.

"This is a big property and it will get bigger each year," Mr. Rock said.

One of the stars of Pepsi's effort will be Mr. Jeter, the 1996 American League rookie of the year for the New York Yankees. Mr. Jeter will be featured on Pepsi's in-store displays and in the catalogue for "Pepsi Stuff," a promotion that lets consumers redeem points on Pepsi packaging for sports-related products.

Mr. Rock said no decision has been made on using Mr. Jeter in television spots, or on using Deion Sanders, of the Cincinnati Reds, who endorses Pepsi as a player for the Dallas Cowboys in the N.F.L.

Pepsi is also the official soft drink of NASCAR and Major League Soccer, is a sponsor of Texas Stadium where the Dallas Cowboys play, and was a major Super Bowl advertiser. On the entertainment side, PepsiCo has a four-year marketing and promotional deal worth \$2 billion with Lucasfilm Ltd. to link its worldwide beverage, snack food and restaurant brands with the rerelease of the "Star Wars" trilogy and three coming films in the series.

Earlier this month, the Yankees signed a 10-year, \$95 million sponsorship with Adidas, upsetting baseball officials, who worried that it violated major league rules governing how teams market themselves locally. The deal may be a model for other teams.



17  
Jon  
Flynn  
Thanks  
JRC

MEMORANDUM

TO: AZA Board of Directors  
FROM: Kathryn R. Roberts, Chair  
DATE: 4 March 1997  
RE: AZA Development and Marketing Committee Report

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980  
<http://www.aza.org>

The AZA's Development and Marketing Committee has been active on the following activities:

- 1) Assistance to Bob Ramin regarding the Proprietary Media "spokescritter" concept development and initial implementation;
- 2) Expansion of the National Alliance For Species Survival card to additional participating institutions;
- 3) Coordination of licensing initiatives and investigation of proposed partners;
- 4) Development of sessions, roundtables, and marketplace ideas for the AZA Annual Conference in Albuquerque;
- 5) Advice regarding incorporation of member reciprocity into the member service component of the AZA; and
- 6) Marketing strategies regarding cause-related promotions presented to the AZA.

Please refer to the attached minutes from our last Committee meeting in Honolulu. We will be meeting at the Memphis Regional at 12 noon in the Crowne Plaza, and all Board members are encouraged to attend.

Enclosure

cc: Development and Marketing Committee



**Minutes of the American Zoo and Aquarium Association  
Development and Marketing Committee Meeting  
20 September 1996  
Honolulu, Hawaii**

**Present:** Ted Beattie, Natasha Collura, Mary Floye Federer, Cynthia Holter, Erich Hunker, Jo Ann Keirse, Bob Ramin (AZA), Gayle Rathbun, Jan Schweitzer (Board of Directors), Kathy Sher, and Kris Vehrs (AZA)

**Closed Session Meeting**

Erich Hunker called the meeting to order at 2:00 p.m., as he was asked to chair the meeting due to the absence of both Chairperson Kathryn Roberts and Vice-Chair Glenn Ekey. Erich congratulated Bob Ramin for his fine work, particularly the most recent notification that Barnum's Animal Crackers was contributing \$100,000 to the AZA and will feature AZA on their cracker boxes (something they have been doing with WWF for years.)

**Proprietary Media**

Kris Vehrs was in attendance to discuss where the AZA is in its relationship with Proprietary Media (PM). Kris reported that the Board has approved the concept and the platypus "spokescritter" and AZA and PM are finalizing the contract which Syd Butler will sign on or before October 15. The Committee recommended that after the contract is signed, Bob disseminate the information about "Aza" and the promotion surrounding him/her in the same fashion as was done with the NOVUS affinity card to all AZA member institutions. This seemed to work well and spell out how zoos and aquariums could participate at different levels.

**Key Result Area (KRA) /AZA Strategic Plan**

Bob and Gayle Rathbun discussed how the KRA was developed and handed out copies of the report on the development and marketing section. The Committee was asked for feedback on it and the other KRA's that appeared in *Communiqué*. The Committee agreed with the KRA's goals and action steps, and added no further input to the other areas.

## Licensing

Licensing co-chair Natasha Collura reported that the AZA Licensing Committee met, and the program is on track with the business plan. K&M, our largest partnership to date, has introduced an exclusive AZA line that is already selling well to zoos and aquariums, toy stores, and catalogs. The Committee is currently developing a second gift shop survey, updating the business plan, and investigating new merchandise categories.

## Annual Conference

Cynthia Holter was congratulated for her excellent work in helping to set up the development, marketing, and membership sessions, roundtables, and marketplace sessions for this year's conference, with help from Steve Ordahl (Minnesota Zoo). There was much discussion about the need for a dedicated AZA staff person to help coordinate conference program needs, sponsorships, and the CEF auction.

Gayle Rathbun would like the Committee to take a more active role in both the live and silent auctions for the CEF regarding donations, set-up, and stewardship. He suggested the Committee could advise the host, but let the host "man" the actual auction with Committee assistance.

Gayle has already met with the Auction Chair, Gail Vavruska from the New Mexico Zoological Society, and she is very interested in receiving assistance. Acting Chair Hunker asked Gayle to chair a sub-committee for the auction and he agreed. Kathy Sher, Mary Floye Federer, and Natasha Collura volunteered to be on the sub-committee with Gayle. **Please contact Gayle or Bob Ramin if you would like to join this sub-committee.**

After much deliberation, the Committee is recommending to the AZA and the Board of Directors the following:

- 
- 1) Have Colleen Kelly, AZA Associate Director of Development and Marketing attend the Annual Conference to be the staff point person for the CEF auction (among other CEF duties) and coordinate it with the host institution. In addition, Kelly will help coordinate all on-site sponsorship recognition.
  - 2) Develop a standardized silent auction form to be used by all future hosts.

- 3) Have AZA write thank you letters to all auction donors.
- 4) List CEF results in *Communiqué* (totals, highest items, etc.)
- 5) Set auction goals.
- 6) Develop a policies/procedures manual for all hosts to follow.
- 7) Look into holding the silent auction (or several smaller ones) at the host hotel, during sessions.
- 8) Have the AZA coordinate sponsorship opportunities to help with conference funding through Bob Ramin.

For the '97 conference in Albuquerque, the Committee further recommends the following:

- 1) Survey conference attendees about what worked/what didn't for the '96 conference.
- 2) Add a member of the Development/Marketing Committee to the Program Committee (due to the increased demand for development and marketing sessions.)

There was discussion about new Committee members to replace those that are no longer involved. Suggestions were: Crystal Bolt (Ft. Worth), Nancy Young (Knoxville) and Gail Eaton (Zoo Atlanta) and a representative from a Canadian institution. **Please contact Bob Ramin with additional suggestions and he will forward these names to Kathryn Roberts and Tom Otten.**

### Membership

The Committee discussed the need to be more pro-active in acquiring and retaining members in the various AZA membership categories. It was suggested that the Development and Marketing Committee work more closely with the Membership Committee on acquisition and retention strategies, especially in light of the opportunities presented by the National Alliance For Species Survival.

### **Open Session Discussion**

Bob talked about our role in continuing education for our profession, and introduced the idea of a "development and marketing school," much like what the educators have set up. Ted Beattie warned that

this was a lot of work and those in attendance agreed that it probably was not necessary in the near term.

After much discussion, it was determined that there should be more emphasis on roundtables for the '97 conference, as this seems to be the best way to learn and share ideas. Jo Ann Keirse and Natasha Collura agreed to chair the formation of sessions/ideas for the '97 conference and to correspond with Jeff Swanagan (Conf. Program Chair). **Anyone interested in moderating or speaking should submit their ideas to Jo Ann or Natasha, for inclusion in a master Development and Marketing Committee conference proposal.**

Bob Ramin updated everyone on several marketing initiatives, including: Borden, ConAgra, Sierra Antifreeze, Solaris, and NOVUS/affinity card. Bob will prepare an update for the Board for the March meeting on the NOVUS promotion and Ted Beattie will ask the Board for input to attempt to get more institutions to participate.

There being no further new or old business, the meeting was adjourned at 4:45 p.m.

**Please indicate your responses to the above "action items" in bold to Bob Ramin at the AZA by 1 November 1996.**

Thank You!

(Minutes prepared and respectively submitted by Erich Hunker)



Jon  
Fry

4-0-2

MEMORANDUM

TO: AZA Board of Directors

FROM: Robert A. Ramin, Director of Development and Marketing

SUBJECT: Board Report

DATE: 19 February 1997

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
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---

Thanks to the help of the Board of Directors and AZA Development and Marketing Committee, the AZA Development and Marketing Department has accomplished a number of goals since our report at the August 1996 Board Meeting. The attached report includes some highlights of some of these exciting projects.

I ask that the Board approve the attached report.

enclosures: Mid-Year Board Report  
FY 1997 Funding Report (Unrestricted Income)



AZA Development and Marketing Department  
Robert A. Ramin, Director  
Colleen Kelly, Associate Director  
Amy Hertenstein, Program Assistant

**Honolulu Conference**

Sessions and Roundtables in development, marketing, and membership were extremely well-attended, and reflected a great deal of effort on behalf of the Development and Marketing Committee, with Cynthia Holter (St. Louis Zoo) and Steve Ordahl (Minnesota Zoo) taking the lead. The Conference team worked closely with Program Chair Jeff Swanagan to create cutting-edge sessions.

The Development and Marketing, Conservation Endowment Fund, and Licensing Committees all met in Honolulu, and enjoyed productive meetings (the Development and Marketing minutes are included with that Committee's Report to the Board).

**Promotions and Marketing Programs**

The development and marketing staff has worked to further develop the highly successful Borden Family Zoofari coupon promotion which will begin it's third year in 1997. We also monitored the creation of a similar program with Nabisco's Barnum's Animal Crackers. We are especially proud of the relationship with Nabisco due to their prior connection with World Wildlife Fund.

The AZA's partnership with NOVUS Services has been outstanding. Since the introduction of the National Alliance For Species affinity card in September 1996, our goals of cardmember and participating zoo and aquarium acquisition have each been surpassed. This program has provided over \$70,000 since September for the AZA and the CEF, not counting funds donated to participating institutions.

Signed contracts and invoices show the development and marketing department surpassing our \$374,000 annual goal for unrestricted operating funding for the AZA budget for 1997.  
Please refer to attached chart for specific amounts.

## Development and Marketing

### Page 2

Existing promotions with Sierra Antifreeze, Roundup Weed killer, and Ralston Purina are being modified and up-dated for 1997. In addition, we have signed a contract to participate in an educational program with Baskin Robbins for fall of 1997.

### **AZA Institution Directors Meeting in New Orleans**

The Development and Marketing Committee approved promotions with NOVUS Services and Proprietary Media then passed them along to the Board for approval. After gaining your support, the Institutional Directors were given presentations detailing how each AZA member zoo and aquarium will benefit. These two marketing endeavors will bring AZA to a new level of corporate partnership.

### **Conservation Endowment Fund**

We completed a 6,000 piece direct mail in June 1996 which resulted in over \$70,000 for the CEF from individual donors. The CEF auction in Honolulu brought in \$14,000, and the Development and Marketing Committee has undertaken the task of overhauling the auction for Albuquerque in 1997. Total donations and pledges for 1996 exceeded \$100,000.

### **Grants**

We are currently working with a number of donors on the following projects, as well as providing interim staff support for the coral reef and tiger education teams in the absence of a Director of Education:

- *Coral Reef Initiative* - funding provided by National Fish & Wildlife Foundation (\$5,000), The Curtis & Edith Munson Foundation (\$20,000), Walt Disney World Co. (\$10,000), Sea World (\$10,000), and member aquariums (\$7,000 from National Aquarium in Baltimore - \$5,000, Steinhart Aquarium - \$1,000, and the Long Beach Aquarium of the Pacific - \$1,000).
- *Suitcase for Survival* - funding provided by American Tourister (\$10,000) and National Fish and Wildlife Foundation (\$5,000) to revive the program in late 1996 through new suitcases, artifacts, and funding to reprint and update materials.

## Development and Marketing

### Page 3

- *Tigers in Crisis - A Traveling Exhibit* - Funding (\$150,000) provided by Exxon through National Fish and Wildlife Foundation.

### Licensing

Our initial licensing partner, AZA Commercial Member K&M International, launched an ambitious plush and soft rubber "National Alliance For Species Survival" line of endangered animal line in the fall of 1996. This line has been selling extremely well, and we should see these items in gift shops very soon. Licensing fees from K&M will be allocated to the Conservation Endowment Fund.

J & C Ferrara Co., Inc. has developed a line of "Mother-Child" animal artwork on the following articles: pewter and sterling pendants, charms, key rings, gift ware, porcelain; cards, lithographs and t-shirts. AZA will receive 5% of all gross sales. Ferrara currently effectively markets its jewelry through catalog and retail outlets.

PandaAmerica has designed a silver Chinese Panda coin as well as Liberian or Gambian coins featuring "sets" of SSP animals based on geographic habitat. Guaranteed minimums are \$2,500 for "AZA-Panda" coin, \$2,500 for each multiple coin package variation, and \$2,500 for each individual animal coin issued.

The Licensing Committee is currently reviewing a number of other categories with the input of member gift shop managers and merchandise directors.

### 25th Anniversary

Initial ideas for the celebration of AZA's 25th birthday have been developed. The ceremony honoring the AZA founders at the final banquet in Hawaii went well, and was capped-off by the Marlin Perkins Award going to AZA founding member Les Fisher. Programs are being planned for the 1997 regional and Albuquerque conferences.

A commemorative edition of Communiqué will be published in September that will exclusively focus on the past 25 years, and will be illustrated with historic photographs.

**Development and Marketing**  
**Page 4**

This 13th issue of Communiqué will be funded through commercial member advertising, with the expectation that each advertiser will incorporate vintage artwork and copy.

**AZA Annual Report**

Writing, editing, and layout work has been completed for the FY 1996 AZA Annual Report. We are happy to report that the 1995 Annual Report received the award for "Award of Excellence" in the not-for-profit environmental category from the Natural Resources Defense Council's ECO Awards.

**Reciprocity**

The Committee has been working to determine future scope of reciprocity. The publication "Connections," edited by Judy Blackstock, has gone out of business and will no longer coordinate reciprocity for member zoo and aquarium support societies. Development and marketing staff and the Development and Marketing Committee will coordinate with Wheeling office as to a permanent solution.

**MARKETING INCOME**  
**FY97 (Oct. 1 1996 - Sept. 30, 1997)**

<u>Partner/Cause Related</u>	<u>Status</u>	<u>Date Expected</u>	<u>Amount</u>	<u>Received</u>	<u>Total</u>
Dunkin Donuts	signed	2/97		\$14,935	\$14,935
Proprietary Media	signed	4/97 & 8/97	\$33,333	\$16,667	\$50,000
NOVUS	signed	monthly	\$5,000	\$65,447	\$70,447
Just Toys				\$5,000	\$5,000
Nabisco	signed	4/97 & 8/97	\$100,000		\$100,000
Borden (1997 promotion)	signed	4/1/97	\$60,000		\$60,000
Solaris	invoice	3/97	\$25,000		\$25,000
Baskin Robbins	signed	4/97 & 9/97	\$50,000		\$50,000
Creative Communications	signed	1/97		\$500	\$500
<b><u>Total</u></b>			<b><u>\$273,333</u></b>	<b><u>\$102,549</u></b>	<b><u>\$375,382</u></b>

Budgeted Goal = \$374,004



19 February 1997

## MEMORANDUM

**TO:** AZA Development and Marketing Committee

**FROM:** Kathryn Roberts, Bob Ramin

**SUBJECT:** March Committee Meeting and Agenda

---

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
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<http://www.aza.org>

We are pleased to announce that the AZA Development and Marketing Committee will meet at the Eastern Regional Conference, hosted by the Memphis Zoological Garden and Aquarium. Please find enclosed our agenda.

Our meeting will be held on Wednesday, 19 March 1997 in the Crowne Plaza Hotel, located at 250 N. Main Street (direct hotel number: (901) 527-7300). We will meet from 12:00 noon to 3:00 PM; our meeting (room to be determined) will be closed until 1:30 PM, when we will open to all interested conference attendees.

The National Alliance For Species Survival Committee will meet from 3:00 PM until 4:00 PM. The National Alliance is the AZA's national membership organization that allows the public to support conservation and educational efforts on behalf of endangered species through the field-based conservation and research initiatives of accredited zoos and aquariums in North America, currently supported primarily through our affinity card relationship with NOVUS Services. Development and Marketing Committee members are encouraged to attend this meeting by Chair Jan Schweitzer.

The AZA Licensing Committee will meet the afternoon of the 19th, from 4:00 PM until 5:00 PM. This is a closed meeting, but will be open to Development and Marketing Committee Members.

Please let Bob know if you will be attending, and if you have any questions regarding the hotel, conference registration, or additions to the agenda. A final agenda and all supporting materials will be sent next week.

A group is planning on visiting Graceland on Wednesday morning -- they open at 8:30 AM -- please indicate if you are interested in participating in this "pilgrimage!"





August 26, 1996

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

DEVELOPMENT/MARKETING COMMITTEE

Chairman/Advisor

Kathryn R. Roberts, Minnesota Zoo

I have just been officially notified by President-Elect Tom Otten of his committee appointments for the coming year. I will again serve as Chair and Glenn Ekey will again serve as Vice Chair. Committee members are:

Cyndy Andrews  
Ted Beattie  
Fran Bernstein  
Charles Bieler  
Natasha Collura  
Glenn Ekey  
Mary Floye Federer  
Cynthia Holter  
Erich Hunker  
Jo Ann Kiersey  
Gayle Rathbun  
Patty Richards  
Carmen Sandoe  
Kathy Sher

The committee is only slightly changed from the past year by the loss of Clare Richardson and Sally Steele to positions outside AZA institutions and with the addition of Patty Richards from the Calgary Zoo.

As a reminder, we will be meeting at the annual conference on September 20 from 3:30 - 5:00 p.m. in Niihau. The Licensing Task Force will also meet on September 19th from 8:30 - 10:30 a.m. in Hilo and then again on the 20th from 2:00 - 3:30 p.m. preceding the full committee meeting. (Agendas will be forthcoming.)

I look forward to another productive year!

*cc Otten, Ramin, Butler, Wagner, McCusker*





**FAX TRANSMITTAL COVER SHEET**

TO: SEE BELOW FROM: Bob Rameri  
 OF: \_\_\_\_\_ FAXED BY: Amy  
 PHONE: \_\_\_\_\_ DATE: 2-20-97  
 FAX: \_\_\_\_\_ TIME: 4:30  
 TOPIC: \_\_\_\_\_

AMERICAN ZOO AND  
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THIS TRANSMISSION CONSISTS OF 3 PAGE(S), INCLUDING  
COVER.

**MESSAGE:**

Contact	Institution	Fax
Cyndy Andrews	Omaha's Henry Doorly Zoo	(402) 733-4415
Dennis Baker	Wildlife Conservation Society	(718) 733-3009
Ted Beattie	Shedd Aquarium	(312) 939-8069
Fran Bernstein	Friends of the National Zoo	(202) 673-4607
Chuck Bieler	San Diego Zoo	(619) 231-3954
Kathy Cloyd Sher	National Aquarium in Baltimore	(410) 576-8238
Natasha Collura	San Diego Zoo	(619) 557-3970
Gail Eaton	Zoo Atlanta	(404) 627-7514
Glenn Ekey	Zoological Society of Florida	(305) 255-7126
Mary Floye Federer	Zoological Society of Houston	(713) 525-3330
Cynthia Holter	Saint Louis Zoo	(314) 647-7969
Erich Hunker	Toledo Zoological Gardens	(419) 385-6935
Jo Ann Kiersey	Oklahoma Zoological Society	(405) 424-1407
Gayle Rathbun	Seneca Zoological Society	(716) 342-1477
Kathryn Roberts	Minnesota Zoo	(612) 431-9300





19 February 1997

## MEMORANDUM

TO: AZA Development and Marketing Committee

FROM: Kathryn Roberts, Bob Ramin

SUBJECT: March Committee Meeting and Agenda

---

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**AGENDA**  
**AZA DEVELOPMENT AND MARKETING COMMITTEE**  
**Wednesday, 19 March 1997, 12:00 - 3:00 PM**  
**Crowne Plaza Memphis**

- I. Welcome and review of proceedings from September 1996  
Committee meeting in Honolulu  
  
Hunker/Ramin
- II. Proprietary Media Presentation (three principals who  
presented to the Director's Retreat in January)
  - a) "Aza" the Platypus Overview
  - b) Sponsorship Strategy
  - c) Input needed from Committee
- III. Conservation Excellence Campaign
  - a) Campaign Status
  - b) CEF Auction - Ramin/Rathbun
  - c) Scholarship Appeal - Ramin  
Beattie/Ramin
- IV. Licensing Committee Update  
  
Collura/Ordahl/Ramin
- V. Marketing Updates - NOVUS/National Alliance for Species  
Survival Card, Renewals/'97 Partners
- VI. Foundation Activity
- VII. Annual Conference/Professional Development
  - a) Conference Sessions, Roundtables, Marketplace
  - b) Volunteer Coordinator for Albuquerque '97  
Keirseay/Collura/Ramin
- VIII. Reciprocity  
  
Bernstein/Ramin
- IX. Other Issues/Conclusion

AZA 761-2002

First Name	Last Name	Title	Organization	Address	City, State, Zip	Phone/Fax
Cyndy	Andrews ✓	Marketing Manager	Omaha's Henry Doorly Zoo	3701 South 10th St.	Omaha, NE 68107-2200	402/733-8401 Fax: 733-4415
Ted	Beattie ✓	Director	Shedd Aquarium	1200 South Lake Shore Dr.	Chicago, IL 60605	312/986-2270 Fax: 939-8734
Fran	Bernstein ✓	Membership & Mktg. Dir.	Friends of the National Zoo	3001 Connecticut Ave. N.W.	Washington, DC 20008	202/673-4950 Fax: 673-4738
Charles	Bieler ✓	Development Director	Zoological Society of San Diego	P.O. Box 551	San Diego, CA 92112-0551	619/231-1515 Fax: 231-0249
Natasha	Collura ✓	Marketing Manager	San Diego Zoo & Wild Animal Park	P.O. Box 51	San Diego, CA 92112-0551	619/231-1515 Fax: 231-0249
Glenn	Ekey ✓	Executive Director	Zoological Society of Florida	12400 S.W. 152nd St.	Miami, FL 33177	305/255-5551 Fax: 255-7126
Mary Floye	Federer ✓	Development Director	Zoological Society of Houston	P.O. Box 66387	Houston, TX 77266	713/529-2632 Fax: 522-2823
Cynthia	Holter ✓	Dev/Mktg. Director	St. Louis Zoo	Forest Park	St. Louis, MO 63110	314/781-0900 Fax: 647-7969
Erich	Hunker ✓	PR/Dev/Mktg. Dir.	Toledo Zoo	P.O. Box 4010	Toledo, OH 43609	419/385-5721 Fax: 385-6935
Jo Ann	Kiersey ✓	Manager/Mktg & Interpretive Services	Oklahoma City Zoo	2101 NE 50th St.	Oklahoma City, OK 73111-7199	405/425-0280 Fax: 425-0207
Gayle	Rathbun ✓	Executive Director	Seneca Zoological Society	2222 St. Paul St.	Rochester, NY 14621-1097	716/342-2744 Fax: 342-1477
Patty	Richards ✓	Marketing Coordinator	Calgary Zoo	P.O. Box 3036, Station "B"	Calgary, Alberta CANADA T2M 4R8	403/232-9300 Fax: 237-7582
Kathryn	Roberts	Executive Director	Minnesota Zoo	13000 Zoo Boulevard	Apple Valley, MN 55124-8199	612/431-9299 Fax: 431-9336
Carmen	Sandoe ✓	Mgr. of Corporate Sponsorship	Wildlife Conservation Park/Bronx Zoo	185th Street & Southern Blvd.	Bronx, NY 10460-1099	718/220-5100 Fax: 220-7114
Kathy	Sher ✓	Sr. Dir./Mktg. & Planning	National Aquarium in Baltimore	Pier 3, 501 East Pratt St.	Baltimore, MD 21202-3194	410/576-3805 Fax: 576-8238

First Name	Last Name	Title	Organization	Address	City, State, Zip	Phone/Fax
Syd	Butler	Executive Director	AAZPA Executive Office	7970-D Old Georgetown Rd.	Bethesda, MD 20814	301/907-7777 Fax: 907-2980
Bob	Ramin	Development/Marketing Director	AAZPA Executive Office	7970-D Old Georgetown Rd.	Bethesda, MD 20814	301/907-7777 Fax: 907-2980
Bob	Wagner	Chief Administrative Officer	AAZPA Administrator	Oglebay Park	Wheeling, WV 26003-1698	304/2420-2283 Fax: 242-2160
Tom	Otten	AZA President-Elect	Point Defiance Zoo & Aquarium	5400 North Peark St.	Tacoma, WA 98407-3218	206/591-5337 x101 Fax: 591-5448
Steve	McCusker	AZA President	San Antonio Zoo	3903 North St. Mary's St.	San Antonio, TX 78212	

Cyndy Andrews  
Omaha's Henry Doorly Zoo  
3701 South 10th St.  
Omaha, NE 68107-2200

Charles Bieler  
Zoological Society of San Diego  
P.O. Box 551  
San Diego, CA 92112-0551

Mary Floye Federer  
Zoological Society of Houston  
P.O. Box 66387  
Houston, TX 77266

Jo Ann Kiersey  
Oklahoma City Zoo  
2101 NE 50th St.  
Oklahoma City, OK 73111-7199

Kathryn Roberts  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Syd Butler  
AAZPA Executive Office  
7970-D Old Georgetown Rd.  
Bethesda, MD 20814

Tom Otten  
Point Defiance Zoo & Aquarium  
5400 North Park St.  
Tacoma, WA 98407-3218

Ted Beattie  
Shedd Aquarium  
1200 South Lake Shore Dr.  
Chicago, IL 60605

Natasha Collura  
San Diego Zoo & Wild Animal Park  
P.O. Box 51  
San Diego, CA 92112-0551

Cynthia Holter  
St. Louis Zoo  
Forest Park  
St. Louis, MO 63110

Gayle Rathbun  
Seneca Zoological Society  
2222 St. Paul St.  
Rochester, NY 14621-1097

Carmen Sandoe  
Wildlife Conservation Park/Bronx Zoo  
185th Street & Southern Blvd.  
Bronx, NY 10460-1099

Bob Ramin  
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Bethesda, MD 20814

Steve McCusker  
San Antonio Zoo  
3903 North St. Mary's St.  
San Antonio, TX 78212

Fran Bernstein  
Friends of the National Zoo  
3001 Connecticut Ave. N.W.  
Washington, DC 20008

Glenn Ekey  
Zoological Society of Florida  
12400 S.W. 152nd St.  
Miami, FL 33177

Erich Hunker  
Toledo Zoo  
P.O. Box 4010  
Toledo, OH 43609

Patty Richards  
Calgary Zoo  
P.O. Box 3036, Station "B"  
Calgary, Alberta  
CANADA T2M 4R8  
Kathy Sher  
National Aquarium in Baltimore  
Pier 3, 501 East Pratt St.  
Baltimore, MD 21202-3194

Bob Wagner  
AAZPA Administrator  
Oglebay Park  
Wheeling, WV 26003-1698

Miss Daisy - ~~pls review~~  
FR: (AKA KRL) ~~This draft~~  
~~Pay!~~

TO Bob RAMIN

MEMORANDUM

TO: AZA Development and Marketing Committee  
FROM: Kathryn Roberts  
Bob Ramin  
DATE: 6 September 1996  
SUBJECT: Agenda for Committee Meeting

Looking forward to meeting with you in our 50th state! Please find enclosed our agenda.

Our meeting will be held on Friday, 20 September 1996 in the Niihau Room in the Sheraton Waikiki, located at 2255 Kalakaua Avenue in Honolulu (direct hotel number: (808) 922-4422, reservations: (800) 782-9488). We will meet from 2:00 to 5:00 PM; our meeting will be closed until 3:30 PM when we will open to all interested conference attendees.

The AZA Conservation Excellence Campaign Advisory Committee will meet the morning of the 17th, from 9:00 AM to 11:00 AM, in the Hilo Room. Chairman Beattie would be happy to have fellow Development and Marketing Committee members attend if you are arriving early. In addition, the Licensing Task Force will meet on Thursday, 19 September from 8:30 AM to 10:30 AM in the Hilo Room. This is a closed meeting, but will be open to Development and Marketing Committee Members.

Please let Bob know if you will be attending, and if you have any questions regarding the hotel, conference registration, or additions to the agenda. FYI - Bob will be arriving on Sunday, 15 September.

ALOHA!

enclosure

Bob - This looks great - Do you want to take my name off the agenda? We let you call Glenn this time - Miss D. is being run ragged today - Thanks for your hard work. KRL

**AGENDA**  
**AZA DEVELOPMENT AND MARKETING COMMITTEE**

**Friday, 20 September 1996, 2:00 - 5:00 PM**  
**Shératon Waikiki, Niihau Room**

- I. Welcome and review of proceedings from March 1996  
Committee meeting in New Orleans  
  
Roberts/Ramin
- II. Key Result Area (KRA)/Strategic Plan Process  
(5 Year Plan for Development/Marketing)  
  
Roberts/Ramin
- III. Annual Conference/Professional Development
  - a) Conference Sessions, Roundtables, Marketplace
  - b) Volunteer Coordinator for Albuquerque '97
  - c) Potential for Development/Marketing "School" like  
new educators course during Management School  
Holter/Beattie
- IV. Conservation Excellence Campaign  
  
Beattie/Ramin  
  
CEF Auction - Ramin/Rathbun  
CEF Check-Off - Ramin
- V. Licensing Task Force Update  
  
Collura/Ramin
- VI. Marketing Updates - NOVUS/National Alliance for Species  
Survival Card, Proprietary Media, Renewals/'97 Partners  
  
Hunker/Ramin
- VII. Foundation Activity
- VIII. Other Issues/Conclusion



August 26, 1996

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

DEVELOPMENT/MARKETING COMMITTEE

Chairman/Advisor

Kathryn R. Roberts, Minnesota Zoo

I have just been officially notified by President-Elect Tom Otten of his committee appointments for the coming year. I will again serve as Chair and Glenn Ekey will again serve as Vice Chair. Committee members are:

Cyndy Andrews  
Ted Beattie  
Fran Bernstein  
Charles Bieler  
Natasha Collura  
Glenn Ekey  
Mary Floye Federer  
Cynthia Holter  
Erich Hunker  
Jo Ann Kiersey  
Gayle Rathbun  
Patty Richards  
Carmen Sandoe  
Kathy Sher

The committee is only slightly changed from the past year by the loss of Clare Richardson and Sally Steele to positions outside AZA institutions and with the addition of Patty Richards from the Calgary Zoo.

As a reminder, we will be meeting at the annual conference on September 20 from 3:30 - 5:00 p.m. in Niihau. The Licensing Task Force will also meet on September 19th from 8:30 - 10:30 a.m. in Hilo and then again on the 20th from 2:00 - 3:30 p.m. preceding the full committee meeting. (Agendas will be forthcoming.)

I look forward to another productive year!





15 August 1996

MEMO TO: KATHRYN ROBERTS, Ph.D.

FROM: THOMAS C. OTTEN, AZA PRESIDENT-ELECT

SUBJECT: COMMITTEE ASSIGNMENTS

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Office of  
Membership Services  
Oglebay Park  
Wheeling, WV 26003  
Tel: 304-242-2160  
Fax: 304-242-2283

I have completed my assignments for committees for the coming year. The task was a formidable one, but also most enjoyable in light of the many offers I received from our members to assist me during my term as President.

I have appointed you as chairperson of the Development/Marketing Committee. Enclosed is a copy of the members of the Development/Marketing Committee. Please check the July *Communiqué* for the times and places of the committee meetings and, if appropriate, invite both the current and new members to attend your meeting in Honolulu.

I have also appointed you to serve as a member of the Finance/Budget Committee and the Strategic Planning Task Force.

Please let me know if I can be of any assistance to you.

TCO/sj

Enclosure

Copies to: AZA Board of Directors  
Syd Butler  
Bob Wagner  
Linda Boyd  
Board Liaison Representative

Bob -  
Is there anything  
amiss here?  
Ginny  
(612) 431-9299

Licensing Task Force  
9/19 8:30 - 10:30 am Hilo  
9/20 2-3:30 pm Niikau  
Dev. 3:30-5 pm Niikau



**DEVELOPMENT/MARKETING COMMITTEE (Roberts\*)**

Kathryn Roberts, Chairperson  
Glenn Ekey, V-C

Cyndy Andrews  
Ted Beattie  
Fran Bernstein  
Charles Bieler  
Natasha Collura  
Mary Floye Federer  
Cynthia Holter  
Erich Hunker  
Jo Ann Keirse  
Gayle Rathbun  
Patty Richards  
Carmen Sandoe  
Kathy Cloyd Sher

Advisors

Sydney Butler  
Bob Ramin



28 June 1996

TO: AZA Board of Directors

FROM: AZA Development and Marketing Committee  
Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo

Committee Members:

Cyndy Andrews, Omaha's Henry Doorly Zoo  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Natasha Collura, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zool. Society of Houston  
Cynthia Holter, Saint Louis Zoo  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Gayle Rathbun, Seneca Park Zoological Society  
Carmen Sandoe, WCS/Bronx Zoo  
Kathy Cloyd Sher, Natl Aquarium in Baltimore  
Sally Steele, North Carolina Zoological Society

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Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980  
<http://www.aza.org>

SUBJECT: Board Report

---

The following memorandum highlights the activities of the AZA's Development and Marketing Committee. In addition, the Committee looks forward to continuing our support through marketing proposal review, development assistance, and lending expertise towards a myriad of promotional initiatives.

### Honolulu Preparations

Again this year, the Development and Marketing Committee submitted a proposal containing a number of formal sessions, roundtables, and marketplace sessions for the AZA Annual Conference in Honolulu. We worked closely with Program Chair Jeff Swanagan regarding the incorporation of individual papers and other offerings. The final result promises to continue the tradition of cutting-edge presentations of interest to all delegates - regardless of specific staff responsibilities.



## Key Result Area VI Benefiting Members Through Financial Excellence

---

*Preamble:* Simply put, the AZA faces two major challenges to 1) respond to the pressure for more sophisticated member services and 2) take advantage of the growing public mandate that our members provide the highest professional care of wildlife and wild places.

We must embrace a commitment to be a healthy, dynamic and creative organization in order to generate excitement and interest in zoos and aquariums which will increase our ability to actively raise and manage money for the benefit of our members.

The AZA is financially stronger than ever. However, no matter how aggressively the organization manages its current funds, we cannot respond effectively to the stated challenges *unless we maintain and increase our fund raising capabilities.*

**Objective #1:**      *Ensure sound financial management.*

**Strategy #1:** Establish a department of finance and administration

Action Step #1:      Hire appropriate staff

Action Step #2:      Charge department to manage for growth with calculated risk

**Objective #2:**      *Continue growth of the Conservation Endowment Fund (CEF)*

**Strategy #1:** Implement the CEF Campaign Plan with the goal of reaching \$6 million by the year 2002

Action Step #1:      Raise and distribute \$2 million in "direct action" funds by the year 2001

DRAFT 6/28/96

AMERICAN ZOO AND AQUARIUM ASSOCIATION  
25TH ANNIVERSARY

**PURPOSE:** "To celebrate our history over 25 years, instill in our membership a sense of pride, and increase public awareness of AZA and its members accomplishments."

**Goal Number One**

- Increase awareness of the AZA to an internal audience of our members, as well as zoo and aquarium professionals, emphasizing AZA accomplishments and the benefits AZA provides.

**Strategies**

- Present a fun slide show in Hawaii featuring founding members, past Marlin Perkins winners (then and now), visual display of old and new zoo/aquarium buildings. Stress the exciting improvements of the last 25 years. Measure number of people in attendance as part of an overall system of measuring marketing exposure.
- Present a more serious videography of the history of AZA during the past 25 years during the business meeting/banquet of the Annual Conference in Albuquerque. PR Committee to help coordinate. Measure number of people in attendance as part of an overall system of measuring marketing exposure.
- Develop a classy anniversary-themed Communiqué pull out or special section for January 1997. Articles will feature an historical timeline, polls on what AZA members were doing in 1971, focus on SSP successes and increased services. Guest editorial by one of the founding members and old ads/new ads infused. Measure number of issues distributed.
- Create small anniversary give-aways such as magnets, tie tacks, or pins for conference attendees, members, and individuals who are interested in membership. Measure number distributed.

- Present a 25th anniversary print by XXX to members and non members at the three conferences and through Communiqué. Measure sales.

Post-It™ brand fax transmittal memo 7671		# of pages ▶
To	Bob Ramin	From
Co.		Co.
Dept.	Call into Mayor - no	Phone #
Fax #		Fax #

# MEMORANDUM

**to:** Steve McCusker  
**from:** Kathryn Roberts  
**re:** Novus proposal  
**date:** April 9, 1996

The AZA staff have been actively working with Novus to try and put together a deal that would 1) provide an on-going stream of revenue to the AZA and 2) develop a "society-like" membership for the AZA. By meeting these two goals, a third benefit will be realized which is getting the name AZA out into the general public.

Last week Bob Ramin, with Ted Beattie, met with Novus. They have finalized a proposal that meets the goals. I have attached a copy of the proposal. Does this need Board approval? It has certainly been talked about for the past year, and I have lost sight of whether it needs formal approval or not. If it does, I would like to get it out to the Board members for their approval. If it does need formal action, would you be willing to send out the memo, or would you like me to do it? Either way is fine with me, but again, I am unsure of the correct process.

Thanks for your help. Please call when you can.

from the desk of...

**KATHRYN R. ROBERTS,**  
**Ph.D.**  
 EXECUTIVE DIRECTOR  
 MINNESOTA ZOO  
 13000 ZOO BOULEVARD  
 APPLE VALLEY, MN 55124

612-431-9299

*Steve O. copied*



28 June 1996

TO: AZA Board of Directors

FROM: AZA Development and Marketing Committee  
Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo

Committee Members:

Cyndy Andrews, Omaha's Henry Doorly Zoo  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Natasha Collura, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zool. Society of Houston  
Cynthia Holter, Saint Louis Zoo  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Gayle Rathbun, Seneca Park Zoological Society  
Carmen Sandoe, WCS/Bronx Zoo  
Kathy Cloyd Sher, Natl Aquarium in Baltimore  
Sally Steele, North Carolina Zoological Society

SUBJECT: Board Report

---

The following memorandum highlights the activities of the AZA's Development and Marketing Committee. In addition, the Committee looks forward to continuing our support through marketing proposal review, development assistance, and lending expertise towards a myriad of promotional initiatives.

### Honolulu Preparations

Again this year, the Development and Marketing Committee submitted a proposal containing a number of formal sessions, roundtables, and marketplace sessions for the AZA Annual Conference in Honolulu. We worked closely with Program Chair Jeff Swanagan regarding the incorporation of individual papers and other offerings. The final result promises to continue the tradition of cutting-edge presentations of interest to all delegates - regardless of specific staff responsibilities.

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AQUARIUM ASSOCIATION

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6/28/96

Page 2

### Galdabini Survey Review

Committee members have reviewed the past two Galdabini Marketing/Management surveys to ensure that the questions are appropriate and germane to the needs of zoo and aquarium marketers, fund raisers, and managers. These results have been tremendously helpful to individual institutions and to the AZA.

### New Orleans Meeting

The Full Committee met at the New Orleans Regional Conference and discussed a wide range of topics. Our primary focus was the analysis of three proposals: NOVUS affinity card, Proprietary Media, and Hylant MacLean. All three were thoroughly debated, and green light recommendations given for each one.

### 25th Anniversary

The Development and Marketing Committee is looking forward to working with the Public Relations Committee on the 25th Anniversary. After Board approval of the parameters at the San Antonio Board meeting (attached for Development and Marketing Committee members), the Committee will take a more active role.

### Licensing

The Licensing Task Force met at the Greenville Regional to discuss progress on the K&M (plush) partnership, and to move forward with the Board-approved Business Plan. Solicitations were sent to all AZA Commercial Members regarding proposals to become an AZA licensing partner. Our next category will probably be posters or tee-shirts. Unfortunately, Licensing Chair Sally Steele is leaving the North Carolina Zoological Society. Natasha Collura (Zoological Society of San Diego) and Steve Ordahl (Minnesota Zoo) will Co-Chair the Committee.

### White Paper

The Committee has reviewed and discussed various drafts of the Development/Marketing White Paper, which has become "Key Result Area VI: Benefiting Members Through Financial Excellence (attached for Development and Marketing Committee members). We are pleased to play an active role in the AZA's future.

## Key Result Area VI Benefiting Members Through Financial Excellence

---

*Preamble:* Simply put, the AZA faces two major challenges to 1) respond to the pressure for more sophisticated member services and 2) take advantage of the growing public mandate that our members provide the highest professional care of wildlife and wild places.

We must embrace a commitment to be a healthy, dynamic and creative organization in order to generate excitement and interest in zoos and aquariums which will increase our ability to actively raise and manage money for the benefit of our members.

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**Objective #1:**      *Ensure sound financial management.*

**Strategy #1:** Establish a department of finance and administration

Action Step #1:      Hire appropriate staff

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**Objective #2:**      *Continue growth of the Conservation Endowment Fund (CEF)*

**Strategy #1:** Implement the CEF Campaign Plan with the goal of reaching \$6 million by the year 2002

Action Step #1:      Raise and distribute \$2 million in "direct action" funds by the year 2001

**Objective #3:**      *Substantially increase the amount raised for unrestricted (member services) funds*

**Strategy #1:** Determine increase from base of \$350,000

**Action Step #1:**      *Increase corporate collaboration regarding cause-related marketing multi-year promotions*

**Action Step #2:**      *Establish licensing program with minimum annual royalty revenue of \$25,000*

**Objective #4:**      *Raise restricted funds for special AZA projects*

**Strategy #1:** Set annual goal of \$500,000

**Action Step #1:**      *Increase foundation grant activity*

**Objective #5:**      *Implement new national membership organization*

**Strategy #1:** Secure national corporate sponsor with minimum of \$25,000

**Action Step #1:**      *Implement in 1997*

**Objective #6:**      *Establish operating surplus of \$1 million*

**Strategy #1:** *Continue success in raising operating funds*

**Action Step #1:**      *Develop and implement plan for distribution of funds*

**Objective #7:**      *Raise \$25,000 in 1996/1997 to implement the AZA 25th anniversary celebration*

**Strategy #1:** *Work with corporate sponsors to underwrite anniversary projects*

**Action Step #1:**      *Develop appropriate vehicles to celebrate growth of AZA and corresponding achievements of member institutions and individuals over past 25 years*

AMERICAN ZOO AND AQUARIUM ASSOCIATION  
25TH ANNIVERSARY

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**Goal Number One**

- Increase awareness of the AZA to an internal audience of our members, as well as zoo and aquarium professionals, emphasizing AZA accomplishments and the benefits AZA provides.

**Strategies**

- Present a fun slide show in Hawaii featuring founding members, past Marlin Perkins winners (then and now), visual display of old and new zoo/aquarium buildings. Stress the exciting improvements of the last 25 years. Measure number of people in attendance as part of an overall system of measuring marketing exposure.
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- Create small anniversary give-aways such as magnets, tie tacks, or pins for conference attendees, members, and individuals who are interested in membership. Measure number distributed.

- Implement a new vigorous campaign to acquire new commercial members and retain current members and incorporate 25th anniversary give-aways, brochures, etc. (Ongoing)

### Goal Number Two

- Increase awareness and exposure of AZA to the general public

### Strategies

- "Top 25 Things That Have Changed in the Zoo/Aquarium Industry in the Past 25 Years" list to member institutions. Measure number of flyers/brochures handed out to zoos and aquariums locally - should be at least 174,000 people exposed (174 institutions x 1,000 copies).
- *Good Morning America* appearance by Jack Hanna at the Hawaii conference. Kick off conference and stress that it is AZA's 25th anniversary. Measure number of people exposed by Nielsen national television ratings.
- Change message on the postage meter to reflect a 25 years theme. Measure amount of mail sent through Pitney-Bowes postage machine.
- Publicize \$25,000 commitment to the CEF in our 25th year from Jack Hanna (others?), as well as the significance of \$250,000 in CEF grants awarded. Measure number of press releases, air time, and print articles, etc.

### Goal Number Three

- Increase short-term and long-term revenues

### Strategies

- Prepare an appeal letter to our members and other interested individuals which highlights our accomplishments over the years and plans for the future. Measure amount of contributions collected.
- Develop and sell pins/posters/t-shirts which accentuates our 25 years donated by Disney. Measure revenue.

- Present a 25th anniversary print by XXX to members and non members at the three conferences and through Communiqué. Measure sales.

## MEMORANDUM

---

**to:** Bob Ramin  
**from:** Kathryn Roberts  
**re:** Check-Off  
**date:** March 6, 1996

I called Charlie Hoessle yesterday to talk about the check off for CEF. He told me the Board and Commission have been following the letter of the law which says they can raise money ONLY for the St. Louis Zoo. They are so strict, that when a speaker comes from let's say the Dian Fossey Fund, they tell the speaker they are prohibited from distributing materials that request donations. I told him we are in the same legal situation, but we just did it. He thinks it is great we can get away with it. He agreed to talk to Cynthia and see if they can figure out how to accomplish the goal. Then, he told me about the Campaign. He is really jazzed up and is going to postpone his retirement a couple of years to work with Cynthia.

Then, I called Joan Wicks in Houston. I left a long message and have not heard back from her. I will call her again if necessary.

Finally, I talked to Steve Taylor. He is going to call Bob Lamb and try to make good on the offer for planning services. Lamb will be invited. I'll keep you posted. I really emphasized the need for a clear mission to help fund raising.

from the desk of...

**KATHRYN R. ROBERTS,**  
**Ph.D.**  
EXECUTIVE DIRECTOR  
MINNESOTA ZOO  
13000 ZOO BOULEVARD  
APPLE VALLEY, MN 55124

612-431-9299



MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Board of Directors  
FROM: Robert A. Ramin  
Director of Development and Marketing  
DATE: 22 January 1996  
SUBJECT: Development and Marketing Report

Please find enclosed the Development and Marketing Report. For additional information, I also enclose the 1995 AZA Income Report from Development and Marketing.

I request that the Board approve the Development and Marketing Report.

*Handwritten notes:*  
1) hit all goals operating \$  
2) renewed Crystal + Borden after-yr. 1  
3) more \$ to Memphis + Conserv. Proj.  
4) cracked found 150,000 Exxon + Minson for Coral Reef  
5) licensing on track ready to sign  
Plush - going to meet Greenville  
6) CCC - turn over to Syd - involved  
7) lived assoc. director - 2 Bd's permission



## AZA DEVELOPMENT AND MARKETING REPORT

This report summarizes the activities of the AZA Development and Marketing Office since the report to the Annual Board of Directors meeting in August 1995. The following activities were initiated or accomplished during the last six months.

### I. 1995 Income from Development and Marketing

During 1995, this office assisted, or was directly responsible for gifts totaling \$891,000.00. This total includes funds directed toward general operating expenses and SSP projects (such as the Celestial Seasonings Penguin TAG support), as well as cash/in-kind donations to member zoos and aquariums (such as the Sierra Halloween cash sponsorships, Dodge cash support, and Hi-C drink donations).

Last year's total was \$529,701.08. Specifically, \$256,500.00 (including accounts receivable) was raised for unrestricted use towards 1995 AZA operations (our goal was \$250,000). Last year's total was \$215,733.55.

The following are highlights from 1995:

Chrysler The AZA received \$50,000 for the coordination of a mini-van promotion that included the participation of over 25 member institutions (each receiving cash and/or the use of two minivans for the year). Dodge donated \$5,000 to the CEC. Chrysler will be working with the AZA again in 1996.

Borden The AZA received \$50,000 from Borden for an extremely well-executed national promotion. Over \$50,000 was directed towards participating institutions, and \$14,000 will be donated to the CEC in early 1996. Borden has agreed to provide \$60,000 to the AZA in 1996, with \$100,000 in cash to member institutions and a minimum of \$15,000 to the CEC.

Discover The AZA received \$50,000 from Discover Card Services for a *Confidential* agreement to explore joint promotional opportunities. We are continuing our dialog in 1996.

Solaris Continuing our relationship with the Solaris Division of Monsanto, makers of Roundup, the AZA received \$25,000 in 1995. In addition, a \$25,000 grant program entitled "Project Habitat" was launched provide direct \$1,000 cash awards to AZA member institutions, as well as other direct sponsorships to zoos and aquariums (such as \$5,000 to the National Zoo).

Disney Primarily through the efforts of Mike Hutchins, a \$108,000 grant was made towards conservation action initiatives. We have every indication that this funding will increase in 1996.

Exxon Lynne Baptista, Bob Wiese, and Syd Butler were primarily responsible for a \$10,000 planning grant, and the subsequent award of \$150,000 over two years for the development of a tiger traveling exhibit.

## II. 1996 Projected Income from Development and Marketing

1996 is shaping up to be another successful year. As we are adding an Associate Director to our staff, the development goal for operating funds has been raised from \$250,000 to \$350,000. I am happy to report the following progress to date:

<u>Source</u>	<u>General Operating</u>	<u>Status</u>
ConAgra/Kid Cuisine	\$75,000	signed contract
Borden	60,000	signed contract
Snickers	15,000	signed contract
Dunkin Donuts	50,000	confirmed
Solaris	<u>25,000</u>	confirmed
Subtotal	\$225,000	

## III. Conservation Excellence Campaign

The Conservation Excellence Campaign is solidly on track, with record corporate and individual support in 1995, and a potential resumption of grants in 1996. Over \$100,000 was donated to the CEC, not including the Disney funds. Over \$25,000 was received in individual gifts, and the check-off program is building momentum.

The CEC enjoyed a high profile at this year's AZA Annual Conference, and enabled participants to receive a commemorative CEC poster as well as donate to the CEC and receive a Disney-designed tee-shirt.

The Disney grant of \$108,000 successfully "kicked-off" the \$1 million "direct conservation action" segment of the Campaign. Scott Schultz of Schultz & Williams was retained to provide an analysis of the Campaign, and give recommendations for future strategies. CEC Chairman Ted Beattie will summarize these results directly to the Board.

The CEC Advisory Committee will meet after the AZA Board of Directors Meeting in New Orleans on Wednesday morning, 28 February 1996, and Board members are welcome to attend.

A meeting was convened in Seattle to discuss the "CEF Live and Silent Auctions. Woodland Park was just coming off their own annual auction, and had "tapped-out" many potential donors. Nevertheless, the Auction garnered \$20,000 towards the Conservation Excellence Campaign.

It was decided that the AZA needs to provide better Auction stewardship to include 1) item donation thanks and acknowledgment, 2) establishment of an CEF Auction Notebook for future coordinators, and 3) greater assistance in attracting donations.

#### IV. Foundation Activity

We have been working closely with the Henry, Barbour, and Exxon Foundations, and look forward to the launch of a serious foundation grant program in 1996. The Associate Director will oversee grant research and development.

#### V. Licensing

We plan to inaugurate an AZA licensing program in mid-1996. Following the Board-approved business plan, we have identified and met with a plush partner, and will introduce an AZA/SSP line tentatively called "Save Our Species" (SOS) Collection at the Annual Conference in September. Proceeds will be directed toward the CEC and SSP projects.

#### VI. Other Activities

In 1996, I anticipate spending time on activities such as membership marketing, 25th Anniversary planning, and the potential development of an AZA public membership society.



29 January 1996

TO: AZA Board of Directors

FROM: AZA Development and Marketing Committee  
Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Committee Members:

- Cyndy Andrews, Omaha's Henry Doorly Zoo
- Ted Beattie, Shedd Aquarium
- Fran Bernstein, Friends of the National Zoo
- Chuck Bieler, San Diego Zoo
- Natasha Collura, Busch Entertainment
- Glenn Ekey, Zoological Society of Florida
- Mary Floye Federer, Zool. Society of Houston
- Cynthia Holter, Saint Louis Zoo
- Erich Hunker, Toledo Zoo
- Jo Ann Keirse, Oklahoma City Zoo
- Gayle Rathbun, Seneca Park Zoological Society
- Carmen Sandoe, WCS/Bronx Zoo
- Kathy Cloyd Sher, Natl Aquarium in Baltimore
- Sally Steele, North Carolina Zoological Society

*1) need for joint membership info  
sub-cc. to address joint issues*

*2) going to discuss "society membership"  
possibility*

SUBJECT: Board Report

The following memorandum highlights the activities of the AZA's Development and Marketing Committee. In addition, the Committee looks forward to continuing our support through marketing proposal review, development assistance, and lending expertise towards planning the AZA's 25th anniversary activities.

**Seattle Conference Issues**

We had an outstanding turn-out by Committee members at the AZA Annual Conference in Seattle, and at our Committee Meeting (13 out of 15). Many Committee members participated and presented at the various marketplace sessions, formal sessions, and roundtables.

In order to accomplish both our heavy agendas, as well as serve as a forum for development, marketing, and membership issues with conference attendees, it was decided that all future Committee meetings will consist of two parts. The first half will be a closed



Page 2

meeting for Committee members only. After our agenda is finished, we will open the meeting to other interested participants. In past years, when Conference offerings were more meager, the Committee meeting served as an additional "session," allowing for an opportunity to network and discuss issues of interest. This is no longer necessary, due to our greatly enhanced conference offerings.

Regarding the Seattle Conference, the attendees were extremely pleased with the offerings. Some items brought forth include possible taping for non-attendees (forwarded to the AZA Conference Program Committee) and the problem of conflicting sessions/meetings of interest. It was decided that it is better to have "too much" to decide from, rather than "too little."

For our Hawaii Conference in 1996, Cynthia Holter and Steve Ordahl (Minnesota Zoo) have offered to serve as our coordinators. Thanks to the many Committee members who stayed late after our meeting to assist in the planning of sessions, roundtables, and educational offerings for next year.

Jeff Swanigan, Conference Program Committee Chair (Zoo Atlanta) has received the initial ideas from our group, and is expecting formal session proposals by 27 March 1996. Glenn Ekey and Mary Collins (Tulsa Zoo Friends) also submitted some ideas from the society executive director's viewpoint that complimented our submissions. The further development of Conference session proposals will be a central focus of our February 1996 Committee meeting.

#### CEF Auction

A meeting was convened in Seattle to discuss the "fate" of the venerable CEF Live and Silent Auctions. Jody Light, Chair of this year's auction, was able to convey an "in progress" report, basically stressing that this is a tough job for a Conference host. Woodland Park was just coming off their own annual auction, and had "tapped-out" many potential donors. Nevertheless, the Auction garnered \$20,000 towards the Conservation Excellence Campaign.

It was decided that the AZA needs to provide better Auction stewardship: to include 1) item donation thanks and acknowledgment, 2) establishment of an CEF Auction Notebook for future coordinators, and 3) greater assistance in attracting donations.

Page 3

The Committee pledged to take on the CEF Auction as a project for 1996, and to assist Cheryl Niggle, Executive Director of the Honolulu Zoological Society with solicitation of items and creation of innovative live auction opportunities. A notebook will be compiled at the AZA, and sent to Cheryl in early 1996.

### Licensing Initiative

The Licensing Committee also met in Seattle, and progress is currently on-track with the business plan. Chair Sally Steele has analyzed gift shop survey results, and initial meetings with potential partners will begin shortly. A status report will be presented to our Committee in February.

### Marketing Survey

As we discussed at our meeting, marketing data from peer institutions continues to be one of the most needed and useful sets of information that the AZA could provide. To this end, the AZA Board agreed to renew the services of Tom Galdabini for a quarterly marketing and management survey. A subcommittee (Ted Beattie, Erich Hunker, Roberts, and Keirse) of the Committee revised and reviewed the Galdabini questions.

### Reciprocity

The reciprocity question still hangs over our heads, and our discussions led to the formation of a group that will work with Judy Blackstock of Connections to resolve misunderstandings and cut down on misinformation.

Fran Bernstein, Ginnie Westmoreland (Saint Louis Zoo) and Ramin will report back to the Committee in February, and other participants/nominations are welcome.

### AZA Society

The concept of a public membership society, in support of the conservation activities of the AZA, has been bantered about for some time. AZA President Steve McCusker has asked the Committee to produce a white paper on the concept by 2 February 1996.

*done by  
membership*

Page 4

Questions regarding the value-related or philanthropic focus of a society need to be further addressed, as do considerations such as support-society "cannibalism" and enhancement. Mary Floye Federer, Holter, and Bernstein agreed to work with Ramin on a draft that will be reviewed by Jan Schweitzer (Glen Oak Zoo), former AZA Membership Committee Chair. The final white paper will be provided to the Committee before our February meeting.

#### February Committee Meeting

The Committee will next meet at the AZA Central Regional Conference in New Orleans, LA in the afternoon on Wednesday, 28 February. After discussion in Seattle, it was decided that the earliest regional was more convenient for most Committee members. However, care will be taken to spread our meetings over different regions in the future. In April 1996, the licensing subcommittee will meet at the Eastern Regional in Greenville, SC.

cc: AZA Executive Director Syd Butler  
AZA Director of Development and Marketing Bob Ramin



## MEMORANDUM

TO: AZA Development and Marketing Committee

FROM: Kathryn Roberts  
Bob Ramin

DATE: 20 February 1996

SUBJECT: Agenda for Committee Meeting

---

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Looking forward to meeting with you in post-Mardi Gras New Orleans! Please find enclosed our agenda, and appropriate supporting materials. As you will note, there are many "big" issues to discuss, and we wanted you to have the appropriate materials to review in advance.

Our meeting will be held on Wednesday, 28 February 1996 in the Oak Alley Room on the third floor of the New Orleans Hilton Riverside, located at #2 Poydras Street (direct hotel number: (504) 561-0500, reservation: (504) 584-3999). We will meet from 2:00 to 5:00 PM, and then adjourn to the Central Regional Conference Icebreaker held at the Aquarium of the Americas. The Committee meeting will be closed, but we are expecting a number of AZA Board members to attend.

The AZA Conservation Excellence Campaign Advisory Committee will meet the morning of the 28th, from 9:00 AM to noon, also in the Oak Alley Room. Chairman Beattie would be happy to have fellow Development and Marketing Committee members attend if you are arriving early.

Please let Bob know if you have any additional questions regarding the hotel, regional conference, or the agenda.

enclosures





AGENDA  
AZA DEVELOPMENT AND MARKETING COMMITTEE

Wednesday, 28 February 1996, 2:00 - 5:00 PM  
New Orleans Hilton Riverside, Oak Alley Room

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

- I. Welcome and review of minutes from September 1995  
Committee meeting in Seattle  
  
Roberts/Ramin
- II. White Paper/Strategic Plan Process  
(White Paper attached)  
  
Roberts/Ramin
- III. Annual Conference/Professional Development  
  
Holter/Beattie
- IV. Conservation Excellence Campaign  
(Schultz & Williams Campaign Report attached)  
  
Beattie/Ramin  
  
CEF Auction - Ramin  
  
CEF Check-Off - Steele/Ramin
- V. Licensing Task Force Update  
  
Steele/Ramin
- VI. Marketing Proposals  
(attachments from Novus, Hylant-MacLean,  
Proprietary Media)  
  
Hunker/Ramin
- VII. Other Issues
- VIII. Conclusion



SENECA ZOO SOCIETY



2222 SAINT PAUL STREET  
ROCHESTER, NEW YORK 14621-1097  
716/336-7200 FAX 716/342-1477

February 22, 1996

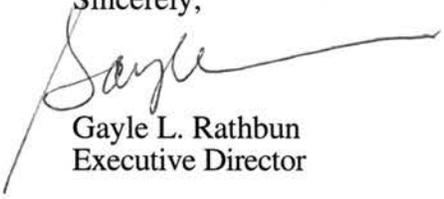
Kathryn Roberts, Ph.D., Executive Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I am honored to be appointed to the AZA Development/Marketing Committee and am pleased to serve.

I am sorry that I will not be at the Regional Conference next week in New Orleans, so will be unable to attend the Committee meeting. I hope to be able to participate in future meetings.

Sincerely,

  
Gayle L. Rathbun  
Executive Director

SUPPORTING THE  
SENECA PARK ZOO  
SINCE 1957

# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

January 31, 1996

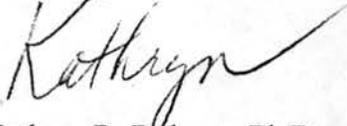
Steve McCusker  
AZA President  
c/o San Antonio Zoological Gardens & Aquarium  
3903 No. St. Mary's St.  
San Antonio, TX 78212-3199

Dear Steve:

Although I'm faxing this to you now, I am putting the original hard copy in the mail also. This is the white paper for Development and Marketing.

Let me know if I need do anything else.

Sincerely,



Kathryn R. Roberts, Ph.D.  
Chair, AZA Development and Marketing Committee

## AMERICAN ZOO AND AQUARIUM ASSOCIATION DEVELOPMENT AND MARKETING *WHITE PAPER*

Kathryn R. Roberts, Ph.D., Development and Marketing Committee Chair

### I. Historical Overview

Officially established in 1993, the Development and Marketing Office of the American Zoo and Aquarium Association (AZA) was given a quantifiable set of goals. Primarily, this office was to raise funds to augment the activities of the AZA, over and above the levels of service currently provided through membership dues and other charges for services.

Fund raising for the AZA is broken into three areas: 1) general operating, 2) conservation endowment fund and SSP Five Year Plans, and 3) members institution assistance.

The AZA Articles of Incorporation relate to many functions supported by the Development and Marketing Office. In particular, this department works to:

"promote the welfare of zoological parks and aquariums and their advancement as public education facilities, as scientific centers, as natural science and wildlife exhibition and conservation agencies, and as cultural recreation establishments, dedicated to the enrichment of human and natural resources."

### II. Where Are We Now?

During 1995, the Office of Development and Marketing assisted, or was directly responsible for gifts totaling \$891,000.00. This total includes funds directed toward general operating expenses and SSP projects, as well as cash/in-kind donations to member zoos and aquariums. Cause-related marketing promotions provide the vast majority of unrestricted support.

Specifically, \$256,500.00 (including accounts receivable) was raised for unrestricted use towards 1995 AZA operations (our goal was \$250,000). Last year's total contribution towards general operating was \$215,733.55, out of \$529,701.08.

#### Conservation Excellence Campaign

The Conservation Excellence Campaign is solidly on tract, with record corporate and individual support in 1995, and a potential resumption of grants in 1996. Over \$100,000 was donated to the CEC from member institutions, corporations, and individual donors. Of this amount, over \$25,000 was received in individual gifts, and the society check-off program is building momentum.

The Disney grant of \$108,000 successfully "kicked-off" the \$1 million "direct conservation action" segment of the Campaign. Scott Schultz of Schultz & Williams was retained to provide an analysis of the Campaign, and give recommendations for future strategies.

### III. Annual Goals and Objectives

**Goal #1**      Raise the Conservation Endowment Fund to \$4 Million  
Raise \$1 Million in Direct Conservation Action" Funding  
To achieve the annual goals of the Conservation Excellence Campaign

Objectives:      Raise \$500,000 each year from the following sources:

                         \$300,000 from corporations  
                         \$125,000 from societies and institutions  
                         \$25,000 from individuals  
                         \$25,000 from foundations  
                         \$25,000 from CEF Auction

Expand the Conservation Excellence Campaign Committee and enlist more corporate/private sector volunteers.

Charge the new Associate Director to assist in raising unrestricted operating funds as his/her first priority. In addition, the Associate Director will maintain and expand the current donor base, provide appropriate stewardship, and raise funds (\$25,000) from foundations.

**Goal #2**      To raise funds for AZA special projects

Objectives:      Raise a minimum of \$500,000 for member support (ongoing).

Raise funding for 1996 initiatives such as the "Year of the Coral Reef" (\$30,000), and to pursue funding for projects such as the AZA Annual Report on Conservation and Science (\$5,000), a habitat education curriculum/brochure program (\$75,000), and Zoo and Aquarium Month (\$100,000 sponsorship).

**Goal #3**      To raise funds for SSP/TAG/FIG programs

Objectives:      To raise \$100,000 to fund the 5-Year plans of SSP/TAG/FIG programs. These funds will be counted towards the \$1 million "action" segment of the Conservation Excellence Campaign.

**Goal #4**      To raise funds from foundations

Objectives:      Charge Associate Director of Development to identify appropriate foundation sources, and to work with AZA Conservation and Science and Education staff

regarding the development and submission of grant proposals. Raise \$25,000 annually.

**Goal #5** To continue to provide development and marketing membership services and consulting for AZA member institutions and individuals.

Objectives: Coordinate publication of 1995 AZA Annual Report (\$7,500 sponsorship - listing current member institutions) and other development and marketing publications.

Coordinate professional development opportunities such as conference sessions, Communiqué articles, and seminars.

Work towards the development of a potential public membership society in support of the AZA. Coordinate a marketing analysis of our current membership base, and implement ways to expand our market penetration.

**Goal #6** To continue becoming proactive in the field of licensing opportunities.

Objectives: Implement licensing task force business plan

a) Initiate test marketing and product development.

b) Factor funding opportunities into overall plan. Goal is to generate \$25,000 annually.

c) Review current AZA member licensing agreements and distribute analysis of findings to institution directors.

**Goal #7** To raise sufficient operating funding for the AZA

Objectives: Raise a minimum of \$35,000 for unrestricted use by the AZA annually for operating expenses.

## *Minnesota Zoo*

### FAX Transmission

From: Kathryn Roberts  
To: Bob Ramin  
Company:

Date: 1/8/96  
Time: 4:07 PM  
FAX #:

Whenever you're able to get into work through all the snow, will you fax us a copy of the memo to the Development Committee? I know you sent us one in the mail last week, but we still haven't received it and I'd like to get it to Gayle Rathbun with his letter.

Also, how's the committee's midyear board report coming (due Jan. 26th)?  
And the white paper on membership (due February 2)?

VOICE: 612-431-9299 FAX: 612-431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124

**MN MINNESOTA ZOO**

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

1-9-96

To: Bob Ramin

I just spoke to Steve McCusker -  
2 points from him

1) wanted to make sure we knew  
white paper would address issues  
other than Zoo Society concept -

2) he will attend our mtg -

Later

Katany



January 5, 1996

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

Chairman/Advisor

Gayle Rathbun, Executive Director  
Seneca Zoological Society  
2222 St. Paul Street  
Rochester, NY 14621-1097

Dear Gayle:

*original  
by mail*

I am pleased to advise you that AZA President Steve McCusker has enthusiastically endorsed my request that you be appointed to serve on the AZA Development and Marketing Committee. The next meeting of the committee, which I chair, will be in New Orleans on Wednesday afternoon, February 28th. A full agenda will be sent as the meeting date approaches. Attached to this letter is the latest communication to committee members to help bring you up to speed.

If you have questions about the committee, feel free to call me at (612) 431-9299 or Bob Ramin, AZA Development/Marketing Director (and real coordinator of the committee) at (301) 907-7777. Both Bob and I look forward to seeing you in February.

Sincerely,

*Kathryn Roberts*

Kathryn R. Roberts, Chair  
AZA Development & Marketing Committee

cc: Bob Ramin  
Bob Wagner





Sored & mailed

MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

To: Steve McCusker  
AZA President

Committee

Chairman/Advisor

From: Kathryn Roberts  
Chair, Development & Marketing Committee

Date: January 3, 1996

Re: DEVELOPMENT AND MARKETING COMMITTEE VACANCY

As you may know, Clare Richardson has left her position at Zoo Atlanta to become Executive Director of the Dian Fossey Gorilla Fund. Clare's new position leaves a vacancy on the Development and Marketing Committee, which I would like to see filled before our next meeting in February. I realize that technically Clare could remain on the Committee, but given the confidential nature of a number of our potential national promotions, this might not be appropriate. The Dian Fossey Gorilla Fund could be competing against the AZA/Gorilla SSP for donations from the same sources.

I do not know the candidates who asked to join our Committee from your Communiqué notice, but would like to propose the following candidates (in order of preference):

Jan Schweitzer	Director, Glen Oak Zoo
Gayle Rathbun	Executive Director, Seneca Park Zool. Society
Gail Eaton	Sr. Vice President, Marketing; Zoo Atlanta
Patty Richards	Marketing Coordinator, Calgary Zoo
Judi Anderson	Development Officer, Santa Barbara Zoo

All the above individuals represent institutions an expertise that would benefit the Committee. Please let me or Bob Ramin know if you need any additional information.

Thank you.



VIA FAX

November 8, 1995

Steve McCusker, AZA President  
c/o San Antonio Zoological Gardens & Aquarium  
3903 North St. Mary's St.  
San Antonio, TX 78212-3199

Dear Steve:

I have spent a great deal of time deliberating about identifying a time and location for the AZA's Development & Marketing Committee.

Being a team player and supporting board decisions is important to me. Having said that, I am making the decision to schedule the committee's meeting in New Orleans. At least four of the committee members will be present in New Orleans. I am unwilling to ask those individuals, myself included, to bear the cost -- either financially or time-wise -- of another trip for a second meeting in another location.

A subcommittee of the Marketing/Development Committee is the group discussing licensing opportunities. This is the group that has been headed by Sally Steele. The subcommittee will schedule their meeting in Greenville, South Carolina rather than meeting with the full committee.

I am hopeful you can understand my position in making this decision. Hopefully next year the committee will be able to meet apart from the board.

Sincerely,

Kathryn R. Roberts  
Executive Director

bcc: Bob Ramin  
Ted Beattie

Post-It™ brand fax transmittal memo 7671	
# of pages ▶	
To	Bob Ramin
From	
Co.	
Dept.	
Fax #	

SAMPLE

AMERICAN ZOO AND AQUARIUM ASSOCIATION

Zoo and Aquarium Gift Shop Survey

Manager's Name \_\_\_\_\_

Zoo or Aquarium \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone Number \_\_\_\_\_ Fax \_\_\_\_\_

Is your gift shop operated by: \_\_\_\_\_ Zoo \_\_\_\_\_ Society \_\_\_\_\_ Franchise  
Other. Please Specify \_\_\_\_\_

Rank the following items sold in your shop(s) in order of popularity: (One being the most popular, ten being the least.)

\_\_\_\_ Notecards      \_\_\_\_ Figurines      \_\_\_\_ Jewelry      \_\_\_\_ Hats  
\_\_\_\_ Calendars      \_\_\_\_ Key rings      \_\_\_\_ Posters      \_\_\_\_ Mugs  
\_\_\_\_ T-Shirts      \_\_\_\_ Plush      \_\_\_\_ Other \_\_\_\_\_

Please check any of the following organizations for which you sell licensed products.

\_\_\_\_ Smithsonian      \_\_\_\_ Friends of the Forest      \_\_\_\_ World Wildlife Fund  
\_\_\_\_ National Audubon      \_\_\_\_ Nature Conservancy      \_\_\_\_ Sierra Club  
\_\_\_\_ WCS      \_\_\_\_ CRES  
\_\_\_\_ Other. Please Specify: \_\_\_\_\_

What wholesalers would you most like to see developed as AZA licensed products for resale in your gift shop?  
\_\_\_\_\_  
\_\_\_\_\_

What wholesalers would you recommend the AZA consider as potential licensees?  
(Please specify item sold by wholesaler) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank you for completing this survey and providing input into this important program.  
\_\_\_\_ I would like the results of this survey. Please mail to me.  
\_\_\_\_ I would like to receive a current list of AZA member zoo and aquarium gift shop managers for networking  
\_\_\_\_ I would like to assist in the development of licensing program. Please contact me to let me know how I may help.

Mail or fax completed surveys by 13 OCTOBER to:  
Kathryn Roberts, Ph.D.,  
Executive Director, Minnesota Zoological Gardens,  
13000 Zoo Boulevard, Apple Valley, MN 55124-8199  
FAX - (612) 431-9300





29 December 1995

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Development and Marketing Committee  
Cyndy Andrews, Omaha's Henry Doorly Zoo  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Natasha Collura, Busch Entertainment  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zool. Society of Houston  
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Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Carmen Sandoe, WCS/Bronx Zoo  
Kathy Cloyd Sher, Natl Aquarium in Baltimore  
Sally Steele, North Carolina Zoological Society  
One Vacancy

FROM: Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo  
Bob Ramin, Director of Development and Marketing

SUBJECT: 1995 Wrap-up and Committee Meeting Notes

---

Hope this memorandum finds you wrapping up 1995 and forging full steam ahead into 1996. As you will note from the above "roster," we are again down a Committee member. Congratulations to Clare Richardson, who has taken the position of Executive Director of the Dian Fossey Gorilla Fund. We hope to be back to a full compliment by our upcoming meeting in New Orleans this February.

You may notice a new name among our ranks, but be assured that she is an old friend. Best wishes to Cynthia Holter (Sumner) on her Thanksgiving marriage to Denny Holter!

In order to make this as "user friendly" as possible, a faxable reply form has been attached for your convenience. As you read through the many topics and action items, please indicate your responses on the reply form, and fax back to Bob Ramin at (301) 907-2980.



### Seattle Conference Issues

We had an outstanding turn-out by Committee members at the AZA Annual Conference in Seattle, and at our Committee Meeting (13 out of 15). The great amount of pre-planning was obvious, and was noticed with envy by many other groups. It was great to see so many Committee members participating and presenting at the various marketplace sessions, formal sessions, and roundtables -- a formidable group! Thank you for your commitment and for sharing your expertise with our colleagues.

**In order to accomplish both our heavy agendas, as well as serve as a forum for development, marketing, and membership issues with conference attendees, it was decided that all future Committee meetings will consist of two parts. The first half will be a closed meeting for Committee members only.** After our agenda is finished, we will open the meeting to other interested participants. In past years, when Conference offerings were more meager, the Committee meeting served as an additional "session," allowing for an opportunity to network and discuss issues of interest. This is no longer necessary, due to our greatly enhanced conference offerings.

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A meeting was convened in Seattle to discuss the "fate" of the venerable CEF Live and Silent Auctions. Jody Light, Chair of this year's auction, was able to convey an "in progress" report, basically stressing that this is a tough job for a Conference host. Woodland Park was just coming off their own annual auction, and had "tapped-out" many potential donors. Nevertheless, the Auction garnered \$20,000 towards the Conservation Excellence Campaign.

It was decided that the AZA needs to provide better Auction stewardship: to include 1) item donation thanks and acknowledgment, 2) establishment of an CEF Auction Notebook for future coordinators, and 3) greater assistance in attracting donations.

The Committee pledged to take on the CEF Auction as a project for 1996, and to assist Cheryl Niggle, Executive Director of the Honolulu Zoological Society with solicitation of items and creation of innovative live auction opportunities. A notebook will be compiled at the AZA, and sent to Cheryl in February 1996. Gayle Rathbun, CEF Auctioneer and Executive Director of the Seneca Park Zoological Society would like to work closely with the Committee's Auction subcommittee.

One immediate manifestation of this meeting resulted in Syd Butler donating his "red cap" services for the lucky bidder (Erich Hunker) to have his suitcases whisked from plane to hotel. **Please indicate if you can assist with Auction strategy and/or solicitation for 1996.**

### Conservation Excellence Campaign

The Conservation Excellence Campaign is solidly on track, with record corporate and individual support in 1995, and the resumption of grants in 1996. The CEC enjoyed a high profile at this year's Conference, and enabled participants to receive a commemorative CEC poster as well as donate to the CEC and receive a Disney-designed tee-shirt.

The CEC Advisory Committee will meet after the AZA Board of Directors Meeting in New Orleans on Wednesday, 28 February 1996, and Development and Marketing Committee members are welcome to attend.

### **AZA Development and Marketing Results**

The AZA brought in over \$250,000 for operating expenses in 1995. In addition, over \$1,000,000 in direct cash and in-kind support was generated for member zoos and aquariums from AZA-generated promotions and collaborations. These totals do not reflect SSP or CEC support. In 1996, our general operating goal has been raised to \$350,000. We currently have \$200,000 in signed 1996 contracts and commitments. Thank you for all the support and assistance that made this possible.

The AZA will hire an Associate Director of Development in January. Advertisements have been placed in *Communiqué*, NSFRE publications, and *The Chronicle of Philanthropy*. **If you have any potential candidates for the Associate Director position, please contact Ramin at the AZA.**

### **Licensing Initiative**

The Licensing Committee also met in Seattle, and progress is currently on-track with the business plan. Chair Sally Steele has analyzed gift shop survey results (attached), and initial meetings with potential partners will begin shortly. A status report will be presented to the AZA Board and our Committee in February.

### **Marketing Survey**

As we discussed at our meeting, marketing data from peer institutions continues to be one of the most needed and useful sets of information that the AZA could provide. To this end, the AZA Board agreed to renew the services of Tom Galdabini for a quarterly marketing and management survey. The Committee had looked into taking on this task under Jo Ann Keirse's guidance, but this method is more efficient for the time being. A subcommittee (Ted Beattie, Erich Hunker, Roberts, and Keirse) of the Committee revised and reviewed the Galdabini questions.

### **Reciprocity**

**The reciprocity question still hangs over our heads, and our discussions led to the formation of a group that will work with Judy Blackstock of Connections to resolve misunderstandings and cut down on misinformation.**

Page 5

Fran Bernstein, Ginnie Westmoreland (Saint Louis Zoo) and Ramin will report back to the Committee in February, and other participants/nominations are welcome.

### **AZA Society**

The concept of a public membership society, in support of the conservation activities of the AZA, has been bantered about for some time. AZA President Steve McCusker has asked the Committee to produce a white paper on the concept by 2 February 1996. \*

Questions regarding the value-related or philanthropic focus of a society need to be further addressed, as do considerations such as support-society "cannibalism" and enhancement. Mary Floye Federer, Holter, and Bernstein agreed to work with Ramin on a draft that will be reviewed by Jan Schweitzer (Glen Oak Zoo), former AZA Membership Committee Chair. The final white paper will be provided to the Committee before our February meeting.

### **February Committee Meeting**

**The Committee will next meet at the AZA Central Regional Conference in New Orleans, LA in the afternoon on Wednesday, 28 February (exact time and location to be determined shortly).** After discussion in Seattle, it was decided that the earliest regional was more convenient for most Committee members. However, care will be taken to spread our meetings over different regions in the future. In April 1996, the licensing subcommittee will meet at the Eastern Regional in Greenville, SC.

The Central Regional registration materials can be found in the November 1995 and January 1996 issues of *Communiqué*. The Regional starts with an icebreaker the evening of the 28th, and runs until Saturday, 2 March. **Please let Ramin know if you are attending by Friday, 12 January 1996, and if you have any specific items of concern to be added to our agenda.**

cc: AZA President Steve McCusker  
AZA Executive Director Syd Butler



**AZA DEVELOPMENT AND MARKETING COMMITTEE  
REPLY FORM**

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

**Please fax to Bob Ramin at (301) 907-2980  
by Friday, 12 January 1996**

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Committee Member Steve Malusker

**YES**, I will attend the Development and Marketing  
Committee meeting in New Orleans on Wednesday, 28  
February 1995. The AZA Central Regional begins that  
evening with the opening icebreaker and ends Sat., 2 March.

I would like to add the following items to our agenda:

**NO**, I cannot attend this meeting.

**YES**, I would like to assist the Committee with the following:

AZA Society "white paper" draft

CEF Auction subcommittee

AZA Annual Conference preparation

Reciprocity

Please indicate below any potential candidate(s) for the position of  
AZA Associate Director of Development:

Thanks!



To: Bob Ranner



JOHN G. SHEDD AQUARIUM  
The Ocean by the Lake

October 24, 1995

Dr. Kathryn Roberts  
Executive Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I just received a copy of Marie Gottwald's letter to you concerning the proposed licensing program. I thought it might be helpful if I provided you with some background information on Marie because I am certain she can be extremely helpful as we move forward with this program.

Marie has been in the zoo merchandising world for nearly 20 years and is probably considered one of the top experts in this area of our profession. She is most knowledgeable about licensing and knows all of our suppliers extremely well.

During my early years at Brookfield Zoo, I hired Marie from the National Zoo to oversee all of Brookfield's merchandising operations. The results were outstanding and continue to be successful today. I later brought her to Knoxville to run all of the visitor services operations, to include food services. She is an outstanding and experienced professional.

I would strongly encourage this subcommittee to include Marie and/or other merchandise professionals in the development of this program. As she indicates in her letter, they are planning to discuss the topic at the Gatlinburg show on November 6. That might be an excellent opportunity to get some very valuable input.

Please feel free to give me a call if you have any questions. I hope this is helpful.

Most sincerely,

Ted A. Beattie  
President / CEO



JOHN G. SHEDD AQUARIUM  
The Ocean by the Lake

October 23, 1995

Mr. J. Stephen McCusker  
Director  
San Antonio Zoo  
3903 North St. Mary's Street  
San Antonio, Texas 78212-3199

Dear Steve:

By now you probably are very tired of getting these letters and phone calls about committee meetings at the various regionals. I have been copied in on your correspondence to the public relations committee and its request to meet in New Orleans, and at the same time I am in the middle of discussions with Kathryn Roberts and Bob Ramin about meetings for the development and marketing committee and the Conservation Excellence Campaign committee.

I believe I understand the concept of attempting to spread these meetings around to the various regionals. Unfortunately, the practicality of such a decision is causing some unnecessary problems . . . especially on the financial end. The development and marketing committee and the CEF committee meetings include a majority of people who will already be in New Orleans. Many of these committee members are also working for institutions that are part of the central region and would normally attend the New Orleans meeting.

If we select an alternate site, we are now asking committee members to spend extra travel money and be away from their full-time jobs additional time. It certainly makes very good sense - both timing and financially - to meet when most of these people are already together at one location.

I would like to kindly suggest that you make an executive decision and suspend the earlier directive concerning committees meeting in New Orleans along with the board of directors. While I have some understanding of why the idea makes sense to spread these meetings around, in real terms it simply does not make good sense and is creating a lot of discord among our members. This is something we certainly do not need from individuals who are volunteering their time and their institutions' resources to assist the association.

I would also like to suggest that this item be added to the board agenda in February so that we can all discuss this issue. It is certainly not worth your time to have to respond to so many of these requests, and it would make it much easier for the committee chairmen to then make decisions based on convenience, budgets, etc. You certainly will get my strongest support to make a change in this earlier decision. Thanks for listening.

Sincerely,

Ted A. Beattie  
President / CEO



*to Bob Ramin*  
KNOXVILLE ZOOLOGICAL GARDENS  
P.O. BOX 6040 • KNOXVILLE, TENNESSEE 37914 • 615/637-5331 • FAX 615/637-1943

October 18, 1995

Kathryn Roberts, Ph.D.  
Executive Director, Minnesota Zoological Gardens  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Dr. Roberts:

I would very much like to be involved in any plans to develop an AZA licensing program. While the potential undeniably exists for a new source of revenue for the AZA, we also know that licensed products cost more. Therefore any program needs to be structured to ensure that the revenue gained by AZA does not come directly from the member-institution's net line.

Care should also be taken to communicate with established Zoo and Aquarium suppliers who have spent years developing and improving their product lines to best serve our merchandising needs.

There are many seasoned, professional zoo and aquarium gift shop managers/buyers in our member institutions. Many of them attend our annual net-working get together during the Smokey Mountain Gift Show in Gatlinburg. This survey, and implications of an AZA licensing program will be a topic of conversation at this year's meeting on November 6th.

I would be happy to share with you any general consensus of opinion that may come from this meeting.

Sincerely,

*Marie Gottwald*  
Marie Gottwald  
Director Visitor Service

*note - thank  
for interest - sent to  
Ramin - she should  
hear -*

*Should I respond  
refer her to Bob  
Sally? (I faxed to  
Bob already).*



# AMERICAN ZOO AND AQUARIUM ASSOCIATION

## Zoo and Aquarium Gift Shop Survey

Manager's Name MARIE GOTTWALD, DIRECTOR OF VISITOR SERVICE

Zoo or Aquarium KNOXVILLE ZOO

Address PO BOX 6040

City KNOXVILLE State TN Zip Code 37914

Phone Number 423.637.5331 x353 Fax 423.637.1943

Is your gift shop operated by:  Zoo  Society  Franchise  
Other. Please Specify \_\_\_\_\_

Rank the following items sold in your shop(s) in order of popularity: (One being the most popular, ten being the least.)

*Most stores combine one or more "categories"*

<u>11</u> Notecards	<u>7</u> Figurines	<u>6</u> Jewelry	<u>5</u> Hats	<u>3</u> <sup>PVC/Rubber/Plastic</sup> Toys
<u>12</u> Calendars	<u>8</u> Key rings	<u>10</u> Posters	<u>4</u> Mugs	
<u>1</u> T-Shirts	<u>2</u> Plush	<u>9</u> Other <u>Educational Toys/Games</u>		

Please check any of the following organizations for which you sell licensed products. \*

<input type="checkbox"/> Smithsonian	<input type="checkbox"/> Friends of the Forest	<input checked="" type="checkbox"/> World Wildlife Fund
<input type="checkbox"/> National Audubon	<input checked="" type="checkbox"/> Nature Conservancy	<input checked="" type="checkbox"/> Sierra Club
<input type="checkbox"/> WCS	<input checked="" type="checkbox"/> CRES	
Other. Please Specify: _____		

What wholesalers <sup>wholesale ITEMS</sup> would you most like to see developed as AZA licensed products for resale in your gift shop?

T-shirt  
Plush  
Educational Toys/Games

What wholesalers would you recommend the AZA consider as potential licensees?

(Please specify item sold by wholesaler) K&M International, Inc - PLUSH  
Portal Publications - POSTERS  
Plum Graphics - T-shirts

Thank you for completing this survey and providing input into this important program.

- I would like the results of this survey. Please mail to me.
- I would like to receive a current list of AZA member zoo and aquarium gift shop managers for networking
- I would like to assist in the development of licensing program. Please contact me to let me know how I may help.

Mail or fax completed surveys by 13 OCTOBER to:  
Kathryn Roberts, Ph.D.,  
Executive Director, Minnesota Zoological Gardens,  
13000 Zoo Boulevard, Apple Valley, MN 55124-8199  
FAX - (612) 431-9300

\* Products are sold for Knoxville Zoo; suppliers develop and pay royalty fees direct to various organizations.



To: Ted Beattie  
 FR: Kathryn Roberts

Confidential

MEMORANDUM

AMERICAN ZOO AND  
 AQUARIUM ASSOCIATION

Executive Office and  
 Conservation Center  
 7970-D Old Georgetown Rd.  
 Bethesda, Maryland 20814  
 Tel: 301-907-7777  
 Fax: 301-907-2980

TO: Kathryn Roberts, Minnesota Zoo  
 FROM: Bob Ramin  
 DATE: 16 October 1995  
 SUBJECT: 1996 Regional Meeting

As per your request, I would like to share a few thoughts on the mid-year meeting of the Development and Marketing Committee in 1996. The Regional Conference dates are:

Feb. 28 - March 2	Central/New Orleans, LA
April 10 - 13	Eastern/Greenville, SC
May 15 - 18	Western/Denver, CO

Only the Accreditation Committee (one Board member, Hayes Caldwell) is allowed to meet in New Orleans in conjunction with the AZA Board. However, because of the "related" groups to the Development and Marketing Committee, it would make the most sense for us to meet in New Orleans. For example, the CEC Advisory Committee includes yourself, Ted Beattie, Roy Shea, and Syd Butler -- all who have to be at the Board Meeting. In addition, Erich Hunker would be attending the D/M Committee, and would make the CEC meeting.

The Licensing Task Force also includes yourself, and D/M Committee members Sally Steele, Clare Richardson, Natasha Sitto, and Cynthia Sumner. All three of these groups include myself as staff liaison. There is a sort of domino effect going on...

More wrinkles: Denver would like to host the D/M Committee, and is planning programming to reflect strong emphasis in this area. Some D/M members I spoke with said they still could attend, even though it is late in the planning season.

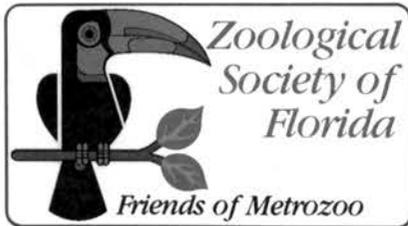


If we were to be hosted in Orlando, I would suggest mid March, so as to avoid a Greenville conflict. We would lose the above synergy, but think that CEC and Licensing could meet in New Orleans and still take advantage of overlapping Board membership, etc. Needless to say, the D/M Committee could learn a great deal from Disney, and in turn, "earn our keep" by providing insights to zoo and aquarium marketing.

Overall, it may not be worth the fight, given your conversation with Steve McCusker, and to just have the meeting in Greenville.

Thanks for your consideration. I would like to resolve this soon, and include the decision in the D/M Committee notes.





September 29, 1995

Ms. Kathryn Roberts, Executive Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I enjoyed being with you at the conference in Seattle, and want to say, again, how impressed I was with your presentation on the Minnesota Zoo.

The entrepreneurial atmosphere you have established within your organization is commendable. If Dade County officials are willing to reach out this year for their zoo as you have for yours, perhaps I can convince them to bring you to Miami to share some of your experience. In January, of course!

While they are making up their minds, I'll have more time to help you with the Development and Marketing Committee this year. Just let me know what I can do.

I'll look forward to speaking with you soon.

With best regards,

Sincerely,

A handwritten signature in black ink, appearing to read "Glenn Ekey", is written over the typed name and title. The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Glenn Ekey  
Executive Director  
Zoological Society of Florida

GE/gmc  
roberts.ltr



## MEMORANDUM

TO: AZA Development and Marketing Committee  
Cyndy Andrews, Omaha's Henry Doorly Zoo  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Natasha Collura, Busch Entertainment  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zool. Society of Houston  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Clare Richardson, Zoo Atlanta  
Kathryn Roberts,  
Carmen Sandoe, WCS/Bronx Zoo  
Kathy Cloyd Sher, Natl Aquarium in Baltimore  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo

FROM: Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo  
Bob Ramin, Director of Development and Marketing

SUBJECT: 1995 AZA Seattle Annual Conference

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

We look forward to seeing you in Seattle at the AZA Annual Conference. Attached is our agenda for the Development and Marketing Committee Meeting, to be held from 3:00 PM to 5:30 PM on Sunday, 17 September 1995 in the Cedar Room of the Seattle Sheraton. This meeting will be open to all interested colleagues. After we finish the Committee's agenda, we plan on addressing discussion items from the floor.

The Seattle Conference promises to be exciting. From the pre-Marketplace "icebreaker" and Marketplace sessions, to the Roundtables and formal sessions, to the Conservation Excellence Campaign donor reception, we have come a long way in making our needs known. We appreciate all of your ideas and cooperation, and thank you in advance for your help as speakers, moderators, and for your participation. Contact Bob at the AZA if you need any additional Conference details and schedules.

Remember, it's not too late to donate to the CEF Auction! The more "off-beat" the item, the better. Contact Jody Light at Woodland Park (206) 233-7271 regarding your treasure.

Please let us know if you would like to add any items to the agenda, and if you will be attending our Committee meeting.

enclosures





**AZA DEVELOPMENT AND MARKETING COMMITTEE  
PRELIMINARY AGENDA FOR SEATTLE ANNUAL MEETING**

Kathryn R. Roberts, Chair

Sunday, 17 September 1995, 3 PM to 5:30 PM  
Seattle Sheraton Hotel, Cedar Room

**AMERICAN ZOO AND  
AQUARIUM ASSOCIATION**

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

- I. Conservation Excellence Campaign
  - a. Update - Campaign Advisory Committee
    - 1) AZA Board Action - Roberts/Beattie
    - 2) Society Check-off - Steele
    - 3) Individuals - Hunker
    - 4) Corporations - Ramin
  - b. Volunteers
- II. Licensing Initiative - Steele
  - a. AZA Board Action/Approval of Business Plan - Roberts/Beattie
  - b. 16 Sept. Seattle meeting, 5-6:30 PM, Sheraton, Douglas Room
  - c. Next Steps
- III. Cause-Marketing and the AZA
  - a. Current Year Relationships/Overview - Ramin
    - 1) Ralston
    - 2) Solaris/Roundup
    - 3) Chrysler
    - 4) Borden
    - 5) Other
  - b. Pending Relationships
    - 1) Exxon
    - 2) Coca-Cola Foods/Hi-C
    - 3) Other
  - c. Sponsorships vs. Promotional Partnerships and Long-Term vs. Short-Term Relationships
- IV. Other Business
  - a. Welcome Cyndy Andrews - Omaha's Henry Doorly Zoo
  - b. Directory - Thanks to Fran Bernstein/FONZ
  - c. Planning for 1996 - Regional and Annual Meetings
  - d. Reciprocity Status
  - e. Committee Review of Pending Proposals
  - f. Surveys



# Memo

To: Bob Ramin  
From: Kathryn R. Roberts  
Date: August 17, 1995  
Re: Seattle CEC Reception

*I would like to get rid of the whole notion of the "fair share" pledges. When I think of fair share, I am thinking of the obligation that was given to us by Wagner many years ago. I would suggest fair share is part of an activity in the past and this Campaign and recognition is related to the "new Campaign." Therefore, I would not include directors in the recognition event because they made the fair share contribution several years ago. Similarly, I would issue the Disney pins to individual donors at the \$100.00 or higher level, not to institutional fair sharers.*

*I am happy to call on some of the directors who have not yet given to the Campaign. However, you are going to have to assign them to me. I know very few people on this list other than Towne and Meyer. Let me know how you want me to proceed.*

*The Board discussed the Honor Roll and understands every contributor will be listed. Are you planning on listing the institutions participating in the check off? What about institutions like Oklahoma City who chose not to participate and sent a donation instead? The Board also knows we will try and increase the number of contributors while we are in Seattle. Have you thought about how we will try to increase donors? I'm sure you have a plan in place which will guarantee everyone has the chance to give. Let me know what you want me to do.*

*You know I am in favor of selling the CEC shirts. And we will be ready and possibly willing to sell them in many conference outlets throughout the week. (It would seem appropriate for those selling the shirts to receive a small token of appreciation--perhaps a pen with ears...)*

ccTed Beattie  
Roy Shea

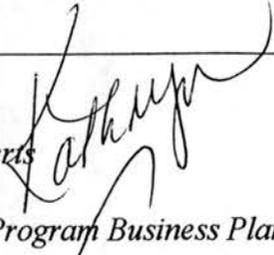
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*Minnesota Zoo Memorandum*

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*To: Sally Steele*  
*From: Kathryn R. Roberts*  
*Date: 08/07/1995*  
*Subject: AZA Licensing Program Business Plan*



Congratulations! The board approved the licensing report with no changes. In fact, they wanted me to let you and your committee know that this was one of the best prepared reports ever passed on to the board for action. Several board members asked us to try and speed up the process. There was some discussion about hiring, on contract, someone who has experience with getting licensed merchandise on the market quickly and profitably. I will talk about that in Seattle. I expect several board members will join your meeting again. You did a great job!

## *Minnesota Zoo*

### FAX Transmission

From: Kathryn R. Roberts  
To: Cyndi Andrews  
Company: Omaha's Henry Doorly Zoo

Date: August 1, 1995  
Time: 1:23 PM  
FAX #: 402-733-8401

I'm just back from vacation and learned you have been appointed to the AZA Development/Marketing Committee, which I chair. WELCOME! Please note that the committee is scheduled to meet during the AZA conference in Seattle on Sunday, September 17th from 3-5:30 in the Cedar Room on the second floor of the hotel. The agenda and location map will be sent to you before the conference.

What follows is the annual report for the committee which also lists other committee members. This will let you know just what you've gotten yourself involved in...

VOICE: 612/431-9299 FAX: 612/431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124



July 10, 1995

Ms. Kathryn Roberts, Executive Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Dear Kathryn:

Thank you so much for agreeing to chair the AZA Development/Marketing Committee for the 1995-96 year. The committees are, in fact, the backbone of this organization. In many cases, where committee vacancies existed, and when it seemed prudent, I put new, young or here-to-fore inactive members on committees. I think it is our responsibility to train and involve these folks for the future of AZA.

Please communicate with all members of your committee and share the committee member list with them; encourage them to play a role in accomplishing your goals. Advise them of upcoming meeting times (i.e. Seattle), if appropriate. New appointees should attend this year's meetings so they get a feel for what lies ahead. I have tried to send a personal note to all the newly assigned committee members. I, however, may have missed a few. This makes it even more important that you, as committee chair, begin communication with your committee members as soon as possible.

Please note that all committee chairs are asked to attend a brief meeting in Seattle. We'll meet the last day of the conference, Tuesday, 19 Sept. 95, from 9:00 - 10:00 a.m., in room 602-CC. This will be an informal, general meeting in which I'd like to discuss committee protocols, goals, communication, and anything you might like to bring to the table.

Again, thanks for your help in our many endeavors.

Sincerely,

J. Stephen McCusker  
President-Elect

JSM:jcl  
cc: Sydney Butler  
Robert Wagner



American Zoo and Aquarium Association

1995-96 COMMITTEES

Development/Marketing (Roberts)

Kathryn Roberts - C  
Glenn Ekey - VC  
Cyndy Andrews  
Ted Beattie  
Fran Bernstein  
Charles Bieler  
Mary Floye-Federer  
Erich Hunker

Jo Ann Keirse  
Clare Richardson  
Carmen Sandoe  
Kathy Cloyd Shea  
Natasha Sitte *Collura*  
Sally Steele  
Cynthia Sumner

Advisors: Sydney Butler, Bob Ramin

## *Minnesota Zoo*

### FAX Transmission

From: Kathryn R. Roberts  
To: Steve McCusker  
Company: San Antonio Zoo & Aquarium

Date: July 5, 1995  
Time: 9:05 AM  
FAX #: 210 734-7291

Dear Steve,

I'm just getting ready to go off on an extended leave which will last until just before the AZA board meeting -- and I'm tying up loose ends today.

I know you are in the midst of making AZA committee appointments. I hope you will appoint Jan Schweitzer to the Development Committee since she has expressed interest and the committee needs more representatives from smaller zoos. I would like to welcome her to the committee when I see her at French Lick.

As soon as I get your list of appointments, I will send off copies of the Development Committee report as well as notice of our meeting scheduled for the annual conference.



VOICE: 612/431-9299 FAX: 612/431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124

Transmit Confirmation Report

No. : 002  
Receiver : 210 734 7291  
Transmitter : MN 200  
Date : Jul 05,95 10:31  
Time : 01'46  
Mode : Fine  
Pages : 01  
Result : OK



# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

April 19, 1995

J. Stephen McCusker  
Executive Director  
San Antonio Zoo  
3903 North St. Mary's Street  
San Antonio, TX 78212

Dear Steve:

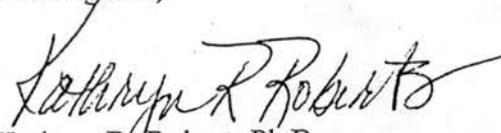
As Chair of the AZA's Development and Marketing Committee, I am responding to your call for review and nominations for committee membership. Our Committee expanded in 1994 and we have had a very productive year. Our participation rate is outstanding, and I am proud of our accomplishments on behalf of the AZA.

Five Committee members are up for renewal in 1995 -- Fran Bernstein (Friends of the National Zoo), Ted Beattie (Shedd), Erich Hunker (Toledo), Jo Ann Keirsey (Oklahoma City), and Clare Richardson (Zoo Atlanta). I heartily endorse their continued service.

One of our Committee members, Barbara Pickard, has left her position as Executive Director of the Friends of the Burnett Park Zoo. I recently spoke with Jan Schweitzer, Director of the Glen Oak Zoo, about her interest in development, and the possibility of her joining our Committee. Jan is very interested in being considered for appointment to the Development and Marketing Committee. Bob Ramin and I agree that Jan would be a great addition, especially considering her perspective of a small institution, which Barbara Pickard represented from her position at Burnett Park.

I also would like to indicate my continued desire to serve as Chair of the Committee. Thank you for your support and consideration of this request as President-Elect of the AZA.

Best regards,



Kathryn R. Robert, Ph.D.  
Executive Director

cc: Robert A. Ramin, AZA



MKG/Deacon

29 June 1995

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Roy Shea, AZA President  
AZA Board of Directors  
AZA Development and Marketing Committee  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Natasha Collura, Busch Entertainment  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zool. Society of Houston  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Clare Richardson, Zoo Atlanta  
Carmen Sandoe, WCS/Bronx Zoo  
Kathy Cloyd Sher, Natl Aquarium in Baltimore  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo  
One Vacancy

FROM: Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo

SUBJECT: 1995 Annual Report

---

The Development and Marketing Committee remains an invaluable asset to the AZA Development and Marketing Department. Given the overwhelming opportunities and the staff of one, Committee members have donated time, expertise, and hard work in many different areas to augment the efforts of the AZA.

For the first half of 1995, the Committee has assisted AZA Development and Marketing Director Bob Ramin and the AZA in attracting over \$723,000 in gifts -- putting us well beyond the 1994 pace. This total does not reflect the great amount of in-kind gifts and non-quantifiable exposure donated directly to member institutions. Of the \$723,000, over \$515,000 was earmarked for SSP projects and specific institutional endeavors, and \$208,000 was made available for AZA general operating expenses. We seem in great shape to surpass our goals in each category.



Page 2

#### AZA Licensing Initiative

Committee member Sally Steele is chairing a Task Force to investigate the opportunities for the AZA and member institutions regarding AZA licensed products. After lively discussion at the Committee's March meeting, Bob Ramin met with Sally to draft a business plan. Development and marketing Committee members Cynthia Sumner, Natasha Collura, Clare Richardson, and myself reviewed this document, which was forwarded to the entire Committee, and is now before the Board. I will formally ask the AZA Board to endorse the Task Force's efforts.

#### 1995 AZA Seattle Annual Conference

Committee members, lead by Erich Hunker, provided great assistance to the new Conference Committee Chair, Pat Simmons of the Akron Zoo, regarding our needs. Pat has been extremely helpful, and I am very pleased to report that we will have a record six formal development and marketing sessions, ten roundtable discussion sessions, and three marketplace sessions.

#### Conservation Excellence Campaign

Stemming from recommendations made by the Development and Marketing Committee, the AZA has spent considerable time working on the Campaign, completed a CEF brochure and an Annual Report which includes a corporate donor honor roll, and has created an efficient gift accounting and acknowledgment system.

The Conservation Excellence Campaign Advisory Committee, lead by Development and Marketing Committee member Ted Beattie, and including members Erich Hunker and myself, has met three times over the past five months at the Shedd Aquarium. Other Development and Marketing members have assisted the Campaign in individual and Check-Off solicitation, corporate and foundation prospect identification, and Campaign management advice.

#### Society Check-Off Campaign

Led by Committee member Sally Steele, we plan to build upon the outstanding total of 34 current society and institution Check-Off participants representing over 350,000 members. The Committee's

Page 3

goal is to replicate the 100% participation rate of institutions represented on the AZA Board.

Assuming that the current participants participate at 26%, income from this group is projected at \$91,000 for 1995. We need to encourage at least ten (10) more societies to participate in 1995 to reach our annual goal of \$125,000.

Targets for 1995 include: Audubon, Brookfield, Cincinnati, Columbus, Dallas, Detroit, Fort Worth, Houston, Jacksonville, Kansas City, Knoxville, Lincoln Park, Memphis, Metro Washington Park, Metropolitan Toronto, Monterey Bay, National Aquarium, New England Aquarium, New Jersey State Aquarium, Oakland, Omaha's Henry Doorly, Philadelphia, Phoenix, Pittsburgh, Rio Grande, Sacramento, San Francisco, Seattle Aquarium, Tennessee Aquarium, Texas State Aquarium, Tulsa, Vancouver Aquarium, and Roger Williams Park.

#### Cause-Related Marketing Initiatives

The AZA Board of Directors, as well as the entire AZA membership, relies upon the Development and Marketing Committee to give final review and approval to all national marketing endeavors that would generate over \$25,000. Given the marked increase in the volume and scope of these initiatives, this service of the Committee is invaluable to the AZA and to the AZA Director of Development and Marketing.

cc: Syd Butler, AZA Executive Director  
Bob Ramin, AZA Director of Development and Marketing



23 May 1995

Gerald Brady  
Director  
Potter Park Zoological Gardens  
1301 South Pennsylvania Avenue  
Lansing, MI 48912

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Dear Jerry:

We are pleased to announce that the AZA has entered into the first stage of a multi-million dollar, multi-year agreement with a corporation that will provide benefits to participating institutions and the AZA. For competitive reasons, during the initial stage of our collaboration, the corporation requests that we not divulge its name, except to note that it is a major financial services company with a credit card division.

As we further explore the financial scope of the collaboration, we would like to ascertain our members' current and potential relationships. We understand that this information may be highly confidential, but we know of no other way to assess the financial possibilities of our collaboration. We would agree, at your request, not to divulge the name of your institution when we summarize this information to the corporation.

We do not ask you to forego beneficial relationships, and do not presume this authority. We do believe this relationship will provide comparable or greater benefits for participating institutions. If you are currently negotiating with a financial services entity, you might call us before you make further commitments.

Please return the confidential questionnaire to Kathryn Roberts. Thank you, and please contact us with any additional questions.

Best regards,

  
Roy Shea  
AZA President  
Executive Director and COO  
Indianapolis Zoo

  
Kathryn R. Roberts, Ph.D.  
Development/Marketing Chair  
Executive Director  
Minnesota Zoological Garden



# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

April 19, 1995

J. Stephen McCusker  
Executive Director  
San Antonio Zoo  
3903 North St. Mary's Street  
San Antonio, TX 78212

Dear Steve:

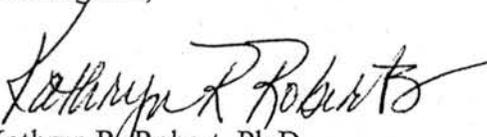
As Chair of the AZA's Development and Marketing Committee, I am responding to your call for review and nominations for committee membership. Our Committee expanded in 1994 and we have had a very productive year. Our participation rate is outstanding, and I am proud of our accomplishments on behalf of the AZA.

Five Committee members are up for renewal in 1995 -- Fran Bernstein (Friends of the National Zoo), Ted Beattie (Shedd), Erich Hunker (Toledo), Jo Ann Keirsey (Oklahoma City), and Clare Richardson (Zoo Atlanta). I heartily endorse their continued service.

One of our Committee members, Barbara Pickard, has left her position as Executive Director of the Friends of the Burnett Park Zoo. I recently spoke with Jan Schweitzer, Director of the Glen Oak Zoo, about her interest in development, and the possibility of her joining our Committee. Jan is very interested in being considered for appointment to the Development and Marketing Committee. Bob Ramin and I agree that Jan would be a great addition, especially considering her perspective of a small institution, which Barbara Pickard represented from her position at Burnett Park.

I also would like to indicate my continued desire to serve as Chair of the Committee. Thank you for your support and consideration of this request as President-Elect of the AZA.

Best regards,

  
Kathryn R. Robert, Ph.D.  
Executive Director

cc: Robert A. Ramin, AZA

DRAFT

18 April 1995

J. Stephen McCusker  
Executive Director  
San Antonio Zoo  
3903 North St. Mary's Street  
San Antonio, Texas 78212

Dear Steve:

As Chair of the AZA's Development and Marketing Committee, I am responding to your call for review and nominations for committee membership. Our Committee expanded in 1994, and we have had a very productive year. Our participation rate is outstanding, and I am proud of our accomplishments on behalf of the AZA.

Five Committee members are up for renewal in 1995 -- Fran Bernstein (Friends of the National Zoo), Ted Beattie (Shedd), Erich Hunker (Toledo), Jo Ann Keirsey (Oklahoma City), and Clare Richardson (Zoo Atlanta). I heartily endorse their continued service.

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Thank you for your support and consideration of this request as President-Elect of the AZA.

Best regards,

Kathryn R. Roberts, Ph.D.  
Executive Director

cc: Robert A. Ramin, AZA



*Bob*  
*7/5*  
*+ll call Bob on Wednesday*

**FAX TRANSMITTAL COVER SHEET**

**AMERICAN ZOO AND  
AQUARIUM ASSOCIATION**

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Kathryn Brooks FROM: Ram  
OF: \_\_\_\_\_ FAXED BY: \_\_\_\_\_

PHONE: \_\_\_\_\_ DATE: 4/18/95  
FAX: \_\_\_\_\_ TIME: \_\_\_\_\_

TOPIC: \_\_\_\_\_

THIS TRANSMISSION CONSISTS OF 3 PAGE(S), INCL. COVER.

MESSAGE:

*Please review - if ok,  
probably should go out on  
main zoo letterhead -  
Just!*

*B*

IF YOU HAVE ANY PROBLEMS WITH THIS TRANSMISSION  
PLEASE CONTACT OUR OFFICE AT (301) 907-7777.



FAX TO: Bob Ramin  
FROM: Joyce Wolen

Bob. Let me know if you have any further questions.

DEVELOPMENT/MARKETING (Roberts)

Kathryn Roberts, Chairperson	1991	(97)	(97)
Glenn Ekey, V-C	1991	(98)	(96)
Fran Bernstein	1994	(01)	(95) ✓
Ted Beattie	1991	(98)	(95) ✓
Charles Bieler	1991	(97)	(97)
Mary-Floye Federer	1991	(99)	(96)
Erich Hunker	1991	(98)	(95) ✓
Jo Ann Keiracy	1994	(01)	(95) ✓
Barbara Pickard	1994	(02)	(96)
Clare Richardson	1994	(01)	(95) ✓
Carmen Sandos	1994	(02)	(96)
Kathy Cloyd Sher	1994	(00)	(97)
Natasha Sitto	1994	(00)	(97)
Sally Steele	1991	(97)	(97)
Cynthia Sumner	1991	(99)	(96)

Advisors - Sydney Butler  
Bob Ramin



11 April 1995

Kathryn Roberts, Ph.D., Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Office of  
Membership Services  
Oglebay Park  
Wheeling, WV 26003  
Tel: 304-242-2160  
Fax: 304-242-2283

Dear Kathryn:

I have issued our annual "call for service," which appeared in the April issue of the *Communiqué*. I now ask the current committee chairmen to evaluate the members and advisors on each of your respective committees. You are the best person to advise me of the effectiveness of those serving with you.

Attached is a list of those serving on your committee. Those marked with an asterisk will have completed their two full terms of service and must step down this September. Others can be replaced if their service has not been productive. Please help me to keep our committees active and effective by sending me comments on your members and advisors. You may note on the attached list whether they are "productive" or "non-productive," include any other comments, and return to me no later than 30 May. Your comments will remain confidential and, if necessary, will be shared only with Syd Butler and Bob Wagner. I would also appreciate your suggestions for potential new candidates for committee service.

It is important to the continued success of AZA that we maintain active and effective committees. Your input at this time will be an important step in continuing our progress.

Sincerely,

J. Stephen McCusker, Executive Director  
San Antonio Zoological Gardens & Aquarium  
3903 North St. Mary's Street  
San Antonio, TX 78212-3199  
(210) 734-7184, ext. 110; Fax 734-7291

Copies to: Syd Butler, AZA Executive Director  
Bob Wagner, AZA Chief Administrative Officer

Enclosure

JSM/jkw

(Bob)  
and letter  
didn't say  
anyone should be  
reappointed



DEVELOPMENT/MARKETING COMMITTEE (Roberts)

Kathryn Roberts, Chairperson  
Glenn Ekey, V-C

Ted Beattie  
Fran Bernstein  
Charles Bieler  
Kathy Cloyd Sher  
Mary Floye Federer  
Erich Hunker  
Jo Ann Keirse  
Barbara Pickard  
Clare Richardson  
Carmen Sandoe  
Natasha Sitto  
Sally Steele  
Cynthia Sumner

Advisors

Sydney Butler  
Bob Ramin



## MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Pat Simmons, Chair, AZA Conference Program  
Committee and Director, Akron Zoo

FROM: Erich Hunker, Development and Marketing  
Committee and Director of Development and  
Marketing, Toledo Zoo  
Bob Ramin, Director of Development and Marketing

DATE: 18 April 1995

SUBJECT: AZA Seattle Annual Conference Proposal Review

Sorry for the feeble attempt at humor -- we just thought a poke at ourselves and taking our sessions "too" seriously might be funny...

The following are our recommendations for sessions that should be included in the Seattle Annual Conference:

### TASK 4: Conference Priority Sessions

- 1) "Hunting in Packs..." (Development)
- 2) "Zoo and Aquarium Television/Radio Shows..." (PR)
- 3) "A Holistic Approach to Educational Exhibit Design..." (Education)
- 4) "Aquarium Exhibit Formulation: From Concept to Opening..." (Exhibit Design)
- 5) "Over the Horizon" (Future Directions)

cc: Kathryn R. Roberts



*Roberts -  
A funny story about  
Pat Simmons...  
I'll call later  
Annex*



## MEMORANDUM

TO: Pat Simmons, Chair, AZA Conference Program Committee and Director, Akron Zoo

FROM: Kathryn Roberts, Chair, AZA Development and Marketing Committee and Executive Director, Minnesota Zoo  
 Erich Hunker, Development and Marketing Committee and Director of Development and Marketing, Toledo Zoo  
 Bob Ramin, Director of Development and Marketing

DATE: 13 April 1995

SUBJECT: AZA Seattle Annual Conference Proposal Review

AMERICAN ZOO AND  
 AQUARIUM ASSOCIATION

Executive Office and  
 Conservation Center  
 7970-D Old Georgetown Rd.  
 Bethesda, Maryland 20814  
 Tel: 301-907-7777  
 Fax: 301-907-2980

Thank you for the opportunity to comment on the submissions for the AZA Annual Conference. We are pleased to present our recommendations as follows:

TASK 1: Prioritization of Development and Marketing Sessions

### Development

- 1) Hunting in Packs: Cultivation Case Studies
- 2) Attracting Support for Zoos and Aquariums – A Holistic Approach
- 3) Capital Campaigns
- 4) Planned Giving Programs – They're Not Just For Lawyers Anymore!
- 5) Zoos and Aquariums: Conservation Organizations in Our Own Backyards
- 6) Practical Techniques in Developing and Executing Capital, Planned and Annual Giving Campaigns

### Marketing

- 1) Corporate Sponsorships vs. Promotional Partnerships
- 2) Temporary vs. Permanent/Long-Term Exhibits

Post-it <sup>®</sup> Fax Note	7671	Date	4/17	# of pages	3
To	KATHRYN ROBERTS	From	Bob Ramin		
Co./Dept.		Co.			
Phone #	414-241-1111	Phone #			
Fax #		Fax #			

Public Relations (we are commenting because of a re-classification of a Development/Marketing submission)

- 1) Zoo and Aquarium Television/Radio Shows: The Team Effort
- 2) "Hey Stop Beating Me Up..."
- 3) "Be Prepared for the Ambush..."
- 4) "The Good, the Bad and the Ugly..."

TASK 2: Compilation of Individual Submissions

Development

- 1) Add the paper submitted by Molly DeDominicis entitled, "Capital Campaign: The Use of Leverage to Increase Local Capital" to Development Session entitled, "Capital Campaigns." Would make four (4) panelists.

Marketing

- 1) Add the paper submitted by Dawn McDonough entitled, "How to reach your public...paid for by corporate sponsors" to Marketing Session entitled, "Corporate Sponsorships vs. Promotional Partnerships." Would replace Jeff Maker of Blue World Beverages as a panelist/presenter.
- 2) Add the paper submitted by Susan Bradford entitled, "Sponsorship and Promotions: Doing More With Less" to Marketing Session entitled "Corporate Sponsorships vs. Promotional Partnerships." Would replace Erich Hunker as panelist/presenter.

Public Relations

- 1) Replace Molly DeDominicis as presenter in Public Relations Session entitled "Zoo and Aquarium Television/Radio Shows" with Erich Hunker as panelist/presenter.

TASK 3: Paper recommendations outside of formal sessions

- 1) Both paper submissions from Jean Bochnowski are good, but, they do not fit into the session priorities. However, we recommend that they be combined to form the body of the fourth "Marketplace" time segment entitled "Marketing to Specific Demographic Segments..."

2) Session entitled "Practical Techniques in Developing and Executing Capital, Planned and Annual Giving Campaigns" (rank #6 under Development) could be a good "Marketplace" presentation – replacing "Non-Profit Regulations..." or running concurrently during another "Marketplace" session.

3) Paper submitted to Marketing by Jim Graham entitled "Thinking About Your Member as Customer" could be an interesting Roundtable, replacing a current topic.

4) Paper submitted to Development by Dana Hines entitled "The Annual Fund Campaign..." could be used for the annual giving topic during the Roundtable sessions.

#### TASK 4: Conference Priority Sessions

At the risk of sounding too self-serving, we would like to nominate the following five sessions:

- 1) "Hunting in Packs..." (Development)
- 2) "Zoo and Aquarium Television/Radio Shows..." (PR)
- 3) "Attracting Support..." (Development)
- 4) "Corporate Sponsorships..." (Marketing)
- 5) "Capital Campaigns" (Development)



3/22  
K - a final copy  
for your files -  
get ready to  
fight for our  
sessions!  
you're in the trenches! B

MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Pat Simmons, Chair, AZA C  
Director, Akron Zoo

FROM: Kathryn Roberts, Chair, AZA  
Committee and Exec  
Erich Hunker, Development  
Director of Develop  
Bob Ramin, AZA Director of Development and Marketing

DATE: 15 March 1995

SUBJECT: AZA Seattle Annual Conference

As you are well aware, our marketing and development colleagues are eager to assist in making the Seattle Annual Conference a smashing success. We have received many proposals for sessions, as well as ideas for the "Marketplace" day. The following outline is an overview of our Conference requests. We look forward to working closely with you and the Conference Program Committee regarding the integration of our sessions that should appeal to a broad cross section of zoo and aquarium professionals.

Along these lines, we have included many non-development and marketing "types" as panelists and moderators. It is our hope to have eight sessions during the Conference, which would attract a broad range of participants. Session rooms can be smaller, to accommodate more concurrent sessions, resulting in a more diverse, dynamic Conference. Again, we pledge to direct all corporate support towards the benefit of the entire Conference and host institution.

I) Marketplace of Ideas

We are expecting another strong turnout for the Friday, 15 September 1995 "Marketplace" day. The informality of this day is great, however, actual roundtables would be unwieldy for 200+ participants. What we are proposing would be true to the original intent of this day.

Four "topics" would be discussed during the day -- fitting into the predetermined time segments. No formal papers or audio-visual equipment will be allowed. However, discussion leaders will have the opportunity to utilize handouts. Each topic will be broken down into specific interest areas, and a colleague (or colleagues) with particular expertise will be the discussion leader(s). This breakdown will also allow for more manageable group sizes. These topics are all of particular concern to the industry, and entail more structured discussion than a traditional roundtable.





## MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Pat Simmons, Chair, AZA Conference Program Committee and  
Director, Akron Zoo

FROM: Kathryn Roberts, Chair, AZA Development and Marketing  
Committee and Executive Director, Minnesota Zoo  
Erich Hunker, Development and Marketing Committee and  
Director of Development and Marketing, Toledo Zoo  
Bob Ramin, AZA Director of Development and Marketing

DATE: 15 March 1995

SUBJECT: AZA Seattle Annual Conference

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- 1) Consultants for Development/Membership/Marketing
  - i) Why our institution has retained counsel -- zoo or aquarium staff discussion leader
  - ii) What a consultant can do for an institution -- current zoo or aquarium consultant discussion leader
  - iii) Why we have decided to build staff in-house and not hire counsel -- zoo or aquarium staff discussion leader
- 2) Concession Negotiations -- How To Leverage the Most for Your Institution
- 3) Non-profit regulations and legal ramifications: IRS (gift accounting) and UBIT -- what we don't know CAN hurt us
- 4) Marketing to Specific Demographic Segments: Events, Promotions, and Programs

"Marketplace" Coordinators: Jo Ann Keirse, Director of Marketing  
Oklahoma City Zoo  
John Hughes, Director of Development  
Dreher Park Zoo

## II) Roundtables

Roundtables are very popular with our colleagues. In Atlanta, two or three concurrent roundtables were run all four mornings and averaged 20 participants each -- all beginning at 7 AM! A number of other professional groups have requested roundtable time during the day, and we agree with Paul Grayson's idea of scheduling roundtables during the "dead" time from 5 PM to 6 PM (Saturday, Sunday, Monday, and Tuesday).

We would like to request two areas each day. Topics will include (depending on space):

- Coupons
- Events for minority audiences
- Annual giving
- Adopt programs
- Donor recognition
- Prospect research
- Strategic planning
- Special events

Roundtable Coordinators: Mary Floye Federer, Director of Development  
Houston Zoological Society

Page 3  
3/15/95

III) Panel Discussion Proposals

Attached to this memorandum are the formal panel discussion proposals, each on a separate sheet.

The session titles are as follows:

- 1) Zoo and Aquarium Television Shows: The Team Effort
- 2) Hunting in Packs: Cultivation Case Studies
- 3) Corporate Sponsorships vs. Promotional Partnerships
- 4) Planned Giving Programs
- 5) Supporting Temporary vs. Permanent/Long-Term Exhibits
- 6) How to Sell Conservation to Donors and Sponsors
- 7) Capital Campaigns
- 8) Fund Raising for Non Fund Raisers

cc: Mike Waller, Woodland Park Zoo

#1

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: Zoo and Aquarium Television/Radio Shows: The Team Effort

Section C

Brief Description: How to start, fund, staff, and renew a show

Section D

Moderator's Name: Jack Hanna, Director Emeritus  
Columbus Zoo

Section E

Panelist's Names: George Donnelly, Director of Marketing  
Mystic Marinelife Aquarium

Molly DeDominicis, Deputy Director  
Texas State Aquarium

Douglas Porter, Assistant Director  
Toledo Zoo

#2

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: Hunting in Packs: Cultivation Case Studies

Section C

Brief Description: How to involve animal/education/non-fund raising staff in cultivation events and follow-up. How to establish a cultivation plan and stewardship protocol.

Section D

Moderator's Name: Barbara Titus, Development and Marketing Director  
Akron Zoo

Section E

Panelist's Names: Dave Wildt, Director  
National Zoological Park Conservation and Research  
Center

Clare Richardson, Executive Vice President  
Zoo Atlanta

Michael Downing, Director of Development  
Cheyenne Mountain Zoo

#3

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: Corporate Sponsorships vs. Promotional Partnerships

Section C

Brief Description: Why is the distinction important? Short term vs. long term corporate relationships. What do sponsors look for? How to identify and attract.

Section D

Moderator's Name: Valerie Jones Koelle, Director of Corporate Sponsorship  
Philadelphia Zoological Society

Section E

Panelist's Names: Maria Pavia, Director, Big Cat Survival Fund  
Ralston Purina Corporation

Jeff Maker, CEO  
Blue World Beverages, Inc.

Erich Hunker, Director of Development and Marketing  
Toledo Zoo

Louise Sloan, Director of Market Development  
Navy Pier Chicago

#4

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: Planned Giving Programs

Section C

Brief Description: How to start, how to involve the Board and community resources, how to market, and how to account for the money/pledges

Section D

Moderator's Name: Nancy Ferguson, Executive Director  
Dickerson Park Zoological Society

Section E

Panelist's Names: Susan Redfield, Vice President for Development  
Lincoln Park Zoological Society

Mary Jane Drews, Director of Development  
John G. Shedd Aquarium

#5

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: Supporting Temporary vs. Permanent/Long-Term Exhibits

Section C

Brief Description: Timing, sponsor's needs, local competition, how does this fit in with your mission, attendance trends

Section D

Moderator's Name: Kathy Cloyd Sher, Deputy Director  
National Aquarium in Baltimore

Section E

Panelist's Names: Heather Farnworth, Senior Marketing Associate  
IMAX Corporation

George Watkins  
Dinamation, Inc.

Natasha Collura, Marketing Representative  
National Promotions and Corporate Sponsorships  
Busch Entertainment Corporation

#6

Section A

Applicant's Name: Development and Marketing Committee

Section B

Session Title: How to Sell Conservation to Donors and Sponsors

Section C

Brief Description: Utilizing our unique niche as conservation organizations to "sell" zoos and aquariums to corporations and individual donors

Section D

Moderator's Name: Carmen Sandoe, Manager, Marketing  
Wildlife Conservation Society/Bronx Zoo

Section E

Panelist's Names: Roger Witherspoon, Director of Public Affairs  
Exxon Corporation

Bill Konstant, Vice President/Conservation  
Philadelphia Zoological Society

Mary Healy, General Curator  
Discovery Island

#7

Section A  
Applicant's Name: Development and Marketing Committee

Section B  
Session Title: Capital Campaigns

Section C  
Brief Description: Either you are thinking of one, doing a feasibility study for one, in the middle of one, or wrapping one up -- campaigns are inevitable

Section D  
Moderator's Name: Charles Hammond, Executive Director  
Detroit Zoological Society

Section E  
Panelist's Names: Bob Ramin, Director of Development and Marketing  
AZA  
  
Holly Duncan, Vice President/Development Services  
The Florida Aquarium  
  
Judi Anderson, Development Officer  
Santa Barbara Zoo

#8

Section A  
Applicant's Name: Development and Marketing Committee

Section B  
Session Title: Fund Raising for Non-Fund Raisers

Section C  
Brief Description: Fund raising is an important element of all staff positions at a zoo or aquarium.

Section D  
Moderator's Name: Warren Iliff, Director  
Phoenix Zoo

Section E  
Panelist's Names: Jack Grisham, Chief Curator  
Oklahoma City Zoo  
  
Lynne Hardie Baptista, Director of Education  
AZA  
  
Lisa Tryon, Executive Director  
Connecticut Zoological Society

DRAFT

## MEMORANDUM

TO: AZA Development and Marketing Committee  
 FROM: Kathryn Roberts and Bob Ramin  
 DATE: 1 March 1995

We are looking forward to seeing many of you in Louisville on 12 March 1995. As a reminder, we will be meeting on Sunday from 3 PM to 5 PM in the Seelbach Hotel, Ballroom West. For any early arrivals, Sally Steele is putting together a licensing ad hoc group for Saturday, 11 March from 3 PM to 5 PM in the Seelbach's Gray Room. Erich Hunker is organizing a group for dinner after the Saturday meeting. Kathryn is arriving on Thursday, and Bob is presenting a paper with Cynthia Sumner on Monday -- needless to say, we will have strong development and marketing "coverage" at this regional meeting!

## AGENDA FOR LOUISVILLE

- I. Cause-Marketing and the AZA
  - a. logo usage
  - b. pending national relationships
  - c. sponsorship vs. promotional partnership
- II. Conservation Endowment Fund Campaign
  - a. update
    - i. society check-off
    - ii. individuals
    - iii. corporations
  - b. volunteers
- III. Licensing Initiative
- IV. Seattle Conference Planning
- V. Sponsorship vs. Permanent Naming -- the debate continues
- V. Other Business
  - a. new member
  - b. giant panda foundation
  - c. new directory
  - d. reciprocity status

*Bob -  
 Agenda looks great!  
 Let's see you next  
 Saturday.  
 KRR*



## MEMORANDUM

TO: Kathryn Roberts  
Chair, AZA Development and Marketing Committee

FROM: Bob Ramin

DATE: 28 February 1995

SUBJECT: AZA Logo Usage

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AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

As the AZA reaches for a higher profile regarding our conservation initiatives on behalf of member zoos and aquariums, our logo has become of value to corporate partners. The AZA Board has expressed some concern regarding how and where our logo is used, as well as how AZA commercial members may participate. Therefore, I have compiled some information and background for your use at the upcoming Board meeting in Louisville, Kentucky.

The AZA Board adopted marketing guidelines in 1993 that addressed logo usage (attached). Briefly, after careful consideration, logo use is allowed after a corporation outlines how the AZA will be featured, where we will be seen, and the right for final art approval is granted. Nothing is considered if the corporation has not agreed to a minimum of \$5,000 for the AZA. Most decisions regarding marketing collaborations are made with the review of the AZA Development and Marketing Committee.

We have had wonderful exposure in the past year representing millions of impressions before the public. These examples include Burger King's The Lion King promotion, Host Marriott's airport and travel plaza promotion, and Blue World Beverage's spring water containers. In the past, the logo has been used on Ralston Purina's Big Cat Survival Fund posters and promotional materials, Hang Ten children's sportswear (hang tag), Dakin plush animal's tags, and WEMCO's men's tie tags.

The development and marketing office carefully considers the appropriateness of the promotion, and whether the AZA's association will be a positive one. This logo exposure gives us a chance to alert the public that member zoos and aquariums are an important force in conservation, and to support the local AZA member institution. In many cases, we are incorporating the SSP logo into promotions, which many members feature in exhibit signage of SSP animals in their collections.



Page 2  
2/28/95

I would like to stress that we are not alone in this arena. The WWF has had a very active licensing initiative, as has the Audubon Society and the National Wildlife Federation. The WWF logo can currently be seen on millions of Evian water bottles, and the NWF logo is featured on millions of Dannon "Danimals" yogurt containers. In addition, at least three of our members, WCS, Sea World, and the San Diego Zoo, are represented on nationally-distributed products.

At this time, AZA commercial members may only use our logo on their letterhead. This privilege is granted as a part of their membership fee. Commercial membership ranges between \$600 and \$3,600, well under the \$5,000 marketing minimum. If a commercial member inquired as to logo usage on their product of in a promotion, I would inform them as to our minimum donation, and encourage the submission of a promotional proposal.

I have witnessed the value of our logo increase as of late. I have turned down a number of requests that are not in keeping with our image, or do not inform the consumer as to our conservation goals. My informal minimum is now \$10,000, and I have a number of innovative promotions for 1995 that will highlight the AZA's conservation message.

Please let me know if you require any additional background of information for your upcoming AZA Board meeting.

enclosure



## MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Kathryn Roberts  
FROM: Bob Ramin  
DATE: 1 March 1995  
SUBJECT: Wildlife Conservation Society

As you know, the Wildlife Conservation Society (WCS) has expressed concern regarding AZA development initiatives in NYC. I have included the recent correspondence concerning this issue, specifically concerning Guernsey's Auction House and Dunkin' Donuts.

As you are well aware, I do not move forward with major development or marketing initiatives without approval from the AZA Development and Marketing Committee. In both cases, the majority of responding Committee members approved the promotions.

In addition, I do not move forward with a promotion without contacting the local member institution. Not only is this part of my procedure and policy, it is good business sense. My ideal fund raising and marketing strategy is to make a joint call on a potential supporter -- thus emphasizing the national and local attributes of an AZA promotion. This procedure, I felt, worked well in NYC regarding Dunkin' Donuts and was very successful in Minneapolis when I made a joint call with Steve Ordahl of your staff. Specifically, WCS recently negotiated a \$10,000 deal with Blue World Beverages and a \$5,000 sponsorship with Borden Cheeses, both based upon national AZA promotions that I had developed.

I feel that Bill Conway's requirement that I contact the member institution's CEO is unwieldy. My goal has been to create relationships with my marketing and development counterparts at zoos and aquariums. I assume that they speak on behalf of that institution, and have either discussed the promotion with their superior(s), or need to wait for final approval.

Regarding the two specific examples, I believe that the background enclosures are self-explanatory. You might not be aware that the Minnesota Zoo has consigned a Warhol print to the Guernsey's "Beasts" auction. I understand that two similar prints



Page 2  
3/1/95

were sold locally with lackluster results. With NYC being the international art auction center, this is a natural venue for the sale of this piece of art. What Bill Conway is asking is that you would contact him and obtain his "permission" for being in his territory.

I will let you as "CEO" address that question -- what if you found out that WCS made a visit to Cargil, General Mills, or Dayton Hudson? Roy Shea and Ted Beattie both mentioned that WCS and San Diego had been to see the Lilly and MacArthur Foundations (respectively) in their cities without their prior approval or knowledge.

The AZA is a national and international conservation organization, and as such, we consider our "region" to be North America. Thank you for addressing this topic with Richard Lattis, and when it is raised during the Board's Executive Session on Friday, 10 March 1995.

enclosures

FEB 03 1995

## NYZS The WILDLIFE CONSERVATION SOCIETY

OFFICE OF THE PRESIDENT AND GENERAL DIRECTOR

THE INTERNATIONAL WILDLIFE CONSERVATION PARK/BRONX ZOO • BRONX, NY 10460-1099 USA • (212) 220-5100

January 31, 1995



Mr. Syd Butler  
AZA  
Executive Office & Conservation Center  
7970-D Old Georgetown Road  
Bethesda, MD. 20814

Dear Syd:

WCS is becoming increasingly concerned about Bob Ramin's fund-raising forays in New York. On the basis of the information at hand, it is difficult not to consider some of AZA's fund-raising here competitive with or confusing to that of WCS.

Our understanding, from previous discussions and correspondence, is that AZA will not fund-raise in an area without advance approval from its local member organization and we have asked that you ratify this position at your March Executive Committee meeting and establish responsive protocols.

Despite our earlier communication, where we informed AZA that communication with the institution must be with an institution's CEO, not a marketing person, Mr. Ramin has continued his New York efforts without complying with our request. Bob told me on Tuesday that he was unaware of it.

I can imagine development opportunities wherein AZA and WCS could profitably work together in New York, but not in the present circumstances. It seems to me that AZA should seek to help its members, communicating marketing/fund-raising opportunities where appropriate and in appropriate ways. It should avoid competition with them or dilution of their markets.

AZA is inheritantly and essentially a creature of its membership, but all such associations carry recessive genes. When these are expressed as a life of its own, they can have a deleterious effect upon its utility.

All best,

William Conway



## MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Syd Butler  
Kris Vehrs  
Roy Shea, AZA President  
Kathryn Roberts, Chair, AZA Development and  
Marketing Committee

FROM: Bob Ramin *BR*

DATE: 31 January 1995

SUBJECT: Dunkin' Donuts

Bill Conway of WCS called me today to express his concern and anger over my recent visit to New York to meet with a marketing representative of Dunkin' Donuts. I would like to outline the facts of this case, as well as clarify my understanding regarding marketing and fund raising calls.

Dunkin' Donuts, through their marketing representative Stephen Field, approached the AZA regarding a cause-related marketing promotion for late summer/fall 1995. This initiative would be multi-faceted, and would include funds for the AZA and funds for participating member institutions. Our initial meeting, held at the National Zoo and hosted by Fran Bernstein (a member of the AZA Development and Marketing Committee), gave us a chance to give our views as to what would make this a successful promotion – both from the AZA and institution perspectives.

After providing a letter of understanding to Dunkin' Donuts, I asked the Development and Marketing Committee to review and approve this initiative. The Committee approved of the concept, thus my meeting with Field on 1/27/95 in his New York City office. Although franchiser Dunkin' Donuts Inc. is a unit of a British-owned firm (Allied-Lyons PLC), and coordinates their U.S. operations out of a Randolph, Massachusetts headquarters, I asked Barbara Motz of WCS if she would join me at my meeting. She stated that WCS did not currently have anything in the works with Dunkin' Donuts, except a possible media connection with Time Warner.

We discussed the promotion in concept, and Barbara was able to give the perspective of WCS and how each of the five institutions could fit in. Of particular concern was the fact that WCS was looking for sponsorship funds from corporate partners, and she presented her Centennial package. We were able to come to an understanding that funds would need to be found to leverage the participation of WCS. In addition, Field was able to outline how Dunkin' Donut franchises (486 in metro/tri-state NY) would be able to directly support WCS through donation boxes and the distribution of WCS promotional material.

1/31/95

Page 2

Conway expressed his expectation that the CEO of a member institution was to be informed as to my attempt to raise money in its geographical area. I have made it my policy to coordinate my marketing and fund raising calls to be made in conjunction with the local staff of member institutions -- whether or not the corporate headquarters are located there or not. These staff members alert me to any pending projects that they are undertaking, and inform their superiors as to my activities. This process is more timely, given the nature of the CEO's limited time and availability. This coordination makes our case for support stronger, and often sets up further local initiatives.

My intent was certainly not to circumvent WCS fund raising efforts, but to introduce a potential corporate relationship that would benefit the AZA and local member institutions. Current policy regarding fund raising by the AZA includes notification of the local marketing and/or development staff before a relationship or agreement is signed.

It is my hope that both organizations continue to grow, and I will look to the AZA Board and the AZA Development and Marketing Committee to ascertain if further measures are necessary.

cc: William Conway  
Barbara Motz

DRAFT

7 February 1995

TO: Roy Shea, AZA President  
AZA Board of Directors  
AZA Development and Marketing Committee  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Barbara Pickard, Friends of the Burnet Park Zoo  
Clare Richardson, Zoo Atlanta  
Carmen Sandoe, Wildlife Conservation Society/Bronx Zoo  
Kathy Cloyd Sher, National Aquarium in Baltimore  
Natasha Sitto, Busch Entertainment  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo

FROM: Kathryn Roberts, Ph.D., Committee Chair  
Executive Director, Minnesota Zoo

SUBJECT: 1995 Midyear Report

---

The Development and Marketing Committee has been extremely active -- assisting Bob Ramin in assessing the merits of marketing proposals, identifying CEF foundation prospects, recruiting society check-off participants, and investigating licensing opportunities. I am extremely proud of their commitment, not only of time, but of expertise. Only through this cooperative effort was Ramin and the AZA able to attract over \$500,000 in gifts in 1994 -- the first full year of a development/marketing director. This total does not even reflect the \$1 million in Roundup donated directly to members. Of the \$500,000, over \$300,000 was earmarked for SSP projects and specific institution endeavors, and almost \$216,000 was made available for AZA general operating expenses.

#### 1994 AZA Atlanta Annual Conference

Committee members Fran Bernstein and Glenn Ekey took the lead in organizing development and marketing sessions and pulled this effort together. Clare Richardson was an outstanding host, and was instrumental (with Bob Ramin and Gail Eaton) in obtaining new sponsors for the Conference. Zoo Atlanta also produced the most successful CEF Auction - donating over \$32,000. The Sunday Session was the best attended to date, and underscores the need for an expanded conference.

We distributed over 200 1994 - 1995 Development Marketing Membership Directories on Sunday, and saw many institution directors, board members, and animal staff participants. The Directory is an invaluable resource, and thanks to Fran Bernstein and her staff at the Friends of the National Zoo for donating their time and materials.

Erich Hunker has been asked by the new Conference Committee Chair, Pat Simmons of the Akron Zoo, to advise the Committee as to our needs. Erich has offered to meet with Pat in Akron. Bob Ramin will be working with Erich and Pat regarding an alternative to the traditional Sunday Session, and to integrate more diverse participants into the sessions.

#### Conservation Endowment Fund (CEF) Campaign

A \$5 million goal was announced for the Conservation Endowment Fund at the Annual Business Meeting. In order to reach this goal from the current level of \$1.8 million, an aggressive Campaign was outlined. Funds will be solicited from corporations and foundations, individual members of the AZA (expanding upon last year's dues mailing appeal), and through the Society Check-Off Campaign. The Committee pledged support through the identification of major corporate and foundation prospects.

Concern was expressed that the AZA articulate the Campaign's priorities, and utilize past CEF grant recipients to leverage future gifts. A Campaign brochure has been drafted with input from the Committee.

Concern was expressed that last year's appeal did not reach all individual members. The Committee advised either a direct mail appeal to all AZA members, or an envelope insert into the November *Communiqué* (an envelope insert turned out to be most cost-effective). In addition, traditional donor levels will be introduced with \$25, \$50, and \$100+ "clubs" established.

The Board approved the establishment of a CEF Advisory Committee for the Campaign. Ted Beattie (Chairman), Erich Hunker and I (from the Development and Marketing Committee) will serve on this Committee, with the assistance from many colleagues.

#### Society Check-Off Campaign

Through the leadership of Sally Steele and Ted Beattie, a successful marketing campaign to garner more check-off participants was inaugurated in August. Through this \$1 check-off on renewal and membership forms, serious funds can be generated for the CEF.

Current participants: Akron (annual donation), Baltimore, Baton Rouge, Buffalo, Central Florida, Denver, Dreher Park, Emporia, Indianapolis, Los Angeles, Louisville, Milwaukee Co., Minnesota, Montgomery, North Carolina, Northwest Trek, Point Defiance, Racine, Reid Park, Lee Richardson, Ross Park, St. Paul's Como, Santa Barbara, Shedd, Sunset, Toledo, Topeka, Utah's Hogle, Wildlife World, and Zoo Atlanta.

This program has produced approximately \$60,000 over the past few years. In 1993, check-off funds amounted to \$17,785 -- a 26% participation rate (assuming each member only included \$1 -- some gifts were larger). Almost \$23,000 was received in 1994, even though all new participants have yet to show results, due to reprinting forms and start-up lag time.

Assuming that the current participants participate at 26%, income from this group is projected at \$91,000 for 1995. We need to encourage at least ten (10) more societies to participate in early 1995 to meet our goal of \$150,000.

Targets for 1995 include: Audubon, Brookfield, Cincinnati, Cleveland, Columbus, Dallas, Detroit, Fort Worth, Franklin Park, Houston, Jacksonville, Kansas City, Knoxville, Lincoln Park, Memphis, Metro Washington Park, Metropolitan Toronto, Miami Metrozoo, Monterey Bay, National Aquarium, National, New England Aquarium, New Jersey State Aquarium, Oakland, Oklahoma City, Omaha's Henry Doorly, Philadelphia, Phoenix, Pittsburgh, Rio Grande, Riverbanks, Sacramento, San Antonio, San Francisco, Santa Barbara, Seattle Aquarium, Tennessee Aquarium, Tulsa, Vancouver Aquarium, Roger Williams Park, and Woodland Park.

#### AZA Panda Plan

Dave Towne, Chair of the AZA Panda Plan Task Force, updated the Committee regarding the progress of the Panda Plan. Again, concern was expressed by the Committee that the Panda Plan coordinate with Ramin at the AZA as well as with the Committee regarding national solicitation (\$40 - 50 million) of corporate partners.

Towne expressed his shared concern that any national partners have potential overlap with local sponsors and concessions (Coke and Pepsi examples were mentioned). The sponsorship consultant has experience working with "sticky" situations, such as bringing a Coke sponsored concert into a Pepsi venue.

#### Cause-Related Marketing Initiatives

The Committee reviewed the current Board-approved AZA Marketing Guidelines, and found them to be consistent with the AZA Logo Usage Marketing Guidelines. Given the current minimums and criteria, the Committee is comfortable reviewing the increasing number of cause-related promotions that are being proposed to the AZA. Past, present, and future/pending promotions were reviewed as well. The AZA Board of Directors relies upon the Committee to give final review and approval to all national marketing that would generate over \$25,000. This service of the Committee is invaluable to the AZA, and is a great asset to the AZA Director of Development and Marketing.

The need for marketing surveys was discussed by the Committee, and the recent Galdabini survey was reviewed by Committee representatives. A direct result of the Atlanta Conference was a call for more marketing benchmarks in the zoo and aquarium industry.

#### Licensing Initiative

Sally Steele is leading an initiative to research licensing possibilities for the AZA, as well as finding important information on behalf of member institutions. She will be meeting in March with Gerry Ward (a commercial member and concession consultant), Committee members Natasha Sitto (who will be bring the Busch Entertainment perspective) and Clare Richardson, as well as consulting with Clint Fields of FONZ and Steve Ordahl of the Minnesota Zoo.

Other

The Committee thanked *Connections* editor Judy Blackstock for her service to the industry through her publication and for coordinating the reciprocal membership listing.

An AZA pooled income fund is being discussed, thanks to the suggestion of Susan Redfield at Lincoln Park. This could be an excellent service to AZA member institutions who are establishing planned giving initiatives.

cc: Dennis Meritt, AZA Past President  
Roy Shea, AZA President  
Syd Butler, AZA Executive Director



12 January 1995

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Development and Marketing Committee  
Kathryn Roberts, Minnesota Zoo, Chair  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Barbara Pickard, Friends of the Burnet Park Zoo  
Clare Richardson, Zoo Atlanta  
Carmen Sandoe, Wildlife Conservation Society/Bronx Zoo  
Kathy Cloyd Sher, National Aquarium in Baltimore  
Natasha Sitto, Busch Entertainment  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo

FROM Bob Ramin, AZA

SUBJECT: Upcoming National Promotions and March Meeting

1995 is off to a great start! I have attached the outlines of two potential national promotions involving a number of different aspects. As always, I look to your collective wisdom regarding these initiatives. Unfortunately, the turn around time is tight, and would greatly appreciate your comments by Friday, 13 January. Please remember that I am not asking for approval on behalf of your institution at this time, but am looking to go forward on behalf of the AZA.

These promotions hopefully incorporate the required elements that make good marketing, public relations, and fund raising sense for our myriad of institutional members and for the AZA. Thanks again for your time and expertise.

Fast approaching is our March committee meeting, which will be held in conjunction with the AZA Board of Director's meeting and the Great Lakes Regional Conference at the Louisville (Kentucky) Zoo. We will be meeting on Sunday, 12 March 1995 from 2 PM until 5 PM. A detailed agenda will be sent out shortly, and look forward to seeing many of you in Louisville.

Chairman Roberts would also like to know if there are any particular topics or issues that Committee members would like to address. Please let me know if you will be attending on the attached reply form.

enclosures



DRAFT

DRAFT

## MEMORANDUM

TO: AZA Development and Marketing Colleagues  
FROM: Bob Ramin, AZA Director of Development and Marketing  
Amy Beard, Marketing Program Associate  
DATE: 11 January 1995  
SUBJECT: Borden Cheeses "Zoofari" Promotion

---

Although many of you are probably bracing for winter's chill, the AZA development and marketing department is already busy planning for upcoming summer promotions. Borden Cheeses, the nation's second largest cheese producer, has recently approached the AZA with a comprehensive summer partnership intended to highlight the Species Survival Plan, promote educational tie-ins to zoos and aquariums, and boost consumer awareness about endangered species. The following points outline the parameters of the promotion as it relates to local AZA member institutions:

- **Free Child's Admission Pass**  
Coupon will be delivered in 10 million Borden Singles packages, 15 million American Dairy Association nature booklets that will be distributed the weekends of 13-14 and 20-21 May, and local retail grocery ads. Coupons will list participating institutions and/or will be printed with an "800" number to call for participating institutions. The offer will be valid from 1 May 1995 through 30 September 1995. The AZA will receive a minimum of \$50,000 for this component.
- **School Outreach Program**  
Local AZA member institutions will have an opportunity to offer field trips to area elementary schools who collect Borden proofs of purchase. Classrooms will be asked to collect proofs from Borden Zoofari-packaged cheeses, and fill up an endangered species poster. When the poster is "redeemed" at a participating zoo or aquarium, Borden will help subsidize this program by paying AZA member institutions \$50 for each field trip (maximum \$500 per institution) and by providing SSP pins as prizes for the students. The Outreach Program will run in March and April 1995.

In addition to the local zoo/aquarium tie-ins, Borden also has suggested the following national programs to help boost consumer awareness of the role AZA member institutions are playing to help preserve endangered species.

- **Species Survival Plan Donation**  
Consumers will have an opportunity to provide a charitable donation to the SSP in their name by collecting Borden proofs of purchase (i.e. 2 proofs=\$1, 3 proofs=\$2, 4 proofs=\$3). As a thank you for their contribution, redeeming consumers will receive a thank you letter from the AZA and an SSP logo pin. Delivered in 5 million packages of Borden Fat Free slices. The SSP will receive a minimum of \$25,000 from this offer.

# DRAFT

- **POG In-Pack**  
Cardboard play disks delivered in packages of Borden Singles. Collection of 10 POGs, each featuring an endangered animal supported by the SSP. Back of POG will feature trivia on the animal, and the zoo and aquarium efforts on behalf of its conservation. Kids can also mail-in to receive an animal-themed SSP POG game board. Delivered in 8 million packages of 8 oz. and 16 oz. Borden Singles.
- **Zoofari Instant Win Game**  
Family fun game featuring a grand prize of a Chrysler minivan and secondary prizes that include memberships to AZA facilities (which Borden will provide \$40 reimbursement per membership). Consumer checks in-pack instant game card to see if they've won. Offered in 10 million packages of Borden Singles.
- **Backpack Mail-In Offer**  
Consumer can mail in for their choice of a Caribou Mountain collection of backpacks, offered for \$11.95 with two Borden proofs of purchase. Delivered in 10 million packages of Borden Singles and Sandwich Mate.
- **Promotional Packaging and Advertising**  
All products packed in specially-designed wrappers with animal/SSP graphics and announcements of AZA offers. Free-standing display units with AZA/animal signage placed in approximately 10,000 stores nationwide. Borden will also place offers and animal merchandising in weekly grocery circulars. There will be opportunities for local AZA member institutions to work with retailers for synergistic public relations.

For its part, Borden plans to donate a minimum of \$100,000 to the AZA, SSP, and member institution education programs as a sign of their commitment to zoo and aquarium conservation efforts. We encourage you all to join us for this summer promotion, one that we feel has been carefully crafted to benefit all parties.

Due to tight deadlines at Borden we need to hear from you all **no later than Friday, January 27th**. Please call Amy Beard or Bob Ramin at (301) 907-7777 with any questions, or Tona Arth at Noble Associates at (417) 831-3663, ext. 805.

Thanks again for your continued support of AZA's national marketing strategies -- you make our efforts possible! We look forward to hearing from you soon!

**DRAFT****BORDEN CHEESES/AZA SUMMER PROMOTION**

- Yes, my institution will honor the free child's admission with paying adult coupon valid from 1 May through 30 September 1995. Please forward my regional contact at Borden regarding local customization of this program at retail locations near my institution.
- Yes, my institution is interested in educational field trip programs sponsored by Borden - each institution will receive \$50 (up to a total of \$500) for each redeemed proof-of-purchase "poster."
- Yes, my institution will provide 2 family memberships for the Instant Win Game, and understand we will be compensated up to \$40 for each redeemed.
- Yes, my institution would like to participate, but is not able to honor the admission coupon. Please contact us regarding ways we can work with this promotion, such as another offer in lieu of the free child's admission.
- No, we are not able to participate in any part of Borden's Summer Zoofari.

Name \_\_\_\_\_

Institution \_\_\_\_\_

Phone \_\_\_\_\_

**PLEASE FAX BACK THIS FORM TO BOB RAMIN OR  
AMY BEARD AT THE AZA EXECUTIVE OFFICE BY  
FRIDAY, JANUARY 27TH. Fax: (301) 907-2980.**

**THANK YOU!**



9 January 1995

Stephen Field  
President  
Field Marketing Services  
54 West 21st Street  
New York, NY 10011

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Dear Steve:

I thoroughly enjoyed our recent meeting at the National Zoological Park in Washington, DC. Your Dunkin' Donuts 1995 proposal to the American Zoo and Aquarium Association sounds exciting, and we are ready to move ahead and work with your tight deadlines.

The following points comprise our understanding:

- 1) Dunkin' Donuts will produce an endangered species series of hot and cold cups and mugs featuring AZA SSP animals and information. Approximately \$.08 from the sale of each cup and mug will benefit the AZA. Dunkin' Donuts will guarantee a minimum donation of \$75,000 from the proceeds, with a maximum of \$100,000.
- 2) Dunkin' Donuts will sponsor a free child's admission (with an accompanying full-paying adult) offer to participating member institutions of the AZA. This coupon, printed with the list of participating institutions, will be distributed in 44 million "free-standing inserts" at a date to be mutually agreed upon. The coupon will be valid from 14 August 1995 through 30 September 1995.

Each participating institution will receive \$.50 for each redeemed coupon. Coupons will be returned to Dunkin' Donuts (or redemption house) for processing. A maximum of \$75,000 will be available to address this expense by Dunkin' Donuts. AZA member institutions who do not charge admission (or cannot give away free admission passes) will be given the opportunity to provide another offer in lieu of admission, and receive \$.50 in compensation. For example, a free small fountain drink would be identified on the list of participating institutions.

If the \$75,000 is not expended in compensation for redeemed admission coupons, Dunkin' Donuts will distribute the remainder proportionately to participating institutions.

- 3) Dunkin' Donuts will facilitate local sponsorships of animals at participating AZA member zoos and aquariums. This support will consist of direct cash support from local franchisees and/or the establishment of donation receptacles at Dunkin' Donuts locations. In the event of multiple member institutions in one locality (for example, the Baltimore Zoo and National Aquarium in Baltimore), the support will be split evenly (assuming all are participating in the promotion).



9 January 1995  
Page 2

Dunkin' Donuts will also make available the use of "Dunkin' Donut Vans" to support local zoo and aquarium events. Samples will be given on-site, as well as other promotional material relating to the AZA promotion.

Local Dunkin' Donuts will provide discounts to participating zoo and aquarium individual support society members for products (such as donuts) at local franchisees when valid membership cards are presented. This offer will be promoted in participating member publications, and could be highlighted in national advertising.

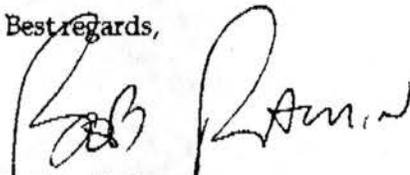
The AZA will provide a list of marketing and public relations staff at each member institution, and Dunkin' Donuts will provide a similar list of regional marketing contacts to facilitate local customization of the promotion.

4) Dunkin' Donuts will support the AZA promotion with approximately \$6 million in multi-media advertising.

5) The AZA will provide the use of its name and logo for the promotion. The AZA will require prior approval of all printed and video material relating to our name and Species Survival Plan program.

I hope that this letter incorporates the most important parts of our collaboration. Please let me know of any changes and/or additions that are necessary. I am looking forward to a great promotion.

Best regards,



Robert A. Ramin  
Director of Development and Marketing



**FAX REPLY FORM**  
**AZA DEVELOPMENT AND MARKETING COMMITTEE**  
**ATTENTION: BOB RAMIN**  
**FAX: (301 907-2980)**

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

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Tel: 301-907-7777  
Fax: 301-907-2980

**Borden Cheeses Promotion**

\_\_\_ YES, I support this promotion.

\_\_\_ NO, I do not support this promotion.

Comments:

**Durkin' Donuts Promotion**

\_\_\_ YES, I support this promotion.

\_\_\_ NO, I do not support this promotion.

Comments:

I will \_\_\_ will not \_\_\_ be attending the March Development and Marketing  
Committee Meeting on Sunday, 12 March 1995 in Louisville, KY.

Comments, agenda items:

Committee Member \_\_\_\_\_



ref. for file

**Minutes of the American Zoo and Aquarium Association  
Development and Marketing Committee Meeting  
20 September 1996  
Honolulu, Hawaii**

**Present:** Ted Beattie, Natasha Collura, Mary Floye Federer, Cynthia Holter, Erich Hunker, Jo Ann Keirse, Bob Ramin (AZA), Gayle Rathbun, Jan Schweitzer (Board of Directors), Kathy Sher, and Kris Vehrs (AZA)

**Closed Session Meeting**

Erich Hunker called the meeting to order at 2:00 p.m., as he was asked to chair the meeting due to the absence of both Chairperson Kathryn Roberts and Vice-Chair Glenn Ekey. Erich congratulated Bob Ramin for his fine work, particularly the most recent notification that Barnum's Animal Crackers was contributing \$100,000 to the AZA and will feature AZA on their cracker boxes (something they have been doing with WWF for years.)

**Proprietary Media**

Kris Vehrs was in attendance to discuss where the AZA is in its relationship with Proprietary Media (PM). Kris reported that the Board has approved the concept and the platypus "spokescritter" and AZA and PM are finalizing the contract which Syd Butler will sign on or before October 15. The Committee recommended that after the contract is signed, Bob disseminate the information about "Aza" and the promotion surrounding him/her in the same fashion as was done with the NOVUS affinity card to all AZA member institutions. This seemed to work well and spell out how zoos and aquariums could participate at different levels.

**Key Result Area (KRA) /AZA Strategic Plan**

Bob and Gayle Rathbun discussed how the KRA was developed and handed out copies of the report on the development and marketing section. The Committee was asked for feedback on it and the other KRA's that appeared in *Communiqué*. The Committee agreed with the KRA's goals and action steps, and added no further input to the other areas.

## Licensing

Licensing co-chair Natasha Collura reported that the AZA Licensing Committee met, and the program is on track with the business plan. K&M, our largest partnership to date, has introduced an exclusive AZA line that is already selling well to zoos and aquariums, toy stores, and catalogs. The Committee is currently developing a second gift shop survey, updating the business plan, and investigating new merchandise categories.

## Annual Conference

Cynthia Holter was congratulated for her excellent work in helping to set up the development, marketing, and membership sessions, roundtables, and marketplace sessions for this year's conference, with help from Steve Ordahl (Minnesota Zoo). There was much discussion about the need for a dedicated AZA staff person to help coordinate conference program needs, sponsorships, and the CEF auction.

Gayle Rathbun would like the Committee to take a more active role in both the live and silent auctions for the CEF regarding donations, set-up, and stewardship. He suggested the Committee could advise the host, but let the host "man" the actual auction with Committee assistance.

Gayle has already met with the Auction Chair, Gail Vavruska from the New Mexico Zoological Society, and she is very interested in receiving assistance. Acting Chair Hunker asked Gayle to chair a sub-committee for the auction and he agreed. Kathy Sher, Mary Floye Federer, and Natasha Collura volunteered to be on the sub-committee with Gayle. Please contact Gayle or Bob Ramin if you would like to join this sub-committee.

After much deliberation, the Committee is recommending to the AZA and the Board of Directors the following:

- 1) Have Colleen Kelly, AZA Associate Director of Development and Marketing attend the Annual Conference to be the staff point person for the CEF auction (among other CEF duties) and coordinate it with the host institution. In addition, Kelly will help coordinate all on-site sponsorship recognition.
- 2) Develop a standardized silent auction form to be used by all future hosts.

- 3) Have AZA write thank you letters to all auction donors.
- 4) List CEF results in *Communiqué* (totals, highest items, etc.)
- 5) Set auction goals.
- 6) Develop a policies/procedures manual for all hosts to follow.
- 7) Look into holding the silent auction (or several smaller ones) at the host hotel, during sessions.
- 8) Have the AZA coordinate sponsorship opportunities to help with conference funding through Bob Ramin.

For the '97 conference in Albuquerque, the Committee further recommends the following:

- 1) Survey conference attendees about what worked/what didn't for the '96 conference.
- 2) Add a member of the Development/Marketing Committee to the Program Committee (due to the increased demand for development and marketing sessions.)

There was discussion about new Committee members to replace those that are no longer involved. Suggestions were: Crystal Bolt (Ft. Worth), Nancy Young (Knoxville) and Gail Eaton (Zoo Atlanta) and a representative from a Canadian institution. **Please contact Bob Ramin with additional suggestions and he will forward these names to Kathryn Roberts and Tom Otten.**

### Membership

The Committee discussed the need to be more pro-active in acquiring and retaining members in the various AZA membership categories. It was suggested that the Development and Marketing Committee work more closely with the Membership Committee on acquisition and retention strategies, especially in light of the opportunities presented by the National Alliance For Species Survival.

### **Open Session Discussion**

Bob talked about our role in continuing education for our profession, and introduced the idea of a "development and marketing school," much like what the educators have set up. Ted Beattie warned that

this was a lot of work and those in attendance agreed that it probably was not necessary in the near term.

After much discussion, it was determined that there should be more emphasis on roundtables for the '97 conference, as this seems to be the best way to learn and share ideas. Jo Ann Keirse and Natasha Collura agreed to chair the formation of sessions/ideas for the '97 conference and to correspond with Jeff Swanagan (Conf. Program Chair). **Anyone interested in moderating or speaking should submit their ideas to Jo Ann or Natasha, for inclusion in a master Development and Marketing Committee conference proposal.**

Bob Ramin updated everyone on several marketing initiatives, including: Borden, ConAgra, Sierra Antifreeze, Solaris, and NOVUS/affinity card. Bob will prepare an update for the Board for the March meeting on the NOVUS promotion and Ted Beattie will ask the Board for input to attempt to get more institutions to participate.

There being no further new or old business, the meeting was adjourned at 4:45 p.m.

**Please indicate your responses to the above "action items" in bold to Bob Ramin at the AZA by 1 November 1996.**

Thank You!

(Minutes prepared and respectively submitted by Erich Hunker)

DRAFT #2

MEMORANDUM

TO: Tom Otten

FROM: Kathryn Roberts

DATE: 18 November 1996

SUBJECT: Development and Marketing Committee Vacancies

As you may know, the AZA Development and Marketing Committee has two openings as a result of current members leaving the zoo and aquarium profession. I would like to see these vacancies filled before our next meeting in March.

I do not know the candidates who asked to join our Committee from your Communiqué notice, but would like to propose the following candidates (in order of preference):

- |                 |                         |                   |
|-----------------|-------------------------|-------------------|
| Dennis Baker    | V. P. Business Services | WCS               |
| Gail Eaton      | Senior V. P. Marketing  | Zoo Atlanta       |
| Crystal Bolt    | Marketing/Devl Director | Fort Worth Zoo    |
| Jean Bochnowski | Director of Marketing   | Franklin Park Zoo |
| Kevan Neff      | Sr. Manager, Promotions | Busch Ent.        |

All the above individuals represent institutions and expertise that would benefit the Committee. Please let me or Bob Ramin know if you need any additional information, and/or addresses.

Thank you.

*Bob -  
 I'll skip the  
 Chicago mtg - One/par  
 we is enuf for  
 me - Shld Ginny  
 send this 1 or you?  
 I hope  
 Eric gets  
 SC. is hopefully  
 expanding their  
 search as we  
 spread.*

*KRP*



MEMORANDUM

K -  
do you want  
to be included?  
B

TO: Syd Butler  
FROM: Bob Ramin, Amy Hertenstein  
RE: National Alliance For Species Survival Development  
DATE: 14 November 1996

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old George road Ea  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980  
http://www.aza.org

We are in the process of planning an initial meeting to develop the National Alliance For Species Survival, in order to further our department's Long Range Plan goal through this action step. There are a number of important decisions which must be made regarding member solicitation, membership benefits, and the symbiotic relationship to the N.A.F.S.S.-NOVUS credit card. After consulting with both Wendy Fisher and Penny Beattie, it has been determined that the easiest and most inexpensive approach would be to hold the meeting in Chicago at NOVUS headquarters around January 14th.

Many of the expected participants including Donna Kuker, Deb Fassnacht, Wendy Fisher, and Penny Beattie are based in the Chicago area and would not require reimbursement of transportation expenses. The only other participants who would incur such costs are Erich Hunker and Jan Schweitzer, both of whom are from Midwestern cities. Therefore, the total cost of transportation would be minimal.

We propose to offer an honorarium of \$500 to each participant and reimburse Erich and Jan for travel expenses. The total cost for this meeting would be approximately \$3,500. At the completion of this initial brainstorming session, we hope to have a clear vision of the future of the National Alliance For Species Survival and a determination of whether a request for proposals from consultants is necessary. We would like to set this date with the above participants, and to obtain approval to expand this initial \$3,500 from the Long Range Plan Fund. Thank you for considering this exciting opportunity.

Bob -  
I would like to  
participate in  
this one - but  
not the date here  
same as the  
America's not in  
New Orleans?  
or only close?  
let me know!  
KMR





August 7, 1995

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

DEVELOPMENT/MARKETING COMMITTEE

Chairman/Advisor

Kathryn R. Roberts  
Minnesota Zoo

Phone: 612/431-9299

This is to advise you that I have received official notification of committee members appointed to the AZA Development/Marketing Committee by President-Elect J. Stephen McCusker.

Welcome to the committee! The list of committee members is attached.

At the AZA Board meeting last weekend, the board reviewed our committee's annual report (previously mailed) and accepted it. They also reviewed the related licensing program business plan (also mailed previously). This is a product that has emerged from a committee chaired by Sally Steele. This report was enthusiastically received by the board.

You will receive an agenda for our Seattle meeting shortly. Again, welcome and I look forward to seeing all of you.

cc: Syd Butler  
Bob Ramin  
Bob Wagner  
Steve McCusker

*g. m. c. world*



First Name	Last Name	Title	Organization	Address	City, State, Zip	Phone/Fax
Cyndi	Andrews	Marketing Manager	Omaha's Henry Doorly Zoo	3701 South 10th St.	Omaha, NE 68107-2200	402/733-8401 Fax: 733-4415
Ted	Beattie	Director	Shedd Aquarium	1200 South Lake Shore Dr.	Chicago, IL 60605	312/986-2270 Fax: 939-8734
Fran	Bernstein	Membership & Mktg. Dir.	Friends of the National Zoo	3001 Connecticut Ave. N.W.	Washington, DC 20008	202/673-4950 Fax: 673-4738
Charles	Bieler	Development Director	Zoological Society of San Diego	P.O. Box 551	San Diego, CA 92112-0551	619/231-1515 Fax: 231-0249
Natasha	Collura	Nat'l Promos/Corp. Sponsorships	Busch Entertainment Corp.	1720 South Shores Rd., Mission Bay	San Diego, CA 92109-7995	619/226-3911 Fax: 226-3997
Glenn	Ekey	Executive Director	Zoological Society of Florida	12400 S.W. 152nd St.	Miami, FL 33177	305/255-5551 Fax: 255-7126
Mary Floye	Federer	Development Director	Zoological Society of Houston	P.O. Box 66387	Houston, TX 77266	713/529-2632 x112 Fax: 522-2823
Erich	Hunker	PR/Dev/Mktg. Dir.	Toledo Zoo	P.O. Box 4010	Toledo, OH 43609	419/385-5721 Fax: 385-6935
Jo Ann	Kiersey	Manager/Mktg & Interpretive Services	Oklahoma City Zoo	2101 NE 50th St.	Oklahoma City, OK 73111-7199	405/425-0280 Fax: 425-0207
Clare	Richardson	Executive Vice President	Zoo Atlanta	800 Cherokee Ave. SE	Atlanta, GA 30315-1440	404/624-5600 Fax: 627-7514
Kathryn	Roberts	Executive Director	Minnesota Zoo	13000 Zoo Boulevard	Apple Valley, MN 55124-8199	612/431-9299 Fax: 431-9336
Carmen	Sandoe	Mgr. of Corporate Sponsorship	Wildlife Conservation Park/Bronx Zoo	185th Street & Southern Blvd.	Bronx, NY 10460-1099	718/220-5100 Fax: 220-7114
Kathy	Sher	Sr. Dir./Mktg. & Planning	National Aquarium in Baltimore	Pier 3, 501 East Pratt St.	Baltimore, MD 21202-3194	410/576-3805 Fax: 576-8238
Sally	Steele	Associate Director	No. Carolina Zoological Society	4403 Zoo Parkway, Box Z00	Asheboro, NC 27203	910/879-7250 Fax: 879-3963
Cynthia	<del>Sumner</del> Hoffer	Dev/Mktg. Director	St. Louis Zoo	Forest Park	St. Louis, MO 63110	314/781-0900 Fax: 647-7969

## *Minnesota Zoo*

### FAX Transmission

From: Kathryn R. Roberts  
To: Bob Ramin  
Company: Company

Date: 9-27-94  
Time: 1:00 PM  
FAX #: 301/907-2980

#### Message:

If you are successful in getting a Discover Card meeting in Chicago set up for the last week in October, it will need to be Monday, Tuesday or Wednesday for me to make it (October 24-26). I have board meetings the last two days of the week.

VOICE: 612/431-9299 FAX: 612/431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124



30 September 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Development and Marketing Committee  
Ted Beattie, Shedd Aquarium  
Fran Bernstein, Friends of the National Zoo  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Jo Ann Keirse, Oklahoma City Zoo  
Barbara Pickard, Friends of the Burnet Park Zoo  
Clare Richardson, Zoo Atlanta  
Carmen Sandoe, Wildlife Conservation Society/Bronx Zoo  
Kathy Cloyd Sher, National Aquarium in Baltimore  
Natasha Sitto, Busch Entertainment  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo

FROM: Kathryn Roberts, Minnesota Zoo  
Bob Ramin, AZA

SUBJECT: Atlanta Notes

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Thank you for all of your hard work that paid off so handsomely in Atlanta. It is safe to say that we provided something for everyone at the Conference, as well as won over many "converts" to the integral nature of development/marketing and membership to the operation of zoos and aquariums. We distributed 200 Directories on Sunday, and saw many institution directors, board members, and animal staff participants.

Needless to say, congratulations to Fran Bernstein and Glenn Ekey for pulling this all together, and to Clare Richardson as the "hostess with the mostest." The Directory will prove invaluable to all, and thanks to Fran and her staff at the Friends of the National Zoo for donating their time and materials.

This leads to our first order of post-Conference business. As you know, next year's AZA Conference is in Seattle, and will be 15 - 19 September 1995. Because this is over a weekend, we could lose the "Sunday Session," or "Marketplace of Ideas."

Our charge is to improve and increase our sessions at the Conference, as well as to integrate development and marketing into "holistic" concurrent sessions. **We are looking for volunteers to fill Fran and Glenn's shoes for Seattle - please let Bob or Kathryn know of your interest.**



Erich Hunker has been asked by the new Conference Committee Chair, Pat Simmons of the Akron Zoo, to advise the Committee as to our needs. Erich has offered to meet with Pat in Akron. **Please submit your session ideas, offers of assistance regarding presenting papers, moderating, and leading roundtables, as well as how to replicate the Sunday Session to Erich at the Toledo Zoo by November 1.**

Development and Marketing Committee Meeting Minutes (9/21/94, 9 - noon)

Members present: Beattie, Bernstein, Bieler, Ekey, Federer, Hunker, Keirse, Pickard, Richardson, Roberts, Sher, Steele, and Sumner. Also present from the AZA: Butler, Ramin

Approximately 30 additional persons were in attendance.

I. Conservation Endowment Fund (CEF) Campaign

A \$5 million goal was announced for the Conservation Endowment Fund at the Annual Business Meeting. In order to reach this goal from the current level of \$1.8 million, an aggressive Campaign was outlined. Funds will be solicited from corporations and foundations, individual members of the AZA (expanding upon last year's dues mailing appeal), and through the Society Check-Off Campaign. **The Committee pledged support through the identification of major corporate and foundation prospects.**

Concern was expressed that the AZA articulate the Campaign's priorities, and utilize past CEF grant recipients to leverage future gifts. **A Campaign brochure has been drafted that is attached for the Committee's review.**

Concern was expressed that last year's appeal did not reach all individual members. **Ramin will investigate either a direct mail appeal to all AZA members, or an envelope insert into the November *Communiqué*.** In addition, traditional donor levels will be introduced with \$25, \$50, and \$100+ "clubs" established.

The Board approved the establishment of a CEF Advisory Committee for the Campaign. The Advisory Committee will assist in the identification and solicitation of major support for the CEF, and will consist of:

Ted Beattie - Chairman	Shedd Aquarium
Penny Beattie - Consultant	Schultz & Williams (AZA Commercial Member)
Clint Fields - Executive Dir	Friends of the National Zoo
Jack Hanna - Director Emeritus	Columbus Zoo
Kathryn Roberts - Exec Dir	Minnesota Zoo
Roy Shea - CEO	Indianapolis Zoo
Steve Wylie - Director	Oklahoma City Zoo

(corporate CEO tbd)

II. Society Check-Off Campaign

Through the leadership of Sally Steele and Ted Beattie, a successful marketing campaign to garner more check-off participants was inaugurated in August. Through this \$1 check-off on renewal and membership forms, serious funds can be generated for the CEF. This campaign builds upon the past support by the:

Baltimore Zoo, Central Florida Zoo, Denver Zoo, Dreher Park Zoo, Emporia Zoo, Montgomery Zoo, North Carolina Zoo, Santa Barbara Zoo, and Sunset Zoo.

To date, the following institutions will begin check -off programs in the near future, and many others are considering this initiative. In addition, the Akron Zoo will make a CEF donation each year in honor of the check-off. **Thank you to the Committee for their support of this initiative at their institutions.**

Buffalo Zoo  
Indianapolis Zoo  
Los Angeles Zoo  
Louisville Zoo  
Milwaukee County Zoo  
Minnesota Zoo  
New England Aquarium  
Northwest Trek Wildlife Park  
Point Defiance Zoo and Aquarium  
Racine Zoo  
Lee Richardson Zoo  
Riverbanks Zoo  
Ross Park Zoo  
Shedd Aquarium  
Toledo Zoo  
Topeka Zoo  
Utah's Hogle Zoo  
Wildlife World Zoo  
Zoo Atlanta

III. International Rhino Foundation

Jim Jackson and Bob Reese, representing the International Rhino Foundation (IRF), presented recent fund raising and marketing progress. The IRF has received significant corporate and foundation support, and will be looking for a 1/2 or full time development officer. A recent White Oak Dance Project Benefit held in Atlanta was a successful attention-getter, and stemmed from the IRF/Development and Marketing Committee workshop hosted by the Minnesota Zoo last November.

The Committee again offered development and marketing assistance. In addition, important cause-marketing ramifications regarding Rhinos were discussed, and many Committee members expressed support for a marketing task force. **Please contact Bob Ramin if you are interested in assisting the IRF regarding cause-related marketing initiatives. Ramin and Roberts will coordinate a possible strategy session within the next few months.**

IV. AZA Panda Plan

Dave Towne, Chair of the AZA Panda Plan Task Force, updated the Committee regarding the progress of the Panda Plan. US Fish and Wildlife holds the cards as to permits, but the Plan has retained a sponsorship consultant (Dick Cecil) to coordinate national solicitation (\$40 - 50 million) of corporate partners as soon as Pandas are on the way. **Again, concern was expressed by the Committee that the Panda Plan coordinate with Ramin at the AZA as well as with the Committee.**

Towne expressed his shared concern that any national partners have potential overlap with local sponsors and concessions (Coke and Pepsi examples were mentioned). The sponsorship consultant has experience working with "sticky" situations, such as bringing a Coke sponsored concert into a Pepsi venue.

V. Cause-Related Marketing Initiatives

The Committee reviewed the current Board-approved AZA Marketing Guidelines, and found them to be consistent with the AZA Logo Usage Marketing Guidelines. Given the current minimums and criteria, the Committee is comfortable reviewing the increasing number of cause-related promotions that are being proposed to the AZA. Past, present, and future/pending promotions were reviewed as well. **The AZA Board of Directors relies upon the Committee to give final review and approval to all national marketing that would generate over \$25,000. This service of the Committee is invaluable to the AZA, and is a great asset to the AZA Director of Development and Marketing.**

The need for marketing surveys was discussed by the Committee, echoing the discussion in the Director's lunch. Chairwoman Roberts offered the Committee's help in reviewing survey questions, and coordinating the review of criteria such as frequency, analysis, and funding.

VI. Other Business

The Committee thanked *Connections* editor Judy Blackstock for her service to the industry, and encouraged submissions to the magazine by Committee members.

An AZA pooled income fund was discussed, thanks to the suggestion of Susan Redfield at Lincoln Park. This could be an excellent service to AZA member institutions who are establishing planned giving initiatives.

The Committee will next meet at the Regional Meeting/AZA Board of Directors in Louisville, Kentucky at the Louisville Zoo from 12 - 14 March 1995.

Meeting adjourned at 12:05 PM.

cc: Dennis Meritt, AZA Past President  
Roy Shea, AZA President  
Syd Butler, AZA Executive Director

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## *Why Give to the CEF*

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North American zoos and aquariums are unrivaled in the business of conservation. They replicate and display *the living world*—from rainforests to deserts to mountain streams. They conserve habitat, save stranded marine mammals, breed and reintroduce endangered species. They educate through field trips, classroom curriculum, and interactive long distance learning via fiber optics. They develop the best research on animal care and implement critical strategies for species survival. They link recreation with conservation by thousands of community events from dinosaur days to family fun nights. And they do it all on a massive scale—for 100 million visitors each year and for hundreds of conservation projects worldwide.

The Conservation Endowment Fund supports this enormous effort. It aggregates the individual donations of AZA members and year in, year out provides the consistent level of resources needed for conservation work. Through competitive awards, it directs the best thinking and planning. Stated simply, the CEF transforms single donations into consistent, comprehensive action.

Surely there are many conservation efforts deserving support. But is there one with any more excitement and scope, or with more potential for educating more people and saving more endangered species? Do you know another effort that better plans for, cares for, breeds, displays, teaches about, reintroduces, or saves habitat for the world's endangered wildlife?

Sydney J. Butler, Executive Director, AZA

## *Preparing for the 21st Century*

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# Conservation Endowment Fund

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## AZA Logo

Executive Office and  
Conservation Center  
7970 -D Old Georgetown Rd.  
Bethesda, MD 20814

## AZA Logo SSP Logo

Office of Membership Services  
Oglebay Park  
Wheeling, WV 26003-1698

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## The Effort

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The American Zoo and Aquarium Association (AZA) was founded in 1924 as the American Association of Zoological Parks and Aquariums to support membership excellence in conservation, education, science, and recreation. The AZA is a 501(c)(3) organization, with an annual budget of over \$1.7 million. Collectively, the 164 AZA member institutions form the only conservation organization large enough to reach over 112 million visitors annually. Some of the AZA's top conservation efforts include the following:

- **Species Survival Plan (SSP)®** — Developed in 1981, the SSP is the cornerstone of the AZA conservation plans and has grown to include over 70 species. An estimated 9,000 animals are carefully monitored to ensure their survival for the next 200 years. Management committees composed of various experts assist the coordinator with the conservation efforts for the particular species, including aspects of population management, research, education and reintroduction when feasible.
- **Taxon Advisory Groups (TAG)** — A Taxon Advisory Group is an AZA committee whose primary functions are to produce a Regional Collection Plan for a given taxon, and to facilitate the activities of relevant species management committees by providing a forum for discussing husbandry, ethical and other issues that apply to the entire taxon.
- **Fauna Interest Groups (FIG)** — A Fauna Interest Group is an AZA committee designed to network and promote the conservation and scientific programs of AZA member institutions in specific geographical areas. Typically, these are focused on areas of the world with high levels of biological diversity.

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## The Fund

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Established in 1984, the Conservation Endowment Fund's (CEF) purpose was to "utilize investment proceeds from the Conservation Endowment to provide finances for carefully considered conservation projects." The CEF was charged to "provide funds for staff resources, and to develop promotional materials for a national awareness program with respect to the SSP and other Association conservation endeavors." It is a critical part of the AZA's effort to meet its conservation mission.

Initial funding for the CEF came from a \$100,000 transfer from the AZA general fund, and from member institutions who made "fair share" contributions. Subsequent funding has been received from generous corporations and individuals. The CEF's principal is approaching \$2,000,000, but must grow dramatically to address the many challenges facing conservation and membership services.

Goals for the CEF include the following:

- Facilitation of field conservation programs — regional and international
- Implementation of conservation programs
- Expansion of the SSP, TAG, FIG, and Scientific Advisory Groups
- Improvement of professional development and training opportunities

Today the AZA manages over 70 SSPs with an estimated goal of 200 by the year 2000.

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## The Purpose

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To be successful in its conservation mission, AZA must build a more secure financial base. This base of invested funds will provide income on a consistent basis and is the key to conservation excellence.

Over the years, over \$400,000 in grants from the CEF have been used to enhance and initiate programs vital to the entire zoo and aquarium profession. CEF awards have gone towards underwriting the development of the AZA Conservation Academy, supporting members of the AZA Small Population Management Advisory Group, and for funding the preparation and distribution of contraceptive implants for captive animals. CEF support was also given to reintroduce Bali mynahs to Bali Barat National Park in Indonesia, developing the first international symposium on disease and the conservation of threatened species, and forming a conservation action plan for Sumatran Tigers.

By supporting this Conservation Endowment Fund you are creating a fund of small donations which together will produce comprehensive conservation action. Our goal of \$5 million dollars can be reached with your help. Would you assist our coalition of North American Zoos and Aquariums as they pursue worldwide conservation for endangered species?

For further information on the CEF or on how you can make a donation, please contact Robert Ramin, the AZA's Director of Development and Marketing at the AZA Executive Office in Bethesda, MD (301) 907-7777.

# EXCELLENCE *in* CONSERVATION



To: AZA Development/Marketing Committee Members

Date: 8/24/94

From: Kathryn R. Roberts, Committee Chair

A handwritten signature in black ink, appearing to read 'Kathryn Roberts', written over the typed name in the 'From:' field.

AZA President-Elect Roy Shea has completed his committee appointments for his term beginning in September. He has asked that I relay to you his appreciation for your willingness to assist him by serving on the Development/Marketing Committee. I am delighted to welcome you to the committee and look forward to working with you in the future. Each and every one of you have strong skills and expertise to give to our tasks. Committee members are:

Kathryn Roberts, Chair  
Glenn Ekey, Vice Chair

Ted Beattie  
Fran Bernstein  
Charles Bieler  
Kathy Cloyd Sher  
Mary Floye Federer  
Erich Hunker  
Jo Ann Keirse  
Barbara Pickard  
Clare Richardson  
Carmen Sandoe  
Natasha Sitto  
Sally Steele  
Cynthia Sumner

Advisors

Sydney Butler  
Bob Ramin

A list of committee member information is attached for your reference.

Our first meeting will be at the AZA Annual Conference in Atlanta on Wednesday, September 21, 1994 from 9AM - Noon in the Summit Room (tentative agenda attached). I look forward to seeing you all then as well as at the Sunday Development/Marketing session, which has been organized by Fran Bernstein and Glenn Ekey.

Thank you for your willingness to strengthen our Association and share your expertise with your colleagues.



## AZA Development/Marketing Committee

First Name	Last Name	Title	Organization	Address	City, State, Zip	Phone/Fax
Ted	Beattie	Director	Shedd Aquarium	1200 South Lake Shore Dr.	Chicago, IL 60605	312/986-2270 Fax: 939-8734
Fran	Bernstein	Membership & Mktg. Dir.	Friends of the National Zoo	3001 Connecticut Ave. N.W.	Washington, DC 20008	202/673-4950 Fax: 673-4738
Charles	Bieler	Development Director	Zoological Society of San Diego	P.O. Box 551	San Diego, CA 92112-0551	619/231-1515 Fax: 231-0249
Glenn	Ekey	Executive Director	Zoological Society of Florida	12400 S.W. 152nd St.	Miami, FL 33177	305/255-5551 Fax: 255-7126
Mary Floye	Federer	Development Director	Zoological Society of Houston	P.O. Box 66387	Houston, TX 77266	713/529-2632 Fax: 522-2823
Erich	Hunker	PR/Dev/Mktg. Dir.	Toledo Zoo	P.O. Box 4010	Toledo, OH 43609	419/385-5721 Fax: 385-6935
Jo Ann	Kiersey	Manager/Mktg & Interpretive Services	Oklahoma City Zoo	2101 NE 50th St.	Oklahoma City, OK 73111-7199	405/425-0280 Fax: 425-0207
Barbara	Pickard	Executive Director	Burnet Park Zoo	1 Conservation Place	Syracuse, NY 13204	315/435-8511 Fax: 422-1224
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Bob	Ramin	Development/Marketing Director	AAZPA Executive Office	7970-D Old Georgetown Rd.	Bethesda, MD 20814	301/907-7777 Fax: 907-2980



cc: Steve O.  
Anne M.

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

## AZA Development/Marketing Committee

Wednesday, September 21, 1994  
9 AM - Noon

Summit Room  
Marriott Marquis  
265 Peachtree Center Avenue  
Atlanta, GA 30303

### Agenda

Welcome/Introduction of Committee Members  
Conservation Endowment Fund Campaign and Kick-Off  
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CEF/SSP Check-Off Campaign  
AZA 1995 Conference Planning -- Seattle  
Other Issues  
Next Meetings





August 17, 1994

Mr. Paul Grayson  
Conference Program Committee Chair  
Indianapolis Zoo  
1200 West Washington Street  
Indianapolis, IN 46222-4500

Dear Paul:

I very much regret that Bob Ramin has been viewed in such a negative way through his efforts to help put together Development and Marketing sessions at the AZA Conference. Without Bob and Fran Bernstein at FONZ, the sessions would not have representation from such diverse geographical regions of the country and such varied skills and experience.

Every colleague I have talked to is delighted that the Sunday sessions are in the formal program for the first time and has commended the program committee's support of the Sunday sessions. Bob has received more than one hundred and twenty five rsvp's for Sunday's Development and Marketing sessions and, rather than being divisive or underhand, I believe that he is genuinely concerned that the round table format will not work with these numbers. It is purely a question of configuration. If we have to have round tables, so be it!

From the beginning of my discussions with Bob, Glenn Ekey and Fran Bernstein, it has been understood that all sponsorships are to be used to off-set the conference bottom line and would not be targeted to Sunday's sessions as at previous conferences. Bob and Fran not only agreed but actively solicited sponsorships and silent auction items with a real team spirit.

*Sharing The Joy And Wonder Of Wildlife*

800 Cherokee Avenue, S.E., Atlanta, Georgia 30315-1440  
(404) 624-5600 Facsimile (404) 627-7514

  
AMERICAN ZOO AND AQUARIUM  
ASSOCIATION



Mr. Paul Grayson  
Page Two  
August 17, 1994

Please be assured that as a Zoo Atlanta host committee member, I and everyone at Zoo Atlanta want only the best for AZA delegates and we are well aware of the enormous responsibility placed on the program committee, as well as the host zoo.

I am looking forward to the conference and I'm sure that our zoo colleagues will have an educational and enjoyable experience. I look forward to seeing you there.

Sincerely,

Clare Richardson  
Executive Vice President

CR/gk

cc: Sydney Butler, AZA Executive Director  
Terry L. Maple, Ph.D., President & CEO, Zoo Atlanta  
Dennis Meritt, Ph.D., AZA President  
Bob Ramin, Director of Dev. & Marketing, AZA  
Kathryn Roberts, Ph.D., Gen. Director, Minnesota Zoo ✓  
Jeff Swanagan, Deputy Zoo Director, Zoo Atlanta



*Met Mtg.  
Wed 9 AM - noon  
Summit Rm*

29 July 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Office of  
Membership Services  
Oglebay Park  
Wheeling, WV 26003  
Tel: 304-242-2160  
Fax: 304-242-2283

Kathryn Roberts, Ph.D., Director  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

Thank you for agreeing to again chair the Development/Marketing Committee. Please send a letter/memo and a copy of the enclosed list to your committee members so they can familiarize themselves with the other members; and if you are conducting a meeting in Atlanta, invite both the current and new members to attend.

Please express to the members of your committee my sincere appreciation for their willingness to assist me and to serve the Association during my term as President.

Also, I have appointed you to serve on the Finance Committee.

Most sincerely,

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Roy A. Shea  
President-Elect

RAS/slj

Enclosure

Copies to: AZA Board of Directors  
Syd Butler  
Bob Wagner



**DEVELOPMENT/MARKETING COMMITTEE (Roberts)**

Kathryn Roberts, Chairperson

✓ Glenn Ekey, V-C

- ✓ Ted Beattie
- ✓ Fran Bernstein
- ✓ Charles Bieler
- ✓ Kathy Cloyd Sher
- ✓ Mary Floye Federer
- ✓ Erich Hunker
- ✓ Jo Ann Keirseay
- ✓ Barbara Pickard
- ✓ Clare Richardson
- ✓ Carmen Sandoe
- ✓ Natasha Sitto
- ✓ Sally Steele
- ✓ Cynthia Sumner

Advisors

Sydney Butler

Bob Ramin

*b: dev-tb1*



To: AZA Development/Marketing Committee Members

Date: 8/24/94

From: Kathryn R. Roberts, Committee Chair

A handwritten signature in black ink, appearing to read 'Kathryn Roberts', written over the typed name in the 'From:' field.

AZA President-Elect Roy Shea has completed his committee appointments for his term beginning in September. He has asked that I relay to you his appreciation for your willingness to assist him by serving on the Development/Marketing Committee. I am delighted to welcome you to the committee and look forward to working with you in the future. Each and every one of you have strong skills and expertise to give to our tasks. Committee members are:

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Glenn Ekey, Vice Chair

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Jo Ann Keirse  
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Natasha Sitto  
Sally Steele  
Cynthia Sumner

Advisors

Sydney Butler  
Bob Ramin

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Thank you for your willingness to strengthen our Association and share your expertise with your colleagues.

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AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

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AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

MEMORANDUM

TO: Kathryn Roberts  
FROM: Bob Ramin  
DATE: August 24, 1994  
SUBJECT: Draft Agenda for Atlanta

---

The following is a "first pass" at an agenda for the Development and Marketing Committee in Atlanta. Please let me know your thoughts...

- I. Welcome Kathryn Roberts, Chair  
Introduction of old and new Committee members  
welcome to zoo and aquarium colleagues
- II. Conservation Endowment Fund Campaign and Kick -Off
- III. AZA Logo Usage Guidelines
- IV. Cause-Related Marketing Initiatives - Past, Present, and Future
- V. AZA Panda Plan Ramifications
- VI. Update on International Rhino Fund Initiatives
- VII. CEF/SSP Check-Off Campaign
- VIII. AZA 1995 Conference Planning - Seattle
- IX. Other Issues
- X. Next Meetings

Regional Meeting/Board of Directors - Louisville, Kentucky  
Louisville Zoo, 12 - 14 March 1995

Annual Meeting - Seattle, Washington  
Woodland Park Zoo, 15 - 19 September 1995





To: AZA Development/Marketing Committee Members

From: Kathryn R. Roberts, Committee Chair

Date: 8/24/94

AZA President-Elect Roy Shea has completed his committee appointments for his term beginning in September. He has asked that I relay to you his appreciation for your willingness to assist him by serving on the Development/Marketing Committee. I am delighted to welcome you to the committee and look forward to working with you in the future. Each and every one of you have strong skills and expertise to give to our tasks. Committee members are:

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AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

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AMERICAN ZOO AND  
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Committee

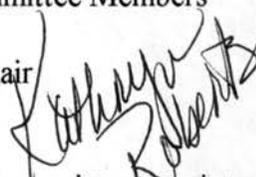
Chairman/Advisor



To: AZA Development/Marketing Committee Members

Date: 8/24/94

From: Kathryn R. Roberts, Committee Chair



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## *Minnesota Zoo*

### **FAX Transmission**

From: Kathryn R. Roberts  
To: Bob Ramin  
Company: AZA

Date: August 24, 1994  
Time: 10:05 AM  
FAX #: 301/907-2980

Bob --

I think the agenda looks wonderful. There can't be a Development or Marketing person who feels like they are not getting enough information at this conference. I have only one question about the agenda, and that is whether you will ask someone from the Panda Plan and/or IRF to appear at our meeting, or will you and I just do the update? Either way, we should probably let David Towne and Jim Jackson know their topics will be discussed at our meeting.

I will be in Saturday night but will be unable to attend the Ice-breaker because CBSG has scheduled a board meeting for that evening.

What follows is my letter to committee members, including our "official" version of your agenda -- to be mailed out on AZA letterhead today.

VOICE: 612/431-9299 FAX: 612/431-9336

**13000 Zoo Boulevard, Apple Valley, MN 55124**

# MINNESOTA ZOO

**Julie Ann Lee**  
Communications Director

612/431-9322

Fax 612/431-9335

Kathryn:

*Bob Roman*

My thoughts on the guidelines are that they look fine, but they don't address two things in my mind.

Our usual concern is the marketing and financial ramifications for participating zoos. I know that's something Bob is working on.

The other is affiliation with companies such as Monsanto, internationally known as a major polluter and maker of Round-up. I think the fourth point under the Criteria heading could and should be strengthened, but I'm not sure I have immediate suggestions on how that could be done.

Thanks.

JL

*As you requested -  
Guernsey's comments coming  
shortly -  
Kathryn*



*Julie -  
Will you pls  
take a look @ this &  
make comments if  
you have them?  
Thanks  
RMR*

MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Development and Marketing Committee  
FROM: Bob Ramin  
DATE: 12 August 1994  
SUBJECT: AZA Logo Use Guidelines

I have enclosed a draft document concerning the usage of the AZA logo. I would appreciate your review and comments. The AZA Board of Directors would like to have a logo policy, and has requested that the Development and Marketing Committee review this draft. I have included the "Marketing Guidelines" that addresses logo use, but the Board would like a more detailed policy. These "Marketing Guidelines" were adopted by the AZA Board in August 1993.

Feel free to write on this document and just send or fax it back to me by 2 September 1994. I will be in touch regarding the AZA Annual Conference and our Committee meeting agenda.

Thanks again!

enclosures



DRAFT

## AZA LOGO USAGE MARKETING GUIDELINES

Proposals submitted to the American Zoo and Aquarium Association (AZA) regarding logo usage shall be considered according to these guidelines. AZA and Species Survival Plan (SSP) logo "use" is placement of logos anywhere, including advertising (print and television), promotions (displays, brochures, hand-outs, coupons, posters), product information (hang-tags), packaging (boxes, bags, bottles, containers), and on-product.

The AZA does not officially "endorse" products related to corporations from whom we are receiving cause-related marketing support. We have approved, and will continue to consider carefully placed logo usage on corporate advertising, promotional material, and product. This usage requires initial AZA staff approval and subsequent review by the AZA Development and Marketing Committee, with a minimum of ten (10) working days advance notice.

### Criteria:

- 1) The AZA requires a minimum donation of \$5,000 for nationally-promoted goods or services. The AZA Director of Development and Marketing will negotiate the highest possible donation. However, in cases involving significant non-monetary benefits (such as positive public relations, an affiliation with a nationally respected organization, or direct benefit to AZA member institutions), consideration may be given to a combination of cash donations and other promotional attributes.
- 2) The corporation produces high-quality goods and/or services, and can demonstrate quantifiable financial stability.
- 3) The corporation adequately answers questions regarding its environmental practices and policies, and adheres to accepted standards of corporate responsibility.
- 4) The AZA will negotiate directly with the sponsoring corporation, or in tandem with marketing companies representing the corporation.

### Procedure:

The AZA Director of Development and Marketing is responsible for the preparation of a logo usage summary for each proposed promotion that will be reviewed by the Executive Director and the AZA Development and Marketing Committee. Necessary elements include:

- 1) Length of promotion and duration of display/sale to the public.
- 2) Scope of promotion, to include national advertising strategy and estimated number of items/packages to be produced.
- 3) Mock-up of sample of product, including placement of AZA and/or SSP logo(s).
- 4) Text of advertising and promotional material (on and off product).

In the event the Development and Marketing Committee recommends against approval, the Executive Director may submit the proposal to the Executive Committee if he/she believes the proposal would be of substantial benefit to the mission/objectives of the AZA.

Board adopted  
8/93

## AAZPA MARKETING GUIDELINES

Proposals submitted to the American Association of Zoological Parks and Aquariums (AAZPA) shall be considered according to the following guidelines:

### National Proposals Involving Discount Coupons, Two-For-One Admission or Other Incentives Involving Cash Discounts or Rebates to AAZPA Institutions.

#### Criteria:

- Minimum donation of \$100,000 to AAZPA. However, in cases involving significant non-monetary benefits (such as positive public relations and affiliation with a nationally respected organization), consideration may be given to smaller donations.
- AAZPA will negotiate directly with the sponsoring corporation, or in tandem with marketing companies representing the corporation.
- The corporation produces high-quality goods and/or services, and can demonstrate quantifiable financial stability.
- The corporation adequately answers questions regarding its environmental practices and policies, and adheres to accepted standards of corporate responsibility.

#### Procedure:

The AAZPA Director of Development is responsible for the preparation of a proposal summary that will be submitted to the Development Advisory Committee. This proposal summary will include:

- Exact length of time of promotion, including start and finish dates;
- Scope of promotion, to include national advertising strategy, product introduction, and estimated number of promotional material/coupons/packages to be produced;

- The AAZPA will negotiate directly with the sponsoring corporation, or in tandem with marketing companies representing the corporation.
- Minimum royalty income per agreement must produce \$5,000 over the life of the agreement, or a percentage based on projected sales volume that will produce at least \$5,000.

Any royalty program of \$25,000 or below may be approved by the Executive Director and Director of Development.

- The corporation produces high quality goods and/or services, and can demonstrate quantifiable financial stability.
- The corporation adequately answers questions regarding its environmental practices and policies, and adheres to accepted standards of corporate responsibility.

**Procedure:**

Company submits proposal to AAZPA that includes:

- Information regarding the company, the product, and a sample or detailed photographs of the product/and or service being considered.
- Mock-up of promotional material, including placement of AAZPA and/or SSP logo.
- Scope of promotion, to include national advertising strategy, product introduction, estimated number of promotional material/packages to be produced.
- Exact length of time of agreement.
- Exact information regarding royalty amount or percentage, and payment schedule.
- Information regarding the corporation's financial stability and environmental policies.

# Anheuser-Busch Theme Parks SM

July 18, 1994

To: Kathryn R. Roberts  
From: Natasha L. Sitto *NS*

Thank you for faxing me the information regarding joining the committee. I would be happy to serve on the committee and hope that my experience will provide new insight.

In regards to joining AZA, I am assuming I need an individual membership as the Busch Gardens parks and Sea World parks are already members. Please advise me if this is not the case. I am awaiting the application so I can submit to my director.

In addition, I was hoping that you could tell me more about the committee and responsibilities. Also, when is the AZA Conference?

Please call me at (619)226-3911 or fax me at (619)226-3997. I look forward to hearing from you (and hopefully working with you!).

*To Barbara:  
Would you please  
ask her for my  
card before!!  
Kla Manka here!!  
(I'm off to work  
6/18/94)*



Tampa, Florida



Tampa, Florida  
Williamsburg, Virginia



Winter Haven, Florida



Sea World.  
Orlando, Florida  
San Antonio, Texas  
San Diego, California  
Aurora, Ohio



Langhorne, Pennsylvania



Williamsburg, Virginia

*for my list  
we back*

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

**FAX TRANSMITTAL COVER SHEET**

TO:  
OF:

*Kathryn Roberts  
Minnifox*

FROM:  
FAXED BY:

*Bob Kamm*

PHONE:  
FAX:

DATE:  
TIME:

*6/30/94*

TOPIC: \_\_\_\_\_

THIS TRANSMISSION CONSISTS OF 4 PAGE(S), INCL. COVER.

**MESSAGE:**

*Sorry for the fax storm -  
but wanted you to have the  
Atlanta schedule. Can you  
participate in a brief (1 minute)  
"welcome" on Sunday 9/13?  
Thanks!*

*B*

IF YOU HAVE ANY PROBLEMS WITH THIS TRANSMISSION  
PLEASE CONTACT OUR OFFICE AT (301) 907-7777.



## AZA DEVELOPMENT/MARKETING SESSIONS FOR ATLANTA ANNUAL CONFERENCE

Saturday Night (September 17, 1994)

Get Acquainted Session for Saturday Night, at Beans Cafe, 2 blocks from Marriott

- \* opportunity to meet colleagues before Sunday session/Conference
- \* capitalize on Saturday arrivals (airline fares/sat night stay over)
- \* Appetizers and drink specials for participants (show your business card)

Sunday Session (September 18, 1994)

Welcome: Fran Bernstein and Glenn Ekey, Atlanta Conference Co-Chairs  
Kathryn Roberts, AZA Development and Marketing Chair, Director/Minnesota Zoo  
Clare Richardson, Exec VP/Zoo Atlanta

Morning Session, 8:30 am - 10:15 am, Marriott Ballroom (breakfast on your own)

## Non-traditional sources of funds

- \* panel discussion to include:
  - Clint Fields, Executive Director/FONZ - innovative ideas applicable to all institutions
  - Steve Ordahl, Director of Enterprise Programs/Minnesota Zoo - concessions, facility rental, concerts, licensing
  - Jim Farmer, President/The Zoo Store
- \* coordinator: Fran Bernstein, Director of Membership/Friends of the National Zoo

Mid-morning Session, 10:30 am - 12 noon, Marriott Ballroom

## Asking for gifts: learning from doing (roll-play)

- \* various scenarios to include
  - Director to donor
  - Board member to donor
  - Staff to volunteer
- \* Involve Directors, staff, Board members, volunteers
- \* presenters:
  - Larry and Shelley Greenwaid (Recognition Resources) - How to work a room and the importance of feedback to the development staff (Shelley is a Board Member at the Columbus Zoo)
  - Cynthia Sumner (Saint Louis Zoo) - How to motivate your Board
  - Ted Beattie (Shedd Aquarium), Mark Goldstein (LA Zoo), and Satch Krantz (Riverbanks) - The Director's roll (panel)
- \* coordinator: Chuck Bieler, Director of Development/San Diego Zoo

- # 2 Bringing Up Baby (but are they really growing up?)- How to nurture your supporters from members to annual donors to major donors. 9/20, Tuesday, 11-12:30pm
- a) New ways to attract members. Presenter: Jim Kirchner, Target Marketing
  - b) Taking the Leap from Member to Donor - is this always cost effective? Presenter: Wendy Fisher, President/Mailworks
  - c) Cultivating your Donors. Presenter: Fern Segerlind, Atlanta Olympic Committee
- \* coordinator: Molly DeDominicis, Deputy Director/Texas State Aquarium
- # 3 Demographics and Development - Reaching for the Right Market. 9/22, Thursday, 3-4:30pm
- a) Demographic Realities. Presenter: Derek Smith, Executive Vice President/Equifax.
  - b) What's Hot and What's Not - Latest Fund Raising Trends (Database marketing, etc). Presenter: Peg Nadler, Database Marketing Manager/Smithsonian Institution.
  - c) How to Practice What Has Been Preached - Putting demographic realities and fund raising trends into practice. Presenter: Janet Perales, Director of Community Relations/Zoological Society of Florida
- \* coordinator: Dan Studnicky, Director of Development/National Zoological Park

**AZA Development/Marketing Committee, Wednesday, 9/21, 9:00 am - noon**

Brown bag breakfast round tables (M,T,W from 7:30 - 8:30 am). Assignment of discussion leaders tbd (Clare Richardson to investigate room arrangements/set-up)

IRS reporting guidelines/compliance (Atlanta IRS agent)  
adoption programs/ movement towards "sponsor a species"  
membership/renewals (Cyndy Andrews - Henry Doorty)  
volunteer/employee incentives  
attendance and advertising trends  
pricing challenges (Kathy Sher - National Aquarium in Baltimore)  
planned giving (Susan Redfield - Lincoln Park Zoological Society)  
Selling your special event internally  
promotions and liability (Todd Land - New Jersey State Aquarium)  
creating events on small budgets (Jean Odell Miller - Micke Grove Zoo)  
Reaching African American and Hispanic audiences through special events

Lunch Session, 12 noon - 1:00 pm, Marriott Ballroom

Jeanne Segal, Philadelphia Zoo - opportunities through eco-tourism

Afternoon Session #1, 1:00 pm - 3:00 pm, Marriott Ballroom

Learning from the Past, Preparing for the Future

- \* Penny Beattie (Schultz and Williams) the next generation of zoos/aquariums and how to support them
- \* Gary Lee (Coe Lee) "encounterment" movement programs, plans, resources
- \* Bob Lamb (WDW) Disney World/Animal Kingdom - challenges and opportunities
- \* coordinator: Director, Glenn Ekey/Zoological Society of Florida

Afternoon Session #2, 3:15 pm - 5 pm, Marriott Ballroom

Stewardship and Recognition Programs for Individuals and Sponsors

- \* new types of incentives for members and adoption ideas - Ginnie Westmoreland, Manager, Membership Programs/St. Louis Zoo
- \* innovative stewardship programs (beyond the plaque) - Bob Ramin, Director of Development and Marketing/AZA
- \* Industry Benchmarking - Where do you stand. Survey findings of AZA members re sponsorship/promotions, logo recognition, and sampling parameters - Lyn Frankel, Director of Marketing and Sponsorship/National Aquarium in Baltimore
- \* coordinator: Karyn Noles, Director of Marketing/Audubon Institute

Official AZA Annual Conference Icebreaker - Marriott Marquis

Three 90 minute Development Sessions - during Conference

- # 1 Sponsorship - What it Takes and How to Structure, 9/19, Monday, 2-3:30pm
  - a) Sponsorship - a "how-to" session for all levels. Presenter: Jim Andrews, Vice President/International Events Group, publisher of *Sponsorship Report*.
  - \* coordinator: Louise Sloan, Director of Marketing/Lincoln Park Zoo



# FACSIMILE MESSAGE COVER SHEET

## NATIONAL AQUARIUM IN BALTIMORE,

Pier 3 / 501 East Pratt Street  
Baltimore, Maryland 21202-3194

### Sender's Fax Number

- 410/576-8238
- 410/659-4253
- 410/576-1080
- 410/576-8641

Date: 7/25/94

If any part of this message is received poorly or is missing pages, please call the sender's phone number immediately.

0 page(s) sent *NOT* including this cover sheet.

*Roy Sher called 8/2  
of her acceptance*

<b>To:</b>		<b>From:</b>	
<b>Name:</b>	<u>Kathryn R. Roberts</u>	<b>Name:</b>	<u>Kathy C. Sher</u>
<b>Dept:</b>	<u>(Minnesota Zoo)</u>	<b>Dept:</b>	<u>Marketing &amp; Planning</u>
<b>Phone:</b>	<u>612/431-9299</u>	<b>Phone:</b>	<u>410/576-3831</u>
<b>Fax:</b>	<u>612/431-9336</u>	<b>fax:</b>	<u>410/659-4253</u>

### Comments:

Kathryn,

Yes, I am delighted to participate. I am and have

been an AZA member for fifteen years. Roy probably knows

me by Kathy Cloyd; I recently married and became Kathy

Cloyd Sher. Please let me know what I can do for the committee.

See you in Atlanta.

*Kath*

cc: Bob Ramin



*What are we going to do for a leadership role?*

*Bob Steele*

MEMORANDUM

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: Kathryn R. Roberts, Ph.D.  
Executive Director  
Minnesota Zoo

FROM: Bob Ramin  
Director of Development and Marketing

DATE: 5/10/94

SUBJECT: Check-off Campaign

*BR*

Please accept my sincere thanks on behalf of the AZA to the Minnesota Zoo for consideration of a check-off initiative for the Species Survival Plan (SSP) program. As you are well aware, funds supporting the SSP come from the AZA's Conservation Endowment Fund (CEF), and institutions such as the North Carolina, Denver, and Baltimore Zoos have all had great success with their check-off programs. Zoo Atlanta and the Shedd Aquarium are inaugurating check-off programs this season, and a number of other member institutions are considering this method of support.

Sally Steele at the North Carolina Zoological Society has been instrumental in spearheading this initiative, and suggested that I forward you some examples of how the check-off is incorporated on the renewal forms of other institutions. I hope this information is helpful. I can also provide a logo stat of the SSP Rhino, if needed.

Thanks again, and please let me know if I can provide any additional information.

cc: Sally Steele

*Kathryn  
National Zoo and  
Lincoln Park are also  
considering members!*



# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

May 23, 1994

Confidential

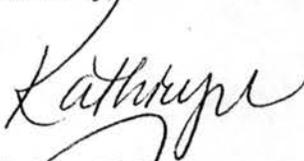
Roy A. Shea, AZA President-Elect  
Indianapolis Zoo  
1200 West Washington Street  
Indianapolis, IN 46222-4500

Dear Roy:

In my letter of May 3, I recommended Greg Wilson, former Director of the Lowry Park Zoo in Tampa, Florida, for appointment to the AZA Development & Marketing Committee as one of six additional members with marketing expertise. In view of the recent situation with Greg, I would like to recommend instead Barbara J. Pickard, Executive Director of the Friends of the Burnet Park Zoo. Barbara has been active in AZA for many years and has taken a leadership role at many AZA conferences.

If you would like to talk further about this or my other recommendations, please call me at (612) 431-9333.

Sincerely,



Kathryn R. Roberts  
Executive Director

cc: Syd Butler, AZA Executive Director  
Dennis Meritt, Jr., AZA President  
Bob Wagner, AZA Chief Administrative Officer  
Bill Dennler, Board Liaison



Attn: Kathryn Roberts, Minnesota Zoo  
Bill Dennler, Toledo Zoo

From: Bob Ramin, AZA 

Date: 5/19/94

Subject: AZA Development and Marketing Committee

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Bill and Kathryn -

This note will confirm my conversation with Kathryn before she left for Germany. It has been noted that Greg Wilson is no longer Director of the Lowry Park Zoo in Tampa, Florida. As he had been nominated to become a member of the AZA's Development and Marketing Committee, this creates a vacancy.

Kathryn suggested that Barbara J. Pickard, Executive Director of the Friends of the Burnet Park Zoo, be nominated. Barbara has been active with the AZA for many years, and has taken a leadership role at many AZA conferences.

Kathryn will officially notify Roy Shea of this change when she returns.



# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

May 3, 1994

Roy A. Shea, AZA President-Elect  
Indianapolis Zoo  
1200 West Washington Street  
Indianapolis, IN 46222-4500

Confidential

Dear Roy:

Thank you for the opportunity to comment on the Development Committee of the AZA. We have had a very productive year, and have gained a full steam of momentum. The following outlines my recommendations for your consideration:

- 1) Change the name of the Development Committee to the "Development and Marketing Committee." This change would incorporate the marketing function at member institutions, which has become so important in bringing in funds. This change would also allow the committee to better evaluate the increasing number of cause-related marketing proposals presented to Bob Ramin at the AZA.
- 2) Expand the membership of the Committee to include marketing professionals. I recommend that we add six (6) new members to give the Committee added expertise in marketing. My nominations are:

Fran Bernstein, Director of Membership and Marketing, Friends of the National Zoo. Fran is Co-chair of the development/marketing planning committee for the AZA Annual Conference.

Jane Dachs, Manager of Corporate Sponsorship, Wildlife Conservation International (all 5 institutions). Jane would bring a broad prospective of the former NYZS institutions and has vast experience with cause-related marketing.

Jo Anne Keirse, Manager of Marketing and Interpretive Services, Oklahoma City Zoological Park. Jo Anne has managed a number of innovative promotions and has been active with the Committee.

Kathy Cloyd Sher, Senior Director for Marketing and Planing, National Aquarium in Baltimore. Kathy is very respected in her field and would like to contribute more to the AZA.

Natasha Sitto, Corporate Marketing, Busch Entertainment (Sea World California, Florida, Ohio and Texas, and Busch Gardens). Natasha would be an invaluable link to the corporate perspective on cause-related marketing.

Greg Wilson, Director, Lowry Park Zoo. As a Director, Greg realizes the importance of development and marketing and has expressed a strong interest in the Committee.

- 3) Replace Jim Thornton, Director of Development at the Cincinnati Zoo with Clare Richardson, Director of Development at Zoo Atlanta. Unfortunately, Jim Thornton has not attended one Committee meeting, nor has he responded to many mailings of the Committee. Clare Richardson has indicated a strong interest in participation (with a copy to you), and has been invaluable in planning the Development and Marketing sessions for the Atlanta Annual Conference.

All other Committee members have been active and make every effort to attend our meetings. I am very pleased with their participation.

I look forward to serving in your "administration" as Chair of the Development and Marketing Committee. Please contact me at (612) 431-9333 regarding any questions about the above recommendations.

Sincerely,



Kathryn B. Roberts  
Executive Director

cc: Syd Butler, AZA Executive Director  
Dennis Meritt, Jr., AZA President  
Bob Wagner, AZA Chief Administrative Officer  
Bill Dennler, Board Liaison

## *Minnesota Zoo*

### FAX Transmission

From:	Kathryn R. Roberts	Date:	April 25, 1994
To:	Linda Boyd	Time:	2:12 PM
Company:	AZA Membership Services	FAX #:	304/242-2160

Re: Development Committee Meeting Space at Atlanta Annual Conference

I mailed in my request for space for Monday 9/19/94 for the Development Committee (preferably at 1 pm) for 3 hours, but I estimated the number of people attending to be 15-20. Based on past experience, I think the room should accomodate 50+ since there is much interest in this committee.

Also, there will be 3 90-minute sessions on marketing/development during the conference, so the meeting should not conflict since the same people will want to attend both the meeting and the sessions.

If you have questions, call at 612/431-9299.

Thanks.

VOICE: 612/431-9299    FAX: 612/431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124

### ATLANTA ANNUAL CONFERENCE

NAME OF COMMITTEE/SPECIAL INTEREST GROUP Development C.

I will  I will not  conduct a meeting in Atlanta.

Date requested 9-19-94

Time: First Choice ~~1pm~~ Second 8 AM Third ?

Length of meeting 3 hrs.

I will require food/beverage service  Yes  No

Estimated number to be in attendance (15-20)

My meeting will be open to all registered delegates  Yes  No

KATHRYN  
 Remember how popular we are?!  
 If we open our meeting, I would expect 50+ (like OMAHA) Do you agree? Draft to Shea will be done by Tues. Bob

Kathryn Roberts  
 (Signature)  
4/21/94  
 (Date)

MAY TO:  
 Linda Boyd  
 Director/Membership Services  
 AZA  
 Oglebay Park  
 Wheeling, WV 26003-1698

KL  
 Do we know when 3 90-min. Dev/mkg. sessions are?

*[Faint handwritten notes]*

ATLANTA ANNUAL CONFERENCE

NAME OF COMMITTEE/SPECIAL INTEREST GROUP

Development C.

I will  I will not  conduct a meeting in Atlanta.

Date requested

9-19-94

Time: First Choice

~~1pm~~

Second

9 AM

Third

?

Length of meeting

3 hrs.

I will require food/beverage service

Yes

No

Estimated number to be in attendance

15-20

My meeting will be open to all registered delegates

Yes

No

Katherine T. Roberts  
(Signature)  
4.21.94  
(Date)

RETURN THIS FORM BEFORE 13 MAY TO:

Linda Boyd  
Director/Membership Services  
AZA  
Oglebay Park  
Wheeling, WV 26003-1698

see Bob Ramin

Anytime Monday  
(except near time)  
Tuesday AM would  
also work

***Minnesota Zoo***

**FAX Transmission**

From: Kathryn R. Roberts  
To: Clare Richardson  
Company: Zoo Atlanta

Date: April 11, 1994  
Time: 1:29 PM  
FAX #: 404-627-7514

**Message:**

I received your request to be added to the Development Committee. I will be forwarding a request to Dennis Merrit to have you appointed. I'll let you know as soon as it happens.

VOICE: 612/431-9299 FAX: 612/431-9336

**13000 Zoo Boulevard, Apple Valley, MN 55124**



FACSIMILE

TO: Dr. Kathryn R. Roberts, Minnesota Zoo  
Development Committee Chair  
Fax: 612-431-9300  
Pages: 1

FROM: Clare Richardson  
Executive Vice President, Development 

DATE: April 7, 1994

RE: AZA Development Committee Mid-Year Notes

---

Many thanks for copying me on the very informative notes from your meeting in Oklahoma City. The notes were concise, focused and dated response deadlines certainly provoked action. For Zoo Atlanta I would like to report the following actions taken:

- Implementation of a \$1 check-off on membership forms will begin with our next re-printing of membership materials.
- We will also work on a "snappy" catch phrase to launch our program and update Bob Ramin and Sally Steele, e.g., "Begin a Savings Plan".
- I have asked several staff members to review the I.R.F. plan and will forward any suggestions to Bob and have already discussed some of the AZA Conference materials with him and forwarded written comments.

We would like to make the Sunday session a big success by involving our local major foundations and philanthropic colleagues from other institutions as co-hosts, perhaps the Saturday night icebreaker would be a great start.

Thanks for the opportunity for input!

CR/gk

cc: Bob Ramin, AZA Director of Development, Fax: 301-907-2980

*Conservation Leadership For Our Second Century*

800 Cherokee Avenue, S.E., Atlanta, Georgia 30315 (404) 624-5600  
Fax# (404) 627-7514 Telex 430-189





April 7, 1994

Dr. Kathryn R. Roberts, Director  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I would like to become a member of the AZA Development Committee and would appreciate your consideration of my request as you move forward with recruitment of new members.

I have enclosed a copy of my resume' and would welcome the opportunity to talk with you if you have specific questions.

As the past Executive Director of the Society, here in Atlanta, I've worked with Terry L. Maple, Ph.D., to merge the two organizations and I have a unique understanding of fundraising and marketing from both perspectives.

I know most of the members of the committee and would enjoy being involved in the new initiatives set out for the '90's.

I look forward to a great conference in September and will continue to communicate with Bob Ramin on conference issues.

I will copy both Bob and Roy Shea on this letter as I'm not sure of the protocol involved.

Many thanks.

Sincerely,

Clare Richardson  
Executive Vice President

CR/gk

cc: Robert Ramin, Director of Development, AZA  
Roy Shea, President & CEO, Indianapolis Zoo

*Conservation Leadership For Our Second Century*

800 Cherokee Avenue, S.E., Atlanta, Georgia 30315 (404) 624-5600  
Fax# (404) 627-7514 Telex 430-189



**CLARE RICHARDSON**  
Executive Vice President, Zoo Atlanta

**EXPERIENCE**

- \* More than 15 years with community nonprofit agencies
- \* Leadership, fundraising, and development skills
- \* Extensive volunteer and professional activities
- \* High credibility in public and private sectors

**POSITIONS**

**Executive Vice President, Marketing/Development, Zoo Atlanta, 1992-present.**

Direct the development, marketing and public relations departments of Zoo Atlanta, a nonprofit organization dedicated to conservation, education and family enjoyment. Instrumental in the development of zoo master plan, cultivation of corporate and community support, and bringing the zoo's services and messages to the community.

**Executive Director, Friends of Zoo Atlanta, 1986-1992.**

Responsible for capital and operational support for Zoo Atlanta through fund raising, membership, membership services and programs, and volunteer recruitment and administration. Instrumental in the redevelopment of Zoo Atlanta, and in bringing membership to 50,000 households. Merged with Zoo Atlanta in 1992.

**Associate Executive Director, Y.W.C.A. of Greater Atlanta, 1981-1986.**

Primary staff responsibility for program administration, monitoring and development of annual budget, long-range planning, buildings and properties administration, and capital development.

**Project Assistant & Researcher, Institute for Responsive Education, 1978-1980.**

Coordinated research for a federal study in Atlanta of the impact of community leadership groups on the education/political decision making process. Primary responsibility for research interviews, development and analysis of demographic information. Monitoring and evaluating the effectiveness of the five community groups involved in the project and editing field researchers' reports.

**COMMUNITY INVOLVEMENT**

Leadership roles include: Grady Hospital, the National Society of Fund Raising Executives, The Advocacy Network, The School Age Childcare Task Force, League of Women Voters, APPLE CORPS., Inc., Jerusalem House and others.

Prior to coming to the United States, was Charge Nurse, Regional Hospital, United Kingdom.

**EDUCATION**

Royal Victoria School of Nursing, England, 1957-1961, R.N.  
Postgraduate courses and professional training  
1981 alumnus of Leadership Atlanta



SO Pugh

4/8/94

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

Mr. Craig Pugh  
Associate Director, Communications  
Brookfield Zoo  
Brookfield, Illinois 60513

Dear Mr. Pugh:

Thank you for your recent letter about the Procter & Gamble/American Zoo and Aquarium Association promotion. The AZA Board and the AZA Development Committee have approved this promotion. Both groups contain a cross-section of AZA member institutions. I hope this letter addresses most of your concerns.

I feel that the AZA has learned from the August 1993 Burger King promotion. As you are aware, there was no Development Director on board during the initial stages of the Burger King promotion. I am contacting each member, rather than relying on P&G. Our name and logo is prominent in the promotion, and we have left sufficient lead time to allow member institutions to tie-into local retail promotions. I am confident that member institutions will benefit from increased interaction with local retailers, and use this national promotion to leverage local promotional dollars for the institution.

I am sorry that the Brookfield Zoo feels that this promotion will not assist in increasing gate count. By always offering the free admission with a paid admission (one of the oldest marketing tactics used), it is assumed overall attendance would be helped, and in-park revenue will be up as well (through increased concession traffic).

While this method can not be tracked specifically; i.e., no one knows whether or not a coupon-redeeming consumer would have attended anyway, the assumption is that they would not have attended. This is why all major marketers offer cents off products through couponing, even though the coupons may be redeemed by regular users - the track record supports a bump in sales.

But to your major point -- it certainly is not the AZA's intention to complicate the Brookfield Zoo's admission point system. Rather, these types of promotions are trying to build awareness and interest in local zoos and aquariums by the public. I am very cognizant of the various restrictions our members face regarding gate incentives. A number of participating institutions are offering other discounts in lieu of the stated offer. Therefore, I have been able to interest over 90 AZA member institutions to participate.



4/8/94  
Page 2

Regarding your contention that the funds from this promotion are not being utilized correctly, \$100,000 of the \$110,000 given to the AZA is going toward helping the AZA better serve our members. We challenged P&G to provide us with some way of gaining more national attention to Zoo and Aquarium Month. Hence, the \$10,000 for the public service announcement.

Last year, in a post Zoo and Aquarium Month survey, the majority of those members responding asked for more national recognition of Zoo and Aquarium Month. They felt comfortable with the local attention, but felt national media would increase their public relations. One of the ideas most echoed was the production of a PSA. We have had a great response for providing this product to our members, many of whom cannot afford to produce such spots within their own means. The AZA Public Affairs office is working on national air time for this PSA.

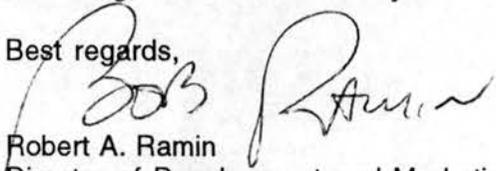
It is always a challenge to find a venue for cause-related marketing dollars which will benefit all AZA member institutions. Any constructive suggestions you can make for us to consider with future promotions would be a great help.

Procter & Gamble's objective is of course selling products. The partnership with the AZA is not so much to improve their image, as leveraging the public's interest in zoos and aquariums to build loyalty to P&G products. Please see the attached Cone Roper study which states that more than six out of every ten consumers say, price and quality being equal, they would switch brands to buy a product supporting a cause they care about.

There is still enough lead time before this promotion hits through the newspaper FSI on May 22nd. I will have the regional P&G sales force contact Louise Sloan to see if there is a way the Brookfield Zoo can specifically tie into this national promotion on a local level. My whole point in promoting these types of relationships is to try to leverage local marketing dollars that may not be coming to our member institutions. Given the response from smaller AZA member institutions, I am confident that the AZA does have a role to play in national promotions through cause-related marketing. I look to the expertise of institutions such as the Brookfield Zoo to assist in making these promotions as beneficial to all members as possible.

Thank you again for your letter. I appreciate hearing comments about the work we are doing, whether or not they are necessarily positive.

Best regards,

  
Robert A. Ramin  
Director of Development and Marketing

enclosure

cc: Sydney J. Butler, AZA Executive Director  
Dennis A. Meritt, Jr., Ph.D., AZA President  
George Rabb, Ph.D., Director, Brookfield Zoo  
Louise Sloan, Brookfield Zoo  
✓ Kathryn R. Roberts, Ph.D., AZA Development Committee Chairperson



Brookfield Zoo



Chicago Zoological Society

March 17, 1994

Mr. Bob Ramin  
Director of Development  
AZA  
7970-D Old Georgetown Road  
Bethesda, Maryland 20814

Dear Mr. Ramin:

I am writing to express staff concern over the recently announced promotional opportunity with Procter and Gamble. It seems we have not learned from the problems generated from the Burger King promotion.

1. Once again AZA is offering a monetary incentive to our visiting public without considering financial consequences for participating institutions. Many zoos are governed by a city or state charter that prohibits discounting admissions. Many other institutions are increasingly dependent on their paid admissions. Some of us have experienced a significant drop in paid admissions over the past few years. Last year's Burger King promotion was very successful by their standards, but not by Brookfield Zoo's. We redeemed over 2,000 coupons -- one of the highest redemption figures among zoos. The benefit to us is unknown; the complication at our admissions points is unwelcome.

2. The consequence of not participating in the promotion is a public relations nightmare. The public assumes total zoo and aquarium participation. This is a no-win position. By listing institutions that are not participating, the public may assume that these zoos and aquariums are not AZA accredited or are not saving "rare and endangered" animals. By not notifying the public about which institutions are not participating, however, we cannot reject coupons at the gate.

3. The use of the Procter and Gamble donation to produce a PSA for Zoo and Aquarium Month is a poor use of funds. Not all institutions participate in Zoo and Aquarium Month. For an organization with no PSA or national awareness campaign it seems a poor choice to promote something that lasts only a month. Furthermore, the possibility of air time in Chicago is remote -- or at 3:00 a.m. -- unless someone is contacting the station on a weekly basis to put the spot in rotation. Even that doesn't guarantee air time.

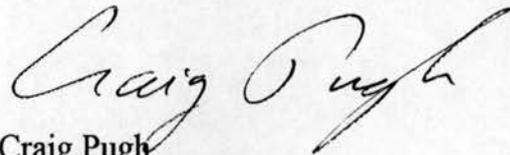
Brookfield, Illinois 60513  
708.485.0263 312.242.2630

Mr. Bob Ramin  
March 17, 1994  
Page 2

4. This promotion does not directly benefit local zoos and aquariums. There is no financial compensation for the revenue lost from the promotion. You may be assuming that zoos and aquariums would benefit from "tag along" visitation and additional in-park revenue. We have no way of knowing if the coupon-carrying visitors would have visited anyway, thus meaning a lost revenue to us. There should be opportunities for local promotions built into any AZA promotion and these opportunities should include local dollars.

5. What is Procter and Gamble's objective in this promotion? Are they lending their name to "saving endangered animals" to improve their image? Are they expecting increased sales? If the latter, there is no indication of special pricing or couponing at a retail level. Marketing and other development programs are about building relationships. If both parties share understanding of each other's goals, then a promotion will more likely succeed in being of mutual benefit.

Yours sincerely,



Craig Pugh  
Associate Director  
Communications

CP:m

cc: Sydney J. Butler  
Dennis A. Meritt, Jr., Ph.D.



AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Office of  
Membership Services  
Oglebay Park  
Wheeling, WV 26003  
Tel: 304-242-2160  
Fax: 304-242-2283

11 April 1994

Kathryn Roberts, Ph.D., Direc  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

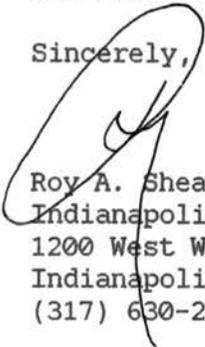
Dear Kathryn:

I have issued our annual "call for service," which appeared in the April issue of the *Communiqué*. I now also would like to ask the current committee chairmen to evaluate the members and advisors on each of your respective committees. You are the best person to advise me of the effectiveness of those serving with you.

Attached is a list of those people serving on your committee. Those marked with an asterisk will have completed their two full terms of service and must step down this September. Others can be replaced if their service has not been productive. Please help me to keep our committees active and effective by sending me comments on your members and advisors. You may note on the attached list whether they are "productive" or "nonproductive," include any other comments, and return to me no later than 30 May. Your comments will remain confidential and, if necessary, will be shared only with Syd Butler, Bob Wagner, and your Board Liaison Representative. I would also appreciate your suggestions for potential new candidates for committee service.

By receipt of a copy of this letter, I am requesting your Board Liaison Representative to provide me with an evaluation of the committee and its members. Remember--it is important to the continued success of AZA that we maintain active and effective committees. Your input at this time will be an important step in continuing our progress.

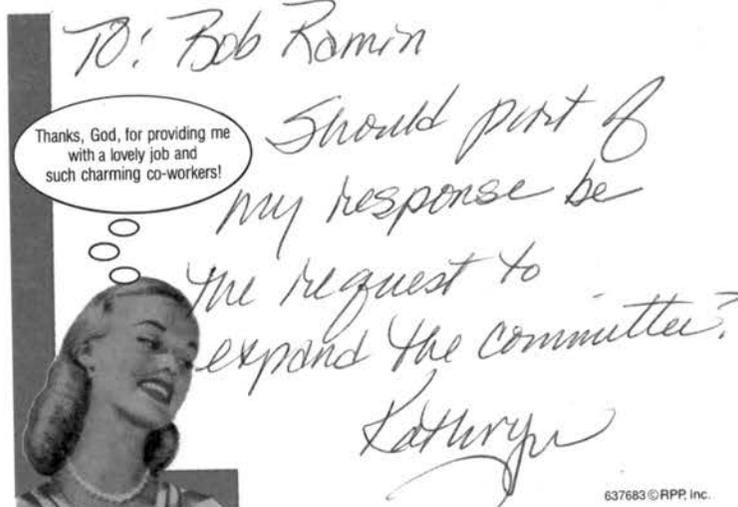
Sincerely,

  
Roy A. Shea, AZA President-Elect  
Indianapolis Zoo  
1200 West Washington Street  
Indianapolis, IN 46222-4500  
(317) 630-2005; (317) 630-2194 FAX

Copies to: Syd Butler, AZA Executive Director  
Bob Wagner, AZA Chief Administrative Officer  
Board Liaison Representative

Enclosure

RAS/jkw



**DEVELOPMENT COMMITTEE (Dennler)**

Kathryn Roberts, Chairperson  
Glenn Ekey, V-C

Ted Beattie  
Charles Bieler  
Mary-Floye Federer  
Erich Hunker  
Sally Steele  
Cynthia Sumner  
James Thornton

Advisors

Sydney Butler  
Bob Ramin



April 7, 1994

Dr. Kathryn R. Roberts, Director  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I would like to become a member of the AZA Development Committee and would appreciate your consideration of my request as you move forward with recruitment of new members.

I have enclosed a copy of my resume' and would welcome the opportunity to talk with you if you have specific questions.

As the past Executive Director of the Society, here in Atlanta, I've worked with Terry L. Maple, Ph.D., to merge the two organizations and I have a unique understanding of fundraising and marketing from both perspectives.

I know most of the members of the committee and would enjoy being involved in the new initiatives set out for the '90's.

I look forward to a great conference in September and will continue to communicate with Bob Ramin on conference issues.

I will copy both Bob and Roy Shea on this letter as I'm not sure of the protocol involved.

Many thanks.

Sincerely,

Clare Richardson  
Executive Vice President

CR/gk

cc: Robert Ramin, Director of Development, AZA  
Roy Shea, President & CEO, Indianapolis Zoo

*Conservation Leadership For Our Second Century*

800 Cherokee Avenue, S.E., Atlanta, Georgia 30315 (404) 624-5600  
Fax# (404) 627-7514 Telex 430-189



**CLARE RICHARDSON**  
Executive Vice President, Zoo Atlanta

**EXPERIENCE**

- \* More than 15 years with community nonprofit agencies
- \* Leadership, fundraising, and development skills
- \* Extensive volunteer and professional activities
- \* High credibility in public and private sectors

**POSITIONS**

**Executive Vice President, Marketing/Development, Zoo Atlanta, 1992-present.**

Direct the development, marketing and public relations departments of Zoo Atlanta, a nonprofit organization dedicated to conservation, education and family enjoyment. Instrumental in the development of zoo master plan, cultivation of corporate and community support, and bringing the zoo's services and messages to the community.

**Executive Director, Friends of Zoo Atlanta, 1986-1992.**

Responsible for capital and operational support for Zoo Atlanta through fund raising, membership, membership services and programs, and volunteer recruitment and administration. Instrumental in the redevelopment of Zoo Atlanta, and in bringing membership to 50,000 households. Merged with Zoo Atlanta in 1992.

**Associate Executive Director, Y.W.C.A. of Greater Atlanta, 1981-1986.**

Primary staff responsibility for program administration, monitoring and development of annual budget, long-range planning, buildings and properties administration, and capital development.

**Project Assistant & Researcher, Institute for Responsive Education, 1978-1980.**

Coordinated research for a federal study in Atlanta of the impact of community leadership groups on the education/political decision making process. Primary responsibility for research interviews, development and analysis of demographic information. Monitoring and evaluating the effectiveness of the five community groups involved in the project and editing field researchers' reports.

**COMMUNITY INVOLVEMENT**

Leadership roles include: Grady Hospital, the National Society of Fund Raising Executives, The Advocacy Network, The School Age Childcare Task Force, League of Women Voters, APPLE CORPS., Inc., Jerusalem House and others.

Prior to coming to the United States, was Charge Nurse, Regional Hospital, United Kingdom.

**EDUCATION**

Royal Victoria School of Nursing, England, 1957-1961, R.N.  
Postgraduate courses and professional training  
1981 alumnus of Leadership Atlanta



**FACSIMILE**

TO: Dr. Kathryn R. Roberts, Minnesota Zoo  
Development Committee Chair  
Fax: 612-431-9300  
Pages: 1

FROM: Clare Richardson  
Executive Vice President, Development

DATE: April 7, 1994

RE: AZA Development Committee Mid-Year Notes

---

Many thanks for copying me on the very informative notes from your meeting in Oklahoma City. The notes were concise, focused and dated response deadlines certainly provoked action. For Zoo Atlanta I would like to report the following actions taken:

- Implementation of a \$1 check-off on membership forms will begin with our next re-printing of membership materials.
- We will also work on a "snappy" catch phrase to launch our program and update Bob Ramin and Sally Steele, e.g., "Begin a Savings Plan".
- I have asked several staff members to review the I.R.F. plan and will forward any suggestions to Bob and have already discussed some of the AZA Conference materials with him and forwarded written comments.

We would like to make the Sunday session a big success by involving our local major foundations and philanthropic colleagues from other institutions as co-hosts, perhaps the Saturday night icebreaker would be a great start.

Thanks for the opportunity for input!

CR/gk

cc: Bob Ramin, AZA Director of Development, Fax: 301-907-2980

*Conservation Leadership For Our Second Century*

800 Cherokee Avenue, S.E., Atlanta, Georgia 30315 (404) 624-5600  
Fax# (404) 627-7514 Telex 430-189

ACCREDITED  
AMERICAN ASSOCIATION  
OF ZOOLOGICAL  
PARKS AND AQUARIUMS



RECYCLED PAPER

March 23, 1994

Dr. Kathryn R. Roberts  
Director  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, Minnesota 55124-8199

Dear Kathryn:

Many thanks for your very complete summary of our meeting in Oklahoma City. Let me quickly respond to a number of your requests.

\* You can add the Shedd Aquarium to the list of institutions that will begin using the check-off system with our membership program. We are presently in the process of revising the format and categories, and this will be an ideal time to add that feature. I would suggest that we set up some type of reporting system that will provide all of us with information as to the success of this effort on an institution-by-institution basis.

Regarding the question of potential members for a national advisory board, I would want to be sure that we have a very thorough and well-supported (and staffed) plan in place before we officially ask for participation by prominent individuals. I would again endorse the idea of using Jack Hanna as a spokesperson for a national effort. I would also suggest two other individuals that may be interested in serving on this board. I am thinking specifically of Lee Bass, who I believe you know through the Rhino Foundation, and his brother, Ed Bass, who is even more of a conservationist and has played a very active role with the World Wildlife Fund. In fact, Ed serves on the WWF board of directors and is most active with a number of conservation programs around the world. Whether he would be willing to assist us, I am not certain. At the appropriate time, I would be willing to talk with Ed about such an idea.

I really do not have any names to add for the marketing members of the committee. I believe Erich's list will be fairly inclusive and give us a good group from which to make selections.

Obviously, a lot of work went into preparation of the rhino plan. This, again, is another major fund-raising undertaking. The staffing needs are significant. I think we need to be very careful that such an effort does not conflict with the overall AZA fund-raising plan. I would strongly recommend that the IRF coordinate this program and plan to staff the fund-raising needs accordingly. There is a lot of history with the IRF and its board. I would be more than happy to talk with you about these efforts at some appropriate time.

Dr. Kathryn Roberts  
Page Two  
March 23, 1994

The agenda for the Sunday sessions and for the regular program format seem to be very inclusive. My only question is my own personal involvement. Apparently, someone has added my name as a potential speaker during the regular sessions. I am certainly very glad to make a presentation, but would like to have some idea as to the direction for this talk. You may ask someone to give me a call about this.

*Am sure  
you  
noted  
this.*

I hope that answers all of your requests. Thanks again for your efforts in coordinating this important committee.

Most sincerely,



Ted A. Beattie  
Director

/mld

# **MINNESOTA ZOO**

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

## FACSIMILE TRANSMITTAL MEMO

DATE: 4/4/94

TO: Bob Ramon

FAX NUMBER: \_\_\_\_\_ TELEPHONE NUMBER: \_\_\_\_\_

FROM: Kathryn Roberts

FAX NUMBER: 612/431-9336 TELEPHONE NUMBER: 612/431-9299

NUMBER OF PAGES, INCLUDING COVER SHEET: \_\_\_\_\_

*I'm not sure you saw this. This Ted is a good guy -  
Thanks for the call - Kathryn*

Steve another of my oversights!!

Sorry.

Ginny

**Minnesota Zoo**

**FAX Transmission**

From: Kathryn R. Roberts  
To: Bob Ramin  
Company: AZA

Date: March 24, 1994  
Time: 2:47 PM  
FAX #: Fax

**Message:**

I got the fax, and the conference idea looks good to me. My staff have asked many times why these issues are not covered at any of the conferences. If you want, feel free to tell Mary we have staff who would be happy to participate by writing papers and presenting.

My schedule is a little out of control today. I will call you on Monday and see how your meeting went with the head of Conference Planning Control Central...

VOICE: 612/431-9299 FAX: 612/431-9336

13000 Zoo Boulevard, Apple Valley, MN 55124



AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

FAX TRANSMITTAL COVER SHEET

TO: Kathryn Roberts  
OF: American Zoo

FROM:  
FAXED BY:

Bob Rawn

PHONE: \_\_\_\_\_  
FAX: \_\_\_\_\_

DATE:  
TIME:

3/25/94

TOPIC: \_\_\_\_\_

THIS TRANSMISSION CONSISTS OF 3 PAGE(S), INCL. COVER.

MESSAGE:

Kathryn -

I received the attached from Mary Collins of Tulsa. I told her I would speak to her after OKC. After my conversation with her today, I offered the review of our Committee - OK by you? If so, I'll do a cover memo and send it out. Thx

IF YOU HAVE ANY PROBLEMS WITH THIS TRANSMISSION  
PLEASE CONTACT OUR OFFICE AT (301) 907-7777.

Bob





February 9, 1994

Mr. Bob Ramin  
 Development Director  
 American Zoo and Aquarium Association  
 7970-D Old Georgetown Rd.  
 Bethesda, Maryland 20814

Dear Bob,

Thank you for taking the time to talk to me earlier this week about our proposal to host a regional or national workshop for Zoo and Aquarium personnel who deal with the visitor service operations. Specifically, we are proposing a workshop geared to increasing dollars and increasing understanding and management skills for food, gift, membership and gate operations. So often at the regional and national meetings the topics discussed are big picture/big dollar - crisis management, direct mail campaigns, development and planned giving. Many managers want to learn from their peers and address questions about basic hands on day-to-day operations.

Topics might include:

**GIFT:** most profitable item ideas in terms of range of merchandise

- cooperative catalogue efforts
- determining performance standards for zoo stores
- inventory control programs
- marketing zoo merchandise
- exploring satellite stores
- use of volunteers in sales

**FOOD:** inventory control programs  
 profit and loss guidelines/performance standards  
 satellite operations  
 menu selection

**GATE:** personnel training  
 TQM/Customer Service Training

**MEMBERSHIP:** using exhibit openings to market membership  
 membership incentives  
 special membership categories such as non-profit and corporate: how structured  
 direct mail results: from the zoo's perspective  
 membership norms: retention, % of metropolitan population; donor levels  
 membership and donor tracking



Most of the workshops would be designed to be an idea exchange and discussion by the participants with a few local guest speakers. We all need to have an opportunity to learn from each other about our common problems, opportunities and successes. My thoughts are to have this a sharing time rather than a series of presentation by consultants.

I envision this being attended by Manager and Assistant Manager level personnel. We have hotels who are willing to work with us to make this cost effective and we are willing to put out the red carpet to all who attend. I suggest we schedule the workshops in early November, 1994. We can then promote them at the national AZA Conference in September.

If the concept is good, I will form a small regional committee to fine tune the discussion topics and we will proceed under your guidance. Thank you for your attention to this proposal and we hope to see you in March. We look forward to hearing from you.

Sincerely,



Mary Collins  
Executive Director

cc: Dave Zucconi, Director  
Tulsa Zoo

Lex Anderson, President  
Tulsa Zoo Friends, Inc.

Attendance for AZA Development Committee meeting -- March 6 in OKC

**ATTENDING:**

Cynthia Sumner  
Erich Hunker  
Sally Steele  
Kathryn Roberts  
Bob Ramin  
(Steve Ordahl)

**CANNOT ATTEND**

Mary Floye Federer  
Jim Thornton  
Chuck Bieler  
Glenn Ekey

Ted Beattie has not yet responded.



*Return in file  
Steve C. -  
note your  
responsibility  
for  
your annual  
corp. report*

15 March 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Development Committee Members  
Ted Beattie, Shedd Aquarium  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, Saint Louis Zoo  
Jim Thornton, Cincinnati Zoo

FROM: Dr. Kathryn R. Roberts, Minnesota Zoo  
Development Committee Chair

SUBJECT: Mid-Year Notes and Preparations for Atlanta

Many thanks to Ted, Erich, Sally, and Cynthia for trekking to Oklahoma City for the Development Committee meeting. We had over 40 in attendance, and accomplished a great many things as we worked through our agenda. There are a number of items that demand immediate action, and I would appreciate your attention to the following:

Bob Ramin presented the draft \$5 million campaign plan for the Conservation Endowment Fund. AZA Executive Director Syd Butler reported on the comments from the AZA Board regarding the Board's commitment to making the CEF more responsive to the AZA's and member needs, and not a strict grant-making entity. The CEF received approximately \$15,000 from AZA members as a result of the annual dues mailing. In addition, North Carolina, Denver, and Baltimore all raised substantial funds from their members through a \$1 check-off on society membership forms. Sally Steele will work with Ramin regarding a "Check it out, Check it off" campaign. **Please consider this check-off program for your institution, so we can build momentum.** This is a positive way for the Development Committee to show leadership and set an example. Cynthia Sumner already has a proposal on her Director's desk!

The Committee discussed the need for a national advisory board, which would assist in fund-raising and prospect identification. Members would primarily be from the corporate sector (Ralston Purina, Anheuser-Busch, CNN - Ted Turner) and a possible "zoo person" such as Jack Hanna. Kathryn Roberts will provide Ramin with the notes from previous Committee meeting where national figures were discussed. **The Committee agreed to provide Ramin with additional names by 3/28/94, as well as contact strategies to ascertain those interested in serving on a CEF Advisory Board.**

The Committee had a spirited discussion regarding cause-related marketing and corporate philanthropy in general. Current and pending AZA programs were discussed. It was decided not to move forward with plans for a separate AZA



AZA Development Committee  
3/15/94

Marketing Advisory Committee, but to add marketing professionals to the current Development Committee. Ramin will investigate the correct procedure to add members, the number allowed on committees, and how to add a member(s) who might presently be serving on another committee. Erich Hunker passed on the names of those who had expressed an interest in serving, and this list will be utilized as the nucleus of our prospects. I envision a Development and Marketing Committee of no more than 15 members (up from our current 9). **Please let me know of any nominations to add by 3/28/94.**

David Towne, Woodland Park Director and Panda Plan Chair, presented the current status of the AZA Panda Plan, as well as some future plans. The Development Committee was very concerned regarding the \$40-50 million business plan, coordination with fund raising for the CEF and AZA budget, as well as coordination with member institution fund raising programs. Roberts offered, on behalf of the Committee, to review the business plan.

Roberts thanked all those involved with the preparation of the Rhino plan for the IRF and the AZA Rhino TAG. Roberts will be working directly with Jim Jackson, Director of Fossil Rim, regarding the plan's implementation. **Please review the enclosed notes, and return any additional comments by 3/28/94.**

Fran Bernstein, Membership Director/Friends of the National Zoo, and Glenn Ekey, Executive Director/Zoological Society of Florida, worked with Ramin on the preparation of development programs in Atlanta for the AZA Annual Conference **Please review the enclosed agenda for the Sunday session and 3-30 minute sessions. Ramin and Bernstein will be presenting the format to Paul Grayson on 3/24/94, so your comments need to be submitted by 3/21/94.**

Other topics that were discussed include our strong support of *Connections*, and Editor/Publisher Judy Blackstock's efforts, the importance of economic impact studies as a development tool, and the flurry of IRS and direct mail regulations effecting our responsibilities.

**As a recap, please send me your suggestions regarding the AZA Atlanta Conference by 3/21/94, and your input regarding a CEF "check-off" at your institution, names for the CEF Advisory Board, "marketing" additions to the Development Committee, and the IRF plan by 3/28/94. Please mail or fax to Bob Ramin (fax: (301) 907-2980).**

Thanks for your assistance, and I look forward to hearing from you shortly. See you in Atlanta!

enclosures

cc: Dennis Meritt, AZA President  
Bill Dennler, Toledo Zoo (AZA Board Liaison)  
Clare Richardson, Gail Eaton, Zoo Atlanta (Annual Conference material)  
Louise Sloan, Brookfield Zoo (IRF material)  
Bob Ramin, AZA Director of Development  
Syd Butler, AZA Executive Director

**AZA DEVELOPMENT SESSIONS FOR ATLANTA ANNUAL CONFERENCE**

DRAFT

→ Sept. 18, 1994

Sunday Session

Possible Ice Breaker for Saturday Night

General theme - membership enhancement

- \* opportunity to meet colleagues before session/conference
- \* possible sponsor: travel company/commercial member (Fun Safaris, Park East, etc- could incorporate an informal "travel" theme, or Ralston Purina
- \* coordinator: someone from Zoo Atlanta?

Breakfast Session, 8:00 am - 10:30 am (continental breakfast, informal set-up)

Non-traditional sources of funds

- \* concessions, facility rental, licensing
- \* possible sponsor: Blue World Beverages/The Zoo Store
- \* coordinator: Steve Ordahl, Dir of Enterprise Programs/Minnesota Zoo

Mid-morning Session, 10:30 am - 12 noon

Asking for gifts: learning from doing (roll-play)

- \* various scenarios to include:
  - Director to donor
  - Board member to donor
  - Staff to volunteer
- \* Involve Directors, development staff, and available Board members and volunteers/docents
- \* possible sponsor: Mailworks/Target
- \* coordinator: Warren Iliff/Director, Phoenix Zoo

Lunch Session, 12 noon - 3:00 pm (buffet, with presentations/discussion)

Learning from the Past, Preparing for the Future

- \* the next generation of zoos and how to support them

- \* encounterment movement  
programs  
plans  
resources
- \* sponsor: Schultz & Williams/Coe Lee
- \* coordinator: Director, Glenn Ekey/Zoological Society of Florida

Afternoon Session, 3:15 pm - 5 pm

Stewardship and Recognition Programs

- \* new types of incentives for members
- \* innovative stewardship programs
- \* possible sponsor: Recognition Resources
- \* coordinator: Ginnie Westmoreland, Manager, Membership Prog/St. Louis Zoo

Breakfast tables for during the week: New IRS reporting guidelines/compliance, adoption programs and movement towards "sponsor a species," membership and renewals, volunteer/employee incentives.

Three 90 minute Development Sessions - during Conference

# 1 Sponsorship - What it Takes and How to Structure

- a) Why Sponsorship? Presenter: Lesa Ukman, Founder, International Events Group, publisher of *Sponsorship Report*.
- b) Sponsorship from A Sponsor's Viewpoint. Presenter: Drew Sheinman, Coca-Cola USA. "How to Sell Your Proposal to Coke, or, If I Knew Then What I Know Now."
- c) Sleeping with the Enemy - Exxon's Support of Tigers at Zoo Atlanta. Presenter: Clare Richardson, Director of Development or Gail Eaton, Director of Marketing/Zoo Atlanta.
- \* coordinator: Louise Sloan, Director of Marketing/Brookfield Zoo

# 2 Bringing Up Baby (but are they really growing up?- How to nurture your supporters from members to annual donors to major donors

- a) New ways to attract members. Presenter: Omaha's Henry Doorly Zoo's Membership Director, or Clint Fields/FONZ.
- b) Taking the Leap from Member to Donor. Presenter: Sally Steele, Assistant Director/North Carolina Zoological Society.

c) Cultivating your Donors. Presenter: Ted Beattie, Director/Shedd Aquarium.

\* coordinator: Ron Forman, Director/Audubon Institute

# 3 Demographics and Development - Reaching for the Right Market

a) Demographic Realities. Presenter: Emory University faculty (like Prof. Christopher Ross, Director of Training and Consulting, SPSS Inc./Assoc Prof, U of Ill at Chicago) or representative from *American Demographics*.

b) What's Hot and What's Not - Latest Fund Raising Trends (Database marketing, etc). Presenter: Representative from Epsilon.

c) How to Practice What Has Been Preached - Putting demographic realities and fund raising trends into practice. Presenter: Wendy Fisher, Mailworks or Jerry Huntsinger.

\* coordinator: Fran Bernstein, Director of Membership/FONZ



# MEMBERSHIP RENEWAL

## Membership Categories

Please see reverse side for benefits

Individual	\$ 25
Plus-One	\$ 40
Family	\$ 40
Associate	\$ 60
Supporting	\$ 125
Curator's Club	\$ 250
Director's Club	\$ 500
President's Club	\$1000

### WE WOULD LIKE TO THANK

and all members for their continued support of the Denver Zoological Foundation!

### RENEWAL INFORMATION: Member # \_\_\_\_\_

Name \_\_\_\_\_ and \_\_\_\_\_

YES, I would like to upgrade my status to \_\_\_\_\_

YES, Please renew my \_\_\_\_\_ membership which expires at the end of \_\_\_\_\_



#### PLEASE INDICATE ANY CHANGES BELOW!

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (Home) \_\_\_\_\_ (Business) \_\_\_\_\_

#### PAYMENT:

Enclosed is my check made payable to the Denver Zoological Foundation. Card # \_\_\_\_\_

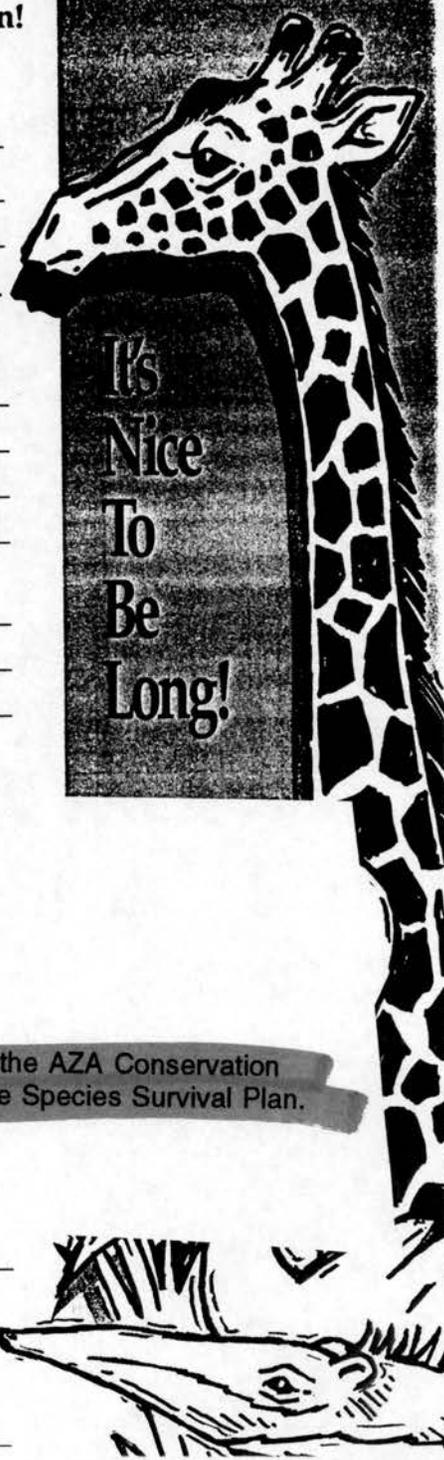
Please charge my MC/Visa. Expiration \_\_\_\_\_ Amount \_\_\_\_\_

Signature \_\_\_\_\_

#### SSP INFORMATION:

I am enclosing an additional \$1.00 for my contribution to SSP.

Many wild animal species are in danger of vanishing forever. SSP (Species Survival Plan) is the research arm of the American Association of Zoological Parks and Aquariums which seeks to strengthen and coordinate captive breeding programs. Would you join us in supporting this effort? EXTINCTION IS FOREVER!



#### GIFT INFORMATION: (If \_\_\_\_\_)

Membership category \_\_\_\_\_

This gift membership is for:

Name(s) \_\_\_\_\_ (One)

Address \_\_\_\_\_

City \_\_\_\_\_

Phone (Home) \_\_\_\_\_



Suggested copy for membership form:

I am enclosing an additional \$1 for my contribution to the AZA Conservation Endowment Fund which supports programs such as the Species Survival Plan.

#### GIFT GIVER INFORMATION Gift my

Would you like to receive the renewal notice next year?  Yes  No

Gift card should read from: \_\_\_\_\_

Please send Membership materials to: \_\_\_\_\_

#### PAYMENT:

Enclosed is my check made payable to the Denver Zoological Foundation.

Card # \_\_\_\_\_

Expiration \_\_\_\_\_ Amount \_\_\_\_\_

Please charge my MC/Visa.

Signature \_\_\_\_\_



# E

## EDUCATION CONSERVATION RECREATION

The Denver Zoo desires to foster an appreciation for the world's wildlife and the conservation of these irreplaceable natural resources through public education while providing an enjoyable leisure-time experience for all ages. Through participation in managed cooperative breeding programs, the Zoo serves as an urban refuge for species which are threatened or in danger of extinction.

### SPECIES SURVIVAL PLAN



Wild animal populations are declining throughout most of the world. Many species are in danger of vanishing forever. The SSP is the research arm of the American Association of Zoological Parks & Aquariums which seeks to strengthen and coordinate captive breeding programs so that zoos can help preserve vanishing species. We ask that you join us in support of this program by adding a tax-deductible contribution of \$1.00 or more to your membership dues. EXTINCTION IS FOREVER!



Species Survival Plan

## ALWAYS NEW, DENVER ZOO!

Every visit to the Denver Zoo provides a different experience. We are building for the future with planned major exhibits for primates and for animals of the tropics.



## LL MEMBERS RECEIVE:

- Unlimited admission with your membership card, every day of the year!
- Invitations to Early Morning and Evening Walks. An opportunity to enjoy this exclusive time to view the Zoo. Walk through on your own, or take advantage of a docent led tour.
- 20% discount on all merchandise purchased at the Pronghorn Gift Shop with your membership card. Film and sale items excluded.
- Free publications — *Zoo Doings* (the members' newsletter) with important announcements and updates and *Zoo Review*, published quarterly in full color, with photos, and feature articles.
- Invitations to our All Members' Picnic (three dates offered during the summer) — held after hours, admission is free to members and their guests. Bring your own picnic or purchase the Zoo barbecue.
- Invitations to special Guest Lectures
- Educational opportunities for members' children through the age of 18 and/or grandchildren through the age of 18.
- Invitations to special Zoo events
- Wildlife Tours — an opportunity to travel with Zoo Staff to nearby spots and around the world.
- In-Zoo-Safari — A wildly popular week at the Zoo for members' children and grandchildren with tours, talks, crafts and games. Early reservations are an absolute must!



DENVER Zoo

**Draft Rhino Plan/Recommendations for the International Rhino Foundation  
and AZA Rhino TAG Program**

Potential \$15 Million Campaign over 3 Years

Prepared by: Kathryn Roberts, Director/Minnesota Zoo  
Robert Ramin, Director of Development/AZA  
Cynthia Sumner, Dir of Development/St. Louis Zoo  
Jane Ballentine, Dir of Public Affairs/AZA  
Louise Sloan, Dir of Marketing/Brookfield Zoo

Development/Phase I

a) Information Gathering

Who are the potential donors?

Roberts to ask Jim Jackson

Roberts to ask Ted Beattie re Bass commitment

Sloan to ask Sullivan @ Brookfield re Gillman

Ramin to prepare potential list of foundation sources

(organizations that have supported conservation/in  
situ programs -- contact names and addresses available)

American Conservation Association, Inc.

The George F. Baker Trust

Helen Brach Foundation

C.S. Fund

Liz Claiborne & Art Ortenberg Foundation

Compton Foundation

The Arthur Vining Davis Foundations

The Educational Foundation of America

The Ford Foundation

The Frost Foundation

W. Alton Jones Foundation

The Kresge Foundation

John D. and Catherine T. MacArthur Foundation

Charles Stewart Mott Foundation

New England Biolabs Foundation

The David and Lucile Packard Foundation

The Pew Charitable Trusts

Weeden Foundation

- b) What should the IRF do initially -- use what it has
- IRF/AZA TAG as knowledge base -- the "Experts"
- Facilities such as White Oak and Fossil Rim can be effectively used to showcase Rhino efforts and host donor events
- Sponsor seminars like White Oak/Tufts workshop "Wildlife Conservation Zoos, and Animal Protection" -- but with a Rhino focus
- c) Preparation of proposals (Lead gift prospects)
- Template foundation proposal to utilize best foundation sources
- Preparation of "script" to use for face to face solicitation of individual donors
- Create a "challenge" concept -- early large commitments to attract further support
- Begin to lay groundwork for IRF endowment -- necessary for Rhino survival and continued support
- d) IRF/TAG must prepare mission statement
- A mission statement is vital to lay out realistic goals to potential donors, as well as to articulate goals to the public
- e) Who will do this?
- IRF needs to hire an Executive Director (full time) with primary responsibility of fund raising (and proceed with next phase)
- IRF Board, donors, and AZA Directors can be utilized as corp of volunteers
- In most cases, these volunteers will be the actual solicitors
- IRF could also hire fund raising counsel, instead of full time executive director (or development director) but this is not as effective, and the costs would be roughly the same
- f) Preparation of Campaign Strategy (development and public relations)
- Identify lead gifts (Foundations, Bass, Gillman, Lillan, Disney)

Identify second tier prospects

Create cultivation events

regional dinners  
events at Fossil Rim and White Oak  
events hosted at AZA institutions w/Rhinos

Structure challenge program

Investigate grass roots component

direct mail appeal with specific targets  
investigate membership in IRF or a Rhino "Club"  
investigate a spokesperson to sign an appeal letter  
look at non-traditional lists (Safari Club Intl.)  
get lists donated

Get a serious symbol (Rholi not appropriate?)

Public Awareness

a) Start from mission statement

b) AZA network/resources

in-kind donations of staff, graphics, expertise

Bill Kurtis(?) production of PSA (as fund raising toll)

c) What do we say to the media?

ascertain how much we have to "teach" the public about conservation  
and the dire situation of Rhinos

d) Kid's component

"Zoofari" kid's TV show featuring Rhinos

How can you help (aimed at parents)  
plugs into possible membership component

e) Timing with development

Start with a press conference/press event announcing the plan, its goals,  
major donors/corporate partners, etc.

make sure direct mail appeals, etc. are timed with PSA

donor events in sync with Conservation Day, etc.

f) Public awareness in consumer nations

build upon strength of Yemen, South Korea

target Taiwan, China

g) Plant major stories in media

feature major donors

coordination with possible trade sanction (China)

specific appeal to target donor groups, Wall Street Journal, Forbes

h) Position IRF

unique, expertise to handle situation

i) Spokesperson

Credible, conservation credentials

Isabella Rossalini?

j) Adopt-a-Park

way to involve AZA institutions and plug into in-situ

way to educate society members of AZA institutions where in-situ \$ goes, and what a difference it can make to the Rhino situation

IRF identification of top parks, IPZs, and IMZs

Multiple zoos supporting 12 parks total worldwide

media opportunities galore -- in local markets and national

k) Zoo and Aquarium Month/Conservation Day

initial corporate cause-related marketing hook

IRF ideas

Adopt a Rhino	maybe	Amount asked for too small, but could tie into direct mail
Newspaper ad	not yet	creative service donated? what is message?
corporate appeal	yes	
celebrity benefit	yes	use with cultivation events
celebrity spokesperson		do we need PSA? Be careful of celebrity credibility. Use celebrities on talk shows. Peter Max/artist donated art to sell.
magic horn	no	"chain letter mentality"
Rholi	no	not serious enough
concerts	later	manpower intensive
800 #	yes	tie-in with direct mail (both labor intensive)

March 8, 1994

Dr. Kathryn Roberts  
Director  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

Just a quick note of thanks for an excellent meeting Sunday afternoon. I was sorry to have had to miss the last portion because of our return flight to Chicago. I certainly was intrigued by much of the conversation, especially early in the meeting.

During the past two years, I have thought a lot about the development direction for AAZPA. We seem to be constantly struggling with this possible plan for a major corporate campaign throughout the country. We all talk about the models which we use in our own institutions.

As you could hear by the conversation Sunday afternoon, we struggle to find the type of volunteer leadership that we would normally plan to use at the institution level. We simply do not have anyone at this time on a national level in the corporate community who could undertake this major effort. I am not sure, as a national association, this format is workable. In addition, we (AZA) do not have the national presence to mount such an effort. I am becoming more and more convinced that we need to look at some of the development programs that Bob is proposing and support his efforts on such ideas as the check-off programs, members' annual giving at year end (which proved so successful this first year), corporate marketing/sponsorship opportunities, and specific grants to foundations and governmental institutions. One person simply cannot do all of these new programs effectively and successfully, and at the same time put together a capital campaign for the association on a nationwide level. As I'm sure you know, we all have much larger development department staffs than what AZA currently supports. And yet, we have asked Bob and Syd to take on something that is far more extensive than any of us do in our own institution by using one professional staff member.

But my major point is not the staffing situation, but the concept of a nationwide capital plan as we discussed. When we are better known, have implemented some of the P.R. initiatives that have been discussed, and Bob is better staffed, we may be in a much improved position to consider such a national effort. I have been checking around the country to see if any other national associations conduct such an effort. I have yet to find one that approaches fund-raising in this way.

These are just ideas for thought and further discussion. As a committee member, I would be remiss in not letting you know some of my thoughts. I (we) certainly do not want to put added pressure on Bob (and Syd) in his excellent efforts to date. He has a gigantic task ahead of him, and I think it is imperative that the association's development plan is a realistic one. Sorry for the wandering of thoughts, but I did want to at least begin some of this discussion or continue it at some level.

Again . . . thanks for all of your efforts, and I look forward to talking with you soon. If you do feel that discussions with people like Jack Hanna are appropriate, in light of our earlier discussions yesterday, please let me know and I would be more than happy to talk with Jack. He is one of my very best friends, and I am sure, with the proper support, he could be very effective. But, again, I would go back to my earlier caution. I look forward to talking to you soon.

Most sincerely,

A handwritten signature in cursive script that reads "Ted".

Ted A. Beattie  
Director

/mld

cc: Syd Butler, AZA  
Mary Floye Federer, Houston Zoological Society  
Erich Hunker, Toledo Zoological Gardens  
Dennis Meritt, Lincoln Park Zoological Gardens  
Bob Ramin, AZA  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, St. Louis Zoo

# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

March 9, 1994

Bill Dennler, Director  
Toledo Zoo  
P.O. Box 4010  
Toledo, OH 43609

Dear Bill:

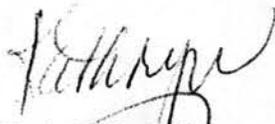
It was nice to see you in Oklahoma City.

I've spoken with Bob Ramin -- he is sending you a packet of the Development Committee supporting materials. In the future, you will receive all the materials I do. Also, Bob and I, together with a couple of others from the Development Committee, are putting the final touches on the IRF fund raising plan. As soon as I have a final copy, I will pass one on to you.

Could I get a copy of your economic impact study you talked about? As you heard, we are ready to embark on the same project and I'd like to see yours for hints.

See you in Atlanta!

Sincerely,



Kathryn R. Roberts  
Executive Director

KRR/gb

February 14, 1994

Ms. Kathryn Roberts  
Director  
Minnesota Zoological Garden  
13000 Zoo Boulevard  
Apple Valley, MN 55124-8199

Dear Kathryn:

I received your notice about the Development Committee meeting at the regional conference in Oklahoma City. As of this date, I do plan to be there on Sunday afternoon to attend the meeting. I look forward to seeing you then.

My first weeks here at the Shedd have been busy ones. I'll look forward to visiting with you in a couple of weeks.

Sincerely,



Ted A. Beattie  
Director

/mld

# MINNESOTA ZOO

13000 Zoo Boulevard, Apple Valley, MN 55124 612.431.9200

February 8, 1994

To: **AZA Development Committee Members:**

Ted Beattie, Shedd Aquarium  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, St. Louis Zoo  
Jim Thornton, Cincinnati Zoo

From: Kathryn Roberts

Attached is a copy of the AZA Development Committee mid-year report to the board. Also attached, for your information, is a memo regarding funding for conservation projects by various SSP, TAG, FIG and SAG groups.

The next **AZA DEVELOPMENT COMMITTEE MEETING WILL BE**

**SUNDAY, MARCH 6, 1994**  
**2 - 5 pm**  
**at Embassy Suites Hotel, Meeting Room #3**  
**in Oklahoma City.**

I'd appreciate a call (612/431-9299) or fax (612/431-9336) to let me know if you'll be able to make the meeting. (Details will follow.) To date, I've only heard from Cynthia Sumner, who will be attending and Mary Floye Federer, who cannot attend.

*Erich Hunker yes*  
*Jim Thornton no*  
*Sally Steele yes*  
*Chuck Bieler no*  
*Glenn Ekey no*  
*Ted Beattie yes*

*Strengthening the bond between people and the living earth*



7 February 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA President, Officers, and Board Members

FROM: Kathryn R. Roberts, Chair  
AZA Development Committee  
Director, Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN 55124

SUBJECT: Development Committee Report

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The AZA Development Committee met during the annual conference in Omaha, at which time it considered a proposal from the International Rhino Fund (IRF). The IRF asked the Development Committee to recommend that the AZA Board enter into a joint fund raising relationship with the IRF to raise funds for rhinos through an institutional program. Because the materials were lengthy, committee members agreed to review them after the meeting and vote by fax. The result was a close vote (3 for/4 against), due to hesitation on the part of the Committee members to endorse individual projects.

However, as Chair of the Development Committee, I hosted and participated in a day-long "rhino session" at the Minnesota Zoo to brainstorm ways to increase public awareness about possible rhino extinction and where funds might be obtained. All those involved graciously contributed their time and travel costs (Louise Sloan-Brookfield, Cynthia Sumner-St. Louis, Bob Ramin and Jane Ballentine-AZA, and Minnesota Zoo staff), and we developed a first-rate plan. We will revisit rhinos at our upcoming mid-year meeting.



Page 2  
2/7/94

Along these lines, members of the Development Committee have been invaluable advisors to Bob Ramin, AZA's Director of Development. Many corporate proposals have been reviewed by individual Committee members, as well as by Committee. I envision the AZA Marketing Advisory Council to take over the review of such national proposals, in conjunction with review by the AZA Board (where appropriate). The Advisory Council will function as an ancillary group of the Development Committee, one that has more specific cause-related marketing expertise. The Committee will review membership of the Advisory Committee at the mid-year meeting.

The mid-year meeting is scheduled for Sunday, March 6th from 2-5 p.m. in Oklahoma City at the Embassy Suites Hotel, Meeting Room #3. At this time we will discuss the Development Workshop to occur on Sunday, September 18th in Atlanta, development and marketing sessions planned for the Annual Conference, review the Campaign Plan and draft brochure (case statement) for the Conservation Endowment Fund (CEF), analyze a proposed National Advisory Board for the CEF, and confer about the status of the IRF.

**Request for Board Action**

None.

cc: Original + 19 to AZA  
Dennis Meritt, AZA President  
Bill Dennler, AZA Board Liaison  
Syd Butler, AZA Executive Director  
Bob Ramin, AZA Development Director  
Bob Wagner, AZA Administrative Officer  
AZA Development Committee Members  
Ted Beattie, Shedd Aquarium  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, St. Louis Zoo  
Jim Thornton, Cincinnati Zoo

The Zoological  
Society of Houston

Houston Zoological  
Gardens

George R. Brown  
Education Center

Post Office Box 06387

Houston, Texas 77206

713-529-2632



FAX #: 713/522-2823

DATE: February 7, 1994

PROJECT: Development Committee Meeting at Regionals

TO: Kathryn Roberts

Fax # 612-431-7377

FROM: Mary Floye Federer

The Zoological Society of Houston, Inc.

MESSAGE/  
DESCRIPTION  
OF MATERIALS  
TRANSMITTED:

I received your correspondence two weeks ago, and I had hoped to be able to come up to the Regionals in Oklahoma City. Unfortunately, we have a VIP reception and tour on the afternoon of Sunday, March 6 which I am responsible for. I am sure you understand that I can't not follow through with my responsibilities here. I would be happy to be involved via fax or phone since I will be at the zoo that day. Let me know how I can participate and contribute to the Development Committee efforts.

Thanks.

*Copy Bob Ramin*

Including this page, we are transmitting 1 pages using a Murata F-50. If you do not receive this transmission clearly, please call 713/529-2632.

**FAX TRANSMITTAL COVER SHEET**

TO: Bob Ramin  
AT: AZA Executive Office

FROM:  Kathryn Roberts  
Minnesota Zoo

Bob:

The report looks great, and I'll leave it as is even if you've got the committee members being invaluable to you, instead of you being invaluable to the committee members -- or at least to the committee chair!!)

If you'll take care of sending the copies to the AZA people, I'll send it to the committee members from here. I want to enclose the some additional stuff.

**THANKS.**

**FAX MEMORANDUM**

Date: 2/2/94

To: Bob Ramin

Fax: (301) 907-2980

From: Kathryn Roberts

Fax: (612) 431-9336 Ph: 431-9333

**Bob:**

I've drafted the attached page for my report to the AZA board. Have I left anything out that you think should be added?

Also, I've been asked by Cynthia Sumner about the location of the meeting. Have you arranged a room at the Embassy Suites? Also, I intend to ask committee members to let me know of their plans when I send their copy of the mid-year report -- if it turns out only 3-4 of us plan to make it, we may rethink our plan.



# American Association of Zoological Parks and Aquariums

DATE: February 2, 1994

REPLY TO: Kathryn R. Roberts, Chair, AZA Development Committee  
c/o Minnesota Zoo, 13000 Zoo Boulevard, Apple Valley, MN 55124

TO: AZA President, Officers & Board Members

RE: **DEVELOPMENT COMMITTEE ANNUAL REPORT**

The AZA Development Committee met during the annual conference in Omaha, at which time it considered a proposal from the International Rhino Fund (IRF). The IRF asked the Development Committee to recommend that the AZA Board enter into a joint fund raising relationship with the IRF to raise funds for rhinos through an institutional program. Because the materials were lengthy, committee members agreed to review them after the meeting and vote by conference. The result was a close vote (3 for and 4 against), due to hesitation on the part of the committee members to approve individual projects. However, as chair of the Development Committee, I have maintained involvement in the discussions, which will also be discussed at our upcoming mid-year meeting.

The mid-year meeting is scheduled for Sunday, March 6th from 2-5 p.m. in Oklahoma City, at which time we will discuss the Development Workshop to occur on Sunday, September 18th in Atlanta, involvement of AZA members in the Conservation Endowment Fund (CEF) Campaign (and the status of the campaign), review of a proposed National Advisory Board for the CEF, and the status of the IRF.

## **Request for Board Action**

None.

cc: Original + 19 to AZA Office  
Dennis Meritt, AZA President  
Bill Dennler, AZA Board Liaison  
Syd Butler, AZA Executive Director  
Bob Ramin, AZA Development Director  
Sabin Robbins, AZA Marketing Director  
Bob Wagner, AZA Administrative Officer  
AZA Development Committee Members:  
Ted Beattie, Shedd Aquarium  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, St. Louis Zoo  
Jim Thornton, Cincinnati Zoo



*Will you take  
a stab?*

6 January 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Office of  
Membership Services  
Oglebay Park  
Wheeling, WV 26003  
Tel: 304-242-2160  
Fax: 304-242-2283

MEMO TO: COMMITTEE CHAIRMEN, SENIOR STAFF, and ADVISORS

FROM: ROBERT WAGNER, CHIEF ADMINISTRATIVE OFFICER *R. Wagner*

SUBJECT: SEMIANNUAL COMMITTEE ACTIVITY REPORTS

President Meritt has requested that I inform all chairmen, our senior staff, and advisors that their midyear reports will be due no later than 7 February 1994. Chairmen and senior staff are to send the original and 19 copies to the Wheeling Office. Advisors should send their reports to the chairmen for inclusion in the committee reports. It would be helpful if your report is typed single spaced and copied on both sides where possible. Do not mail reports directly to Board members. However, please send a copy of your report to your Board liaison, those serving on your committee, and President Meritt.

If you have any questions with respect to your report, please channel such questions through your Board liaison. It would be greatly appreciated if you would include specific recommendations or make specific suggestions to the Board in concluding your written report. Even though you may have matters that are not complete by the deadline, do not delay in sending your report - submit it on time and send an addendum.

The Board meetings will be hosted by the Oklahoma City Zoological Park and held at the Embassy Suites. They will begin on Friday afternoon, 4 March, and conclude around noon on Sunday, followed by the Central Regional Conference. Your report should be presented to the Board by your Board liaison, unless you feel it is necessary for you to be in attendance. If you plan to personally present your report, please advise President Meritt and make your reservations at the Embassy Suites through the Oklahoma City Zoological Park.

On behalf of President Meritt, Executive Director Butler, and the Board of Directors, I take this opportunity to thank each of you for your dedicated service to our Association.

ROW/br

Copies to: Board of Directors





KATHRYN -  
Please review  
and I'll  
send out  
today -  
Thanks!  
Bob

12 January 1994

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Executive Office and  
Conservation Center  
7970-D Old Georgetown Rd.  
Bethesda, Maryland 20814  
Tel: 301-907-7777  
Fax: 301-907-2980

TO: AZA Development Committee Members  
Ted Beattie, Shedd Aquarium  
Chuck Bieler, San Diego Zoo  
Glenn Ekey, Zoological Society of Florida  
Mary Floye Federer, Zoological Society of Houston  
Erich Hunker, Toledo Zoo  
Sally Steele, North Carolina Zoological Society  
Cynthia Sumner, St. Louis Zoo  
Jim Thornton, Cincinnati Zoo

FROM: Kathryn Roberts, Chair, AZA Development Committee  
Director, Minnesota Zoo

SUBJECT: Development Committee Meeting

I would like to convene the Development Committee for a meeting at the Central Regional Conference in Oklahoma City. The meeting will be held from 2:00 p.m. until 5:00 p.m. on Sunday, 6 March. We are currently scheduled to meet at the Embassy Suites, after the AZA Board of Directors concludes their session. I will confirm the exact location prior to the meeting, along with an agenda.

Some of the topics I feel are important to review include the Sunday development workshop and the development and marketing sessions at the AZA Annual Conference in Atlanta, involvement of AZA members in the Conservation Endowment Fund (CEF) Campaign and status of the Campaign, review of a proposed National Advisory Board for the CEF, status of AZA's involvement with the International Rhino Fund, cause-related marketing initiatives, and other important topics. Please contact me or Bob Ramin at the AZA if you would like to add an item to our agenda.

This meeting is open to all interested development and marketing professionals, as well as other interested AZA members who are attending the regional conference. Please encourage your colleagues to attend.

cc: Bob Ramin, AZA Director of Development

Bob - Great as usual.  
OK here we come...  
MKC

