



Minnesota State Zoological Board.  
Zoo-Related Organizations Files.

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**AAZPA**

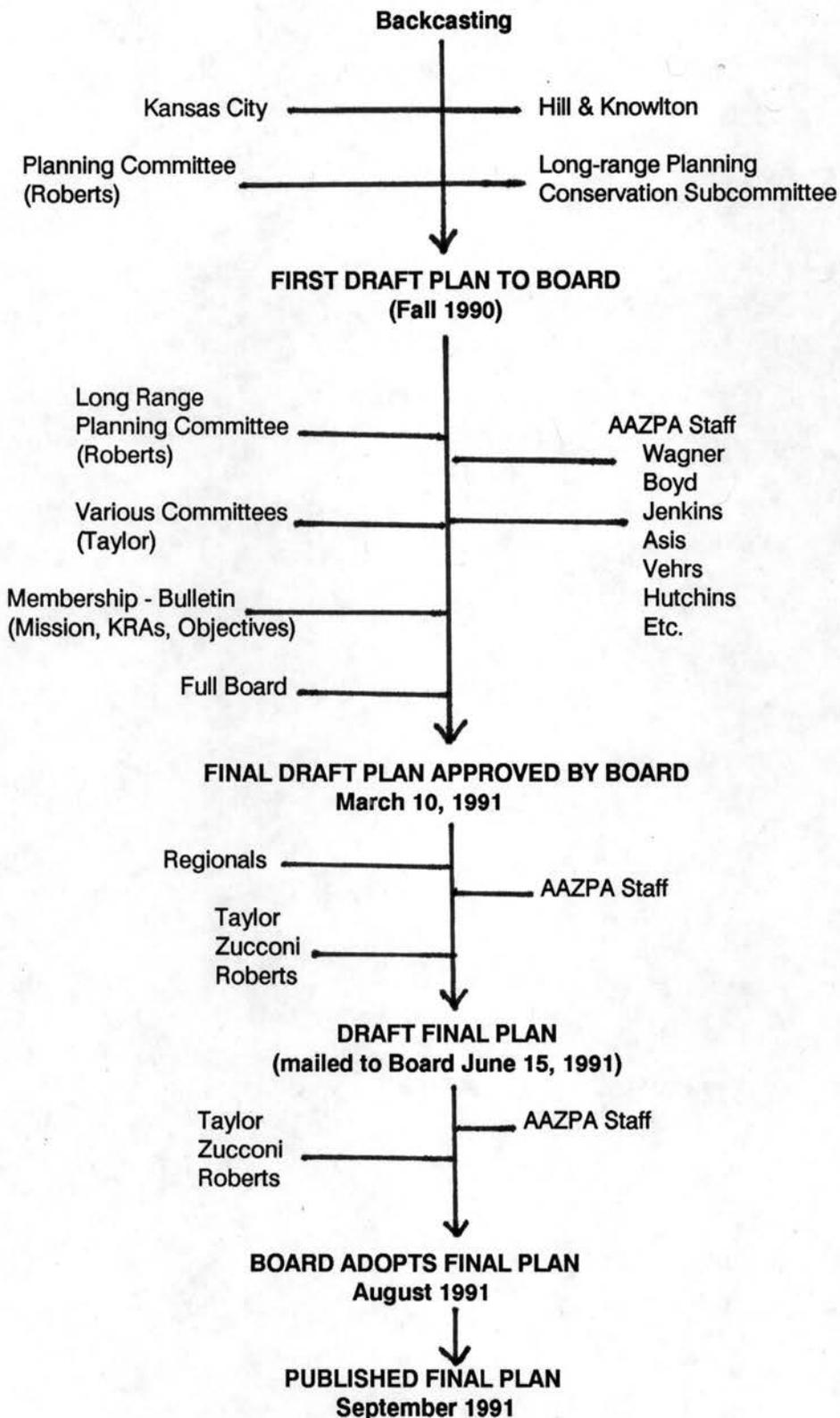
**1991 - 1996 STRATEGIC PLAN**

**DRAFT PLAN**

Presented to the Board 8 March 1991

# 1991 - 1996 STRATEGIC PLAN

## PROPOSED TIMETABLE



## **AAZPA**

### **MISSION & VALUES**

#### **MISSION**

The mission of the American Association of Zoological Parks and Aquariums is to foster and support excellence in the purposes of zoological parks and aquariums.

#### **VALUES**

**Cooperation** -- working with each other to further our professional goals.

**Commitment to Community** -- encouraging excellence in recreational and cultural events and programs which strengthen our institutions' positions in their communities.

**Commitment to Conservation** -- encouraging the coordination of animal management programs, both in captivity and in the wild. Conservation, education and research are integral components of these programs.

**Self-Regulating** -- embracing the Code of Professional Ethics and Accreditation which ensure high professional standards and behaviors.

**Advocacy** -- representing its members' interests in legislative bodies, governmental agencies and others will result in furthering the mission of zoological parks and aquariums.

**Information Management and Communication** -- developing and managing data bases relevant to our mission and the timely distribution of current information to our members.

## ACTION PLANS

### KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

(Planning Leader: Steve Taylor)

**Preamble:** All membership surveys including the one by Hill & Knowlton clearly have indicated that the overwhelming majority of our members place a high value on achievements and established services of the Association and, while the membership supports expanded conservation programs, they do not want these increased programs to distract from membership services.

Therefore, although we see the Association expanding its conservation and legislative programs during the implementation of the plan, it will not do so at the expense of its present and expanded membership services. The following objectives for membership services are essential to the well being of our Association.

**Objective 1:** Report recommendations on AAZPA publications to AAZPA Board by August 1992.

**Strategy 1:** Examine the costs, feasibility and quality of existing publications and the need for new publications.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Assemble a report on existing publications	Executive Office Adm. Asst.	7/90	11/90		This would include: costs, number printed, comments from membership, funding of publications
2. Establish a task force	AAZPA President		8/90		
3. Meeting of Task Force	Chairman of Task Force		9/24/90		
4. Preliminary report to the Board	Task Force	9/24/90	8/91		NOTE: Task Force should attempt to obtain expert advice from other professional publications.
5. Final report to Board	Task	8/91	8/92		

KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

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Objective 2: Establish an expanded zoo and aquarium database on computer disk by 1 September 1992.

Strategy 1: Continue to establish and expand the database.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Put existing data on disk and make available to membership	Executive Office Adm. Asst.	7/90	1/91		Information already contained in new 1990 directory.
2. Determine additional data and methodology (software) needed.	AAZPA Dep. Dir.	10/90	8/91		Work with Barbara Birney and others
3. Create, mail and tabulate new data surveys in education, PR, research & conservation	AAZPA Dep. Dir.	9/90	5/91		
4. Incorporate expanded data into existing database.	AAZPA Staff (Robinson)	5/91	8/91		
5. Make expanded data on disk available to membership	Exec. Office	8/91	9/92		

KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

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Objective 3: Create development opportunities, including promotions, fund raising, and grants that would at least double existing development income to AAZPA and its member institutions by 1 January 1995.

Strategy 1: Complete staff and committee assignments.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Activate development task force	AAZPA President		8/90		
2. Development task force reviews existing policies and determines guidelines for future development initiatives.	Task Force Chairman	9/90	1/91		
3. Determine responsibilities of new development position and hire appropriate personnel.	AAZPA Exec. Dir.	10/90	1/91		

KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

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Objective 3: Create development opportunities, including promotions, fund raising, and grants that would at least double existing development income to AAZPA and its member institutions by 1 January 1995.

Strategy 2: Increase income.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop plan of action with financial objectives and targets for all areas of development	Development Committee	9/12/90	8/91		Note #1: Estimated AAZPA development income for last 4-5 years is \$700,000.
2. Implement Plan	Development Officer	9/91	1/95		Note #2: This plan would require \$1,790,000 additional dollars plus inflationary to be accomplished completely over the next five years.
3. Make a recommendation to the AAZPA Board on the concept of creating a development advisory board of corporate and foundation executives.	Development Committee	9/90	8/91		
4. If recommended, create a development board.	Development Committee	8/91	8/92		

KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

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Objective 3: Create development opportunities, including promotions, fund raising, and grants that would at least double existing development income to AAZPA and its member institutions by 1 January 1995.

Strategy 3: Measure success.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Prepare annual breakdown of funds received and anticipated through all areas of development	Development Officer	8/92	8/95		
2. Survey institutional membership at least bi-annually to determine the amount of income they have received through AAZPA development.	Development Officer	8/92	8/95		

KEY RESULT AREA I -- EXPAND AND IMPROVE MEMBERSHIP SERVICES.

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Objective 4: Create a written public relations crisis management plan to address key issues currently impacting on zoos and aquariums, for presentation and/or demonstration at 1992 annual conference.

Strategy 1: Develop plan.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Initial discussion with Public Relations committee at 1990 conference.	AAZPA PR Director		9/24/90		Note: Four case studies will be presented at 1990 conference as well as a session working with the media.
2. Develop a preliminary plan to present to the Board.	PR Comm. Chairman	10/90	8/91		Note: D. Jenkins & K. Asis will help determine the timeline for this plan.
3. Workshop at annual conference.	PR Dir. & Committee	10/90	9/91		Consult with AAM and other organizations that may have similar plans. A cost/benefit analysis will be done for a crisis management seminar for members.
4. Finalize plan.	PR Dir. & Committee	10/90	8/92		Note: Legal counsel (K. Vehrs) should be consulted during this process before plan is finalized.
5. Final plan presented at annual conference.	PR Comm. Chairman	8/92	9/92		

## ACTION PLANS

### KEY RESULT AREA II -- ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL AND WILDLIFE CONSERVATION.

(Planning Leader: Kathryn Roberts)

**Preamble:** It is of very high importance that the AAZPA be recognized as a professional organization whose members are committed leaders in environmental and wildlife conservation issues. In order to achieve the recognition we desire, we must first have an easily identifiable and recognizable name. We need to understand our audiences and the issues they regard as important for us to address. Finally, we must capitalize on our strengths by developing and carrying out a strong public relations plan which is the vehicle to carry our mission.

**Objective 1:** Develop an easily recognizable identity to improve name recognition by September 1991.

**Strategy 1:** Contract with professionals for input, concurrence and development.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Investigate need for new name and/or logo, and if deemed appropriate, ask membership for comments.	LRP Chair	6/91	8/91		In newsletter -- open to everyone.
2. Create review team if new name/logo is deemed desirable.	LRP Chair	9/91	10/91		
3. Ask members for ideas for new name and/or logo		11/91	2/92		
4. Research field for appropriate logos.	AAZPA PR Dir.	11/91	2/92		Concurrent with task 3. Would prefer professional.
5. If appropriate, review member suggestions for new name, make interim presentation.	LRP Chair		3/92		Mid year board meeting

KEY RESULT AREA II -- ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL AND WILDLIFE CONSERVATION.

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Objective 2: Conduct market research to determine our audiences and issues by January 1992.

Strategy 1: Review Hill and Knowlton report and determine methodology.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Statistical and methodological review of Hill & Knowlton.	Marliave	6/90	8/90	8/90	Done
2. Recommend methodology.	Marliave	6/90	10/90	10/90	Including new questions and statistical criteria.
3. Approve recommended methodology.	LRP Chair		4/91		

KEY RESULT AREA II -- ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL AND WILDLIFE CONSERVATION.

Page 3

Objective 2: Conduct market research to determine our audiences and issues by January 1992.

Strategy 2: Implement, assess and communicate the results.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Enlist institutions who can include items in upcoming, planned survey instruments.	LRP Chair		complete	6/90	St. Louis Zoo, Minnesota Zoo, Busch Gardens, San Diego Zoo, (J. Marliave to contact Calgary Zoo and Metro-Toronto.
2. Conduct the surveys.	Marliave	8/90	8/91		Same participants as above.
3. Compilation and analysis of results.	Marliave	9/91	12/91		
4. Communicate results through COMMUNIQUE, Regional, National and Board Meetings.	AAZPA PR	1/91	6/91		

KEY RESULT AREA II -- ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL AND WILDLIFE CONSERVATION.

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Objective 3: Develop a public relations plan based on existing market research to determine our message by September 1992.

Strategy 1: Create a team to develop an Implementation Plan.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Identify team members to be added to PR Committee if appropriate.	AAZPA Pres.	6/91	8/91		
2. Recruit and organize the committee.	AAZPA Pres.	8/91	12/91		
3. Assign tasks to committee.	AAZPA PR Dir.	3/92	4/92		
4. Complete development of PR plan which may include a major PR campaign.	AAZPA PR Team	8/91	8/92		
5. Carry out plan that may include major PR campaign.	AAZPA PR Dir. & Team	4/91	Annual review from 6/92		
6. Monitor and evaluate progress and results of the plan.	LRP Comm.	8/92	Annual review from 8/92		
7. Review and report at all board meetings and through COMMUNIQUE	LRP Comm. & AAZPA PR DIR	8/92	Annual review from 8/92		Perhaps quarterly via self-reporting mechanism.

KEY RESULT AREA II -- ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL AND WILDLIFE CONSERVATION.

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Objective 3: Develop a public relations plan based on existing market research to determine our message by September 1992.

Strategy 2: Coordinate PR skills and information within member institutions.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Identify which institutions currently have PR staff and/or capabilities.	AAZPA PR Dir.	10/91	11/91		Probably already knows
2. Secure willingness to cooperate by sharing instruments, results, ideas.	AAZPA PR Dir/Comm.	11/91	1/92		
3. Develop mechanisms for sharing information	AAZPA PR Dir/Comm.	1/92	7/92		
4. Implement ongoing sharing and cooperation.	AAZPA PR Dir.	8/92	Annual update starting 8/92		

### ACTION PLANS

**KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.** (Planning Leader: Bruce Read)

**Preamble:** The highest priority of the AAZPA and its member institutions is conservation. Over the next five years, in order to expand and improve conservation programs, we must fully integrate captive breeding programs with other global efforts; expand species survival plans in both terrestrial and aquatic realms through training and increased efficiency; encourage research in support of these programs; encourage conservation, education and habitat preservation at all levels; and finally, promote internal resource conservation within all member institutions.

**Objective 1:** Integrate AAZPA programs with global captive breeding and other conservation programs by 1993.

**Strategy 1:** Coordinate planning to determine resources, species prioritization and more efficient means of animal exchanges internationally.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop protocols of cooperation with IUCN, SSC, CBSG.	Hutchins	8/90	11/90		IUCN; SSC, CBSG, other specialist groups.
2. Develop a continuing and efficient liaison and communication system with international and regional conservation organizations with similar objectives.	AAZPA Pres.	8/90	Ongoing with annual review from 8/91		ISIS EEP Programs IUDZG Above are closest organizations but associations of private holders or fanciers may be important for coverage of several major animal groups.
3. Participate in global heritage programs.	Hutchins	8/90	Ongoing with annual review from 8/91		SSC directed initiative in cooperation with IUDZG, CBSG prospectively will assemble biological information for program targets.
4. Develop annual report on AAZPA and members' conservation efforts globally.	Hutchins	12/90	12/91		
5. Propose a program to appropriate government agencies, congressional committees to facilitate transfer of genetic material between animal populations internationally.	B. Read	1991	1992		AAZV is a natural allied organization. It will require a coordinated effort to plan and perhaps exertion of the lobbying capacity of AAZPA members to effect.

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 1: Integrate AAZPA programs with global captive breeding and other conservation programs by 1993.

Strategy 2: Increase participation in species restoration programs.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Participate in state-of-the-art workshops on a regional basis.	Hutchins	1/91	Ongoing with annual review from 8/91.		In cooperation with CBSG, government agencies and others.
2. Further development of consortium programs in developing countries.	WCMC/ Hutchins	1/91	Ongoing with annual review from 8/91		Institutions representatives from AAZPA member zoos and aquariums will be central to this program. Collaboration with international organizations is essential.
3. Workshop on disease in captive animals and potential effect on re-introductions.	WCMC/ Hutchins	9/91	9/92		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 2: Expand and improve the SSP and other conservation programs, with a target goal of 100 SSP programs by 1995.

Strategy 1: Develop more effective and efficient procedures for SSP and other conservation programs.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Streamline meeting and travel needs.	Hutchins	9/90	9/92		AAZPA to provide funding for program development.
2. Participate in developing user friendly software.	ISIS/ Hutchins	3/91	12/92		
3. Develop a more efficient communication system including publication of research.	Wemmer	10/90	12/93		
4. Evaluation of programs.	WCMC	12/90	Annual review from 12/91		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

Page 4

Objective 2: Expand and improve the SSP and other conservation programs with a target goal of 100 SSP programs by 1995.

Strategy 2: Seek and procure political and financial support for conservation programs.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Review policy and goals for CEF fund.	AAZPA Pres. & Board	8/90	8/91		At least double current monies available for SSP programs (see KRA I).
2. Prepare project menu for development purposes.	WCMC/ Hutchins	10/90	8/91		
3. Seek financial support for conservation programs.	Dev. Off.	1/91	1/95		
4. Develop a process to communicate and facilitate political support at all levels (board, local & national).	VEHRS/ JENKINS	1/91	Annual review from 8/91		
5. Move forward on political front to develop increased governmental funding for zoo/aquarium conservation.	VEHRS/ JENKINS & BOARD	1992	Annual Review		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 2: Expand and improve the SSP and other conservation programs with a target goal of 100 SSP programs by 1995.

Strategy 3: Educate and recruit people to manage SSP, studbook and Taxon Advisory Groups.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Appoint a task force to establish an AAZPA Conservation Academy.	AAZPA Pres.	8/90	8/90	8/90	
2. Establish a pilot program.	B. Read	9/90	3/91		
3. Establish a self-sustaining program.	AAZPA BD.	1/91	3/92		AAZPA Development Officer to help to procure grants to partially underwrite the program (Cost estimate \$25,000 per year -- 1991 funds from CEF.

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 3: Provide increased scientific support for SSP and conservation programs.

Strategy 1: Determine the research priorities for SSP and conservation programs.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. The formation of WCMC scientific advisory committee.	WCMC	8/90	9/90		
2. Encourage and assist the WCMC committee in the identification of critical research priorities.	C. Wemmer	1/91	8/91 with annual update.		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 3: Provide increased scientific support for SSP and conservation programs.

Strategy 2: Facilitate the development and implementation of research on aquariums and zoos.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop a model research protocol. 	Hutchins	1/91	12/92		The university community needs a clear understanding of the nature and limits of research in a zoo and aquarium setting.
2. Create a means of recognition for outstanding research.	Chairman, Honors & Awards Comm.	9/91	9/92		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 2: Provide increased scientific support for SSP and conservation programs.

Strategy 3: Encourage the recruitment and training of new scientists, educators, and other staff for zoos and aquariums.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop a national fellowship program wherein Ph.D. students are trained in our zoological parks and aquariums while doing their research using the zoological collection while receiving a stipend from the fellowship program.	AAZPA Pres.	1991	1993		This program is to recruit scientists, educators early in their development and infuse them into captive zoological community as well as train them to function within AAZPA systems.
2. Advertise advanced positions in other professional journals to bring trained professionals to the zoological profession	Individual Institutions	1991	Ongoing		This will expand the number of professionals to solicit for our job market.
3. Define guidelines for what the professional level of expertise is needed to function in our job levels within the zoological profession.	AAZPA Exec. Sec.	1991	Ongoing		This will add some uniformity in the goal of the fellowship and how we approach the other professional journals.

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 3: Provide increased scientific support for SSP and conservation programs.

Strategy 4: Encourage the development of graduate programs in zoo and aquarium conservation biology.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop a curriculum with 1-3 universities that will meet the academic needs of the schools and practical needs of zoos.	AAZPA Office & Educ. Coord & Educ. Comm.	Mid 1991	?		The AAZPA as a profession has not defined what is needed, as educational background and training for an individual to be hired directly out of a scholastic program. This program will give future definition to the application of science within our profession

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 4: Encourage and expand conservation education activities.

Strategy 1: Compile and disseminate information on conservation education activities.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. As part of AAZPA database, determine the scope of existing conservation programs.	AAZPA Dep. Dir.	1/90	9/91		Some data is already in existence, but much of it is not in an easily analyzable form.
2. Compile an easy access information system on outstanding conservation education programs and publications within our own or related institutions.	Educ. Coord	6/91	7/92		To be updated annual thereafter.
3. Develop a generic, easily-adapted series of aquarium and zoo graphics, video, traveling exhibitions, to demonstrate our role in conservation to the public.	Public Educ. Comm.	6/91	12/93		Initial materials, more to follow on an annual basis.

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 4: Encourage and expand conservation education activities.

Strategy 2: Enter into national and global conservation education programs.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Identify appropriate governmental programs and opportunities.	Education Coord.	3/91	12/91		
2. Identify appropriate potential partnerships.	Educ. Coord	6/91	12/91		
3. Enter into at least one major program each year; example: the Rhino Walk and Conservation Day.	Conservation Center Ed. Coord.	1/91	12/95		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 4: Encourage and expand conservation education activities.

Strategy 3: Provide necessary staff and funding.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Hire AAZPA Education Coordinator.	WAGNER/ JENKINS	1/91	3/91		The education coordinator, working with the P.E. Committee will develop a list of potentially fundable programs.
2. Hire AAZPA grants and development officer.	WAGNER/ JENKINS	1/91	3/91		
3. Seek and obtain national funding for conservation programs (government, corporate funding).	Development Officer	3/91	Ongoing with annual review from 12/91		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 5: Promote conservation of resources in AAZPA institutions.

Strategy 1: Obtain and disseminate information on wise resource management.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Establish a task force to collect and communicate information on zoo and aquarium operations.	AAZPA Pres.	3/91	8/91		Important to image and effectiveness in lobbying. Topics to cover include water usage, waste management, material recycling, energy conservation. Data should be in AAZPA database center.
2. Incorporate task force data into AAZPA data base.	JENKINS	8/91	12/91		

KEY RESULT AREA III -- EXPAND AND IMPROVE OUR CONSERVATION PROGRAMS.

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Objective 5: Promote conservation of resources in AAZPA institutions.

Strategy 2: Suggest goals and recognize achievement in this area of concern.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Task force to analyze collection of information to identify high performance levels.	Chairman of Task Force	8/91	8/92		P.E. committee participation, comparisons with other professional associations desirable. Will involve management and operations personnel in AAZPA institutions who otherwise might not be in the conservation picture.
2. Establish awards for resource accomplishments and innovations.	Chairman Honors & Awards Comm	3/92	9/92		

**ACTION PLANS**

**KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.**

(Planning Leader: Steve Wylie)

**Preamble:** The legislative and regulatory issues facing the Association and its members are increasing in intensity, complexity and scope. The conservation, education and research programs supported by these institutions are being jeopardized. Therefore, the AAZPA and its members must assume a leadership role in refining and unifying the efforts made to address these issues.

**Objective 1:** Identify legislative and regulatory priorities and initiatives by January 1991.

**Strategy 1:** Appropriate staff and association members with knowledge of legislative and regulatory history and challenges should establish priorities.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. At 1990 Annual Conference, Legislative Comm. to discuss means of establishing priorities.	E. SCHMITT	9/90	9/90		K. Vehrs, D. Jenkins and others to assist.
2. Prepare document identifying priorities.	K. VEHR	10/90	11/90		E. Schmitt, D. Jenkins and others to assist.
3. Distribute document to Board.	VEHR/ SCHMITT		3/91		
4. Distribute document to institutional CEOs for their information.	VEHR	3/90	1/91		D. Jenkins to assist.
5. Evaluate both the document and its effectiveness on a yearly basis.	VEHR/ LEG. COMM.		Annual Bd. Mtg.		

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 2

Objective 1: Identify legislative and regulatory priorities and initiatives.

Strategy 2: Design and distribute a survey to institutional CEOs that will solicit comments and concerns on institutional positions relative to legislative and regulatory questions.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Formulate and distribute surveys.	K. VEHR	7/90	9/90	8/90	E. Schmitt & D. Jenkins to assist.
2. Collate survey response and publish results in COMMUNIQUE.	K. VEHR	9/90	10/90		Preliminary data to be used for input into priority meeting of 9/23/90.
3. Obtain names of key contact individuals from CEOs (other than CEO).	K. VEHR	3/91	9/91		
4. Evaluate and continue if successful.			Annual		May use annual Director's meeting as forum.

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 3

Objective 2: Reduce institutional reaction time associated with high priority legislative and regulatory issues.

Strategy 1: Develop a decision making process which ensures timely response.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop a step-by-step process that will result in timely responses	K. VEHRS	8/90	12/90		
2. Report to Board.	K. VEHRS SCHMITT	8/90	3/91		

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 4

Objective 2: Reduce institutional reaction time associated with legislative and regulatory issues.

Strategy 2: Develop a phone/FAX/mailing network.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop phone/FAX/mailing system that is topic-related, fast and efficient.	K. VEHR B. Robinson	7/90	9/90		Better utilization of existing commercial networks.
2. Make system topic-related.	K. VEHR		8/91		
3. Develop a computer billboard.	K. VEHR		8/92		Dependent on Zoo & aquarium computerization and willingness to utilize for this function.

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 5

Objective 3: Expand the professional base in order to be more pro-active across a broader range of issues than presently possible.

Strategy 1: Form coalitions with other conservation organizations.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Identify appropriate organizations.	WAGNER	10/90	1/91		D. Jenkins, K. Vehrs & E. Schmitt to assist.
2. Select appropriate organizations.	AAZPA BD.	2/91	8/91		B. Wagner & K. Vehrs to assist.
3. Identify and assign AAZPA professional members to selected groups and coalitions.	AAZPA PRES.	8/91	9/91		AAZPA Board and B. Wagner to assist.
4. Evaluate the effect of each coalition.	WAGNER & BOARD		Annual		

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 6

Objective 3: Expand the professional base in order to be more pro-active across a broader range of issues than presently possible.

Strategy 2: Hire an outside firm or legislative specialist who will supplement the Association's professional legislative staff.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Identify agencies that can be of assistance to us.	K. VEHRHS	10/90	1/91		
2. When required, develop and distribute requests for proposals from these agencies.	B. WAGNER				K. Vehrs to assist.
3. Select appropriate outside assistance for specific topics.	AAZPA BD.				B. Wagner and K. Vehrs to recommend.

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 7

Objective 4: Increase association member participation in legislative challenges and process.

Strategy 1: Inform institutional members of their respective legislators and on which committee they serve.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Develop a list of legislators and committees on which they serve.	K. VEHR	7/90	3/90		E. Schmitt to assist.
2. Distribute the list to institutional members.	K. VEHR	9/90	10/90		Link to phone/FAX/mailing system.
3. Distribute governmental guide.	K. VEHR		12/91		
4. Keep list current.	K. VEHR		Bi-annual		

KEY RESULT AREA IV -- DEVELOP AND ENHANCE AN EFFECTIVE LEGISLATIVE PLAN.

Page 8

Objective 4: Increase association member participation in legislative challenges and process.

Strategy 2: Formulate a plan for categorizing severities of legislative issues and methods of how to respond to each.

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	REMARKS: (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. Formulate a plan for identifying and categorizing severities and methods to respond.	K. VEHRs	7/90	1/92		E. Schmitt, B. Wagner and D. Jenkins to assist -- state and international problems included.
2. Committee to draft plan and present to Board.	K. VEHRs/ Leg. Comm.	8/91	3/91		
3. Revise plan with membership input and get final Board approval.	K. VEHRs/ Leg. Comm.	3/91	3/92		
4. Distribute final plan to institutional members.	K. VEHRs	1/92	4/92		
5. Make presentations or conduct workshops explaining plan.	K. VEHRs	3/92	9/92		E. Schmitt to assist.

	1990	1991	1992	1993	1994	1995
<b>KRA I</b>						
Crisis Management			\$80,000			
Executive Secretary			\$37,500	\$37,500	\$37,500	\$37,500
Business Mgr. & Sec.				\$65,000	\$65,000	\$65,000
Publ. Editor & Sec.				\$62,000	\$62,000	\$62,000
Equipment			\$15,000		\$15,000	
Exec. Office Expansion				\$50,000		
<b>KRA II</b>						
Recognition/Logo			\$40,000			
Major PR				\$400,000		
<b>KRA III</b>						
Conservation Biologist			\$37,500	\$37,500	\$37,500	\$37,500
Assistant Director				\$50,000	\$50,000	\$50,000
Administrative Asst.					\$35,000	\$35,000
Research Coordinator						\$50,000
Disease Seminar/Reintro.			\$40,000			
Conservation Education		\$160,000				
Conserv. Ctr. Expansion						\$750,000
<b>KRA IV</b>						
Legal Fund			\$50,000		\$50,000	
Assistant #1 & Sec.				\$80,000	\$80,000	\$80,000
Staff Atty. & Sec.					\$85,000	\$85,000
<b>Base</b>	\$1,015,470	\$1,286,500	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000
Plus unshaded amounts			\$125,000	\$382,000	\$502,000	\$502,000
Subtotal	\$1,015,470	\$1,286,500	\$1,425,000	\$1,682,000	\$1,802,000	\$1,802,000
Plus shaded amounts		\$160,000	\$175,000	\$400,000	\$15,000	\$750,000
<b>GRAND TOTAL</b>	\$1,015,470	\$1,446,500	\$1,600,000	\$2,082,000	\$1,817,000	\$2,552,000

	1990	1991	1992	1993	1994	1995
<b>KRA I</b>						
Crisis Management			\$80,000			
Executive Secretary			\$37,500	\$37,500	\$37,500	\$37,500
Business Mgr. & Sec.				\$65,000	\$65,000	\$65,000
Publ. Editor & Sec.				\$62,000	\$62,000	\$62,000
Equipment			\$15,000		\$15,000	
Exec. Office Expansion				\$50,000		
<b>KRA II</b>						
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Conservation Education		\$160,000				
Conserv. Ctr. Expansion						\$750,000
<b>KRA IV</b>						
Legal Fund			\$50,000		\$50,000	
Assistant #1 & Sec.				\$80,000	\$80,000	\$80,000
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<b>Base</b>	\$1,015,470	\$1,286,500	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000
Plus unshaded amounts			\$125,000	\$382,000	\$502,000	\$502,000
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Plus shaded amounts		\$160,000	\$175,000	\$400,000	\$15,000	\$750,000
<b>GRAND TOTAL</b>	\$1,015,470	\$1,446,500	\$1,600,000	\$2,082,000	\$1,817,000	\$2,552,000

**AAZPA LONG RANGE PLAN 1991-1995**  
**MAJOR FINANCIAL IMPACTS**

	1990	1991	1992	1993	1994	1995
<b>KRA I</b>						
Crisis Management			\$80,000			
Executive Secretary			\$37,500	\$37,500	\$37,500	\$37,500
Business Mgr. & Sec.				\$65,000	\$65,000	\$65,000
Publ. Editor & Sec.				\$62,000	\$62,000	\$62,000
Equipment			\$15,000		\$15,000	
Exec. Office Expansion				\$50,000		
<b>KRA II</b>						
Recognition/Logo			\$40,000			
Major PR				\$400,000		
<b>KRA III</b>						
Conservation Biologist			\$37,500	\$37,500	\$37,500	\$37,500
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Research Coordinator						\$50,000
Disease Seminar/Reintro.			\$40,000			
Conservation Education		\$160,000				
Conserv. Ctr. Expansion						\$750,000
<b>KRA IV</b>						
Legal Fund			\$50,000		\$50,000	
Assistant #1 & Sec.				\$80,000	\$80,000	\$80,000
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<b>Base</b>	\$1,015,470	\$1,286,500	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000
Plus unshaded amounts			\$125,000	\$382,000	\$502,000	\$502,000
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Plus shaded amounts		\$160,000	\$175,000	\$400,000	\$15,000	\$750,000
<b>GRAND TOTAL</b>	\$1,015,470	\$1,446,500	\$1,600,000	\$2,082,000	\$1,817,000	\$2,552,000

Notes:

1. Does not include inflationary increases.
2. 1991 Base Budget includes Education and Development Director plus \$160,000 in costs for Rhino Walk.
3. Shaded areas represent one-time expenses.
4. Unshaded amounts include increased staff and legal fees.
5. Some items may be funded from Conservation Endowment Fund.



# American Association of Zoological Parks and Aquariums

DATE: February 7, 1991

REPLY TO: Kathryn R. Roberts, Chair  
Long Range Planning Committee  
Minnesota Zoo  
Apple Valley, MN. 55124

To: President Zucconi

Subject: Mid-year Report Long Range Planning Committee

A small group of people met at the Indianapolis AAZPA conference to discuss the future role of the Long Range Planning Committee. The people who met are the same people who participated in the planning sessions facilitated by Bob Smith and accepted responsibility for seeing a Key Results Area through to completion.

In a discussion with you, it was decided that we would put the full formal Long Range Planning Committee on hold until the Long Range Plan was completed and accepted by the Board.

A copy of the draft Plan document and a summary of the process was mailed to the AAZPA committee chairs and all members of the full Long Range Plan asking for their comments and suggestions.

Those of us who are responsible for seeing through Key Results Areas have also continued to modify and update our sections based on the comments received. A copy of the draft plan is attached.

President Elect Steve Taylor has requested time on the agenda for all the Regional Conferences to present a draft Planning document and respond to questions which may arise.

This has been a huge undertaking by many people. I would like to take this opportunity to thank everyone for their hard work and commitment to the task and the organization.

Respectfully submitted,

cc: Long Range Plan Board Liaison, Bill Conway  
S. Taylor  
B. Read  
S. Wylie  
W. Dennler D. Jenkins  
N. Brown  
S. Engfer  
C. Hoessle  
M. Robinson  
P. Krantz  
L. Boyd



# American Association of Zoological Parks and Aquariums

DATE: January 30, 1991

REPLY TO: Kathryn R. Roberts, Chair  
Long Range Planning Committee  
Minnesota Zoo  
Apple Valley, MN. 55124

To: President Zucconi

Subject: Mid-year Report **Long Range Planning Committee**

A small group of people met at the Indianapolis AAZPA conference to discuss the future role of the Long Range Planning Committee. The people who met are the same people who participated in the planning sessions facilitated by Bob Smith and accepted responsibility for seeing a Key Results Area through to completion.

In a discussion with you, it was decided that we would put the full formal Long Range Planning Committee on hold until the Long Range Plan was completed and accepted by the Board.

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Those of us who are responsible for seeing through Key Results Areas have also continued to modify and update our sections based on the comments received.

President Elect Steve Taylor has requested time on the agenda for all the Regional Conferences to present a draft Planning document and respond to questions which may arise.

It is the intent of our small informal committee to present a final draft of the Plan to the Board at the mid-year meeting. A copy of the draft document will be mailed to all Board members directly from my office at least 10 days prior to the meeting.

This has been a huge undertaking by many people. I would like to take this opportunity to thank everyone for their hard work and commitment to the task and the organization.

Respectfully submitted,

cc:

*Bill Conway, Bill Liaison*  
S. Taylor  
B. Reed  
S. Wylie  
W. Dennler  
D. Jenkins

copy

2-9-91

Dear Steve,

The Plan is in a darn good draft form and was mailed to Wheeling with the letter of progress. We did not include the estimated cost for the effort for two reasons. First, the numbers didn't add up, and secondly, I didn't know what to do with the stuff Wagner sent along. We can give it to Board members at the mid-year meeting.

Now, on another note. I read the material Wagner sent to you and David and I am hopping mad. The tone is terrible. If I interacted with my Board Chair in that manner, I would be on thin, thin ice. I am offended by the manner the message was delivered. I also have a practical concern about the amount of money he is asking for more office space. The Minnesota Zoo is out of money for AAZPA's office space. We can no longer afford the luxury of paying for two offices. I am more than willing to pay for increased services as outlined in the long range plan, or for a conservation initiative, or for training. It seems to me to be a very poor business to use needed program dollars for an unnecessary office complex.

Thanks for listening. How did your dinner go?

Kathryn



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
(304) 242-2160 Fax: 304-242-2283

A non-profit, tax-exempt organization dedicated to the advancement of zoological parks and aquariums for conservation, education, scientific studies and recreation.

## TELECOPIER MEMORANDUM

Fax Number: 304-242-2283

### OFFICERS

President  
DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESLLE

Executive Director  
ROBERT C. WAGNER

### DIRECTORS

TED A. BEATHE

DENNIS A. MENTZ, JR., Ph.D.

CHRISTEN M. WEDGER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SFEA

R. GREGORY TANKY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN MCCLOSKEY

TO: STEVE TAYLOR, DIRECTOR, CLEVELAND METROPARKS ZOO  
FROM: ROBERT WAGNER, EXECUTIVE DIRECTOR *RW*  
DATE: 1 February 1991  
RE: STRATEGIC PLAN

Total Pages 4

If there are any problems regarding this fax, call (304) 242-2160.

COMMENTS: I received your packet of Strategic Plan materials today via Federal Express. I will attempt to digest them over the next several weeks and offer comment as time permits. However, I wanted to get the following information to you. That information was prepared and sent to David Zucconi on 17 October 1990 and includes my "wish" list for the future of AAZPA. Regrettably, the only items I see factored into the Strategic Plan deals with new employees for the Conservation Center. I request that you include all of the items on the attached list into the Long-Range Plan in the fashion I submitted them to David. Please also note that both the Executive Office and Conservation Center are at capacity in terms of space. Therefore, you will note I have added a \$1.5 million in 1994 to secure a larger building for the Conservation Center. However, I noted that figure would be reduced by approximately 50% by selling our present property.

The addition of the numerous staff people required for the Executive Office will mandate that we secure larger facilities. Therefore, please add another \$500,000.

Obviously, we will have a chance to talk about these matters during your stay here in Wheeling next week.

FEB-21-1991

15:36

FROM AAZPA

TO

TAYLOR

P.02/04



## American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
(304) 242-2160 Fax: 304-242-2283

A nonprofit tax-exempt organization dedicated to the advancement of zoological parks and aquariums for conservation, education, scientific studies and recreation.

17 October 1990

PERSONAL AND CONFIDENTIAL

**OFFICERS**

Mr. David Zucconi, Director  
Tulsa Zoological Park  
5701 E. 36th Street North  
Tulsa, OK 74115

President  
DAVID G. ZUCCONI

President-Elect  
STEVEN TAYLOR

Dear David:

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOSSLE

Executive Director  
ROBERT O. WAGNER

Per our discussions over the past several days, this letter will serve to explain some of the items on the list of projects/programs I recently sent you. The list includes matters called to our attention during the past year by members of the Board, various committee chairmen, strategic plan, various zoo and aquarium directors and in a few cases, members of my staff. None of the items are included in my 1991 operating budget. All of them require the infusion of new dollars, and the source of those dollars has not yet been identified.

**DIRECTORS**

TED A. SEATHS

DENNIS A. MERITT, JR., Ph.D.

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Before I begin to identify and explain specific items on the list, I want to express my pleasure with the amount of faith being given to me and my staff by the Board and members of the Association in forging ahead with new and exciting programs. At the same time, I must express a tiny bit of concern with the ever-growing number of projects we are being called upon to complete. I am worried about nearly all of my staff's obvious overload. As you know, we are already deeply immersed in the Rhino Walk program; and even though we have retained a full-time coordinator (paid for via grants), David and Karen have already dedicated a great deal of time to the project and will continue to do so during the life of the promotion. I will also have to dedicate a portion of my time in the overall administration of the event.

If we take on any additional projects, I envision one of three things happening: 1) Most or all of any new projects/efforts will have to be handled by professional firms. 2) We will be required to bring on more staff now, and funds for such remain unidentified. 3) We will assign added responsibilities to the already overburdened staff and suffer the consequences.

On the brighter side, 1990 will prove to be an incredibly successful year for AAZPA in many respects, including financially. Income from membership dues will be about \$78,000 over the amount projected, conference exhibits will be up 50% more than anticipated (an increase of more than \$19,000) and interest on investments will be up nearly 100% (an increase of \$22,000). Moreover, we have deposited the Ralston Purina promotion money in the restricted CEF account, which will generate approximately \$16,000 more in interest during 1991. Also, the Purina income for 1991 will result in a \$300,000 contribution, which should be received during the last quarter of the year.

Mr. David Zucconi  
17 October 1990  
Page 2

In considering all of the above, there is no way we can sustain the 1990 growth in general income during 1991. In building my general operating budget, I factor in the anticipated income from all sources and use the current year trends in my projections.

David, if the Board were to allow me to add some of the "surplus" in 1990 income over 1990 authorized expenditures to add to my 1991 general operating budget and allow the expenditure of the \$16,000 additional interest in the CEF income resulting from the deposit of the Purina money, I may be able to fund the requested Conservation Biologist and Education Coordinator/Director positions. Please let me know your thoughts. Laurie Bingaman is a computer whiz, very familiar with SSP's and masterplanning. She is available, and Michael Hutchins/Bob Weise need her assistance. Moreover, it would be another signal that conservation remains our highest priority.

Following is a more detailed version of the list I sent you Monday.

Please let me know what further assistance I can offer.

All best regards,

AMERICAN ASSOCIATION OF  
ZOOLOGICAL PARKS AND AQUARIUMS



Robert O. Wagner  
Executive Director

ROW/tw

Enclosure

1991	Education Coordinator/Officer (including fringe benefits) - Conservation Center	\$ 40,000
1991/92	Major symposium on zoo diseases (Conway's request)	\$ 40,000
1991/92	Crisis media management seminars (5 Regional and Annual Conference)	\$80,000/\$100,000
1990/91	Public relations campaign for Conservation Day (I believe such an expenditure and program would be inappropriate. It is a "natural" for incorporation with the Rhino Walk. As you know, the Discovery Channel is a full partner with us and would see to it that Conservation Day was well advertised - at no cost.)	\$100,000
1991/92	Major public relations campaign (Will require very careful planning to determine the goals and objectives.)	\$400,000/\$1,000,000
1991	Legislative Officer and secretary for marine mammal issues (including fringe benefits) - Conservation Center	\$ 80,000
1992/93	Staff Attorney and secretary (including fringe benefits) - Conservation Center	\$ 85,000
1992/93	Publications Editor and secretary including fringe benefits) - Executive Office	\$ 62,000
1991	Conservation Biologist (including fringe benefits) - Conservation Center	\$ 37,500
1991/92	Executive Secretary (including fringe benefits) - Executive Office	\$ 37,500
1992/93	Business Manager and secretary (including fringe benefits) - Executive Office	\$ 65,000
1992	Conservation Biologist and secretary (including fringe benefits) - Conservation Center	\$ 63,500
1994	Conservation Biologist and secretary (including fringe benefits) - Conservation Center	\$ 63,500
1994	Larger building to house Conservation Center staff (The cost would be reduced by approximately 50% by selling the existing property.)	\$1,500,000
1992/93	Personnel Manager and secretary (including fringe benefits) - Executive Office	\$ 63,000
1991/94	Office furniture and equipment for all the above	\$100,000

## AAZPA

**DRAFT**LONG-RANGE PLAN 1991 - 1995  
MAJOR FINANCIAL IMPACTS

	1991	1992	1993	1994	1995
KRA I - Crisis Mgmt.	\$	80,000	-	-	-
Executive Sec'y	37,500	37,500	37,500	37,500	
Bus. Mgr. & Sec'y		65,000	65,000	65,000	
Pub./Editor & Sec'y			62,000	62,000	62,000
Personnel Manager				65,000	65,000
Equipment		25,000	25,000	25,000	25,000
Expansion of Exec. Office			500,000		
KRA II - Recog./Logo		40,000			
- Major PR			400,000		
KRA III - Academy		25,000	25,000	25,000	25,000
Cons. Bio.		37,500	37,500	37,500	37,500
Asst. Director			50,000	50,000	50,000
Admin. Assist.				35,000	35,000
Research Coord					50,000
Disease/Reintr.		40,000			
Conser. Educ.	100,000	100,000	100,000	100,000	100,000
Expansion-Conser. Center			750,000		
KRA VI - Legal Fund		100,000	100,000	100,000	100,000
Assist. #1		80,000			
Assist. #2				85,000	
Base	1,300,000	1,300,000	1,300,000	1,300,000	1,300,000
	100,000	565,000	2,152,000	687,000	652,000
Total	\$ 1,400,000	1,865,000	3,452,000	1,987,000	1,952,000

1. Does not include inflationary increases.
2. 1991 Base Budget is approximately 1.3 million dollars including Education and



# American Association of Zoological Parks and Aquariums

DATE: February 8, 1991

REPLY TO: Kathryn R. Roberts, Chair  
Long Range Planning Committee  
Minnesota Zoo  
Apple Valley, MN 55124

Susan Engfer  
Cheyenne Mountain Zoo  
4250 Cheyenne Mt. Zoo Rd.  
Colorado Springs, CO 80906

Dear Susan:

Thanks for your memo of January 15th commenting on the draft strategic plan. The new mission was formulated by the Nucleus Group for Strategic Planning. I've attached a document which explains the discussion resulting in the current wording.

Your suggestion for parallel construction in the values section was taken. Thank you for pointing it out. As noted in the attached mid-year report, the document is in a draft form. I fully expect changes to be made before the final plan is published. Your suggested rewording for the conservation value may well be included in the final plan.

Again, thanks for taking the time to comment.

Sincerely,

Kathryn R. Roberts, Chair  
Long Range Planning Committee

gb

## MISSION STATEMENT TASK FORCE REPORT

The Mission Statement Task Force has considered a number of ideas and approaches to the Mission Statement. Submitted here for your consideration are basically two Mission Statements. One is very simple and straight forward while the other contains a number of planks (or goals). We have also presented here explanations, discussions, and alternatives.

For historical perspective, the report includes the Mission Statement that was on the docket when we departed Washington.

### AAZPA MISSION STATEMENT

"The mission of AAZPA is to work in concert with its members for the worldwide conservation of wildlife through the encouragement and coordination of captive propagation, environmental education, and relevant research programs. AAZPA promotes the cultural, educational, and recreational benefits of zoos and aquariums, and its members are committed to the highest standards and practices of their profession."

Discussion: It may be that the above statement is too wordy and that it already contains a number of planks. In other words, it could essentially be broken down into the following:

The mission of the AAZPA is to work in concert with its members to:

- encourage and coordinate the worldwide conservation of wildlife through captive propagation.
- encourage and coordinate the worldwide conservation of wildlife through environmental education.
- encourage and coordinate the worldwide conservation of wildlife through relevant research programs.
- promote the cultural benefits of zoos and aquariums.
- promote the educational benefits of zoos and aquariums.
- promote the recreational benefits of zoos and aquariums.

The final statement "and its members are committed to the highest standards and practices of their profession", does not speak to the format of a mission statement and probably cannot be said of all members of the Association. One member also raised the concern as to whether any reference to "recreation" should be mentioned. For these reasons, there may be a question as to whether this statement is acceptable in its present form.

AAZPA MISSION STATEMENT (Simple Form)

"The mission of the American Association of Zoological Parks and Aquariums is to foster and support excellence in the purposes of zoological parks and aquariums by encouraging the highest professional standards and practices possible."

Discussion: This statement basically says that the mission of the AAZPA is to foster (i.e., promote or stimulate) and support (i.e., sustain or commit to) excellence in the purposes (already established as recreation, education, conservation, and zoological research) of zoological parks and aquariums by encouraging the highest professional standards and practices possible (this identifies itself with those it serves and who serve it).

The statement is also based on the premise that it doesn't matter whether the AAZPA is an association of Institutions or Individual members. It is an organization that conducts many activities on behalf and through the guidance of its membership. Its primary functions are to enhance cooperation, communication, and standards among its members, and it conducts these activities only as far as its members allow. The Association by itself does not enter into any of the purposes of its constituencies without their full cooperation and support. In other words, the AAZPA can perhaps best be defined as an association of members helping members that essentially do not have an identity, purpose, or agenda of their own apart from those members.

It has been suggested that the last word of the statement "possible" be dropped. It was also suggested that the statement "from among its members" be added following "possible".

AAZPA MISSION STATEMENT (With Planks)

The mission of the American Association of Zoological Parks and Aquariums is to foster and support its membership by...

- PROMOTING the benefits and purposes of zoological parks and aquariums as cultural assets.
- ENCOURAGING the highest professional standards and practices possible.
- FACILITATING communications and cooperation among its members in all association endeavors.
- REPRESENTING the interests and concerns of its members on zoological and nonzoological matters.
- COORDINATING the collective efforts of its members toward identified goals.

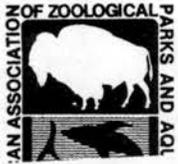
Discussion: These points are presented in no particular order of priority. These thoughts have been consolidated for simplification, and perhaps some are too general or broad. However, they can certainly be elaborated upon if desired.

It was suggested that these planks might also be considered as goals. In other words, the Association would have a simple Mission Statement followed by a set of goals. These "goals" would be reviewed on a regular basis to determine whether they are being met.

#### GOALS

- Encourage and coordinate the worldwide conservation of wildlife through captive propagation.
- Facilitate the business of its members by providing services, communication, collective marketing, fund raising, and training.
- Represent its members' interests to government agencies and other organizations that also further the cause of wildlife conservation.
- Encourage and coordinate the worldwide conservation of wildlife through environmental education.
- Guide the profession through policies, guidelines, accreditation, and the review of ethical issues.
- Promote the educational, cultural, environmental, and recreational benefits of zoological parks and aquariums.

In summary, the Task Force generally felt that the format of the Mission Statement should be simple and direct in composition. It also felt that if planks and goals were necessary, they might resemble what has been presented here.



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
(304) 242-2160 Fax: 304-242-2283

A nonprofit, tax-exempt organization dedicated to...

SAME LETTER SENT TO EACH OF THE FIVE REGIONAL CONFERENCE COORDINATORS

January 25, 1991

## OFFICERS

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DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSLE

Executive Director  
ROBERT O. WAGNER

Mr. Sal Perkins  
Coordinator  
Western Regional Conference  
Wildlife Safari Park  
P. O. Box 1600  
Winston, Oregon 97469

Dear Sal:

As President-elect of AAZPA, I would like to request ten minutes on your agenda for myself or a designated member of the Board of Directors to present the Association's new Long-range Plan. This would probably be best immediately after Bob Wagner's address to the membership.

As you are probably aware, the Association's first Long-range Plan created the Washington, DC Conservation Center and the positions of Public Relations Director, Deputy Director, and Education Coordinator. Those of us that have been involved in discussing our new plan feel that it is equally as exciting.

Let me know if you can schedule this short presentation.

Sincerely,

Steve H. Taylor  
President-Elect

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WILLIAM G. CONWAY

J. STEPHEN McCUSKER

ST/ms

cc - Bob Wagner  
Dave Zucconi  
Claudia Collier  
Kathryn Roberts



4250 Cheyenne Mt. Zoo Rd.  
Colorado Springs, CO 80906  
(719) 633-9218

15 January 1991

MEMO TO: KATHRYN ROBERTS, CHAIRMAN  
AAZPA LONG RANGE PLANNING COMMITTEE

FROM: SUSAN ENGFER

SUBJECT: STRATEGIC PLAN

In response to your memo of 24 October 1990 requesting the committee's response to the new AAZPA Strategic Plan, I have the following comments:

#### MISSION

1. The 1987-1991 Long-Range Plan for the AAZPA defined the Association's future role as more "action-oriented" than the new Strategic Plan. In the new plan, the AAZPA's mission is to "foster and support excellence in the purposes of zoological parks and aquariums," while in the old plan it is to "contribute to the conservation of wildlife..., to promote the...benefits of zoos and aquariums; and to continue to improve the standards and practices of the profession it represents."

I am curious why the mission has been changed to emphasize "service," or so it reads to me.

2. Since the new mission is totally founded in fostering and supporting the purposes of zoos and aquariums, I feel that these purposes should be defined somewhere in the document for reference. Assuming all of us in the profession can agree to these purposes, it would be helpful to outside parties reading the document to have such a reference point.

#### VALUES

The values section is very good. I have a few comments...

1. Small point - perhaps the usage should be parallel, i.e. working, encouraging, embracing, representing, developing and managing.

2. The Commitment to Conservation value is not very clearly stated. Below is a suggestion for rewording:

"Encouraging the development and coordination of animal management programs and related conservation education and research programs in captivity and in the wild."



3. Should the Advocacy value read: furthering the mission of the AAZPA or furthering the purposes of zoological parks and aquariums?

TIMETABLE

Looks good to me.

ACTION PLANS

All four of the KRA's and the objectives for each seem right on target. I wonder if the timetable for KRA II isn't too ambitious.

Kathryn, it is clear that an enormous amount of time and effort has gone into developing this document. I believe the AAZPA has an excellent plan to guide its activities over the next five years. Now all we have to do is implement it!

cc: D. Zucconi  
R. Wagner



# American Association of Zoological Parks and Aquariums

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January 14, 1991

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WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Brenda Stringer  
John Ball Zoological Gardens  
1300 W. Fulton Street, NW  
Grand Rapids, Michigan 49504

Dear Brenda:

Thank you for responding to the draft of the AAZPA's next long-range plan. I will try to integrate your concepts into the plan by (1) sharing your thoughts with others, and (2) by suggesting revisions when appropriate.

KRA I. Expanding database is already ongoing thanks to past recommendation of your committee and others.

KRA I, Obj. 3 - Development. One of the action steps is to determine guidelines and I believe they may be ready for adoption at the mid-year meeting (1991)

KRA I, Obj. Crisis Management. Yes, I realize that this is happening and could easily be accomplished about the same time the plan is finalized.

KRA I - Membership. Your comments are noted. Many members take AAZPA's fine membership services for granted and complain about everything not being done. In all membership surveys, however, membership services have ranked highest, usually about conservation and legislation.

KRA II - Enhance Image. Comments noted and I will forward to Kathryn Roberts. My feeling is we need to improve image but how that will be done is still to be determined. Any change from current name and logo won't be easy and will take considerable discussion.

Market research is important. Updating Hill & Knowland may be the next step. I will ask Kathryn Roberts to define further PR Committee vs. Team. I think "team" should be defined with more than one PR committee person.

Thank you again for your valued input. We are all a little naive in working on a national scope.

Very best wishes,

  
Steve H. Taylor  
President-Elect

cc - Bob Wagner & staff  
David Jenkins  
Karen Asis  
David Zucconi  
Kathryn Roberts



# American Association of Zoological Parks and Aquariums

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January 3, 1991

JAN 8 1991

Steve Taylor  
Director  
Cleveland Zoo  
3900 Brookside Park Dr.  
Cleveland OH 44109

## OFFICERS

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DAVID G. ZUCCONI

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STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSELE

Executive Director  
ROBERT O. WAGNER

Dear Steve:

Thank you for inviting me to comment on the AAZPA's Strategic Plan. Let me just say I realize what a major task it is to try to plan and coordinate such an effort. My compliments to the Planning Committee. In general, I think the plans look great and certainly ambitious.

## DIRECTORS

TED A. BEATTIE

DENNIS A. MERITT, JR., Ph.D.

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ROY A. SHEA

R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Following are a few brief responses to some of the objectives and strategies:

KRA I-Expand and improve membership services.

Objective 2-establish an expanded data base.

Comment: This is a tremendous project which could be of great value in a variety of areas.

Objective 3-development opportunities

Comment: Would strongly advise that the development committee create standards to judge promotions and development

opportunities. The example that comes to mind is the "Huggies" promotion which had been previously approved by the Board and then met with disapproval from the PR committee due to the implied endorsement of disposable diapers.

I think the biannual survey of institutions is a necessary tool for the development group. One of the concerns I have regarding AAZPA promotions and development activities is that institutions will be asked to participate and then feel that their actual return is insignificant. It wouldn't take long before participation would drop and national promotions would be next to impossible.

#### Objective-Crisis Management Plan

Comment: Louise Sloan and other PR committee members are currently working on a crisis management plan. Our deadline is Sept. 91. Even if we do not make our self-imposed deadline, the plan should be well on its way to completion. I certainly see no problem making the strategic plan deadline of Sept. 92. Our committee is having a mid-year meeting in N. Carolina and could certainly give you a progress report on the crisis plan.

#### Additional comments on KRA I:

We are going to have to start "selling" membership benefits within the association. As the association starts becoming an institution on to itself, members will need to be convinced there is importance to their membership. The privilege of being a member will need to be enforced. If abused, membership will need to be taken away. It is the only form of control the AAZPA has. Benefits and privileges should be highly regarded and not taken lightly.

#### KRA II-Enhance our image.

##### Objective 1-Name recognition.

Comment: This has been discussed for years. Personally I think a lot of time and money could be wasted on this problem. What we really need to do is spend the time and money developing an image for the AAZPA and building name recognition. AAZPA isn't any more unwieldy than NAACP or NCAA or CCCP--yet we all recognize these organizations. A new logo could help better define our image but taking on a name change could be a real drain of money and resources without the expected benefits.

#### Objective-PR Plan

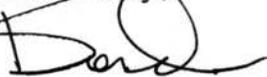
Comment: I know the value of market research, surveys, etc. but can we afford to wait for a research firm to tell us what our message should be. The PR Committee was truly concerned that we start the process of implementing a national PR campaign as soon as possible. We really need to take an aggressive approach to our conservation message. Too often we simply find ourselves reacting to special interest groups and taking a defensive posture. This objective needs to get a jump start from the Board. Hopefully the Rhino Walk will take up the slack in the meantime. This objective has to be a major priority properly backed with AAZPA funds.

Also I'd recommend including more than one PR Committee member serving on this team. There are some extremely talented people in this group with experience in national campaigns. Jeff Jouett, Catherine Belden, Fran Kennelly and Louise Sloan would all be excellent.

Steve, I'm always concerned when asked to comment on AAZPA projects. I have great confidence when working with my own zoo in my own community. On a national scope, however, I feel limited and a little naive. I hope there is something of value for you in my comments. Thanks for asking.

Hope you had a great holiday and that your new year will be a good one!

Sincerely,

A handwritten signature in cursive script, appearing to read "B. Stringer", with a long horizontal flourish extending to the left.

Brenda Stringer  
Public Relations Committee



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
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January 14, 1991

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WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Sandra Skrei  
Program Officer, ZCOG  
Fossil Rim Wildlife Center  
P. O. Drawer 329, Route 1, Box 210  
Glen Rose, Texas 76043

Dear Sandra:

Thank you for your input into the Association's next long-range plan. I will try to integrate your concepts into the plan by (1) sharing your thoughts with others, and (2) suggesting revisions where necessary.

First, your thought on self-regulation is well taken and no one has an answer at this time. We only suggest self-regulation is a value, but it takes consensus of the membership to adopt self-regulating guidelines.

Crisis Management Plan. Please share your thoughts with Karen and the PR Committee. The long-range plan just states there will be a Crisis Management Plan, not what it will include.

KRA Image. I agree, it's a bit confusing. Perhaps Kathryn's preamble (see attached) will help explain. No, each KRA has equal priority.

KRA III - Objs. 4 & 5 are not lowest priority. They will be expanded as we hire an education officer allowing for the conservation education element in everything AAZPA does.

Thanks again for your comments. I think you will be pleased with the final product.

Best wishes,

Steve H. Taylor  
President-Elect

ST/ms

cc - David Zucconi  
Kathryn Roberts  
David Jenkins & staff  
Robert Wagner & staff

# MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.  
 Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

David Jenkins  
 Deputy Director  
 AAZPA  
 Washington Office

Post-It™ brand tax transmittal memo 7671		# of pages • 1
To: <i>David Jenkins</i>	From: <i>Kathryn Roberts</i>	
Co. <i>Clowder Management</i>	Co. <i>MM 200</i>	
Dept. <i>FYI</i>	Phone # <i>(612) 431-9233</i>	
Fax #	Fax # <i>(612) 431-9336</i>	

October 11, 1990

Dear David,

Attached is an edited set of objective statements for KRA II - Enhance our Image as leaders in the environmental and wildlife conservation.

I have also attached a draft preamble for the KRA. Feel free to take as much editorial liberty as you would like. I have no ownership problems with language changes.

Objectives:

1. To develop a new name which will be easily recognized and understood by September 1991.
2. To conduct market research which will define our audiences and issues by
3. Develop a public relations plan which is based on the results of the market research which will effectively communicate our message by September 1991.

Preamble:

It is of very high importance that the AAZPA be recognized as a professional organization whose members are committed leaders in environmental and wildlife conservation issues. In order to achieve the recognition we desire, we must first have an easily identifiable and recognizable name. We need to understand our audiences and the issues they regard as important for us to address. Finally, we must capitalize on our strengths by developing and carrying out a strong public relations plan which is the vehicle to carry our mission.

Let me know if you need more changes or help.

Warm regards,

*Kathryn Roberts*  
 Kathryn R. Roberts

P.S. You put together one heck of a conference. I thought it was very well done and stood in contrast the conferences gone by. Thanks for the effort. It was greatly appreciated.





JAN 3 1991

Dec. 27,1990

Steve Taylor  
Director  
Cleveland Metroparks Zoo  
3900 Brookside Park Drive  
Cleveland, Ohio 44109

Dear Steve,

Thank you for the opportunity to comment on AAZPA's strategic plan. I am enclosing a copy of portions of an article that ran in Dallas' most highly read newspaper. I am doing this because the references to AAZPA and Bob Wagner have been bothering me. As you may remember from my comments on the Marine Mammal Act regarding captive cetaceans, I have been advocating a strong, proactive rather than a defensive, reactive stance, especially when dealing with animal rights groups. With this in mind, I have the following questions and comments:

1. Regarding values, under Self-regulating, does embracing the code of Ethics and Accreditation strengthen the meaning of being accredited? Are their zoos, aquariums, dealers, etc out there that have been accredited or approved (the same thing in the public's eye, see article) that really shouldn't be? Are their zoos that do more to promote the postage stamp menagerie image than the professional conservation organization image? Have we really defined education and conservation? Is breeding a few endangered species a couple of times, and having deteriorating labels (than do not contain any conservation message) near animal exhibits, or entertaining millions of people with animal tricks enough to justify a zoo claiming to be involved in conservation or education? How can we establish rigorous (yet fair, given AAZPA member institutions' budget range of less than \$300,000 to over \$50,000,000) guidelines for accessing if a zoo is truly doing education and conservation?

## 2. ACTION PLANS

KRA I, Obj. 4, (Crisis management plan), I hope that the system contains a means and budget to be updated continuously.

Perhaps the educator and the public relations person would work together to send updates on "looming crises". Much of

Nick Brown's trouble he described in Indianapolis could have been avoided had they understood the depths of the animal rights groups commitment to their cause, and their ability to stir up the press.

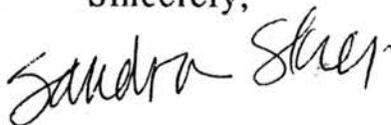
KRA II, I don't understand how these objectives enhance our image as leaders, (is "our" AAZPA's or zoos in general?). Obj. 1, seems to be geared towards increasing public recognition of AAZPA. Does KRA II have more priority than KRA III? If it does, it shouldn't, in that by promoting III, zoos will enhance their image as conservation leaders.

KRA III, Objs. 4 and 5 will go much further in enhancing our image as conservation leaders with the general public than will 1 through 3, as they are something tangible the visitors can participate in, and they can provide examples for the visitors to follow (recycling, water and energy conservation for example). I am glad to see these included, but hope that they will not be the lowest priority.

The Action Plans look great.

Thank you for giving me the opportunity to comment on this important topic. Good luck to all of you.

Sincerely,



Sandra Skrei  
Program Officer/Zoo Conservation Outreach Group  
Education Specialist/ Fossil Rim Foundation  
PEC Member

enc:



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
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January 14, 1991

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Immediate Past President  
CHARLES H. HOESSLE

Executive Director  
ROBERT O. WAGNER

Mr. Hayes Caldwell  
D. K. Caldwell Interests  
P. O. Box 4280  
Tyler, Texas 75712

Dear Hayes:

Thank you for your note regarding the next AAZPA long-range plan.

I believe you bring up an issue that may be beyond the publications task force, but certainly something that is currently causing some confusion. I suppose I somewhat "tongue in cheek" would say, if you could write it, I'd recommend we publish it! I hope we will address some of these issues in March, particularly ISIS and then the animal supplier issue.

Thanks again for your review of the membership services section of the Association's next plan.

Very best wishes,

Steve H. Taylor  
President-Elect

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WILLIAM G. CONWAY

J. STEPHEN McCUSKER

ST/ms

cc - Bob Wagner  
David Zucconi  
Kathryn Roberts



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J. STEPHEN McCUSKER

Gail Schneider  
Chairman, Publications  
Review Task Force  
Dreher Park Zoo  
1301 Summit Boulevard  
West Palm Beach, Florida 33405

Dear Gail:

Thanks for your copy of your publications review. It appears that you have a good start on KRA I, Objective 1 - Review of Publications. It further appears that the August 1991 preliminary report, as suggested in plan, is workable.

As president-elect, I am planning on continuing your Committee until its final report in August 1992.

You and Linda are to be commended on this in depth study.

Very best wishes,

Steve H. Taylor  
President-Elect

ST/ms

cc - Bob Wagner  
Linda Boyd  
David Jenkins  
David Zucconi  
✓ Kathryn Roberts



# DREHER PARK ZOO

1301 SUMMIT BOULEVARD, WEST PALM BEACH, FLORIDA 33405-3098 • (407) 533-0887  
Executive Director, Gail Schneider

December 17, 1990

David G. Zucconi, President AAZPA  
Tulsa Zoo  
5701 East 36th Street North  
Tulsa, OK 74115

Dear Dave,

Thank you for your recent call. I am really sorry for the long delay in getting started on the publications project. However, this note is to let you know that at last, something is done, being produced and will be on its way. However, it will take a few days for our wonder woman, Jean Connery, otherwise known as the one and only secretary using the one and only word processor at Dreher Park Zoo can produce it.

Thank you for your patience. I do care and intend to fulfill my obligation.

Happy Holidays!

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Sincerely,

Gail Schneider  
Executive Director

GMS/jhc





# American Association of Zoological Parks and Aquariums

January 14, 1990

DATE:

REPLY TO:

Nancy S. Hollenbeck, Assistant Director  
Santa Barbara Zoo  
500 Ninos Drive  
Santa Barbara, CA 93103

Steve Taylor, AAZPA President-elect  
Cleveland Metroparks Zoological Park  
3900 Brookside Park Drive  
Cleveland, OH 44109

Dear Steve,

This memo is in response to your memo dated October 15, 1990 which was sent to Sherry Sheng requesting comments and feedback on the Strategic Plan draft. I apologize for sending it back right at the end of your deadline but I must have overloaded my committee because only three have responded to my request for input! I wanted to give them every chance to voice their opinions.

The action plans relating to Education are very straight forward and contain most of the priorities we have discussed in the Public Education Committee, as you know. From a technical standpoint, some of the objectives are measurable (for example Key result Area III, Objective 2) and some are not (Key Result Area III, Objective 4). It seems all of the objectives which relate to education are not measurable. This may have been done intentionally since it is unsure when exactly the Education Coordinator will be hired and what that person's priorities will be.

One committee member felt the plan did not clearly identify the avenues which will allow the action steps to effectively make education more influential. I am not sure I agree that a plan can provide that type of information - it is so dependent on the people who carry out the action steps to provide that sort of leadership.

Under Key Area III, Objective 4, Strategy 1 Action Step 3 (whew!) - Brint Spencer, AAZK/AAZPA liaison, believes that the AAZK PEC can be very helpful and that this should, in part, be a cooperative effort. They have already made some progress in that area with a brochure and they are working on a portable display. He has even suggested a procedure which seems workable. I am going to send it to Brenda Stringer and see if we cannot get a member of our PEC and a member of the PRC to work with AAZK on drawing up some concrete ideas.

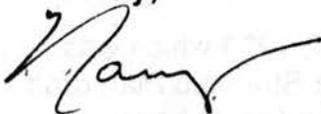
The success of the long-range plan will, of course, depend on the cooperation and communication of those responsible for carrying out the action steps. The more

specific the steps are to begin with, the less chance we have for letting it go by the wayside because of the difficulties in coordinating busy and overloaded (albeit energetic and dedicated) volunteer groups who don't meet very often with busy and overloaded (albeit energetic and dedicated) staff. Some of the action plans outlined are very specific and easily attainable (Key Area III, Objective 4, Strategy 1, Action Step 2) and some seem to encompass an almost insurmountable (or maybe just poorly defined) number of tasks (same Key Area, etc. Action Step 3).

I hope these comments are helpful. The plan is a great one and really provides some incentive and direction for progress. I feel the lack of response I received from the PEC is also due to their general acceptance of it. If they felt strongly about some things not working they would have been pounding down my door!

Good luck and see you in North Carolina.

Sincerely,



Nancy S. Hollenbeck  
Chair, PEC

cc: AAZPA Board  
Robert Wagner  
David Jenkins  
Kathryn Roberts



# American Association of Zoological Parks and Aquariums

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January 22, 1991

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Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSLE

Executive Director  
ROBERT O. WAGNER

Nancy S. Hollenbeck  
Assistant Director  
Santa Barbara Zoo  
500 Ninos Drive  
Santa Barbara, California 93103

Dear Nancy:

Thank you for the letter dated January 14, 1991 regarding the long-range plan. I agree with you that strategies relating to conservation education are somewhat vague. I would hope that AAZPA education staff and the PEC can define them more in the next few years. This is a living/breathing plan and must be flexible to add and delete as the years pass and the Board changes.

Thanks again.

Sincerely,

Steve H. Taylor  
President-Elect

## DIRECTORS

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DENNIS A. MERITT, JR., Ph.D.

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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

ST/ms

cc - Bob Wagner  
David Jenkins  
Kathryn Roberts

## D.K. CALDWELL INTERESTS

POST OFFICE BOX 4280  
TYLER, TEXAS 75712

CALDWELL SCHOOLS, INC.  
MRS. D. K. CALDWELL, PRESIDENT  
HAYES CALDWELL, DIRECTOR  
CALDWELL ZOO

D. K. CALDWELL FOUNDATION  
ELBERT H. CALDWELL, PRESIDENT

January 7, 1991

Mr. Steve Taylor  
AAZPA President-Elect  
Cleveland Metroparks Zoo  
3900 Brookside Drive  
Cleveland, Ohio 44109

Dear Steve:

I am writing concerning the new AAZPA Strategic Plan. I agree with you in that it seems very complete and ready for Board approval in March.

The only additional comment I have concerning Key Result Area I which deals with membership services is as follows. The first objective is to report on AAZPA publications to AAZPA Board by August 1991. From a Membership Committee standpoint I would like to see us develop a publication which not only defines and addresses services for each classification, but also spells out what is required of each classification, i.e. participation in ISIS, Code of Professional Ethics, etc.

In general, I feel that if prospective applicants are made aware of the requirements that go along with AAZPA membership, it will minimize misunderstandings and problems in the long run.

Please let me know if you would like to discuss this more or if I can be of further assistance.

Sincerely,

CALDWELL ZOO

Hayes Caldwell  
Executive Director

HC/bg

cc: AAZPA Board of Directors  
Robert O. Wagner  
David Jenkins  
✓ Kathryn Roberts

# Saint Louis ZOO

Forest Park  
Saint Louis, Missouri 63110  
(314) 781-0900  
Fax (314) 647-7969

Charles H. Hoessle  
Director

Robert Hyland  
President, Zoological Commission



January 2, 1991

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

Dear Kathryn:

Thanks for your note -- I'm happy to pass along my thoughts about the AAZPA survey process, which are noted below.

## Hill & Knowlton Questions

The questions from the Hill & Knowlton survey are not well-worded. The instructions for the "thermometer" question are lengthy and cause respondents to become impatient. The other questions, as noted by Jeff Marliave, are worded in such a way that the respondent is lead to select a particular response.

When public relations firms design surveys, it is sometimes with the intent of gaining positive information that will make for an interesting press release. Whether or not that was the idea behind the Hill & Knowlton survey, the questions do seem to lead people to the response that AAZPA would prefer.

## Another Approach

One of the strengths of survey information is that it can show trends and changes that take place over time. A program to do annual surveys would help AAZPA and member institutions do just that. However, relying on member institutions to implement this is pretty risky. First, not all institutions are able to do surveys. There is no assurance that the surveys that *are* returned represent a geographic cross-section of the U.S. or Canada. Second, the results obtained by AAZPA are affected by the reliability of each institution's survey techniques, sample size, survey population (visitors vs. non-visitors, biases), etc. The information gained is of dubious value to AAZPA, and certainly should not be relied upon for decision-making.

AAZPA would be better served by a newly-designed survey, administered on a regular schedule. This survey can be professionally designed and conducted (see below) for an amount that is substantially less than the Hill & Knowlton survey. National telephone surveys are but one way of gaining information; there are other, less expensive methods at our disposal. A reputable firm will help AAZPA work within its budget, and may be willing to make special arrangements that would bring costs down.

The St. Louis Zoo is working with M/A/R/C, a national custom marketing research firm, on a visitor study program. During one of our meetings, I mentioned that AAZPA was trying to track public opinion and awareness of the goals of zoos and aquariums, and that the cost of retaining a firm to do a national survey was prohibitive. The vice president in charge of the St. Louis office commented that M/A/R/C has a national test panel, and that with a sample size of 1,000 (representing the 9 U.S. census regions), a mail survey might cost \$30,000 - \$35,000. In case you are interested, I've enclosed a description of their national panel.

I am convinced that using the old Hill & Knowlton questions and relying on individual institutions to provide valid samples will not yield the accurate information that AAZPA seeks. Perhaps a firm such as M/A/R/C can help provide a cost-effective solution. At any rate, it may be worth exploring further. Please let me know if there is anything I can do to assist the Long Range Planning Committee in moving forward on its objective.

Very truly yours,



Ellen E. Stokes  
Executive Administrator

cc: C. Hoessle



**M/A/R/C'S  
NATIONAL PANEL**

## M/A/R/C PANEL

The M/A/R/C Panel was first introduced in 1981 as the National Neighborhood Panel (NNP). Composed of zip code clustered households in selected markets, NNP was designed for economical door-to-door placements, in-home personal interviewing, and targeted focus group/central location test recruiting. These neighborhood panel households were conveniently located near qualified local field services in 27 geographically dispersed markets.

In 1985, the decision was made to expand M/A/R/C's panel capabilities from a Neighborhood Panel to a National Panel, providing nationally representative household samples for mail and telephone research.

### Recruitment/Maintenance

Households are recruited for the M/A/R/C panel by a series of mass mailings. A variety of list sources is used to allow targeted mailings to households in "hard-to-fill" geodemographic cells. Each household receives an introductory "invitation" letter and household information form. When the applications are returned, households are assigned to either the Balanced or the Reserve portion of the National Panel.

Households are not paid in any way for their participation. They are merely invited to have a "say" about goods and services brought to the market.

The household information form, when returned, provides the following demographic information which becomes a permanent record for each household.

- Geographic Division
  - Population Density (Nielsen County Size)
  - Household Income
  - Household Size
  - Age of Male and Female Head
  - Employment
  - Occupation
  - Education
  - Type of Dwelling
  - Home Ownership
  - Race
  - Age, Sex and Relationship of Other Household Members
- } Of Male and Female Head

- Ownership
 

Dishwasher	VCR: VHS/Beta/8 mil/Camcorder
Microwave	Cellular Phone
Cable TV	Cat
Whirlpool Bath	Dog
PC at Home	PC at Work
- Household Information
 

Smoker	Dentures
Diabetic	Contact Lenses
Weight Loss Diet	Eye Glasses

The preceding data can be used for sample selection, as well as cross-tabulation of survey results.

In order to maintain the "freshness" of the panel database, a purge policy has been established to eliminate chronic non-returners from the panel.

In the following instances a panelist would be dropped from the file:

- A panel member requests to be dropped
- A panel member is non-responsive/non-cooperative in six consecutive studies
- An unresolved address problem exists
- A panel member refuses delivery of study materials

Recruitment is conducted continuously to fill voids from dropped and purged households. Rebalancing to the most current Census information will occur every other year. At this time new households will be added and household information for all current members will be updated.

#### Rapport with Panel Members

Effort is made to establish and maintain a personal rapport with all panel members.

All correspondence and communication with panel members is coordinated by the Panel Group under the Ann Douglas signature. Panel members are offered no payment for their participation; however, token gifts or incentives are required for studies that require extra effort on the part of the panelist (e.g., questionnaires six pages and over in length, pantry checks, diaries, etc.).

A toll-free number is printed on all panel correspondence to encourage communication. Panel members frequently make use of this number to update their address and telephone number and changes in their household status. The "Neighborhood News" is also used to maintain contact with members and to keep panelists involved. (See Appendix.)

M/A/R/C recognizes that the relationship with its panelists is crucial to maintaining the integrity of the panel. A commitment of confidentiality is made to each panel member. They will be contacted for marketing research purposes only and their names, addresses, and telephone numbers will not be released.

### Balancing

The term "balancing" is frequently used when referring to the representativeness of national panels. M/A/R/C "matches" or "balances" the National Panel to quotas projected from the most recent CPS data. The Current Population Survey (CPS) is an annual government survey of 60,000 households. To facilitate the sample selection process and multi-client screenings, the total panel is balanced in replicates of 5,000 households. The total balanced panel consists of 50,000 households in 10 panels of 5,000 with over 50,000 households in reserve. These reserve households are used to supplement the balanced panel and to replace households dropped or purged.

The demographic variables that M/A/R/C balances on are age of head of household, household income, household size and population density within each of the nine geographic divisions.

Breaks for each of the variables are shown below:

#### Geographic Division

- New England
- Middle Atlantic
- East North Central
- West North Central
- South Atlantic
- East South Central
- West South Central
- Mountain
- Pacific

Within each of the divisions, the panel is balanced on:

#### 1. Age

##### Family\*

Under 30  
30 - 39  
40 - 49  
50 - 59  
60+

##### Non-Family\*

Male under 35  
Male 35 and over  
Female under 35  
Female 35 and over

2. Income

Under \$10,000  
\$10,000 - \$19,999  
\$20,000 - \$29,999  
\$30,000 - \$39,999  
\$40,000 - \$49,999  
\$50,000+

3. Household Size

One member  
Two members  
Three members  
Four members  
Five+ members

4. Population Density

A	] Nielsen County Size Designations
B	
C	
D	

\* Non-family and single member households are fully integrated into the panel and represented in proper proportion to family households.

The five variables on which the M/A/R/C Panel is balanced are similar to those used by other panel companies. However, M/A/R/C approaches balancing on a cell-by-cell basis to provide a sample that is as "close to perfect" as possible. Instead of looking solely at the marginal quotas for age, income, household size, population density within geographic division, quotas have been established for each of the 9,720 cells (9 geo x 9 age x 6 income x 5 household size x 4 population density) and effort is made to balance each cell as closely as possible before defaulting to the marginals. Due to the large sample sizes necessary for this type of "within-within" balancing it may not be practical to balance on all breaks within all five demographic variables. However, if two or three variables are determined to be the most critical to a particular study, programs have been developed to quickly determine the number of households necessary for balancing and the number of households available.

## Usage Policies

Programs have been developed to monitor the following for each household:

- Date of last contact
- Type of test participated in
- Subject matter of tests participated in
- Return/cooperation rates

To prevent overuse of households and possible biasing, the following policies govern the selection of households for use in a particular study:

- Minimum of three weeks must pass between contacts except Question?Marc and screeners
- Three months must pass between blind concept, product tests, questionnaires or telephone interviews within the same subject category
- Six months must elapse before a panelist screened by a particular client (via a custom screener) can be rescreened in the same subject category

## A Profile of M/A/R/C

Founded in 1965 with just seven employees and \$100,000 in revenues, M/A/R/C Inc. today is considered the leader in the development and application of integrated marketing information services.

With headquarters in Dallas and 10 offices in other major cities throughout the U.S., M/A/R/C Inc. (which stands for Marketing And Research Counselors) reported revenues of \$64 million in 1990 and has grown at an average yearly rate of 24 percent since its inception. The company currently employs 500 full-time employees and approximately 1,200 part-time employees.

Originally established as a partially owned subsidiary of the Dallas-based advertising agency Tracy-Locke, M/A/R/C today is a public company listed as MARC on the over-the-counter (OTC) market. The company is engaged in four distinct, but highly related marketing categories.

- **Marketing Research** offers a full range of custom marketing research services for more than 200 clients who market consumer, agricultural, business/industrial products and services. M/A/R/C is the largest custom research firm in the U.S.
- **Targetbase<sup>SM</sup> Marketing** begun in 1984, specializes in database marketing, developing and implementing customer acquisition and retention direct marketing programs for consumer and business-to-business clients.
- **Market Modeling Services** offers marketing intelligence through the MACRO Market Modeling System<sup>SM</sup>. It can be used for both new and existing products and services sold through any distribution channel.
- **Customer Satisfaction** uses a variety of techniques to help clients identify areas they need to address in order to gain and nurture customers.

Greater detail on the nature and scope of these businesses and M/A/R/C's technical capabilities follows.

## Marketing Research Group

The principal custom marketing research services performed by M/A/R/C can be divided into four categories: testing, tracking, positioning and problem analysis.

1. Testing may be conducted for any of several purposes:
  - Concept tests to determine consumer acceptance of a new product, service or advertising concept;
  - Product tests to determine the strengths and weaknesses of a particular product among customers;
  - Advertising pre-tests to determine the ability of an advertisement to communicate a message or to sell a product or service;
  - Media tests to determine the optimum media expenditure level of media mix to advertise a product. M/A/R/C's patented service in this area is called The Advertising Index<sup>SM</sup>;
  - Package test to determine appeal, convenience, durability and other aspects of a package with consumers.
2. Tracking consists of conducting a continuing study or a series of similar studies over a period of time to determine changes or trends in consumer awareness, acceptance or reaction to products, services, advertising campaigns or industries. Tracking studies may last from a few months to several years.
3. Positioning studies are made to determine how consumers perceive the benefits and image of particular brands or products. The results indicate how a brand should be "positioned" to achieve maximum consumer acceptance. Positioning studies are often conducted in conjunction with segmentation research. Segmentation studies identify distinct groups of consumers according to the similarity of their needs for products or the benefits they are seeking. These results can be used to target the advertising and image of a client's product to the segments that are most favorably disposed toward it.
4. Problem Analysis attempts to determine why a product, service or advertisement is not performing as expected. The purpose of such studies is to identify the reason or reasons for poor performance in the marketplace and to serve as the basis for making recommendations for corrective action.

### Market Modeling Services Group

In addition to these custom research services, M/A/R/C also offers a comprehensive marketing management system developed for use with both new and existing products or services. The MACRO Market Modeling System<sup>SM</sup> is unique in a variety of ways:

1. Applications for existing products. It is the only market modeling system available for existing products and services. MACRO directly links consumer wants, needs and preferences to consumer behavior and market sales, allowing marketers to understand who is buying their products (and those of their competitors) and why. MACRO's capabilities for existing products are divided into three areas:
  - MACRO EXPLOROR<sup>SM</sup> which provides a one-point-in-time product and category profile including information on category size, market share of competitors (in total and by consumer buying segment), demographic profiles of each consumer segment, analysis of purchase dynamics (frequency, quantity, brand loyalty, consideration set and price sensitivity), cross usage and consumer attitudes on key product positioning dimensions.
  - MACRO MONITOR<sup>SM</sup> which tracks the same information as MACRO EXPLOROR but on an ongoing or periodic basis to monitor the business and provide an early warning system for marketing action.
  - MACRO SIMULATOR<sup>SM</sup>, a forecasting system which allows marketers to assess the impact of various marketing strategies and tactics on usage and sales volume in a simulated environment.
2. Applications for new products. For new products, MACRO ASSESSOR<sup>SM</sup> performs the same function as MACRO EXPLORER AND SIMULATOR, profiling the competitive category, assessing consumer attitudes toward the new product concept and projecting likely sales volume based on planned product positioning, marketing strategies and tactics.

The MACRO system is the only one of its kind that can be used for any type of product or service (consumer or business to business).

### Customer Satisfaction Group

M/A/R/C also offers a proprietary customer satisfaction research program, known as the M/A/R/C ACTION System<sup>SM</sup>. The ACTION System starts by identifying specific product or service features which determine whether or not a customer is satisfied, quantifying their satisfaction levels for each attribute. It then links these attributes to specific work processes in the design, manufacturing and sales/servicing of the product enabling companies to improve satisfaction levels. ACTION can also project what effect these

changes will have in sales volume for the product or service. The ACTION System is the only one currently available which offers this feature.

### Targetbase Marketing<sup>SM</sup> Group

Targetbase was formed to develop advanced direct-to-consumer marketing techniques to isolate and direct targeted marketing efforts at specific market segments. M/A/R/C is differentiated by its ability to offer the full scope of services required to execute marketing in this manner. We begin with strategic planning based upon an understanding of market segmentation. M/A/R/C provides all the components--consumer screening, database management, creative production, fulfillment, automated response processing and computerized optimization of media spending.

The group employs marketing research techniques to identify prime prospects for a product or service. They then pursue such prospective customers through direct response marketing and promotional programs to accelerate trial and continued use of the client's product. The company's advanced analytical and modeling techniques provide a means to segment the marketplace efficiently and tailor marketing strategies to multiple target groups. The database is continually updated, and the marketing intelligence it contains leads to optimally effective marketing programs over time.

### Technical Capabilities

Custom data required for M/A/R/C's groups is gathered in several ways. M/A/R/C operates three Wide Area Telephone Service (WATS) centers in Denton, Texas; Greensboro, North Carolina; and McKeesport, Pennsylvania. These centers have approximately 235 CRT-equipped WATS interviewing positions.

The Local Market Network (LMN) utilizes a proprietary on-line survey system known as PCRS (Personal Computer Research System<sup>SM</sup>) to provide automated interviewing at shopping malls, local telephone centers and other central location test facilities in cities nationwide. Data is retrieved daily from the LMN sites, via modem and dedicated phone lines and is then systematically uploaded onto a mainframe computer at the company's central computer facility in Dallas.

M/A/R/C also has a consumer mail panel which consists of a database of 100,000 households who have agreed to participate in marketing research projects, primarily by mail. Fifty thousand of these households are balanced to the census data and are nationally representative. The remaining 50,000 households are used to augment the national panel.

Additionally, the company offers exceptional design and analytic capabilities through a Marketing Science Group. Members of the staff conduct specialized market analyzes and consult with company clients and account executives on marketing research design, statistical analysis and strategic marketing.

## Proprietary Software

Much of the company's growth is attributable to the technical innovation and development of proprietary software. The first major proprietary software developed by M/A/R/C was its Automated Custom Research System (ACRS). ACRS became the state-of-the-art marketing research software system because it was designed and developed by marketing researchers as a menu-driven, user-friendly system that integrated all tasks of the marketing research process into a single on-line, interactive system.

ACRS was followed by the Personal Computer Research System (PCRS) referenced earlier which takes all of the functionality of ACRS to decentralized interviewing sites.

The ACRS computer-based system has also proved adaptable to a variety of other marketing applications, thus enabling the company to engage in direct marketing and telemarketing activities, facilities management, database management services and to produce large sample syndicated studies more efficiently.

The company has also developed a nationwide X.25 packet switch network. The X.25 platform network has a completely open-ended nature allowing for many different host, phone switches, LANS and even other network connections. Presently the remote offices and WATS centers connect at concentration sites called nodes, to share a multiple routed network of leased lines to the host of their choice. The communications are supported by more than a dozen communications experts presently working on further network integration of voice/data throughout the network.

The company licenses its ACRS proprietary marketing research interviewing and tabulation software programs in both the U.S. and in Europe to operations that operate their own telephone interviewing facilities.

## Summary

When M/A/R/C began in 1965, the discipline of marketing research was in its infancy. The company has grown with the industry and has been a major force in shaping its evolution from "art" into "science." M/A/R/C today is considered a leader in the marketing services business. The company is recognized both for the pioneering work it has done in the development of intelligent electronic information gathering systems and for its ability to tackle tough marketing problems and challenges. Its professional staff is distinguished from that of many other marketing research firms in its "actionability" orientation. Rather than just collecting and reporting data to clients, M/A/R/C's consultants pride themselves on their ability to develop actionable solutions to marketing problems and opportunities. This winning combination of "horsepower" and "manpower" has served M/A/R/C well for the last 25 years and now positions it for even greater growth in the challenging environment of the 1990s and beyond.

# MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

December 18, 1990

Mr. Jeff Marliave  
Vancouver Aquarium  
P. O. Box 3232  
Vancouver, British Columbia  
CANADA V6B 3X8

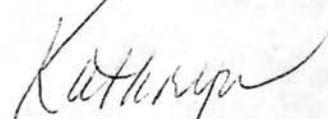
Dear Jeff:

I have enclosed a letter I received from the St. Louis Zoo and my response. I also spoke with Steve Taylor about Ellen Stokes' request. Until the board approves our plan, I think it is prudent to move slowly in the key result areas.

We are in the process of awarding our contract to conduct a significant market research study this spring. We will include the questions that you have asked us to make a part of our survey.

Happy holidays!

Sincerely,



Kathryn R. Roberts  
General Director

KRR/gb



# MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

December 18, 1990

Ms. Ellen E. Stokes  
Executive Administrator  
Saint Louis Zoo  
Forest Park  
St. Louis, MO 63110

Dear Ms. Stokes:

Thank you for your letter of December 5. I appreciate your willingness to share information with me regarding different strategies for marketing research. I would greatly appreciate receiving your insights in writing so that I can share them with the rest of the Long Range Planning Committee.

In the meantime, our progress on this marketing research goal goes slowly until the AAZPA board approves our final plan, which will happen hopefully in March.

Again, thank you for your offer to help. Happy holidays!

Sincerely,



Kathryn R. Roberts  
General Director

KRR/gb



# Saint Louis ZOO

Forest Park  
Saint Louis, Missouri 63110  
(314) 781-0900  
Fax (314) 647-7969

Charles H. Hoessle  
Director

Robert Hyland  
President, Zoological Commission



December 5, 1990

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

Dear Dr. Roberts:

Jeff Marliave of Vancouver Public Aquarium recently sent me the latest version of the survey questions that AAZPA wants to have included in member institutions' visitor studies. As you may know, the St. Louis Zoo has developed an on-going visitor study. We are continuing to refine the study, and as a part of that process, I would like to discuss the revised Hill & Knowlton questions with you.

On a related topic, I had a conversation recently with an executive in a national custom marketing research firm. We talked about the cost of doing the kind of public opinion research that the Hill & Knowlton study addressed, and he had some interesting observations about cost and methods.

We want to assist AAZPA in any way possible -- I look forward to talking to you about how we can help achieve the association's objectives. I'll call you next Wednesday to discuss some suggestions and ideas.

Very truly yours,

A handwritten signature in cursive script that reads "Ellen Stokes".

Ellen E. Stokes  
Executive Administrator



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698  
(304) 242-2160 Fax: 304-242-2283

◆ A nonprofit, tax-exempt organization dedicated to the advancement of zoological parks and aquariums for conservation, education, scientific studies and recreation. ◆

December 5, 1990

*filed*

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David Jenkins  
AAZPA Conservation Center  
7970-D Old Georgetown Road  
Bethesda, MD  
20814

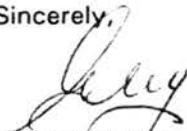
Re: Rhino Walk and Beyond

I like the idea of the long-range approach to the program as you have identified it, particularly if the Rhino Walk is successful. I think it is something we should build on to maintain momentum. I think you have identified a couple of programs as the type of thing the AAZPA could appropriately become involved in. I think, however, before we leap head-long into this new field, we should see how the Rhino Walk fits us as an association. Whether it meets our expectations, and whether it meets the expectations of our membership should be decided before we accept that this is something that should become part of our corporate fiber.

My only concern on the negative side of the issue is really one of human resources and priorities. My guess is that no matter how many specialists we bring in to organize and orchestrate events such as the Rhino Walk, or future programs, it is going to take energy from our relatively small professional staff group to ensure that the programs meet the standards, and goals and objectives of the association. I think we need to put these types of events in perspective with all of the other priorities identified within the long-range plan to ensure that we are not loading so much onto our staff that they are unable to cope with the workload. As we all know, this could ultimately cause burn-out, staff turn over, etc. etc..

In summary, David, I think the idea, conceptually, is one I like. I would like to see us get the Rhino Walk out of the way before we start making long-range commitments so that we can truly evaluate the benefits as well as the costs in time, staff resources and money to the association.

Sincerely,

  
**GREG TARRY**  
Associate Director, Zoological Operations  
Calgary Zoo  
P.O. Box 3036, Stn. B  
Calgary, AB, Canada  
T2M 4R8

xc: Members of the Board of Directors, K. Asis, N. Brown, M. Hutchins, B. Read, S. Robbins, K. Roberts, N. Hollenbeck, B. Stringer, B. Wagner



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November 15, 1990

*file  
Liz Pla*

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WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

George Rabb, Ph.D., Director  
Chicago Zoological Park  
3300 Golf Road  
Brookfield, IL 60513

Dear George:

Thank you for your Oct. 23 letter, regarding a Zoo Act initiative. It is a very timely and creative concept, and more than a few of our colleagues are anxious to explore this pathway further. At the very least, Board members want to discuss it at the March meeting in North Carolina.

As you pointed out, staffing is integral to a project of this scope and importance. Yet, AAZPA staff is currently maxed-out and in no position to assume new projects at this time. This is not meant to imply that such a project cannot be given priority; I am merely superimposing a reality that must be met and dealt with by the Board.

Currently, there is a great deal of thinking/discussion going on at all levels of AAZPA. A long-range development plan and the Strategic Plan represent our most productive attempt to set direction and policy for the year and years ahead. I'm very hopeful that, by March, a lot of the discussions will have materialized into tangible recommendations that can be incorporated into the fabric of our overall Strategic Plan.

All of the information-getting activities you suggest are excellent, and several are already under consideration. From those already in progress we may gain further insight and impetus for favorable Board action in March. And, it would be additionally

catalytic if you could find the time to appear before the Board yourself.

Thank you very much for your tenacious encouragement of a program that is probably long-overdue.

Best regards,



David G. Zucconi, President  
AMERICAN ASSOCIATION OF  
ZOOLOGICAL PARKS & AQUARIUMS

DGZ:jo

cc: B. Wagner, Exec., Dir. AAZPA  
Bd. of Dirs.  
D. Towne  
K. Roberts ✓



# American Association of Zoological Parks and Aquariums

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1 November 1990

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

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WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Dear Kathryn:

Knowing how hard and for how long the Strategic Planning Committee has been working on their mission makes it a little difficult to comment; that is, I'm sure whatever I have to offer has already been talked about many times. With that inane prologue, I'll proceed to comment.

Education, in one form or another, is critical to our entire mission, all our KRA's, and most of our objectives. Yet the word education appears only twice in the material you've sent. That is not to say that it (education) is not implied throughout the documents, but to the average reader it may appear we've neglected this role.

There has been much discussion with regards to AAZPA taking a more active role in national and even international political and legislative arenas; the term Zoo Act comes immediately to mind. This is dealt with in KRA IV; however, after the meetings in Indianapolis (esp. the Directors lunch meeting) I wonder if we should be more specific in the objectives of KRA IV.

Kathryn you and your committee have done an outstanding job on this project. I look forward to increased involvement in the long range plans of our organization.

Regards,

  
J. Stephen McCusker  
Director

JSM:mrc  
CC: Wagner  
AAZPA Board



# American Association of Zoological Parks and Aquariums

Executive Office, Oglebay Park, Wheeling, WV 26003-1698

(304) 242-2160 Fax: 304-242-2283

◆ A nonprofit, tax-exempt organization dedicated to the advancement of zoological parks and aquariums for conservation, education, scientific studies and recreation. ◆

October 31, 1990

## OFFICERS

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Immediate Past President  
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WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Kathryn R. Roberts, Chair  
Long Range Planning Committee  
Minnesota Zoo  
13000 Zoo Boulevard  
Apple Valley, MN  
55124

Dear Kathryn:

Just a couple of observations to the copy of the document, I received, which you had sent to Nick Brown of the National Aquarium. First, in the area of values, the first three values listed seem, to me, to be philosophical statements of beliefs, things which I would have identified, very clearly, as value statements. However, the fourth one, Self Regulating, starts to almost move from a philosophical statement to an operational one, and I think this drift continues in Advocacy and is most apparent with the final one of Information Management and Communication. To me that very much seems an operation statement as opposed to a value that we as an organization believe in.

Under Key Result Area II, Objective 1, I must have missed the comment about developing a new name for the Association by September 1991. I'm not sure how we could find anything more easily understood and recognized than our current name, and I would really wonder whether that sort of a cosmetic change is going to have any significant impact on our image other than to confuse the people who are now familiar with and respectful of the AAZPA name and logo.

Objective 2 and 3 of Key Result Area II and Objective 1 of Key Result Area IV all have a time line of January 1991. Since the plan is not technically to be approved until March 1991, are those accurate dates, or will some of this work be going forward prior to the approval of the document by the Board and eventually the membership.

Thank you for any insight or information you could share with me on these areas.

Sincerely,

**GREG TARRY**  
Associate Director, Zoological Operations  
Calgary Zoo  
P.O. Box 3036, Stn. B  
Calgary, AB, Canada  
T2M 4R8

GT/pc



# American Association of Zoological Parks and Aquariums

DATE: October 24, 1990

REPLY TO: Kathryn Roberts, Minnesota Zoo

To: Long Range Planning Committee Members

Mr. Nicholas Brown  
National Aquarium in Baltimore  
Pier 3 - 501 E. Pratt Street  
Baltimore, MD 21202

Dear Nicholas:

During the past year, a Strategic Planning Committee was formed by President Hoessle. Sixteen members who represent diverse institutions were asked to serve on this committee and help generate the AAZPA's new Strategic Plan. The group met for five days with Robert Smith of Strategies/Teams, Inc. guiding us through the process.

As the Plan emerged, several components were identified. The mission was discussed and revised; four distinct Key Results Areas were identified; objectives were written for each of the Key Results Areas; and finally, action steps were developed to support the objectives.

I have attached copies of the mission and values, a proposed timetable for the strategic plan, and the objectives for the Key Result Areas. I think that as you read through these documents you will see that all of the ideas which are presented are ideas that have been discussed in other forums. We are now looking for your input.

The Strategic Planning Committee is hopeful that the completed plan can be approved by the Board at the mid-year March meeting. In order to meet this timeline, it is important that you respond with your written comments and questions and critiques by January 15, 1991. Your responses should be directed to my attention: Kathryn R. Roberts, Minnesota Zoo, 13000 Zoo Boulevard, Apple Valley, MN 55124.

We are confident that this document can guide our organization over the next three to five years in a positive and productive way.

Thank you for your help.

Sincerely,

Kathryn R. Roberts, Chair  
Long Range Planning Committee

cc: AAZPA Board  
Robert Wagner  
David Jenkins

Same letter to: Linda Boyd (Advisor), Bill Conway, Bill Dennler, Susan Engfer, Charlie Hoessle, Satch Krantz (Advisor), Michael Robinson, Steve Taylor, Steve Wylie

AAZPA

MISSION & VALUES

MISSION

The mission of the American Association of Zoological Parks and Aquariums is to foster and support excellence in the purposes of zoological parks and aquariums.

VALUES

Cooperation - working with each other to further our professional goals.

Commitment to Community - encourage excellence in recreational and cultural events and programs which strengthen our institutions' positions in their communities.

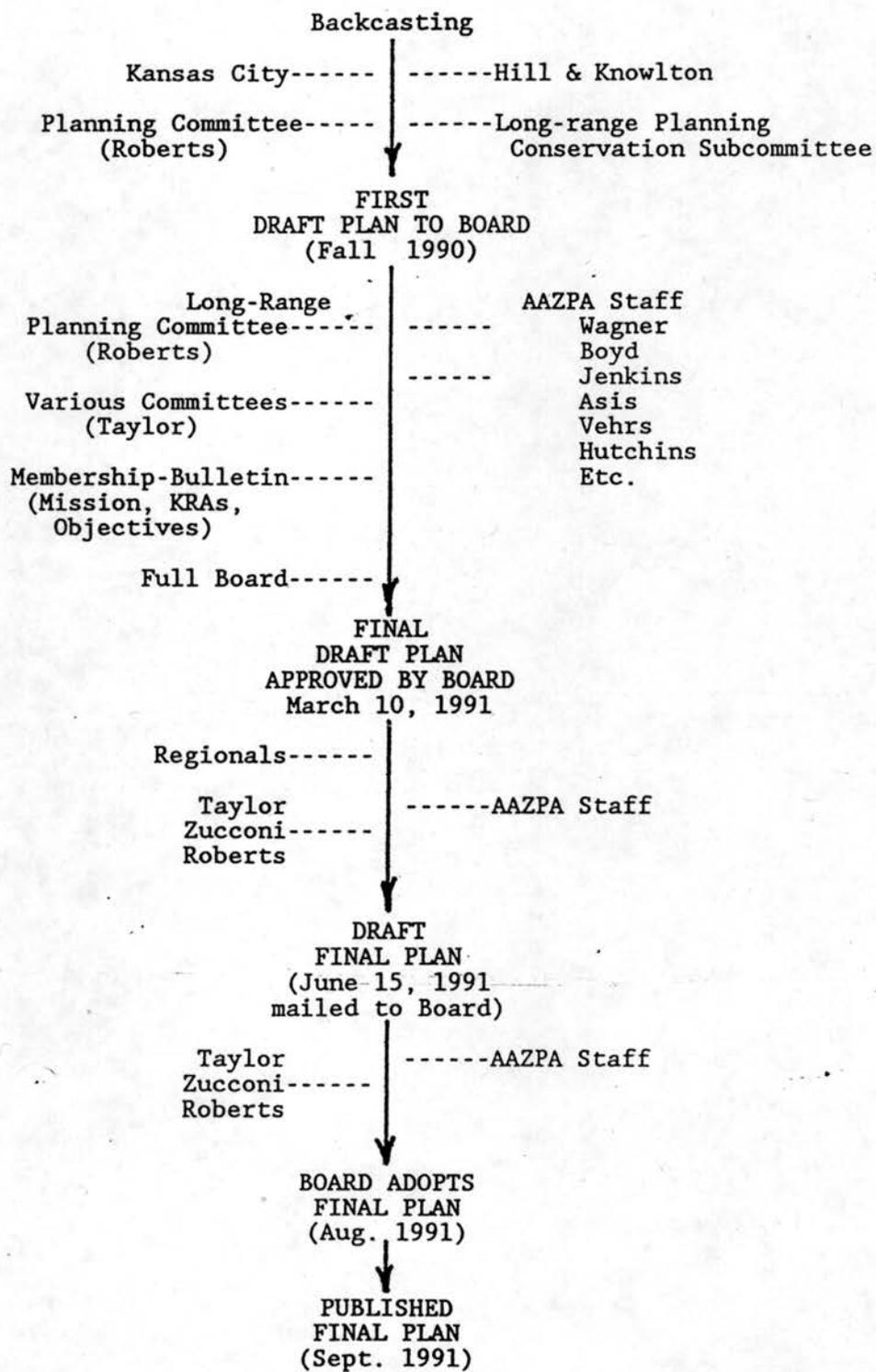
Commitment to Conservation - encourage the coordination of animal management programs, both in captivity and in the wild. Conservation, education and research are integral components of these programs.

Self-Regulating - embrace the Code of Professional Ethics and Accreditation which ensure high professional standards and behaviors.

Advocacy - representing its members' interests in legislative bodies, governmental agencies and others will result in furthering the mission of zoological parks and aquariums.

Information Management and Communication - development and management of data bases relevant to our mission and the timely distribution of current information to our members.

PROPOSED TIMETABLE  
1991 - 1996 STRATEGIC PLAN



## ACTION PLANS

### **Key Result Area I** Expand and improve membership services.

- Objective 1 Report recommendations on AAZPA publications to AAZPA Board by August 1992
- Objective 2 Establish an expanded zoo and aquarium data base on computer disk by 1 September 1992
- Objective 3 Create development opportunities, including promotions, fund raising and grants that would at least double existing development income to AAZPA and its member institutions by 1 January 1995
- Objective 4 Create a written public relations crisis management plan to address key issues currently impacting on zoos and aquariums, for presentation and/or demonstration at the 1992 conference.

### **Key Result Area II** Enhance our image as leaders in environmental and wildlife conservation.

- Objective 1 Develop a new name which will be easily recognized and understood by September 1991.
- Objective 2 Conduct market research which will define our audiences and issues by January 1991.
- Objective 3 Develop a public relations plan which is based on the results of the market research which will effectively communicate our message by September 1991.

### **Key Result Area III** Expand and Improve our Conservation programs.

- Objective 1 Integrate AAZPA programs with global captive breeding and other conservation programs by 1993.
- Objective 2 Expand and improve the SSP and other conservation programs, with a target goal of 100 SSP programs by 1995.
- Objective 3 Provide increased scientific support for SSP and conservation programs.
- Objective 4 Encourage and expand conservation education activities.
- Objective 5 Promote conservation of resources in AAZPA institutions.

### **Key Result Area IV** Develop and enhance an effective legislative plan.

- Objective 1 Identify legislative and regulatory priorities and initiatives by January 1991.
- Objective 2 Reduce institutional reaction time associated with high priority legislative and regulatory issues to 72 hours.
- Objective 3 Expand the professional base in order to be more pro-active across a broader range of issues than is presently possible.
- Objective 4 Increase association member participation in legislative challenges and process from 10% to 30%.



## American Association of Zoological Parks and Aquariums

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October 19, 1990

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

### OFFICERS

President  
DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSLE

Executive Director  
ROBERT O. WAGNER

### DIRECTORS

TED A. SEATLE

DENNIS A. MERRILL, JR., Ph.D.

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SEEA

R. GREGORY TARRY

WILLIAM F. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Dear Kathryn:

The Long-range Planning Committee letter is fine.

I do agree that input should come to you (the Committee chairs are sending it to me). In order to change anything in our current draft plan, we should have consensus from David Zucconi, AAZPA staff, the KRA leader, Committee chair and you and me. I believe we have some work to do before we have a usable plan and one that will be adopted by the Board.

As I review the plan, we have two basic problems.

- Objectives need to be clean and concise. I am not sure that "increase association member participation in legislative challenges and process 10% to 30%" is the right value. Is 10% correct? How measured?
- Each project must have a cost established. Those costs need to be identified in KRA 1 - Objective 3. The success of our last plan was its simplicity and that project or improvement had funding identified.

Did you get my flow chart and other Long-range Plan documents?

Sincerely,

*Steve*

Steve H. Taylor *ms*  
AAZPA President-elect

ST/ms  
P.S. Have Nick call me about camels.

Post-It™ brand fax transmittal memo 7671 # of pages ▶ 2

To	Steve Taylor	From	K. Roberto
Co.		Co.	
Dept.		Phone #	612 431 9333
Fax #	216 661 3312	Fax #	

10-16-90

Dear Steve,

I have attached a draft copy of a letter I would like to send to the Long Range Planning Committee. The letter is very similar to the one you wrote for Committee Chairs. The letter would be mailed after the draft document is completed.

My letter says very clearly that the comments should be mailed to me. Is that OK? As I recall, I was to serve as the collection point for all comments. Do you want the Committee Chairs to send their comments to you or to me?

Let me know if you would like any changes made.

Kathryn

Dear (Long Range Planning Committee Member)

During the past year, a Strategic Planning Committee was formed by President Hoessle. Sixteen members who represent diverse institutions were asked to serve on this committee and help generate the AAZPA's new Strategic Plan. The group met for five days with Roberts Smith of Strategies/Teams, Inc. guiding us through the process.

As the Plan emerged, several components were identified. The mission was discussed and revised, four distinct Key Results Areas were identified, objectives were written for each of the Key Results Areas, and finally, action steps were developed to support the objectives.

We have now produced a draft copy of the Plan. I think that as you read through the document you will see that all of the ideas which are presented are ideas that have been discussed in other forums. We are now looking for your input.

The Strategic Planning Committee is hopeful that the plan can be approved by the Board at the mid year March meeting. In order to meet this timeline, it is important that you respond with your written comments and questions and critiques by January 15, 1991. Your responses should be directed to my attention, Kathryn R. Roberts, Minnesota Zoo, 13000 Zoo Blvd., Apple Valley, MN. 55126.

We are confident that this document can guide our organization over the next three to five years in a positive and productive way.

Thank you for your help.

Sincerely,

Kathryn R. Roberts  
Chair, Long Range Planning Committee

cc  
AAZPA Board  
Robert Wagner  
David Jenkins



# American Association of Zoological Parks and Aquariums

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(304) 242-2160 Fax: 304-242-2283

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October 30, 1990

George Rabb  
Brookfield Zoo  
3300 Golf Rd  
Brookfield, IL 60513

## OFFICERS

President  
DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSLE

Executive Director  
ROBERT O. WAGNER

Dear George:

Thank you very much for your letter of October 23 concerning the Zoo Act initiative. I am most excited and intrigued by the possibility of such an activity. Although I can appreciate your concerns about our Canadian members and their reaction to such an "all out" venture, this could very well set the tone and basis for a similar recognition from their government. For that reason, I hope we would have their support. Also, keep in mind, George, that the monies and efforts we expend toward legislative activities, for the most part, are directed at U.S. governmental agencies.

## DIRECTORS

TED A. BEATTIE

DENNIS A. MERITT, JR., Ph.D.

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

This proposition could obviously throw a new dimension into our Long Range Plan and its priorities. We would certainly have to investigate the feasibility of allocating AAZPA staff time to such a task. My immediate impression is that with the items we have already identified in the plan, our current staff base is not large enough to provide the necessary support for this effort. Therefore, it might be wise for us to seek funding that would underwrite those expenditures, both paid and volunteer-related, that we expect to incur.

This venture would no doubt fall under the Long Range Plan's Legislative KRA. As team leader for that area, I suspect that I should raise the question as to the appropriateness of adding this item to the agenda. Before I do that, however, I would like some guidance from the Nuclear Planning Group. On the other hand, George, this item might best be pursued as an agenda item of the AAZPA Board of Directors. Either way, I suspect timing will be important.

George Rabb  
October 30, 1990  
Page 2

Please advise me as to what you feel should be the next step. I do support this endeavor but realize we must first work out the mechanics of how it should proceed before we take the initiative.

Hope all is well.

Sincerely,



Stephen R. Wylie  
Vice-President

SRW:dsc

cc: Bob Wagner



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(304) 242-2160 Fax: 304-242-2283

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October 15, 1990

Mr. Edward Schmitt  
Associate Director  
Chicago Zoological Park  
3300 Golf Road  
Brookfield, IL 60513

## OFFICERS

President  
DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSLE

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R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

Dear Ed:

During 1990, a Strategic Planning Committee (16 members of diverse backgrounds) appointed by President Hoessle met on three separate occasions to develop AAZPA's new Strategic Plan. Robert Smith of Strategies/Teams, Inc. guided us through the process. While all planners have different terms and methodologies, the basics are similar. The components of our plan are as follows: The mission and values, four different key result areas, 3-5 objectives for each KRA, strategies, and action steps. While this may appear complicated, if done correctly, it can guide our organization for 3-5 years and accomplish a great deal for AAZPA and our member institutions.

The draft plan has already had tremendous input. I do not believe there are any completely new concepts. All proposals have had previous discussion and study at Kansas City (March 1989), or in the Strategic Planning Sessions, or by the Board, etc. Nonetheless, additional input is requested before the Board of Directors approves a draft plan in March 1991. It is our desire to have a final plan approved by the Board meeting in August 1991 (see attached).

As president-elect of AAZPA, I have volunteered to work with Kathryn Roberts, (Chair, Long-range Planning Committee) and David Zucconi (President), to see that the plan has sufficient input from interested parties.

Therefore, I am asking your input into the mission, KRAs, objectives and individual action plans in which you have considerable expertise.

Please respond to my request by January 15, 1991. Your comments are essential if we are to produce a usable plan for AAZPA.

Thank you for your assistance.

Sincerely,

Steve H. Taylor  
President-elect

ST/ms  
Enclosures  
cc - AAZPA Board  
Robert Wagner  
David Jenkins  
Kathryn Roberts

Similar letter/enclosures sent to Brenda Stringer (Public Relations)  
Bruce Read (WCMC)  
Gail Schneider (Public Relations Task Force)  
Sherry Sheng (Education)  
Hayes Caldwell (Membership)

AAZPA  
MISSION & VALUES

MISSION

The mission of the American Association of Zoological Parks and Aquariums is to foster and support excellence in the purposes of zoological parks and aquariums.

VALUES

Cooperation - working with each other to further our professional goals.

Commitment to Community - encourage excellence in recreational and cultural events and programs which strengthen our institutions' positions in their communities.

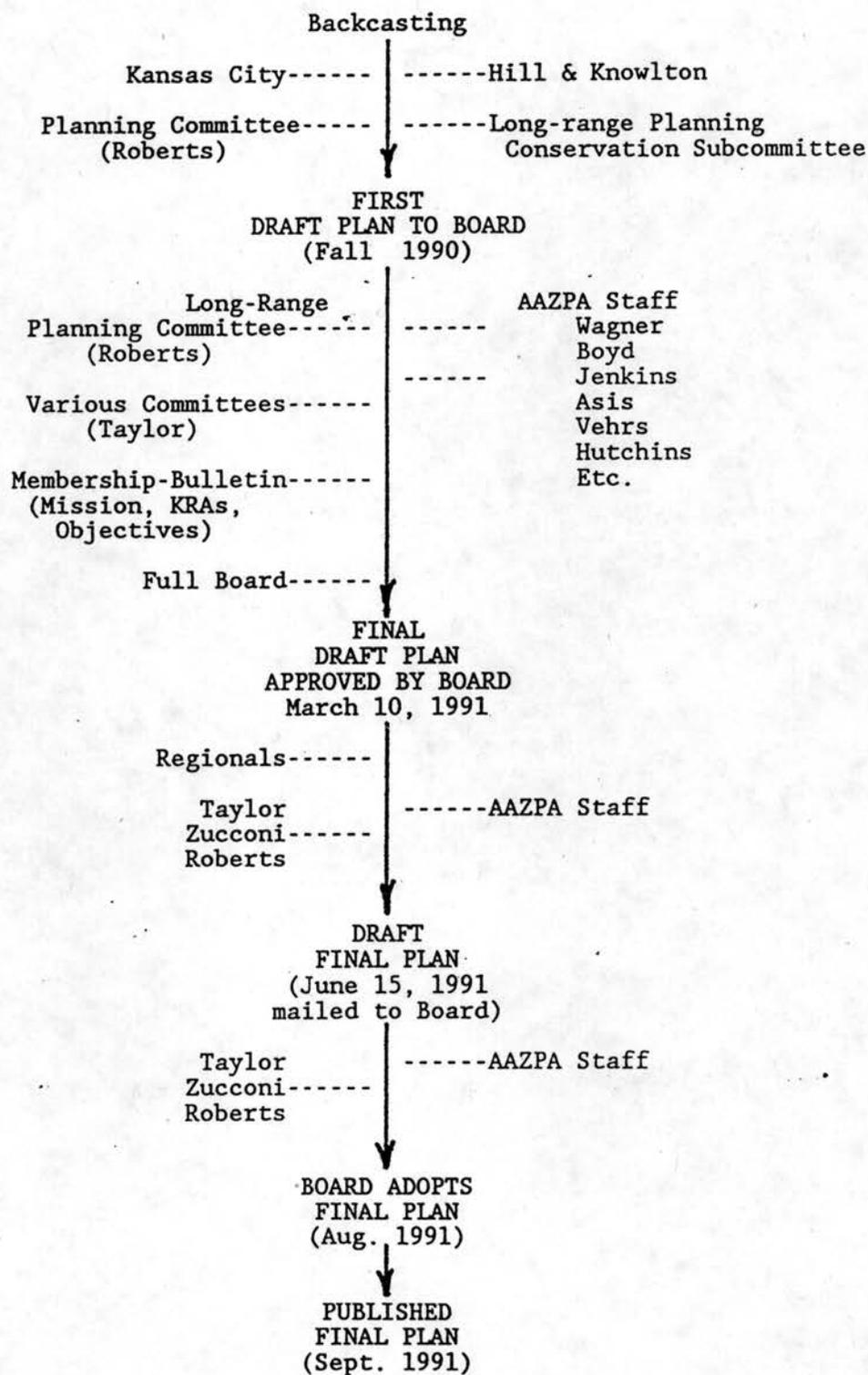
Commitment to Conservation - encourage the coordination of animal management programs, both in captivity and in the wild. Conservation, education and research are integral components of these programs.

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Advocacy - representing its members' interests in legislative bodies, governmental agencies and others will result in furthering the mission of zoological parks and aquariums.

Information Management and Communication - development and management of data bases relevant to our mission and the timely distribution of current information to our members.

PROPOSED TIMETABLE  
1991 - 1996 STRATEGIC PLAN



## ACTION PLANS

Key Result Area I Expand and improve membership services.

- Objective 1 Report recommendations on AAZPA publications to AAZPA Board by August 1992
- Objective 2 Establish an expanded zoo and aquarium data base on computer disk by 1 September 1992
- Objective 3 Create development opportunities, including promotions, fund raising and grants that would at least double existing development income to AAZPA and its member institutions by 1 January 1995
- Objective 4 Create a written public relations crisis management plan to address key issues currently impacting on zoos and aquariums, for presentation and/or demonstration at the 1992 conference.

Key Result Area II Enhance our image as leaders in environmental and wildlife conservation.

- Objective 1 Develop an easily recognizable identity to improve name recognition by September 1991.
- Objective 2 Conduct market research to determine our audiences and issues by January 1991.
- Objective 3 Develop a public relations plan based on existing market research to determine our message by September 1991.

Key Result Area III Expand and Improve our Conservation Programs

- Objective 1 Integrate AAZPA programs with global captive breeding and other conservation programs by 1993.
- Objective 2 Expand and improve the SSP and other conservation programs, with a target goal of 100 SSP programs by 1995.
- Objective 3 Provide increased scientific support for SSP and conservation programs.
- Objective 4 Encourage and expand conservation education activities.

Objective 5 Promote conservation of resources in AAZPA institutions

Key Result Area IV Develop and enhance an effective legislative plan

Objective 1 Identify legislative and regulatory priorities and initiatives by January 1991

Objective 2 Reduce institutional reaction time associated with high priority legislative and regulatory issues to 72 hours.

Objective 3 Expand the professional base in order to be more pro-active across a broader range of issues than is presently possible.

Objective 4 Increase association member participation in legislative challenges and process from 10% to 30%.

# MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

David Jenkins  
Deputy Director  
AAZPA  
Washington Office

October 11, 1990

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 1
To <i>Steve Taylor</i>	From <i>Kathryn Roberts</i>	
Co. <i>Cleveland Metroparks</i>	Co. <i>MN Zoo</i>	
Dept. <i>FYI</i>	Phone # <i>(612) 431-9233</i>	
Fax # .	Fax # <i>(612) 431-9336</i>	

Dear David,

Attached is an edited set of objective statements for KRA II -Enhance our image as leaders in the environmental and wildlife conservation.

I have also attached a draft preamble for the KRA. Feel free to take as much editorial liberty as you would like. I have no ownership problems with language changes.

Objectives:

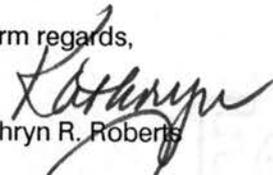
1. To develop a new name which will be easily recognized and understood by September 1991.
2. To conduct market research which will define our audiences and issues by
3. Develop a public relations plan which is based on the results of the market research which will effectively communicate our message by September 1991.

Preamble:

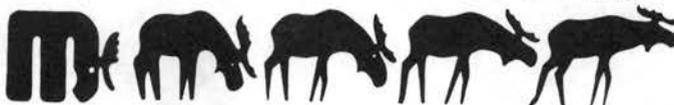
It is of very high importance that the AAZPA be recognized as a professional organization whose members are committed leaders in environmental and wildlife conservation issues. In order to achieve the recognition we desire, we must first have an easily identifiable and recognizable name. We need to understand our audiences and the issues they regard as important for us to address. Finally, we must capitalize on our strengths by developing and carrying out a strong public relations plan which is the vehicle to carry our mission.

Let me know if you need more changes or help.

Warm regards,

  
Kathryn R. Roberts

P.S. You put together one heck of a conference. I thought it was very well done and stood in contrast the conferences gone by. Thanks for the effort. It was greatly appreciated.



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# MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

October 11, 1990

Mr. Steve Taylor  
Cleveland Metroparks Zoo  
3900 Brookside Park Drive  
Cleveland, Ohio 44109

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 1
To <i>Steve Taylor</i>	From <i>Kathryn Roberts</i>	
Co.	Co.	
Dept.	Phone # <i>612-431-9299</i>	
Fax # <i>216-661-3312</i>	Fax # <i>612-431-9300</i>	

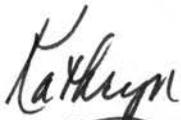
Dear Steve:

I finally had the time to look at the timeline you sent to me. The dates look good and probably more importantly, they look reasonable.

I have also read the letter to the committee chairs. I will send one that is very similar to the members of the Long Range Planning Committee. I'm assuming these letters will be mailed out after David has received all of the edited copies of the two page documents from us and has put together final copy.

If you want any help (relief) from travel to all of the regionals, let me know and I will be happy to help out.

Sincerely,



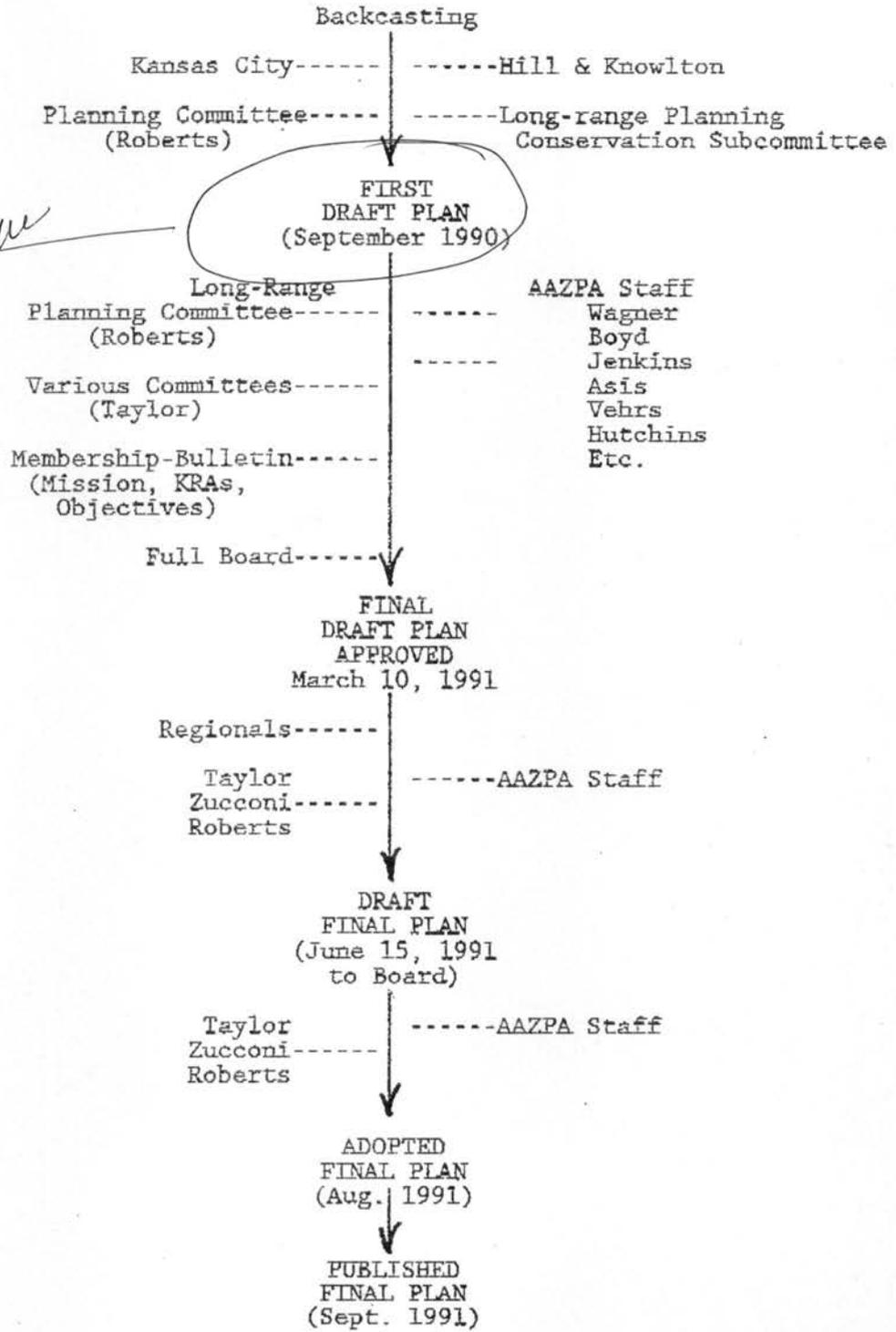
Kathryn R. Roberts  
Director

KRR:pn



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PROPOSED TIMETABLE  
1991 - 1996 STRATEGIC PLAN



*Is this the whole plan or 2 page document? If you 2 pages, I assume*



# American Association of Zoological Parks and Aquariums

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(304) 242-2160 Fax: 304-242-2283

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October 9, 1990

## OFFICERS

President  
DAVID G. ZUCCONI

President-Elect  
STEVE H. TAYLOR

Vice President  
STEPHEN R. WYLIE

Immediate Past President  
CHARLES H. HOESSELE

Executive Director  
ROBERT O. WAGNER

## DIRECTORS

TED A. BEATTIE

DENNIS A. MERIT, JR., Ph.D.

CHRISTEN M. WEAVER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

TO: Kathryn Roberts, Chair, Long-range Planning Committee  
David Zucconi, President

FROM: Steve H. Taylor, President-elect

SUBJECT: Notice for Input

I plan to send the following letter along with portions of the long-range plan to the following AAZPA committee chairs, etc.

Ed Schmidt	- Legislation
Brenda Stringer	- Public Relations
Bruce Read	- WCMC
Gail Schneider	- Publications Task Force
Sherry Sheng	- Education
Hayes Caldwell	- Membership (I realize this committee does not deal with service, but I want Hayes involved.)

I will proceed unless I hear from you.

ST/ins  
Enclosure



CLEVELAND METROPARKS ZOO

3900 Brookside Park Drive Cleveland, Ohio 44109 (216) 661-6500

Accredited by The American Association of Zoological Parks and Aquariums

F A X

DATE: 10/19/90

Number of Pages (including this one): 3

TO: Kathryn Roberts  
Wisconsin  
Minnesota Zool. Garden

FAX NUMBER 612-431-9300

FROM: Steve Taylor

If you do not receive all pages, call (216) 661-6500 or FAX (216) 661-3312

Special Instructions:

DIRECTORS

TED A. BEATTIE

DENNIS A. MERRITT, JR., Ph.D.

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY LARRY

WILLIAM P. BRAKER

WILLIAM G. CONWAY

J. STEPHEN McCUSKER

ED SCHMIDT  
Brenda Stringer  
Bruce Read  
Gail Schneider  
Sherry Sheng  
Hayes Caldwell

- Legislation
- Public Relations
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- Publications Task Force
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ST/ms  
Enclosure

Dear

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The draft plan has already had tremendous input. I do not believe there are any completely new concepts. All proposals have had previous discussion and study at Kansas City (March 1989), or in the Strategic Planning Sessions, or by the Board, etc. Nonetheless, additional input is requested before the Board of Directors approves a draft plan in March 1991.

As president-elect of AAZPA, I have volunteered to work with Kathryn Roberts, (Chair, Long-range Planning Committee) and David Zucconi (President), to see that the plan has sufficient input from interested parties.

Therefore, I am asking your input into the mission, KRAs, objectives and individual action plans in which you have considerable expertise.

Please respond to my request by January 15, 1991. Your comments are essential if we are to produce a usable plan for AAZPA.

Thank you for your assistance.

Sincerely,

Steve H. Taylor  
President-elect

ST/ms

cc - AAZPA Board  
Robert Wagner  
David Jenkins  
Kathryn Roberts



# American Association of Zoological Parks and Aquariums

DATE: October 1, 1990

REPLY TO: Kathryn R. Roberts

TO: Long Range Planning Committee

RE: DECISIONS AND TASKS

As a result of our meeting in Indianapolis, several decisions were made and tasks assigned.

- \* Our group will become the Long Range Planning Committee. We will be responsible for finalizing the document which will be shared with members, refining the document and preparing a final "glossy" product.
- \* Each of us will review the two page summary and submit changes to Jenkins.
- \* KRA leaders will draft a preamble (save Read) for their arena of responsibility. The preamble should be forwarded to Jenkins.
- \* Each of us will review the time-lines and send modifications to Jenkins.
- \* Roberts will draft a memo to members for inclusion in the December Communique. It will include a brief summary of the process, people involved, the Mission Statement and a request for input. All comments will be forwarded to Roberts.
- \* Taylor will draft a letter to committee chairs and ask for input from them and their members.
- \* At the same time, Roberts will draft a similar letter to the Long Range Planning Committee members identified by Zucconi and ask for their input and explain the process and their role.
- \* Following collection of comments, our group will review and take action to incorporate or not. We may also ask for additional information from the suggestor.
- \* Our modifications should be complete in order that a final document can be available at the mid-year meeting.
- \* Taylor will present the document at each regional conference. The presentation will not be directed toward solicitation of comments, but rather toward informing the participants.

Perhaps our group can reconvene at the mid-year meeting and identify what needs to be done, what has been done, and generally where we are.

Thanks for your help.

KRR:pn

Same letter to: S. Taylor, D. Jenkins, S. Wylie, W. Dennler, B. Read

October 1, 1990

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## AAZPA CONSERVATION CENTER

7970-D Old Georgetown Road, Bethesda, MD 20814  
(301) 907-7777 Fax: 301-907-2980



Conservation ♦ Development ♦ Education ♦ Legislation ♦ Public Relations

### MEMORANDUM

TO: All KRA Leaders  
FROM: David Jenkins  
Conservation Center  
DATE: 19 September 1990

Enclosed are the updated versions of all four KRAs. They include suggestions from Bob Smith and the Strategic Advisory Committee. I believe there are still several areas that need work and we can discuss that at the meeting on 26 September. Except for KRA III, Bob Smith believes each needs a preamble.

Steve Taylor also suggests a one page summary of the four KRAs plus their objectives, which I am enclosing. He also believes that we should have an overall time line, which I can start creating after our meeting.

All of this is now on Barbara Robinson's computer, so it will be very easy to change.

I am also enclosing a brief summary of where I believe we are, that I sent to David for his report.

CC: C. Hoessle  
B. Wagner  
D. Zucconi

ICRA leader mtg - Wednesday

Staff + field people will write the document  
Up to us to re-do the document

Oct 29 going to DC. Mike Hutchins + Bruce Reed  
Sci Auth., AFIS, Ag.

Legislative Co. mtg needs copy of ICRA

Talk to Karen about when + where her co. wants to  
interact + plan

How integrate new ideas

---

What should get sent out  
Mission statement  
+

Need do-able obj.

Our role  
to monitor plan

until approved plan - no gap.

Need to write Preambles  
Need to review action plans +  
look @ dates



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698  
(304) 242-2180; FAX: (304) 242-2283

September 17, 1990

TO: B. Wagner, Exec. Director, AAZPA

FROM: D. Zucconi, Pres-elect, AAZPA

## OFFICERS

President  
CHARLES H. HOESSLE

President Elect  
DAVID G. ZUCCONI

Vice President  
PAUL S. CHAFFEE, D.V.M.

Immediate Past President  
PALMER E. KRANTZ, III

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## DIRECTORS

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DENNIS A. MERITT, JR., Ph.D.

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

B. GREGORY LARRY

SUBJECT: AAZPA Strategic Plan

Recent communiques (Jenkins, Aug. 28, Boyd, Sept. 4 and Sept. 4; Taylor, Sept. 10, and others) lead me to the following suggestions:

1. AAZPA staff should continue to work closely with Kathryn Roberts, incoming LRPC chair and Steve Taylor, incoming President-elect. Both of these folks are key to the overall process of plan completion.
2. Steve Taylor is willing to appear at each of the five 1991 regional conferences to represent the Plan along with yourself.
3. To continually reach our general membership as a target for the communication of the Plan, it may be well to print a non-extravagant, one or two-fold brochure that can be included with materials normally sent to every new member (individual, RO, etc.).
4. I think it's important that we copy Gail Schneider, Chair of the Publications Review Task Force, on every communication that relates to publications (Proceedings, husbandry manuals, etc.) so that her committee has a full view of all possibilities.

DZ:jo

cc: C. Hoessle, Pres., AAZPA  
D. Jenkins  
K. Roberts ✓  
S. Taylor  
L. Boyd, Admin. Asst., AAZPA  
G. Schneider



## AAZPA CONSERVATION CENTER

7970 Old Georgetown Road, Bethesda, MD 20814  
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11 September 1990

David Zuconi  
Tulsa Zoological Park  
5701 E. 36th Street North  
Tulsa, OK 74115

Dear David:

Unfortunately I am gone for the rest of the week and Barbara Robinson is finishing putting all of the revised KRAs in the computer. We will send them out to each KRA leader on 17 or 18 September. I have added in Bob Smith's corrections and suggestions as well as those of the advisory board.

I thought, for purposes of your report to the membership at the annual conference, it would be good to know what has already been achieved. In summary, here is where we are in the projects.

KRA I: Expand and improve membership services

Objective 1: Report recommendations on AAZPA publications to AAZPA Board by August 1992

Linda Boyd is over halfway through preparing the report on existing publications and it will be finished by 1 November.

Objective 2: Establish an expanded zoo and aquarium data base on computer disk by 1 September 1992

Linda Boyd and the executive office staff have all of the 1989 data in the 1990-91 directory in the computer and will have it available on disk by 1 January 1991.

We have created two of the four data surveys for the entire data base. The Legislative Survey has been sent and is now being returned for analysis. The Education Survey will be mailed by 20 September. The Public Relations/Development and Conservation/Research surveys will be mailed out early in 1991. When all this information is combined we will, for the first time, have comprehensive data on what our member institutions are doing.

Objective 3: Create development opportunities.....etc.

As you know, the task force has been activated and we meet tomorrow. We will have our preliminary report ready for the board meeting.

KRA 2: Enhance our image as leaders in environmental and wildlife conservation.

Jeff Marliave has completed his analysis of the Hill and Knowlton Report and will be making recommendations on methodology in mid-October. A number of surveys are now finished and Jeff will be analyzing them in early 1991.

KRA 3: Expand and improve our conservation programs

Objective 1: Integrate AAZPA programs with global captive breeding and other conservation programs by 1993.

There has been great progress in this area in the past three months. Protocols of cooperation and formal lines of communication between AAZPA and CBSG are nearly finished. At the last CBSG meeting, a global international regional coordinators committee (SSP, EEP, etc.) was formed, and a CBSG steering committee is being formed. In addition, the joint EEP/SSP training manual has been approved. Finally, Michael Hutchins has been working on an annual report on conservation and science and will have both a proposal and an outline ready for the board meeting this month.

Objective 2: Expand and improve the SSP and other conservation programs

A survey of the methods needed to streamline SSP meetings has been sent and at least an experimental system is expected to be finalized at a special SSP coordinators meeting to be held in Indianapolis.

In addition, the AAZPA board approved the ISIS development funds for improving its SPARKS software, and the CBSG regional coordinators meeting has strongly recommended that ISIS work with the Dutch Federation, which has excellent EEP software, to standardize a number of programs, such as international stud books.

Finally, the review of the CEF policy is well under way and a preliminary report should be ready shortly for board review.

Strategy 2: Educate and recruit people to manage  
SSP.....etc.

The AAZPA Conservation Academy has been approved as a joint program and should begin in late February 1991.

Objective 4: Encourage and expand education activities

The board has approved an AAZPA education coordinator and the position will be filled in 1991.

KRA 4: Develop and enhance an effective legislative plan.

Objective 1: Identify legislative and regulatory priorities.

Kris Vehrs is now analyzing the first surveys requesting such priority information from our institutional CEOs and at the annual conference, the legislative committee will be discussing the process leading to the establishment of priorities.

Objective 2: Reduce reaction time to high priority legislative and regulatory issues.

Thanks to the use of MCI's Fax Network, we can now fax material to almost all our member institutions in a matter of minutes (getting them to respond is another matter)

Objective 4: Increase association member participation in legislative challenges.

A comprehensive list of legislators and the committees on which they serve is being prepared and will be distributed in mid-October.

This pretty well wraps up the status on all four KRAs. You can pick whichever you choose. The bottom line is that even though the strategic plan is really only a few months old, we are making progress in almost every area.

Next week I will send you the complete set of corrected action plans. Please call me Monday or Tuesday if you have any questions.

Yours sincerely,

AAZPA

*DAJE*

David Jenkins

Deputy Director

DJ:bcr

CC: C. Hoessle  
B. Wagner



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Yours sincerely,

AAZPA

  
David Jenkins

Deputy Director

DJ:bcr

CC: C. Hoessle  
B. Wagner

MEMORANDUM

TO: AAZPA Nucleus Planning Group  
The Strategic Plan Advisory Committee

FROM: David Jenkins  
Deputy Director

DATE 28 August 1990

RE: Next steps in Strategic Plan

On Monday, 27 August, Bob Smith met with us in the Conservation Center to turn over his notes and suggestions as well as samples of possible printed plans. Based upon that meeting, we have developed the following "Plan to Communicate the Plan."

First, Target Groups: We agreed that we have three major target groups, each with different needs.

The first target group is our general membership. David Zucconi will be giving a brief report at the Annual Conference. We shall prepare a basic summary of the major KRAs and Objectives, our accomplishments to date, and anything else he needs. We shall have this information to him by mid-September.

Then, by 10 November, the Conservation Center Office will prepare a 4-6 page article for publication in the December edition of COMMUNIQUE. This will be the primary vehicle for communicating the plan to the general membership.

The second target group is the Nuclear Planning Groups itself, the AAZPA Board of Directors and the AAZPA staff. This group will need a full binder detailing all the elements of the plan from backcasting to action plans. This will be our working document to insure projects proceed as planned.

We will prepare a complete draft of this document by 31 December 1990 and a fully edited copy by 28 February 1991. This will give us a working document for both the Regionals and the Mid-year Board Meeting. This document will then be reviewed at each Annual Board Meeting and updated as necessary.

The third target group is potential sponsoring corporations and foundations, major government leaders, and perhaps institutional trustees or other interested parties. For this group a professionally written document with graphics could become a valuable tool, not only for expressing who the AAZPA is, but also to show where we are going. This could be a stand-alone publication, or it could include material from our SSPs, overall zoo and aquarium statistics and other vital information.

KRA I is "Expand and improve membership services." Objective 1 is "report recommendations on AAZPA publications to AAZPA Board by August 1992." The first Action Step is "to form a task force." I would request that by March 1991 this task force examine the working documents assembled to that point, as well as samples that Bob Smith has left, and recommend whether they would like to proceed with a professionally created document.

Our immediate next steps are these:

1. From Linda Boyd I will need the master set of notes so we can flesh out the backcasting, key values, etc. I will also need a copy of the statement of costs that Bob Wagner read at the Annual Board Meeting.
2. From each planning leader I will need a preamble, (This can be part of the 1st draft review I will send out shortly--see # 3)
3. Within the next few weeks, I will send to each planning leader a draft of their KRA with Bob Smiths' and the AAZPA staffs' corrections and additions for their review.
4. I will also be calling several of you to clarify certain points.



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698  
(304) 242-2160; FAX: (304) 242-2283

August 21, 1990

MEMO TO: K. Roberts, Director, MSZ

FROM: D. Zucconi, AAZPA President-Elect

## OFFICERS

President  
CHARLES H. HOESSELE

President-Elect  
DAVID G. ZUCCONI

Vice President  
PAUL S. CHAFFEE, D.V.M.

Immediate Past President  
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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

A few thoughts for your consideration as incoming LRPC Chair; these derive from the Board's recent meetings in St. Louis:

- (1) Ted Beattie is organizing a Development Committee meeting in New Orleans, prior to Indianapolis; I suspect this meeting will result in some very important input for the Membership KRA;
- (2) several suggestions were put forth by the Advisory Committee, re Action Plans, and by way of <sup>A</sup>I am asking Linda Boyd to update you on these; <sub>XC</sub>
- (3) Bill Conway, Satch Krantz suggested that they would be providing some input for the Membership KRA;
- (4) I think the "Plan for Communicating the Plan" will be a very important consideration for the LRPC, "in order to provide everybody with knowledge of the plan as they need it in terms of their assignments and roles" (R. Smith). The Advisory Committee feels that a "slick" is in order for general distribution/communication, but that still leaves the question of who else receives how much information, and in what format(s).
- (5) although there appears to be no budgetary roadblock to implementation of the Action Plans through 1991, it will be necessary to "look down the road" for 1992 and to suggest budgetary priorities for the Board's consideration next year.

DZ:bm

CC:C. Hoessle  
B. Wagner  
R. Smith  
B. Denler  
T. Beattie  
L. Boyd  
W. Conway  
S. Krantz



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698  
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August 21, 1990

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FROM: D. Zucconi, AAZPA President-Elect

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T. Beattie  
L. Boyd  
W. Conway  
S. Krantz

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 1
To David Jenkins	From Kathryn Roberts	
Co.	Co. MN 200	
Dept. (301) 907-7777	Phone # 431-9333	
Fax # (301) 907-2980	Fax # (612) 431-9300	



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 · 1698  
(304) 242-2180; FAX: (304) 242-2283

August 21, 1990

MEMO TO: AAZPA Long-Range Planning Committee

FROM: D. Zucconi, *Chairman*

## OFFICERS

President  
CHARLES H. HOESSELE

President Elect  
DAVID G. ZUCCONI

Vice President  
PAUL S. CHAFFEE, D.V.M.

Immediate Past President  
PALMER E. KRANTZ, III

Executive Director  
ROBERT O. WAGNER

During the annual AAZPA Board of Directors meeting in St. Louis, Bob Smith presented an overview of our Strategic Planning Process and briefed the Board on the Action Plans that have evolved from the process. Executive Director Bob Wagner indicated that most of the Action Plans could be implemented, through 1991, without significant impact on the Association's operating budget. The Board accepted the report and approved continuation of the process, with targeted completion in August 1991.

In September, Kathryn Roberts will assume the chair of the 1990-1991 L-R Planning Committee; it will be the responsibility of this committee to massage the Strategic Plan into its final form. Input and assistance will be derived from the Advisory Committee, Action Plan leaders, AAZPA staff, a Task Force on Publications, and the membership itself.

Thanks to each one of you for your assistance in this very important project.

## DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

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ROY A. SHEA

R. GREGORY TARRY

DZ:bm

CC:K. Roberts ✓  
R. Smith  
L. Boyd  
S. Robbins  
W. Iliff



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698  
(304) 242-2160; FAX: (304) 242-2283

9 July 1990

## OFFICERS

President  
CHARLES H. HOESSLE

President-Elect  
DAVID G. ZUCCONI

Vice President  
PAUL S. CHAFFEE, D.V.M.

Immediate Past President  
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Executive Director  
ROBERT O. WAGNER

MEMO TO: KATHRYN ROBERTS, PH.D., LONG-RANGE PLANNING COMMITTEE  
CHAIRMAN

FROM: DAVID ZUCCONI, PRESIDENT-ELECT

SUBJECT: COMMITTEE ASSIGNMENTS

*Dave*

I have written to all those who will serve on next year's committees to inform them of my appointments and invite them to attend their respective committee meetings in Indianapolis (refer to the July COMMUNIQUÉ for the times and places). Please send a letter or memo and a copy of the lists I previously provided you to your committee members so they can familiarize themselves with the other members of your committees.

This will inform you that I have also appointed you to serve on the Charter & Bylaws Committee during my term as President.

## DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

STEPHEN R. WYLIE

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CHRISTEN M. WEMMER, Ph.D.

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ROY A. SHEA

R. GREGORY TARRY

I also take this means to request that you be in attendance for a "cabinet meeting" of all committee chairmen on Sunday, 23 September, from 4:00-5:00 p.m. in the Cameral Room of the Westin Hotel. At that time, I will provide you with the committee guidelines and briefly discuss my plans for the Association during the coming year. I sincerely thank you for your willingness to assist me and to serve the Association during my term as President.

DGZ/jkw

Copies to: AAZPA Board of Directors  
Louis DiSabato

*Wed. 26th -  
lunch on your own  
12:30 - 2 pm*

*Should you be  
setting up a mtg  
of your  
committee?*



# American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698  
(304) 242-2160; FAX: (304) 242-2283

21 June 1990

## OFFICERS

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ROY A. SHEA

R. GREGORY TARRY

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

Dear Kathryn:

I recently completed the initial assignments to next year's committees. I am pleased you will be chairing the Long-Range Planning Committee during my term as President.

In assigning committee members, I attempted to limit each member's service to one committee, where feasible. Therefore, while some members of your committee may have received a favorable evaluation, I may have assigned them to another committee. A list of those persons I plan to formally assign to your committee is attached. If you have serious concerns with any of those I proposed, please contact me immediately. I plan to make all formal appointments by 9 July.

Thank you for your willingness to serve the Association during my term as President.

Sincerely,

AMERICAN ASSOCIATION OF  
ZOOLOGICAL PARKS AND AQUARIUMS

David G. Zucconi  
President-Elect

DGZ/jkw

Attachment

Copies to: Bob Wagner  
Paul Chaffee

LONG-RANGE PLANNING (Conway)

Kathryn Roberts, Chairman  
Stephen Wylie, V-C

Nicholas Brown  
William Conway  
William Dennler  
Susan Engfer  
Charles Hoessle  
Michael Robinson  
Steve Taylor

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Accredited by The American Association of Zoological Parks and Aquariums

April 19, 1990

Kathryn Roberts  
Director  
Minnesota Zoological Garden  
12101 Johnny Cake Ridge Road  
Minneapolis, MN 55124

Dear Kathryn:

Just a quick note to tell you that I enjoyed your summary of the culture characteristics of AAZPA and have a few short comments to make regarding that delightful document.

1. Item #1 - the word "preservation." We have had trouble in our own institution with the word preservation since it means to preserve in a pristine state and really, our goal seems to be more conservation than preservation. It is difficult to create a document by using the word conservation over and over again and our own mission statement has been changed to use the phrase "responsible stewardship."
2. Item #10. I agree with this concept and discussing with our colleagues in museums and botanical gardens find that this is fairly typical throughout our type of agencies. I think that it may be better to rewrite the last sentence to state that AAZPA has no active plans to change this rather than say that it appears to be acceptable with AAZPA.
3. Item #18. "We seem not to be particularly religious." Although I am not particularly religious myself, I know there are those in our profession that are deeply religious and I am not sure that this statement is particularly a correct assumption.

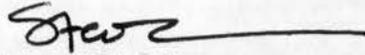
X On my own draft of this document, I underlined some of the key phrases and found it more easily read in that manner and might offer this as a suggestion. I would also suggest that you group the five items, 1,2,3,4, 6 and 21 together with a subtitle as all six of them directly relate to zoos, whereas, the other 15 items could be true of many types of industry.

Kathryn Roberts  
Page 2.

April 19, 1990

Again, thank you for taking on this assignment and doing the job and coming up with such an accurate description of our culture.

Best regards,



Steve H. Taylor  
Zoo Director

ST/ms

*Thanks for the inside-  
outside agitators list!*

# MINNESOTA ZOO

forwarded &  
mailed  
3/30/90

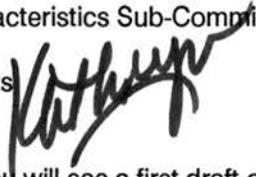
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3-28-90

To: The Culture Characteristics Sub-Committee

Fr: Kathryn R. Roberts



On the following pages you will see a first draft of cultural descriptions for the AAZPA. The draft results from input from several people. It will give you something to begin to work with. You will also find a sample of another organizations cultural characteristics which was provided to us by Bob Smith.

Please take this draft and add, delete and edit the list. Send your proposed changes back to me in the next couple of days. I will try a second draft and send that one back out again before we submit the final product to Linda Boyd to distribute to the full group.

Feel free to call me if you want to talk about the list rather than doing it by writing.

Thanks for all of your assistance.

Phone: 612-431-9333

FAX: 612-431-9300



### Cultural Characteristics of the AAZPA

1. We are dedicated to the preservation of flora and fauna, both in the natural and captive state. We are conservationists by nature.
2. Many of us, (perhaps because of our backgrounds) seem to prefer work with animal related problems and issues rather than people related problems and issues.
3. We do not easily welcome people who have different, or non-animal training. Our language reflects this feeling. We call people who are strong members of the zoo family, but not "animal people" "special interest groups." They are made separate by our language.
4. We act as if we do not value people who work in or issues that affect aquariums.
5. We are cautious about letting new-comers into our ranks. They must prove themselves before they are accepted.
6. We deal with our membership in a caste system. We classify all of our members in levels, assign name tag colors for levels of members, allow differing levels of power to different levels etc.
7. We are passionate and intense about our profession.
8. While we are a group of well-educated, well traveled and knowledgeable about conservation and biology related topics, we are not worldly about issues that we think are unrelated to our profession. We may have some tunnel vision.
9. We are a Good Old Boys organization. There is a relatively small group of people who control a very large group and look out for each other. This group has been generally been together for a relatively long time.
10. Women have not been encouraged or supported in efforts to become part of the leadership of the organization. This posture is considered to be acceptable within AAZPA. It is a group that feels it is OK to treat women differently than men.
11. We are a group that values tradition. Our meeting have repetitive formats, written materials are consistent etc.
12. We value rituals. We like to have award presentations, big banquets and speeches.
13. We don't like to be regulated or governed by others, particularly when it comes to matters we strongly believe in.
14. We are cautious about announcing up to the minute news. Our conference requires that papers be submitted months before presentations. Our news comes through a formal written communique which comes on a monthly basis.
15. We tend not to always be savvy in our approach to issues. We tend to be straight forward and let the chips fall where they may.
16. We are slow to change.
17. We are not particularly formal. We tend to be casual in our appearance (dress) and manner.
18. We seems not to be particularly religious.
19. We love to gossip.

EXAMPLE  
OF  
COMPANY X

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CHARACTERISTICS OF COMPANY'S CULTURE

Our roots are in the old Gusto culture of sales. We have become conditioned to thinking mostly of sales rather than production and operations. We are market-driven, using technology development as our back-up. We are aggressive. We have had the guts to do many things for the first time.

- However, with this strong sales orientation, we have had ill effects on our administration, which some see as being in a very bad state.
- It leaves the general impression of chaos or a beehive, sometimes leading to touch-and-go or hipshooting decisions.
- In this milieu we have big communication problems - up and down and in all directions. Communication among people in our Monaco office... and with our overseas offices... is difficult.
- Everyone has been running. But with time, some have become influenced by the sun. We have mostly lived in a booming, up - up - up business environment, but now a less buoyant market influences our attitudes and behaviour.
- The local environment in which we work is fairly relaxed but the service we provide has to be disciplined and results-oriented to be successful. This incompatibility creates strain and conflict. A large part of the Company is not disciplined and it is hard to get speedy decisions from our Monaco office when you are away from here.
- We are target-oriented, mobile and international. There is no inhibition to any national culture.
- Because we have so many nationalities in the company we are open-minded and can approach the client in a more open manner... and we have unusual access to multi-national resources in technology.
- We build and operate all over the world rather easily, even in places and cultures we do not know well.
- With so many different nationalities in the company, we tend to generalize about their attitudes and characteristics. We accept these generalizations too easily and without justification.
- We have a language problem. We all communicate in English but since it is not the mother tongue for many, there is chance for misunderstanding and mistrust that must be recognized and dealt with. There also is a tendency to form groups based on nationality.
- We have strong centralized top management that has a paternalistic leadership style. We do not delegate very much.

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- There is a gap between top management and mid-management in terms of transmitting from the top the company's goals and objectives. Some managers and other staff down the line do not know the "why's" behind decisions and would be more motivated if they did. Mid-managers also need to know more about top management thinking so they can better motivate others.
- Our tendency has been to organize more around people than tasks. This was a way to keep a number of very good people but not the way to optimally handle tasks. We have produced a number of small departments with consequential division of responsibility.
- Hence, we are split up into a lot of small groups... departments and other units. We have had a terrible inflation of titles.
- We do not have a strong solidarity among departments. When something goes wrong, there is a tendency to blame others rather than seeing how we can resolve it together.
- We sometimes have conflicts of interest among our groups, as with sales strategies for our products.
- In today's tight market there are pressures to blame others for what the company has not achieved. Engineers particularly feel this.
- We are living in an internal environment of competition... often at the expense of collaboration.
- Within the company, at all levels, there is great enthusiasm. For example, designers are anxious to know how the business is doing, how clients have responded to their work.
- Our whole organization is still young. We are enthusiastic, we talk a lot, we are dedicated.
- The Company runs in a typical entrepreneurial, small enterprise style. We operate by instinct, rapidly, emotionally, informally, aggressively.
- A lot of things are done opportunistically, with both good and bad outcomes.
- In our engineering, we do not like to make the same thing twice.
- And we have extreme difficulty in storing and using our own experience.
- But we do use our "product" in common. It belongs to the Company.

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- We know we are relatively isolated - geographically and product-wise. We are remote from the centers of offshore engineering and general product environment. In Monaco there is no way you can bump into a client in a pub or a restaurant.
- Within our IHC Caland Group we also live as separate and isolated companies. We make no or insufficient use of one another's capabilities, facilities and people. We behave more as a conglomerate than an integrated group of related companies.
- In Monaco, we have a small turnover of staff. It is a big step to come here and a big step to leave here.

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2. Many of us, (perhaps because of our backgrounds) seem to prefer work with animal related problems and issues rather than people related problems and issues.

[We are somewhat cognizant of a need to change this as evidenced by maintaining public relations and development officers geared toward reaching people who are not necessarily animal oriented. The public education committee is another example.]

[This is a problem not only for AAZPA but for zoos since the world's conservation problems and indeed AAZPA and zoo's problems which effect their abilities to deal with animal related problems are primarily people caused. I think our organization has become aware of this as witnessed by the fact that AAZPA now has a public relations officer, development officer and education officer all geared to some extent toward reaching non-animal oriented entities. (We are making an effort to change our culture to some extent --evolution, adaptation for survival.)

3. We do not easily welcome people who have different, or non-animal training. Our language reflects this feeling. We call people who are strong members of the zoo family, but not "animal people" "special interest groups." They are made separate by our language.
4. We act as if we do not value people who work in or issues that affect aquariums.
5. We are cautious about letting new-comers into our ranks. They must prove themselves before they are accepted.
6. We deal with our membership in a caste system. We classify all of our members in levels, assign name tag colors for levels of members, allow differing levels of power to different levels etc.
7. We are passionate and intense about our profession.
8. While we are a group of well-educated, well traveled and knowledgeable about conservation and biology related topics, we are not worldly about issues that we think are unrelated to our profession. We may have some tunnel vision.
9. We are a Good Old Boys organization. There is a relatively small group of people who control a very large group and look out for each other. This group has been generally been together for a relatively long time. Rather than encouraging a broad participation in committee activities, some individuals sit on several committees which limits opportunities for committee service to fewer individuals.
10. Women have not been encouraged or supported in efforts to become part of the leadership of the organization. This posture is considered to be acceptable within AAZPA. It is a group that feels it is OK to treat women differently than men.

[Aside from the Good Old Boys mentioned in Item 9, this characteristic is not universally felt. If this is a broad based feeling among women Professional Fellow members, it should be worded differently.

AAZPA does not seem to put forth an affirmative action stance with regard to encouragement and support of minorities assuming organizational leadership roles. There are noticeable small numbers of female and/or racial minority individuals in leadership roles.]

11. We are a group that values tradition. Our meetings have repetitive formats, written materials are consistent etc.

12. We value rituals. We like to have award presentations, big banquets and speeches.
13. We don't like to be regulated or governed by others, particularly when it comes to matters we strongly believe in.
14. We are cautious about announcing up to the minute news. Our conference requires that papers be submitted months before presentations. Our news comes through a formal written communique which comes on a monthly basis.
15. We tend not to always be savvy in our approach to issues.
16. We are slow to change.
17. We are not particularly formal. We tend to be casual in our appearance (dress) and manner.
18. We seems not to be particularly religious.
19. We love to gossip.
20. We are a congenial and social group; we work hard and play hard; an association of friends. We tend toward workaholism, which I believe comes with dedicated animal work (they need care 24 hours a day/7 days a week).
21. We tend to perceive the world as split into two groups: Pro conservation/zoological interests and anti conservation/big money-industrial type interests. We tend to forget (and thus forget to communicate with) regular, everyday people. These people are neither pro or anti; they are just buy living average lives and have not had the benefit of a zoological or conservationist background and simply don't think about it. This might be called apathy or ignorance, but it doesn't matter. These people are voters, consumers, potential zoo goers, parents and even legislators. We tend to "play to" other zoologists instead of regular people who are a part of our culture.

*draft 2*

Cultural Characteristics of the AAZPA

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## Cultural Characteristics of the AAZPA

*draft 1*

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8. It is a group that feels it is OK to treat women differently than men. When two late comers to the Washington meeting arrived they were told that we were discussing house rules. Basically, there is no drinking and smoking. One of the people responded that they didn't smoke or drink "but we like our women to be hard drinkers and smokers." The group responded with laughter. This is a specific behavioral incident that reflects a cultural characteristic.
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