



Minnesota State Zoological Board.
Zoo-Related Organizations Files.

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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%.

**- CONFIDENTIAL -
FAX MEMORANDUM**

August 2, 1990

To: Jeff Marliave

Fr: Kathryn Roberts

Jeff,

I got a call from Karen after her repeated attempts to get hold of you. She is extraordinarily sensitive to the way you characterized her comments about the Hill & Knowlton survey.

She is sensitive to Bob Wagner's reaction to the phrase "ripped off" being attributed to her. She did call Charlie Hoessle to explain that she had not used these words and felt the need for everybody on the committee to know that.

I wrote the attached memo and faxed it to everyone in your absence. I hope you are comfortable with my taking the liberty of writing this. It was really important to Karen that something like this be received in Bob's office prior to seeing your memo. He returns to his office on Friday and will see both of them at the same time.

Please call me on Monday (612/431-9333) to talk about this.

August 2, 1990

Memorandum

To: Bob Wagner, Dave Zucconi, Karen Asis, Charlie Hoessle,
Doug Myers, Gerry Lentz, Jeff Marliave

Fr: Kathryn Roberts

I have just received the fax from Jeff Marliave about the Hill & Knowlton survey information. I understand Jeff's concerns about lack of statistical background.

I feel compelled to say that while I agree with Jeff, I think that Karen has been misrepresented in Jeff's comment that she stated we may have been "ripped off" by Hill & Knowlton.

I know from my own conversations with Karen that she believes there were problems but I also know that Karen would never characterize those actions as "ripped off."

I hope everybody on the committee takes the comment as Jeff's interpretation -- not as Karen's remarks. I hope no one reacted more strongly than was necessary over Jeff's fax.



American Association of Zoological Parks and Aquariums

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

20 July 1990

*Do you need
to go to
this?*

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MEMO TO: STRATEGIC PLANNING ADVISORY COMMITTEE and NUCLEUS GROUP

FROM: LINDA BOYD, PLANNING COORDINATOR *Linda*

SUBJECT: MINUTES OF TULSA MEETING and REVISED ACTION PLANS

Enclosed are the minutes from the Tulsa meeting and the revised Action Plans developed by the Task Force leaders of the Nucleus Planning Group. They are Membership Services - Bill Dennler, Image - Kathryn Roberts, Conservation Programs - Bruce Read and David Jenkins, and Legislation - Steve Wylie.

David Zucconi has asked that the Advisory Committee study these enclosures and bring them to the meeting in St. Louis on 9 August. Bob Wagner was asked to estimate cost involved with the proposed implementation of the Action Plans. He will have that information available for the meeting in St. Louis.

Bob Smith asked that I provide you with a copy of Process for Inventing the Future for your use in orienting staff members to this management activity. It is included.

I am also enclosing another copy of David's excellent letter detailing where the process goes from here.

DIRECTORS

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/ljb

Enclosures

Copy to: Bob Smith

STRATEGIC PLANNING COMMITTEE MEETING

TULSA, OKLAHOMA - 18-19 JUNE 1990

The meeting of the Nucleus Planning Group of the Strategic Planning Committee was called to order at the Westin Hotel on Monday, 18 June in Tulsa, Oklahoma. In attendance were: Chairman David Zucconi, Facilitator Bob Smith, Planning Coordinator Linda Boyd, Bill Dennler, Lou Garibaldi, Charles Hoessle, David Jenkins, Jerry Lentz, Jeff Marliave, Doug Myers, George Rabb, Bruce Read, Kathryn Roberts, Gail Schneider, Ulie Seal, Steve Taylor, Bob Wagner and Steve Wylie.

The four Task Force Chairmen (Roberts - Image, Seal - Conservation Programs, Wylie - Legislation and Taylor - Membership Services) delivered their reports, which received comment and input from the group. It was stated that we need to involve the institutions' governing bodies and staff, which will take a commitment to their education. Ulie informed the group that more than \$5 million is spent annually by zoos/aquariums for research. It was suggested that our societies be used for letter writing campaigns and that the institutions' boards establish government relations committees. There was much discussion regarding the development of surveys to help determine the needs of our institutions, whether or not to refer to groups other than AAZPA committees as "special interest groups," the need to educate the general public about the roles of zoos and aquariums, the need to determine the members' positions on critical issues, whether or not the Association should become more involved in animal transportation, and whether or not it would be appropriate to conduct another survey of the general public as a follow-up to the Hill & Knowlton report.

The majority of the second day was spent in four groups (Conservation Programs, Image, Legislation and Membership Services) preparing Action Plans. Because of the early departure of Seal, Read assumed the leadership of the Conservation Task Force. Each leader then verbalized the plans his/her group had worked on, taking note of comments and suggestions from the other groups. Revisions are to be made to the Key Result Area Action Plans and sent to the Strategic Planning Committee members and AAZPA Board of Directors. On 9 August, the Advisory Committee will meet in St. Louis in conjunction with the AAZPA Board of Directors meeting to critique and recommend the prioritizing of the revised Action Plans, and then Bob Smith will present them to the Board. Implementation of the plans will be done by staff, supplemented by committees. Bob Wagner is to supply the Advisory Committee with a guesstimate of the cost to implement various components. We will publish reports in COMMUNIQUE apprising the membership of the Strategic Plan and its implementation; and Zucconi, Hoessle and Wagner will discuss the Strategic Plan during the Business/Awards Presentation Meeting in Indianapolis. Additionally, Wagner will report on the Plan at each of the 1991 Regional Conferences to further enlist input from the membership. The Long-Range Planning Committee and AAZPA Board of Directors are to monitor the implementation of the Strategic Plan. Dennler is to refine Membership Services, Roberts - Image, Wylie - Legislation and Read - Conservation Programs. Boyd is to prepare a list of existing and past publications to include printing costs, number printed, distributed to whom, etc., for the Publications Review Committee. For backcasting, a list of all documents AAZPA has produced will be included.

The meeting was concluded at 5:00 p.m. on Tuesday, 19 June.



Linda Boyd
Planning Coordinator
20 June 1990

ACTION PLAN

Key Result Area: Expand and Improve Membership Services

Planning Leader: _____

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

Dates of Action Plan:

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

Presented _____ Approved _____

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	Exec. Office (L. Boyd)	7/1/90	11/1/90		This would include: costs, number printed, comments from membership, funding of publications, etc. Task Force will meet in Indianapolis and be in communication with each other during the 11 months to determine need for new publications. NOTE: Task Force should attempt to obtain expert advice (i.e., from other professional publications) at no charge if possible.
2. Establish a Task Force	AAZPA President (D. Zucconi)		8/1/90		
3. Meeting of Task Force	Chairman of Task Force		9/24/90		
4. Preliminary report to Board	Task Force	9/24/90	8/1/91		
5. Final report to Board	Task Force	8/1/91	8/1/92		

ACTION PLAN

Key Result Area: Expand and Improve Membership Services

Planning Leader: _____

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

Dates of Action Plan:

Presented _____ Approved _____

Strategy: Continue to establish and expand the data base.

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 computer disk and make available to membership	Exec. office (L. Boyd)	7/1/90	1/1/91		Information already contained in new 1990 directory.
2. Determine additional data and methodology (software) needed with membership input	D. Jenkins	10/1/90	8/1/91		Work with Barbara Birney and other
3. Put expanded data on disk and make available to membership	Exec. office (L. Boyd)	8/1/91	9/1/92		

ACTION PLAN

Key Result Area: Expand and Improve Membership Services

Planning Leader: _____

Objective: #3 Create development opportunities, including promotions, fund raising, and grants that would double existing

Dates of Action Plan:

Strategy: development income to AAZPA and its member institutions by

Presented _____ Approved _____

#1 Complete staff and committee assignments

January 1, 1995

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 Committee	AAZPA President (D. Zucconi)		8/1/90		
2. Hire Development Officer	Exec. Director (R. Wagner)		1/1/91		

OBJECTIVE #3 (Continued) - Create development opportunities, including promotions, fund raising, and grants that would double existing development income to AAZPA and its member institutions by January 1, 1995

ACTION 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)
<u>Strategy #2: Increase income</u>					
1. Meeting of Development Committee	Chairman of Development Committee		9/24/90		NOTE: Estimated AAZPA development income for last 4-5 years is \$700,000.
2. Develop plan and guidelines to accomplish objectives and submit to Board	Development Committee	9/3/90	8/1/91		
3. Implement plan	Development Officer and Development Committee	9/1/91	1/1/95		

OBJECTIVE #3 (continued) - Create development opportunities, including promotions, fund raising, and grants that would double existing development income to AAZPA and its member institutions by January 1, 1995.

ACTION PLAN

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	<u>REMARKS</u> (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
<u>Strategy #3: Measure success</u>					
1. Quantify funds received by AAZPA and member institutions	Development Officer	1/1/95	8/1/95		
2. Survey institutional membership	Development Officer	1/1/95	8/1/95		

ACTION PLAN

Key Result Area: Expand and Improve Membership Services

Planning Leader: _____

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

Dates of Action Plan:

Presented _____ Approved _____

Strategy:

conference

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	K. Asis		9/24/90		NOTE: Four case studies will be presented at 1990 conference as well as a session on working with the media.
2. Develop a preliminary plan to present to Board	Chairman PR Committee	10/1/90	8/1/91		NOTE: D. Jenkins and K. Asis will determine the timeline for this plan.
3. Workshop at annual conference	K. Asis	10/1/90	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	K. Asis	10/1/91	8/1/92		NOTE: Legal counsel (K. Vehrs) should be consulted during this process before plan is finalized.
5. Final plan presented at annual conference	K. Asis	8/1/92	9/92		

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

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

Strategy: Contract with professionals for input, concurrence and development

Planning Leader: Kathryn Roberts

Dates of Action Plan:

Presented _____ Approved _____

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. Research field for appropriate vendor	Karen Asis		Sept. 1990		
2. Request bids from acceptable vendors	Robt. Wagner Chas. Hoessel	Sept. 1990	Oct. 1990		
3. Select Vendors	Robt. Wagner Chas. Hoessel	Oct. 1990	Mar. 1991		
4. Communicate concepts to Membership	K. Roberts/ NPG	July 1990	Sept. 1990		
5. Specify parameters and options for development		Sept. 1990	Feb. 1991		e.g. either new AAZPA name and logo or ad slogan and logo (separate
6. Create review team	K. Roberts/ NPG			June 1990	Design staffs and consultants of St. Louis Zoo, Minnesota Zoo, Busch Garden Vancouver
7. Team reviews, interim Presentation	Asis, review team	May 1991	July 1991		
8. Present to Membership	Asis		Sept. 1991		at annual AAZPA meeting

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

Objective: Conduct market research to determine our audiences and issues by January 1991

Strategy: (A) Review Hill and Knowlton and determine methodology

Planning Leader: K. Roberts

Dates of Action Plan:
Presented _____ Approved _____

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 - questions 5,6,8, 29 (1988 P.R. plan)	J.Marliave	June 1990	July 1990		
2. Recommend methodology	J.Marliave	June 1990	July 1990		Including new questions, statistical criteria
3. Approve recommended methodology	K.Asis, K.Roberts	July 1990	Aug. 1990		

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ACTION PLAN

Strategy: (B) 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	K. Roberts		complete	June 19/90	St. Louis Zoo, Minnesota Zoo, Busch Gardens, San Diego Zoo (J.B. Marliave to contact Calgary Zoo and Metro-Toronto)
2. Conduct the surveys	J.Marliave	Aug.1990	Nov. 1990		- same participants as above.
3. Compilation and analysis of results	J.Marliave K. Asis	Nov.1990	Jan.1991		
4. Communicate results through Communique, Regional, National and Board Meetings	K. Asis		Aug.1991		

JUL 12 '90 15:20 VAN PUBLIC AQUARIUM

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

Objective: Develop a public relations plan based on market research to determine our message by September 1991

Strategy: (A) Create a team to develop an Implementation Plan

Planning Leader: K. Roberts

Dates of Action Plan:

Presented _____ Approved _____

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	C. Hoessel	June 1990	Aug. 1990		note: "team" versus "PR committee" refer to different groups. "Team" must include at least one from PR committee Perhaps quarterly via self-reporting mechanism
2. Recruit and organize the team	C. Hoessel	Aug. 1990	Sept. 1990		
3. Assign tasks to team	K. Asis	July 1990	Oct. 1990		
4. Carry out tasks	K. Asis Team Members	Oct. 1990	Annual review		
5. Monitor and evaluate the progress and results of the tasks	long-range planning comm.		Annual review		
6. Review and report at all Board meetings and through communique	long-range planning K. Asis	Sept. 1990	Annual review		

ACTION PLAN

Strategy: (B) Coordinate P.R. 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 P.R. staff and/or capabilities	K. Asis		Aug. 1990		
2. Secure willingness to cooperate by sharing instruments, results, ideas.	K. Asis P.R. Comm.	Aug. 1990	Oct. 1990		
3. Develop Mechanism for sharing information	K. Asis P.R. Comm.	Oct. 1990	Jan. 1991		Will assist-AAZPA office and member institutions
4. Implement ongoing sharing and cooperation	K. Asis				Will check periodically and report to Board.

Key Result Area: Development of Conservation Programs

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 the terrestrial and aquatic realm 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.

ACTION PLAN

Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

Objective: (1.) Integrate AAZPA programs with global captive breeding and field conservation programs by 1993.

Dates of Action Plan:

Presented _____ Approved _____

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 a continuing and efficient liason and communication system with international and regional conservation organizations with similar objectives.	AAZPA President	1990	Ongoing with an annual review		IUCN: SSC, CBSG, other specialist groups 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

ACTION PLAN

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Key Result Area:Objective:Strategy:

Planning Leader: _____

Dates of Action Plan:

Presented _____ Approved _____

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)
2. Participate in global heritage species program.	David Jenkins	1990	Ongoing with an annual review		SSC directed initiative in cooperation with IUDZG, CBSG prospectively will assemble biological information for program targets
3. Propose a program to appropriate government agencies, congressional committees to facilitate the transfer of genetic material between animal populations internationally	Bruce Read	1991	1992		AAZV is a natural allied organization Will require a coordinated effort to plan and perhaps exertion of the lobbying capacity of AAZPA members to effect.

ACTION PLAN

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Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

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

Dates of Action Plan:

Presented _____ Approved _____

Strategy: 2. Increase participation in field 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. Participate in state-of-the-art workshops on a regional basis	Conservation director	1991	Ongoing with annual review		CBSG, Government agencies & others who are apt to be initiators of such workshops
2. Further development of consortium programs in developing countries	WCMC	1990	Ongoing with annual review.		Institutional representatives from AAZPA members zoos and aquariums will be central to this program (existing programs are Madagascar Consortium, Sumatran Rhio, Kouprey, etc.) Collaboration with international organizations is essential (WCL, WWF, IC&P, etc.)

ACTION PLAN

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Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

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

Dates of Action Plan:

Presented _____ Approved _____

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 meetings travel, etc.	Conservation Coordinator	1990 (Sept.)	1992 (end)		Funding for program development
2. Participate in developing user friendly software.	Conservation Director	1991	1994		
3. Develop a more efficient communication system including the publication of research, etc.	Chris Wemmer	1990 (Oct.)	1993		
4. Evaluation of programs.	WCMC	1990	Annual Review		
5. Seek & procure political and financial support for the conservation programs					

ACTION PLAN

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Key Result Area: Development of Conservation programs

Planning Leader: Read/Jenkins

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

Dates of Action Plan:

Presented _____ Approved _____

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)
5. (continued)					
a. Review policy and goals for CEF fund.	President, AAZPA Board	1990 (Aug)	1991 (mid-year)		
b. Project menu for development purposes.	WCMC	1990	1991 (ongoing)		
c. Develop a process to facilitate political support at all levels (board, local, & national)	Kris Vehrs David Jenkins	1991	Ongoing & Review		

ACTION PLAN

Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

Objective:

2. Expand the SSP and other conservation programs.

Dates of Action Plan:

Presented _____ Approved _____

Strategy:

2. 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. Establish an AAZPA Conservation Biology School					
a. Appoint a task force	AAZPA President	1990	1990		
b. Establish a self-sustaining program.	AAZPA Board	1991	1991		

ACTION PLAN

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Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

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

Dates of Action Plan:
Presented _____ Approved _____

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

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	<u>REMARKS</u> (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1. The formation of WCMC scientific advisory committee	WCMC	1990	1990		
2. Encourage and assist the WCMC committee in the identification of critical research priorities.	Chris Wemmer	1991	1991		

ACTION PLAN

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Key Result Area:Planning Leader: Read/JenkinsObjective:

Dates of Action Plan:

Presented _____ Approved _____

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 the model research protocol.	Conservation Director	1991	1992 (end)		
2. A means of recognition	Honors & Awards Com	1991	Ongoing review		

ACTION PLAN

Key Result Area: Development of Conservation Programs

Planning Leader: Read/Jenkins

Objective: (4) Encourage and expand conservation education activities

Dates of Action Plan:
Presented _____ Approved _____

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 the AAZPA data base determine the scope of existing conservation programs.	D. Jenkins	Sept. 1990	Sept., 1991		Some data already in existence, but little numerical
2. Compile an easy access information system on outstanding conservation education programs and publications within our institutions or related institutions.	Education Coord.	June, 1991	July, 1992		To be updated annually thereafter
3. Develop "generic, easily adapted series of aquarium and zoo media (graphics, video, traveling exhibitions, etc.) to demonstrate to the public our role in conservation.	Public Education Committee	June, 1991	Dec. 1993		1st materials, more to follow on an annual basis.

P.10/14

JUL 16 '90 08:39 ST. LOUIS ZOO 314 647 7969

ACTION PLAN

Key Result Area:

Planning Leader: Read/Jenkins

Objective:

Dates of Action Plan:

Presented _____ Approved _____

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	P.R. Office Conserv. Center staff	Early 1991	Initial list Dec. 1991		
2. Identify appropriate potential partnerships.	Education Ccoordinator	June, 1990	Ongoing		
3. Enter into at least one major program per year.	Conservation Center Staff (Ed. coord)	1991	Continuing		

ACTION PLAN

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Key Result Area: Development of Conservation ProgramsPlanning Leader: Read/JenkinsObjective: 4. Encourage and expand education activities

Dates of Action Plan:

Presented _____ Approved _____

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 conservation coordinator.	AAZPA Exec.	1991			
2. Hire AAZPA grants & develop. officer.	AAZPA exec.	end 1991			
3. Seek and obtain national level funding for conservation education programs (government funding, corp.)	Grants & develop. coord.	1991	Ongoing		

ACTION PLAN

Key Result Area: Development of Conservation Programs

Planning Leader: _____

Objective: 5. Promote conservation of resources in AAZPA institutions.

Dates of Action Plan:

Presented _____ Approved _____

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 President	1990	1990		Important to image, effectiveness in lobbying. Topics to cover include water usage, waste management, material recycling, energy conservation. Data should be in AAZPA data base central.

ACTION PLAN

Key Result Area: Development of Conservation programs

Planning Leader: _____

Objective: 5. Promote conservation of resources in AAZPA institutions.

Dates of Action Plan:

Presented _____ Approved _____

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 the collected information to identify desired performance levels.	Chairman of the task force	1991	1992		P.E. committee participation, comparisons with other professional associations desirable. Will involve management, operations personnel in AAZPA institutions who otherwise might not be in conservation picture.
2. Establish awards for resource consortium accomplishments and innovations.	Honors & Awards Committee	1991	1992		

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

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

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #1 - Appropriate staff and Association members who have broadest perspective and 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 - schedule and hold meeting at 1990 Annual Conference to establish priorities	K. Vehrs	9/23/90	9/28/90		E. Schmitt, D. Jenkins & B. Heffernan to assist
2 - Prepare document identifying priorities	K. Vehrs	9/28/90	10/31/90		E. Schmitt, D. Jenkins & B. Heffernan to assist
3 - Distribute document to institutional CEO's for their information and comment	K. Vehrs	11/1/90	12/1/90		D. Jenkins to assist

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Reduce reaction time associated with legislative and regulatory issues to 72 hours.

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #2 - Develop a decision-making process which insures timely responses.

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	7/90	9/90		

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

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

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #2 - Design and distribute a survey to institutional CEO's 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 survey and distribute	K. Vēhrs	7/20/90	9/1/90		E. Schmitt, D. Jenkins to assist
2 - Collate survey responses	K. Vehrs	9/2/90	9/20/90		To be used for input into priority meeting of 9/23/90

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Expand the professional base in order to be more pro-active.

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #1 - 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 2 - When required, develop and distribute requests for proposals from these agencies 3 - Select appropriate outside assistance for specific topics	B. Wagner AAZPA Board of Directors				K. Vehrs to assist B. Wagner & K. Vehrs to assist

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Expand the professional base in order to be more pro-active.

Dates of Action Plan:

Strategy: #2 - Form coalitions with other conservation organizations.

Presented _____ Approved _____

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	B. Wagner	10/1/90	1/91		D. Jenkins, K. Vehrs & E. Schmitt to assist
2 - Select appropriate organizations	AAZPA Board of Directors	2/91	8/91		B. Wagner & K. Vehrs to assist
3 - Identify and assign AAZPA professional members to selected groups and coalitions	AAZPA President	8/91	9/91		AAZPA Board and B. Wagner to assist

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Reduce institutional reaction time associated with legislative and regulatory issues to 72 hours.

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #1 - Develop a phone/FAX/mailing network

Action Steps	Who Responsible	Starting Date	Scheduled Completion Date	Actual Completion Date	<u>REMARKS</u> (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)
1 - Develop phone/FAX/mailing system that is topic-related	K. Vehrs	7/90	9/90		Better Equipment needed, i.e., FAX machine

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Increase Association member participation in legislative challenges and process from 10 to 30%.

Dates of Action Plan:
Presented _____ Approved _____

Strategy: #1 - Inform institutional members of their respective legislators and on which committees 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. Vehrs	7/90	8/90		E. Schmidt to assist
2 - Distribute the list to institutional members	K. Vehrs	8/90	8/90		Link to phone/FAX/mailing system

ACTION PLAN

Key Result Area: EFFECTIVE LEGISLATIVE PLAN

Planning Leader: S. WYLIE

Objective: Increase Association member participation in legislative challenges and process from 10 to 30%.

Dates of Action Plan:
Presented _____ Approved _____

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 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 - Distribute plan to institutional members	K. Vehrs				
3 - Make presentations or conduct workshops explaining the plan	K. Vehrs				E. Schmitt to assist

Process for Inventing the Future was written as a popular article on strategic planning to familiarize people about to engage in a "team planning process."

Hopefully, it may be of use to you in your orientation of staff members to this management activity.

It follows closely the philosophy and "plan for planning" we are using in our AAZPA strategic planning.

Robert F. Smith
President

Strategies

Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(714) 223-1818

August, 1983

PROCESS FOR INVENTING THE FUTURE

by Robert F. Smith, President,
Strategies and Teams, Inc., San Diego, California

(Originally published for San Diego State University, 1980)

(Revised for Management Centre Europe, Brussels,
...and Middle East Management Research Centre,
Dubai, September 1982)

An organization needs to implement its leaders' conception of the future, rather than offer a glimpse of a fast-retreating past. The oft-used axiom is, "structure follows strategy."

Organize to achieve plans for tomorrow, rather than those for yesterday is the message. Planning comes up front, because planning generates strategies. But what's needed in planning is an on-going procedure by which an organization invents its future.

Hopefully, little time need be spent to make the case for doing planning (both long and short term) "colleagially." The day of the total expert with willing subordinates to do as he bids seems well behind us. Research, marketing, public relations, advertising, manufacturing, service delivery, finance, computer processing--and everything else important in an enterprise-- is too complex for the wizard operator. What is needed is a rational procedure for pooling a lot of individual knowledge to achieve collective wisdom. In short, a team planning process...that can keep the organization directed and relatively crisis-free in the future.

The procedure I am about to describe can be modified and used in any unit of an enterprise (publicly traded and closely held; not-for-profit, government and private; big and small). It is long form-style but can be adapted to short form as the user wishes. It has been developed and updated over time by institutions like the American Management Associations/International, diverse organizations and individual consultants.

TEAM, TIME FRAME, PROCEDURE

First, there's the requirement for determining who will be on the planning team...and how long the period covered by one's plan should be.

All the people who directly report to the chief are usually on his or her planning team. Occasionally someone at the next organizational level may also be included because of special knowledge that can help the entire long-range planning effort (e.g., head of economic research).

How far to plan into the future? A basic rule of thumb: plan for the time period it takes to implement the strategies (with their human and financial investments) which you are going to use. For many organizations five years continues to be a practical strategic period.

The procedure has three main pieces: Internal assessments ("know ourselves"), external assessments ("know our outside environment") and decisions on objectives and strategies ("know what we want").

Knowing ourselves begins with the development of a "mission" statement that spells out clearly but briefly what the organization's purpose is (or as corporate planning teams ask themselves, "what business are we in?"). This may seem a bit unnecessary in a government-owned or subsidized organization that has been set up by legislative action and rooted in legal definition, but still the lawyers and legislators are not all that clear, and room remains for pinning down "what needs do we meet...for whom...where," classic elements of a mission statement.

Once the mission is clearly established, the opportunity comes for team members to deliberate about their priorities, the main values underlying the work they do. This is the challenge to write their creed or philosophy. This should be limited to one or two pages. The shorter it is, the more likely that the points it contains will be direct and contain the thrust that the writers intend. The danger here is that it can become a wordy "motherhood" statement. But the best of the philosophies written by the planning teams come across with strength, because they portray sharply the platform upon which the planning team stands.

Preparation of a philosophy statement leads to the development, and later the updating, of eight or ten main policies which the enterprise will use in its own government. A policy is an enforceable guideline to decisions that are required on important issues that come up on a repetitive basis.

Policies can easily be confused with planks in the philosophy. The main difference is that policies need to help administrators readily understand which decision they will make when confronted with a particular requirement for a decision. For example, it is a policy in our advertising agency that we will not represent as a client any of the mass media. Hence, no matter how attractive the opportunity financially to represent a newspaper chain or a TV network, we decide not to. The policy makes sense because we are committed to the notion that we need independence of judgment at all times in buying media for other clients. It would not be appropriate to take the chance of biasing our judgment in favor of a medium that might itself be one of our clients.

Every management team finds its own policies. They need to be consistent with the philosophy. For to be otherwise is to invite a charge of hypocrisy.

It is probable that in a government entity, some policies are contained within the law which created the agency. In that case, these need to be stated in language for every day use that makes it unambiguous for the administrators who must apply the policies.

At this point, the planning team should review how their organization is structured, e.g., how our people are grouped in order to do all the work required to implement the plan. This means looking at organization charts, identifying job titles and the people by name who occupy the jobs, particularly managerial ones. Primary and secondary relationships can be clarified...and matrix arrangements with all their implications illuminated. Sophisticated techniques of accountability charting, refined in use by management psychologist Dr. Neil Miller, can do much to point out the existing distribution of responsibilities and authorities within the planning team.

What occurs from time to time outside the planning sessions is that organizational changes are made, particularly in sub-units, which are not promptly called to the attention of the rest of the organization. And it takes the planning team's review process to bring these changes to the fore, making certain that all administrative people are aware of what is currently the real organization. At this point, organization changes are not made, but rather just an agreement achieved on how we are presently structured. Later there will be the opportunity to see if organizational changes are required, in order to carry out the new plans that have been developed by the team.

BACK-CASTS

Every enterprise needs to do what international consultant James F. Kingsley calls "back-casting"...as well as forecasting. A back-cast is a graphically displayed statistical summary of

the results achieved by the enterprise in each of its major categories of activity over a specific number of years. A college or university, for example, may have such categories identified with their programs offered. In the case of a community college, activity categories might be the academic program, the community service program, the vocational education program, the athletic program and the counseling program. Then statistics about enrollments, budgetary allotments, faculty members, actual expenditures, and other significant measures would be provided over some number of past years up through the most recent one, in an effort to provide curves that back-cast where we have been, as well as where we are now.

For companies this is also an easy matter, as they identify by product or services, or groups of products or services, or by locations of operations...what the sales, the profits, and the contribution by product or service in terms of percent of sale, percent of profit and return on investment have been.

Just how many measures are to be used in such back-casting is up to the judgment of the planning team. The numbers involved are nearly always on record somewhere. This is a matter of assembling quantified information in a different array than is normally used. The big advantage for this effort is that it brings to the attention of all members of the planning team the factual data which they need in order to answer the questions of where we are now...and how we got there.

STRENGTHS AND WEAKNESSES

One main element remains in developing a present situation analysis. This is the planning team's concentration on internal strengths and weaknesses inside the organization. This works best when each member of the team comes to the meeting having thought through what he or she thinks are the principal strengths of the enterprise, with particular thought to those which may be presently under utilized. Similarly, there needs to be a determined effort to identify the principal weaknesses, especially those which, if they go untended, will create major difficulties in the future.

At this team meeting, the members prepare an inventory of all their inputs. These can be placed on flip chart sheets and posted around the meeting room. When they are available for all to see, the leader can help the group to develop consensus on which are the most significant strengths that need to be better utilized, and which are the major weaknesses that hold the greatest dangers. The technique calls for identifying these in colored ink, so they stand out for easy recognition later in the process.

This particular part of the planning team's work is a measure of the ongoing climate shared by the team members. If the climate is so healthy that it can be described as having open, non-defensive communication, then the group will produce useful data and a provocative exchange of thinking. On the other hand, if the climate is one marked by uptight, defensive communication, then the information gathered in this exercise tends to be shallow in depth and of little value.

WHAT'S HAPPENING ON THE OUTSIDE

In the second of the three major parts of the strategic planning process, the team does its best to forecast changes they believe will be happening in the surrounding environment during the planning period ahead. This turns out best when all team members do homework in advance of a sit-down session.

By prior agreement, the team selects the dimensions of the outside world along which they will make their predictions. In today's time of volatile external factors, what has been described as turbulent, at least six dimensions of change are relevant: economic, energy costs and availabilities, social, political/governmental, competitive, and technological.

Here again, the flip chart becomes a valuable instrument as the leader assists his team to develop an inventory of their predictions which goes up on visual display around the room. Then comes the effort to develop consensus as to which of the environmental assumptions offer the greatest threats to the enterprise...and which provide the most encouraging opportunities. These two types of assumptions are appropriately marked in color for easy recovery later in the process.

For many teams, this chapter is the most exciting of the entire process. The educational advantage is always significant. Team members are impressed with how much their colleagues are aware of what is happening in the world. As the planning may be done by a single unit within a larger organization, the team may decide to treat the rest of the organization as part of the "outside environment."

DECIDING WHAT WE WANT AND HOW TO MAKE IT HAPPEN

Now comes part #3 of strategic planning. It popularly is thought of as "planning." Namely, it is the determination of where we want to go and how we are going to get there...together.

The first step in this part is the one that is often neglected. It calls for the team to identify its highest priorities. This means setting out "Key Result Areas." These are the outcomes of the enterprise's effort which have to show significant change.

It's easy to illustrate what's involved here by looking once more at the example of the community college. Key Result Areas for such an institution could be increasing enrollments, expanding the number of PhDs on faculty, obtaining favorable legislative action, developing a public information program, or developing an ongoing trace of the career development of graduates.

In business enterprises, the Key Result Areas usually start with improving profit, increasing sales turnover, raising R.O.I., increasing market share...but can include expanding research, developing management and others of a non-financial nature.

The team must exercise care that it does not select too many Key Result Areas. At the most, three or four, perhaps five, should be selected. This does not mean that there are not other priorities, and that things will not be done about them, but rather is a determination of those of the highest significance around which the strategic plan will be built.

Within each Key Result Area there is the challenge of establishing a quantified, concrete, time-certain objective. Sometimes more than one objective is desirable. Objectives expressed in terms of pounds or dollars, for example, can be misleading because of inflation. Therefore, in addition to expressions in dollars, it is valuable to state them in other quantifiable terms. For instance, in an educational institution, it may be there is one objective expressed in terms of dollars of research contracts to be obtained. Because of inflation, it may be well also to express another objective in terms of man hours of research effort to be obtained.

In approaching the setting of objectives, a useful concept conceived by futurist Dr. Michael J. Kami, and known as "gap analysis," can be used. What gap analysis suggests is that if nothing is done new, differently and better over the period of the plan, the planners are making the dangerous assumption that they can, on a straight-line projection basis, set their objectives as something of a forward glide on a curve of past performance.

The experienced government or not-for-profit administrator realizes that this is a bad assumption because too many things can go wrong, like successful strategies employed by competitive enterprises going after the same scarce resources.

In a company, it would mean that competitive enterprises do new things to chew away successfully the existing share of the market enjoyed by the company's products. Hence, it becomes especially dangerous to make straight-line projections from the past in setting future objectives, because undesirable things will happen in the environment in most cases to make such objectives unattainable.

A different approach is to make an estimate of where you are likely to end up at the end of your planning period if you don't do some things that are new, different and better. This will be a curve that goes downward ordinarily. It provides the first appearance of a gap when compared to the straight-line projection from past performance. However, here the planners have their chance to go to work creatively, utilizing the data base developed earlier in the strategic planning process.

For one thing, they can examine their array of back-cast statistical information to see if it provides any clues of things that have been happening that to this point have not been identified as new trends. Next, they can look at the principal internal strengths and weaknesses and see where they could make good things happen, were they to exploit the under-utilized current strengths of the enterprise or to shore up the major weaknesses. This kind of thought process develops optimism within the planning team about what can be achieved within a Key Result Area.

Additional optimism often can be generated by examining the assumptions that have been made about expected changes in the outside environment. Here, once more, thinking about the big opportunities can lead to ideas about how to make sure they are fully exploited. Likewise, consideration of the major threats provides the spark for ideas about how to make sure the threats are scotched as quickly as they may develop.

From this kind of review and analysis of data comes a feeling within the planning team of what the most appropriate objectives in each Key Result Area may be. For the thoughtful, courageous planning team, this usually positions their objectives higher than those that would exist along the straight-edge projection from past performance.

Admittedly, in government funded enterprises, we must always recognize that we are dealing with a major outside force in the form of a legislative body that is the source of funding. However, this does not mean that we cannot do strategic planning, or that we cannot use gap analysis for establishing objectives.

Once an objective has been established, it is well to consider it tentative. The next step is to test the objective with others in the enterprise outside the strategic planning team. If there has been ongoing linkage from each planning team member to the members of his or her own team (what Kingsley calls "pipelining"), this is a natural ongoing process that has provided a readiness for sub-teams to consider the attainability of the tentative strategic objective. Once the testing has been completed, then the strategic planning team may or may not modify what was considered tentative, ending up with a final setting of objectives in all the Key Result Areas.

Now again, we can look at the graph we have been preparing that has three curves. The curve of the straight-line projection from past performance, the bending downward curve of what will likely happen if we don't do things that are new, different and better, and now the third upward swinging curve to the higher objective that assumes effective dealing with strengths, weaknesses, opportunities, and threats.

The creative chore before the team at this point is to determine how to fill the "planning gap" between the bottom curve and the top one. Filling this is a matter of developing "strategies" which are broad decisions about how to allocate the organization's resources, in order to reach objectives. In a real sense, strategies are layered one upon another until they fill or exceed the planning gap.

A strategy is a decision to travel a specific avenue to reach a destination. It is a decision on how to apply the enterprise's scarce resources to achieve a challenging objective. Here let's use the example of a profit-making organization which sets a demanding objective in the Key Result Area of "increasing sales turnover." Brainstorming may develop six or eight appealing strategies, but in measuring them against relevant criteria (including estimated cost to implement), it may turn out that only three or four are feasible for filling the planning gap. At this point, a large part of "strategic planning" is completed.

MAKING IT HAPPEN

Armed with identified Key Result Areas, quantified objectives in each, and a set of strategies for reaching each objective, it might appear that no more planning is needed. However, as clear as the directions which this much planning may give an enterprise, it still may not make things happen.

The quest for successful implementation of strategies begins with a caution: just as it is a mistake to have too many Key Result Areas, so it is a mistake to have too many strategies. The more strategies, the more implementation effort required...and later on, the more follow-up monitoring needed to see if results are occurring as set forth in the plan.

This means the planning team has to hold its strategies to just those of highest value in terms of their contribution toward attainment of the objective to which they relate.

The team requires a procedure to set up implementation of each of these carefully selected strategies. This is described as "action planning." All of the steps that need to be taken have to be spelled out in a chronological listing. This means putting them down on paper in a numbered fashion...and who, by name, will be responsible for carrying out the various steps...and showing a

target date for completing each one. This is the familiar step-by-step kind of action plan that everyone has used in one form or another in other professional and personal planning. It produces individual commitments to make something happen. Without the what, by whom, when, and where, there is no assurance that strategies will be translated from schemes into deeds.

In its deliberations, the planning team also needs to determine who on the team should be the "planning leaders," with responsibility for preparation of the various action plans. Agreement on the format of the action plan document is required. Then, target dates are set for when the team will meet for as many sessions as needed to review first drafts of the action plans prepared by team members.

In the weeks that follow, the action planners involve as many other people as useful in getting the action planning prepared. When they present their action plans to their colleagues for review, they should be the product of a good deal of consultative and participative effort with people not on the strategic planning team. As that has occurred, commitments at several organization levels have been building up to making the plans work. Cost/benefit analyses of the action plans further strengthen confidence in the contribution each will make.

At "progress review meetings" of the planning team, where the action plans are reviewed and perhaps modified, dates are also established when implementation will begin. Also discussed is how the organization's regular year-by-year operational planning/budgeting process will be affected by the new strategic plan, with its specific action plans. There must be recognition that operational one-year-type planning and budgeting is best seen as the first year of a multi-year strategic plan. The strategic planning team members have an often sticky task of connecting their one year planning, usually well-established over many years, to this new longer-term approach. It may require a task force of members of the strategic team to work on the details of this vital linkage of short term to long term planning efforts.

At this point, team members need to create a schedule for further progress review meetings that will keep tabs on results of implementation. Requirements for reports that are not covered by present reporting arrangements will have to be determined.

As it works this way, the planning team is becoming the evaluation and control team. This makes good sense. It enforces the concept that those who have been in on the planning should also be held accountable for control. And vice versa, those who are expected to behave according to plan, and be accountable for its implementation, should share in doing the planning. The final

outcome is authentic participation by many people, with the prospect of strong commitment by everybody involved. There is also the probability of rising morale, with morale being defined as the personal experience of accomplishing what one has set out to do.

As they experience all the phases in strategic planning, team members, without having consciously subscribed to it, begin intuitively to develop a point of view that planning is best conceived as an ongoing process, rather than a from time-to-time series of episodes.

FURTHER ADVANTAGES

Once the strategic plan document has been agreed upon as complete, the planning team has the opportunity to sit down once more and carry out three important wrap-up activities.

First shot is to reexamine how the enterprise is structured... and ask themselves should we be restructured in order to carry out this new strategic plan. It is easy to see the dangers in being organized to carry out an old plan rather than a new one. Changes that may have been made in such crucial things as the enterprise's mission, Key Result Areas, objectives, and strategies may dictate that some kind of restructuring is necessary. So may drastic changes forecast in the outside environment demand structural redesign.

This is anticipating organization changes needed. It is organization planning in the best sense. It relates to long-range plans. It does not relate to theories or fads about organization planning and development. As mentioned earlier, an old adage in management reads "structure follows strategy." Once you have developed your objectives and strategies, then you can determine how you should be organized.

This process can be pursued all the way to updating of position descriptions, individualized standards of managerial performance, and, as demonstrated by management expert William J. Burke, personalized development programs for managers.

A second follow-up task for the team is to develop a sub-plan for "communicating the plan." This amounts to determining who, a, groups and individuals, should receive what parts of the plan, when, from whom, and how. Experience shows this to be one of the most neglected parts of the strategic planning process even among sophisticated, experienced planning teams. It often is overlooked because of the feeling of urgency to "get back to work." On the other hand, much success is being reported from enterprises whose strategic planning teams have taken the time to go through this additional effort in order to provide everybody with knowledge of the plan as they need it in terms of their assignments and roles.

The third of these three last steps would be the strategic planning team critiquing the total process it has just worked through. It is a matter of sitting down and saying how did we do this time, how could we do better next time, where did we waste time, how could we be more efficient, how could we have more successfully involved other people. It is a straightforward self-critique, taking place when the process is warmest and freshest in the minds and feelings of the participants. It leads the way to setting up a refined "plan for planning" to be used next time around.

MARKS OF SUCCESSFUL PLANNING PROCESSES

As the American Management Association's Center for Planning and Implementation has discovered, successful planning processes seem to have marks to identify them. They appear to be objective-oriented. They do involve subordinates. There is clear leadership from the chief, be that person called director, administrator, or department head. Someone within the team is assigned to provide staff support to the leader and the other team members as needed. This person may or may not be called the planning director...that really doesn't matter. And there is a plan for planning. Everybody knows what the steps are in the procedure, and what each person is expected to do.

Still another characteristic is the provision for systematic follow-up and control, the monitoring aspect.

From start to finish, the planning is as fact-based as possible, recognizing the areas where opinion and judgment are required, but not letting the whole process hang on opinions forcibly expressed by the most vocal in the group...rather letting things stand, as far as possible, on a solid platform of facts.

Finally, the planning makes things happen, and people are motivated.

With time, planning team members become aware that their planning process not only gets planning done, but it helps to build the strength of their team, as well. All of which bears out the idea that in strategic planning, and all planning for that matter, what emerges as a truth is "the process is as important as the plan it produces."

ROBERT F. SMITH
Sesimbra, Portugal
October 24, 1982



American Association of Zoological Parks and Aquariums

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

June 29, 1990

TO: Nucleus Planning Group

FROM: D. Zucconi, Chairman NPG

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President
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CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

Following our planning sessions of June 18-19, I would like to relate my understanding of where the process goes from here:

- (1) Working with action plan leaders, each KRA leader will insure revision of action plans and submit same to Linda Boyd by July 15; it is hoped that all KRA and action plan leaders will remain active through completion of the entire Strategic Plan and hopefully into its implementation.
- (2) The Advisory Committee will meet in Saint Louis, Aug. 9. Their agenda will include, amongst other considerations:
 - a) cost-benefit aspects of action plans (to be prepared by staff);
 - b) a plan for communicating the plan.
- (3) At Saint Louis, the Board will be presented with results of the NPG meetings including a recommendation of the Advisory Committee for adoption/modification/prioritization of action plans.
- (4) During the Annual Conference in Indianapolis, the membership will be advised of the Plan's status.
- (5) Members will have an opportunity to review and discuss the Plan during each of the five regional conferences in 1991.
- (6) The Plan will be revised as necessary, then submitted to the Advisory Committee for review and finalization;
- (7) The Plan will be submitted to the AAZPA Board in August, 1991 for approval and subsequent distribution.
- (8) Throughout, the Long-Range Planning Committee will monitor and -- where necessary -- coordinate the flow of these activities, insuring that all steps in the process design have been implemented.

Please let me know if there are any omissions or misunderstandings.

DZ:jo

cc: Advisory Committee
R. Smith, Strategies & Teams, Inc.
W. Iliff, Dir., Dallas Zoo
S. Robins, AAZPA Dev. Coord.



American Association of Zoological Parks and Aquariums

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

June 27, 1990

*File 2
Part of
Planning*

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Immediate Past President
PALMER E. KRANTZ, III

Executive Director
ROBERT O. WAGNER

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

Dear Kathryn:

With the completion of formal meetings for our Nucleus Planning Group, I would like to thank you, most sincerely, for your patient and expert participation in AAZPA's Strategic Planning process. I am truly amazed at the amount of time, talent and expense that you and other members of the NPG have invested in this process, and I am confident that a clearly-defined direction for AAZPA's next five years will result from that investment.

DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

STEPHEN R. WYLIE

TED A. BEATTIE

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

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

Thanks, Kathryn, for bringing your special brand of expertise to our planning process, and I appreciate your willingness to head up the effort to carry it forward into 1991.

Sincerely,

David G. Zucconi, Chairman
AAZPA Long-Range
Planning Committee

DGZ:jo

cc: Advisory Committee
C. Hoessle, Pres., AAZPA
B. Wagner, Exec. Dir, AAZPA
W. Iliff, Dir., Dallas Zoo



American Association of Zoological Parks and Aquariums

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

June 29, 1990

TO: Nucleus Planning Group

FROM: D. Zucconi, Chairman NPG

OFFICERS

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President-Elect
DAVID G. ZUCCONI

Vice President
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Immediate Past President
PALMER E. KRANTZ, III

Executive Director
ROBERT O. WAGNER

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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

Following our planning sessions of June 18-19, I would like to relate my understanding of where the process goes from here:

- (1) Working with action plan leaders, each KRA leader will insure revision of action plans and submit same to Linda Boyd by July 15; it is hoped that all KRA and action plan leaders will remain active through completion of the entire Strategic Plan and hopefully into its implementation.
- (2) The Advisory Committee will meet in Saint Louis, Aug. 9. Their agenda will include, amongst other considerations:
 - a) cost-benefit aspects of action plans (to be prepared by staff);
 - b) a plan for communicating the plan.
- (3) At Saint Louis, the Board will be presented with results of the NPG meetings including a recommendation of the Advisory Committee for adoption/modification/prioritization of action plans.
- (4) During the Annual Conference in Indianapolis, the membership will be advised of the Plan's status.
- (5) Members will have an opportunity to review and discuss the Plan during each of the five regional conferences in 1991.
- (6) The Plan will be revised as necessary, then submitted to the Advisory Committee for review and finalization;
- (7) The Plan will be submitted to the AAZPA Board in August, 1991 for approval and subsequent distribution.
- (8) Throughout, the Long-Range Planning Committee will monitor and -- where necessary -- coordinate the flow of these activities, insuring that all steps in the process design have been implemented.

Please let me know if there are any omissions or misunderstandings.

DZ:jo

cc: Advisory Committee
R. Smith, Strategies & Teams, Inc.
W. Iliff, Dir., Dallas Zoo
S. Robins, AAZPA Dev. Coord.

Post-It™ brand fax transmittal memo 7671 # of pages ▶ 6

To	Jeff Marliave	From	Kathryn Roberts
Co.	Vancouver Region	Co.	MN 200
Dept.		Phone #	(612) 431-9333
Fax #	(604) 631-2529	Fax #	(612) 431-9300

6-20-90

To: Jeff Marliave
Fr: Kathryn R. Roberts



On the plane flying back to the north country I made the changes to our planning document that I could recall. Use what you can.

I would like to see the final copy. Who was assigned the responsibility as KRA leader? How long did the meeting continue?

Thanks for all of your help. I have enjoyed working with you and hope we can continue.

ACTION PLAN

Key Result Area: PROTECT + ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL + WILDLIFE CONSERVATION

Planning Leader: _____

Objective: DEVELOP AN EASILY RECOGNIZABLE IDENTITY TO IMPROVE NAME RECOGNITION BY SEPTEMBER 1991

Dates of Action Plan:
Presented _____ Approved _____

Strategy: CONTRACT WITH ~~STAFF~~ PROFESSIONALS FOR INPUT, CONCURRENCE + 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. RESEARCH FIELD FOR APPROPRIATE APPROPRIATE VENDOR	STAFF <i>AS</i>		SEPT. 1990		
2. REQUEST BIDS FROM ACCEPTABLE VENDORS	STAFF <i>Wagner + Phos</i>	Sept 90	OCT. 1990		
3. SELECT VENDORS	STAFF/BOARD <i>Wagner + Phos</i>	Oct 90	MAR. 1991		
4. COMMUNICATE CONCEPTS TO MEMBERSHIP	K. ROBERTS/ NPG	JULY 1990	SEPT. 1990		
5. SPECIFY PARAMETERS + OPTIONS FOR DEVELOPMENT		Sept 90	FEB. 1991		
6. CREATE REVIEW TEAM STAFF STAFF/BOARD STAFF	ST. LOUIS ZOO MINNESOTA ZOO BUSCH GARDENS VANCOUVER			JUNE 1990	
7. TEAM REVIEWS, INTERIM PRESENTATION		MAY 1991	JULY 1991		
8. PRESENT TO MEMBERSHIP			Sept 1991		At annual mtg.

(3)

ACTION PLAN

Key Result Area: PROTECT + ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL + WILDLIFE CONSERVATION

Planning Leader: _____

Objective: CONDUCT MARKET RESEARCH TO DETERMINE OUR AUDIENCES + ISSUES BY JANUARY 1991

Dates of Action Plan:

Strategy: (A) REVIEW HILL + KNOWLTON + DETERMINE METHODOLOGY

Presented _____ Approved _____

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 + METHODOLOGICAL REVIEW OF H+K - QUESTIONS 5, 6, 8, 29 (1988 P.A. PLAN)	J. MARLIAVE	June 90	JULY 1990		"Experts" will be asked to submit candidate methodologies to Marliave
2. RECOMMEND METHODOLOGY	J. MARLIAVE	June 90	JULY 1990		
3. REVIEW APPROVE RECOMMENDED METHODOLOGY	NPG SUB/com K. ASIS ROBERTS	July 90	AUG. 1990		

31

ACTION PLAN

Key Result Area: PROTECT & ENHANCE OUR IMAGE AS LEADERS IN ENVIRONMENTAL & WILDLIFE CONSERVATION

Objective: CONDUCT MARKET RESEARCH TO DETERMINE OUR AUDIENCES & ISSUES BY JANUARY 1991

Strategy: (B) IMPLEMENT, ASSESS + ~~COMMUNICATE~~ COMMUNICATE THE RESULTS

Planning Leader: _____

Dates of Action Plan:

Presented _____ Approved _____

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 DETERMINE INSTITUTIONS WHO CAN INCLUDE ITEMS IN UPCOMING, PLANNED SURVEY INSTRUMENTS	ROBERTS ST. LOUIS ZOO MINNESOTA ZOO BUSCH GARDENS SAN DIEGO ZOO		Complete	June 19, 1990	Jeff will coordinate
2. CONDUCT THE SURVEYS	(SAMBA AS ABOVE) MARLIAVE	Aug 90	Nov. 1990		Have already agreed same participants as above
3. COMPILATION + ANALYSIS OF RESULTS	J. MARLIAVE K. ASIS	Nov 90	JAN. 1991		
4. COMMUNICATE RESULTS RESULTS THROUGH COMMUNIQUE, REGIONAL, NATIONAL + BOARD MEETINGS	K. ASIS		AUG. 1991		

ACTION PLAN

Key Result Area: *PROTECT + ENHANCE OUR IMAGE AS LEADERS
IN ENVIRONMENTAL + WILDLIFE CONSERVATION*

Planning Leader: _____

Objective: *DEVELOP A PUBLIC RELATIONS PLAN BASED ON MARKET
RESEARCH TO DETERMINE OUR MESSAGE BY SEPTEMBER 1991*

Dates of Action Plan:
Presented _____ Approved _____

Strategy: *(A.) 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	C. HOESSLE	June 90	AUG. 1990		<p>Core Team with members PRC</p> <p><u>Team B</u> different from PR Committee. Team will include at least 1 person from committee</p> <p>at least quarterly Using at least a self reporting mechanism</p>
2. RECRUIT + ORGANIZE THE TEAM	C. HOESSLE K. ASIS	Aug 90	SEPT. 1990		
3. ASSIGN TASKS TO TEAM	K. ASIS	July 90	OCT. 1990		
4. CARRY OUT TASKS	K. ASIS TEAM MEMBERS	Oct 90	ongoing		
5. MONITOR + EVALUATE THE PROGRESS + RESULTS OF THE TASKS	CHAIR OF LONG-RANGE PLANNING COMM. <i>CS</i>		ongoing		
6. REVIEW + REPORT ^{on status} AT ALL BOARD MEETINGS + THRU COMMUNIQUE	LONG-RANGE PLANNING COMM. K. ASIS	Sept 90	on-going		

ACTION PLAN

Key Result Area:

Planning Leader: _____

Objective:

Dates of Action Plan:

Strategy: (B.) COORDINATE P.R. SKILLS + INFORMATION WITHIN MEMBER INSTITUTIONS

Presented _____ Approved _____

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 P.R. STAFF AND/OR CAPABILITIES	K. ASIS		AUG. 1990		
2. SECURE WILLINGNESS TO COOPERATE BY SHARING INSTRUMENTS, RESULTS, IDEAS, ETC	K. ASIS P.R. COMM.	AUG 1990	OCT. 1990		
3. DEVELOP MECHANISM FOR SHARING INFORMATION	K. ASIS P.R. COMM.	OCT 1990	JAN. 1991		
4. IMPLEMENT THE ONGOING SHARING + COOPERATION	K. ASIS				

Will assist AAZMA office & member institutions

~~Will check~~
Will check periodically + report to Bd.

** TRANSMIT CONFIRMATION REPORT **

Journal No. : 004
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Date : Jun 20,90 10:25
Time : 05'54
Mode : FINE
Document : 06 Pages
Result : 0 K



American Association of Zoological Parks and Aquariums

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

9 April 1990

OFFICERS

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CHARLES H. HOESSLE

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

Immediate Past President
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Executive Director
ROBERT O. WAGNER

MEMO TO: STRATEGIC PLANNING COMMITTEE - NUCLEUS GROUP

FROM: LINDA BOYD, PLANNING COORDINATOR *Linda*

SUBJECT: MATERIALS FOR MEETING IN DENVER

Enclosed are materials from the Mission Statement, Culture and AAZPA Organization Task Forces. Bob Wagner's Key Operating Policies were sent last week. Also enclosed is a copy of the AAZPA Staff Organizational Chart which we prepared. Bruce Read will bring his Backcasting report to Denver. I called Doug Myers regarding his report on the evolution of legislative concerns and regulatory actions, but have not heard from him.

Please bring all the above-mentioned materials with you to Denver for our meeting. I look forward to seeing you soon.

DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

STEPHEN R. WYLIE

TED A. BEATTIE

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

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

/ljb

Enclosures

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.

Cultural Characteristics of the AAZPA

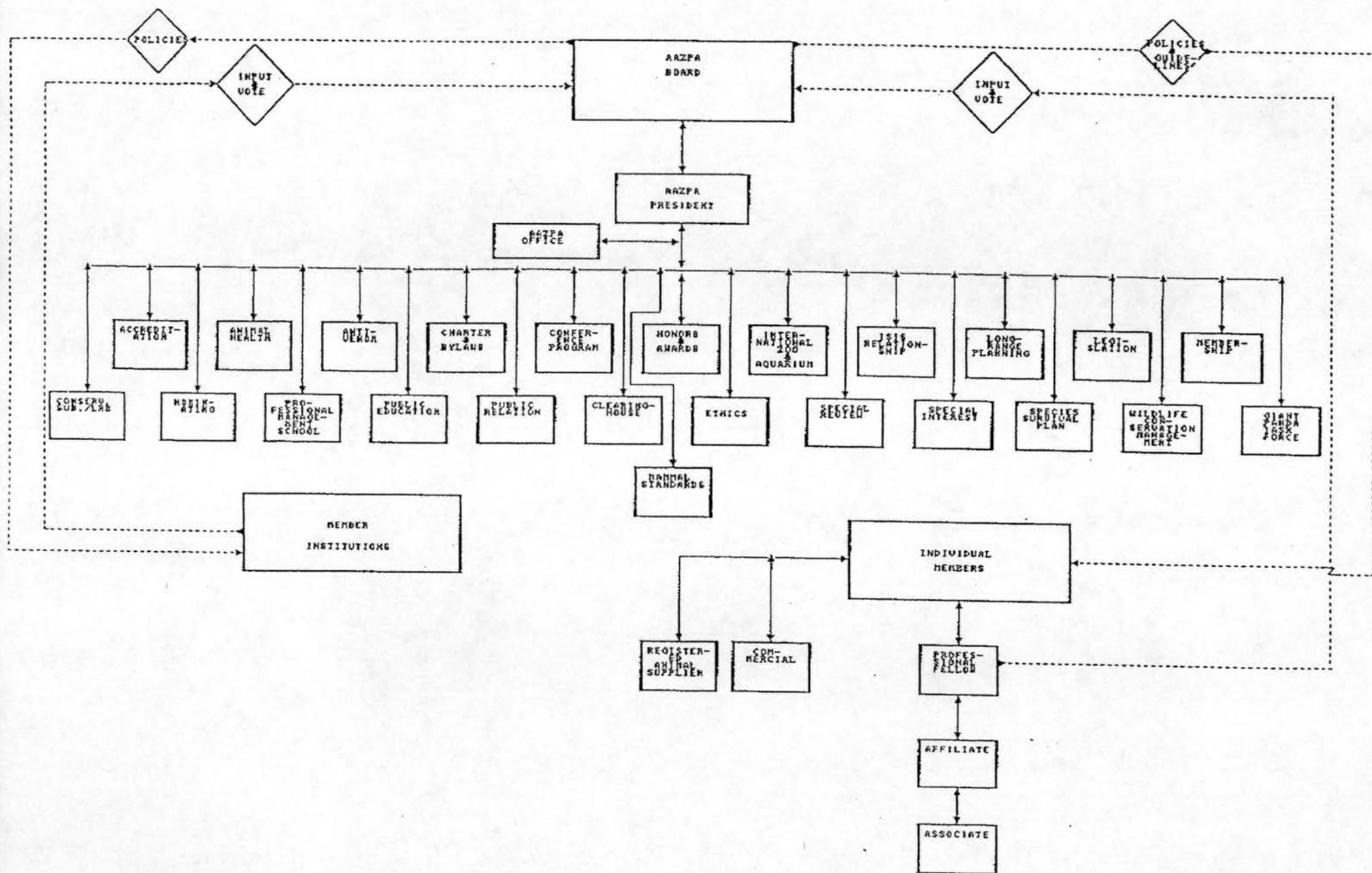
1. We are dedicated to the preservation of flora and fauna, both in the natural and captive state. We are conservationists by nature.
2. Many of us, (perhaps because of our backgrounds) seem to prefer work with animal related problems and issues rather than people related problems and issues.

[We are somewhat cognizant of a need to change this as evidenced by maintaining public relations and development officers, and a public education committee, geared toward reaching people who are not necessarily animal oriented. This is a problem not only for AAZPA but for zoos since the world's conservation problems are primarily people caused.]

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 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. AAZPA does not put forth an affirmative action stance with regard to encouragement and support of women and minorities assuming organizational leadership roles. There are noticeably small numbers of female and/or racial minority individuals in leadership roles. This posture is considered to be acceptable within AAZPA.]
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 seem 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 workaholicism, which comes from dealing with animals that 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) people who are neither pro or anti, who are either apathetic or ignorant of the problem. These people are voters, consumers, potential zoo goers, parents and even legislators. We tend to "play to" other zoologists instead of these people who are a part of our culture.

AAZPA ORGANIZATIONAL CHART

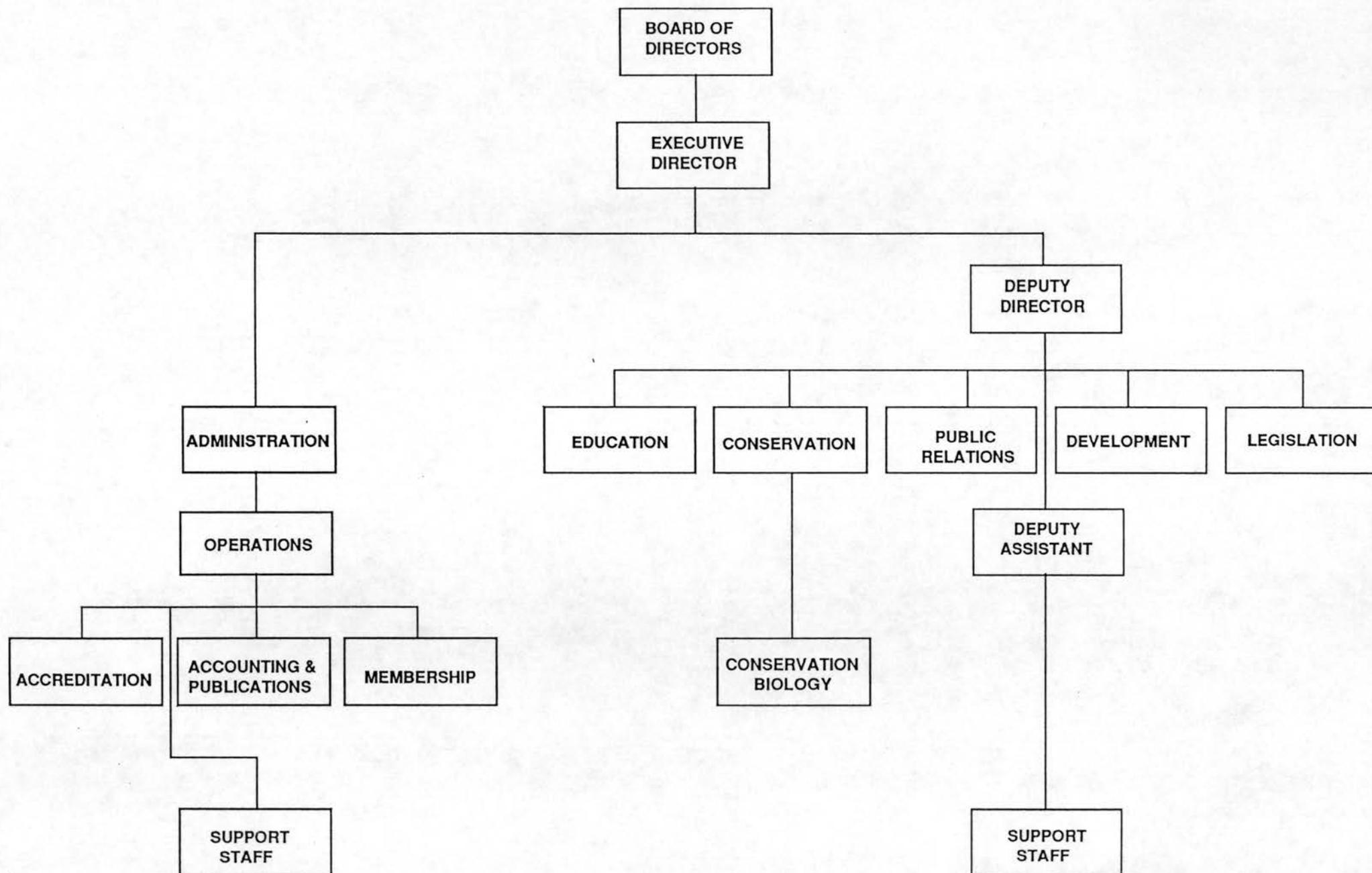


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P. 202

DRAFT - APRIL 4, 1990

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
ORGANIZATIONAL CHART



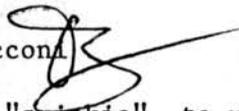


American Association of Zoological Parks and Aquariums

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

April 19, 1990

TO: Strategic Planning, NPG
Strategic Planning, Advisory Committee

FROM: Dave Zucconi 

This memo is a "quickie"--to update you on our NPG meeting in Denver and to solicit your input/advice--pending the distribution of minutes from AAZPA Executive Offices.

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

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

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

A) AAZPA's Mission was re-defined as follows:

"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."

B) The values of AAZPA were elaborated as follows:

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.

Commitment to Community

Encourage excellence in recreational and cultural events and programs which strengthen our institutions' positions in their communities.

Cooperation

Working with each other to further our professional goals.

Self Regulation

Embrace the Code of Ethics and Accreditation which ensures high professional standards and behaviors.

Advocacy

Representing its members interests to governmental agencies, legislative bodies and others which 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.

- C) Key Result Areas were identified as follows:
- (1) Develop our conservation resources.
 - (2) Expand and improve member services.
 - (3) Clarify our public (conservation) image.
 - (4) Develop a legislative plan.

Task forces were assigned to develop objectives and strategies for these KRA's for discussion at the Tulsa meeting in June.

Although many other components of the Strategic Plan were discussed in Denver (and you will be reading about those in the full minutes), I would like to know your thoughts about publishing the above-stated outline (mission, values, KRA's) in the June issue of Communique so that all AAZPA members might have the opportunity to comment at this point in the process?

DZ:bm

CC: Long-Range Planning Committee
AAZPA Board
R. Smith

Post-It™ brand fax transmittal memo 7671		# of pages ▶	1	
To	Steve Taylor		From	Kathryn Roberts
Co.			Co.	
Dept.			Phone #	612 431 9299
Fax #	216-351-2584		Fax #	612 431-9300

AAZK

AAZV

MMIG Maine Mammal Interest Group

Zoo Horticulturist

FMATA - ^{Annual} Fittle Marine ~~Mammal~~
Travels Assoc.

IVIDZG

Educators (?)

Zoological Societies

CAZA, other state groups.

CBSG

ISIS

Zoo Culturist

For Profit Organizations

Commercial numbers, etc

Bird Curators

AA M



Zoological Society of San Diego
ZOO FAX

FAX # 619-231-0249

*Ulie -
Could you bring
a copy for
Kathryn also?*

TO: Ulie Seal
Minnesota Zoo

FAX # 612-431-9300

FROM: Douglas Myers

DEPT # Director's Office

DATE: 4-13-90 TIME: _____

COMMENTS: For the Denver
Long-Range Plan Meeting
ON 4-16.

(4 Pages, including cover sheet)

FAX DATE: _____ FAX TIME: _____



The Lacey Act, the Endangered Species Act, and the Marine Mammal Protection Act heralded the beginning of more enforcement from regulatory agencies.

The need was seen to have AAZPA serve as a body to police the regulatory agencies. Where once we were only concerned with being regulated or passively monitoring legislation, the changing times called for us to aggressively follow legislation that applied to us and become an resource to the bureaucracy. Programs were developed such as ISIS, SSP and an ethics code to be more responsive to the way we ran our own organizations.

Today we are instrumental in helping to write the regulations and this should continue. The threat of damage to our ozone layer, the rain forests and damage caused from oil spills, etc., will continue to need our conservation endeavors as well.

Even though the number of agencies has not really changed (Departments of Agriculture, Commerce, Interior and the Marine Mammal Commission) the number of offices within the agencies and the number of locations of these offices have multiplied. The lack of communication between these offices and the changing staff is and will continue to be a challenge to AAZPA organizations. Most importantly, the time spent working with these agencies has greatly increased. A portion of this is attributed to the agencies' increase in seeking out AAZPA to review proposed or existing standards. The attention to detail in the regulations has increased, and we, at times, are forced into reactive positions. More and more special emphasis is being placed on animal comforts than ever before -- shipping, cage sizes, etc.

Early on there were individuals and groups that differed from the goals of AAZPA and were to become the animal rights groups. We underestimated the animal rights movement when it started to gather momentum in the early '80's and it has gained too much ground. In the beginning, they were not as well funded nor nearly as extreme or violent. They are much stronger in Washington, D.C. than they ever have been. They are much more aggressive with lobbying efforts and are receiving much more pro bono work by D.C. law firms. They put much emphasis on legislation and regulations and sue various governmental agencies on permits granted to AAZPA institutions. The animal rights groups also introduce animal welfare legislation permitting individuals to bring suit against people or businesses on behalf of animals. And, a bit unsettling, the regulatory agencies are actually taking notice and listening to these groups.

Where do we go from here? The trend in legislation will be looking towards more preventative legislation such as

bio-diversity. We should also be looking towards working more closely with IMS and paying more attention to NSF to receive grants to carry on our work. States that have several AAZPA institutions may be moving towards joining forces to defeat legislation and serve as a sounding board for state regulatory agencies. California and Florida have already moved in this direction.



Zoological Society of San Diego
ZOO FAX

FAX # 619-231-0249

TO: Kathryn Roberts
Minnesota State Zoo

FAX # 612-431-9300

FROM: Douglas Myers

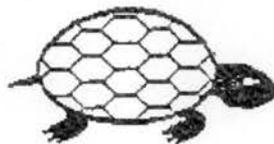
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Today we are instrumental in helping to write the regulations and this should continue. The threat of damage to our ozone layer, the rain forests and damage caused from oil spills, etc., will continue to need our conservation endeavors as well.

Even though the number of agencies has not really changed (Departments of Agriculture, Commerce, Interior and the Marine Mammal Commission) the number of offices within the agencies and the number of locations of these offices have multiplied. The lack of communication between these offices and the changing staff is and will continue to be a challenge to AAZPA organizations. Most importantly, the time spent working with these agencies has greatly increased. A portion of this is attributed to the agencies' increase in seeking out AAZPA to review proposed or existing standards. The attention to detail in the regulations has increased, and we, at times, are forced into reactive positions. More and more special emphasis is being placed on animal comforts than ever before -- shipping, cage sizes, etc.

Early on there were individuals and groups that differed from the goals of AAZPA and were to become the animal rights groups. We underestimated the animal rights movement when it started to gather momentum in the early '80's and it has gained too much ground. In the beginning, they were not as well funded nor nearly as extreme or violent. They are much stronger in Washington, D.C. than they ever have been. They are much more aggressive with lobbying efforts and are receiving much more pro bono work by D.C. law firms. They put much emphasis on legislation and regulations and sue various governmental agencies on permits granted to AAZPA institutions. The animal rights groups also introduce animal welfare legislation permitting individuals to bring suit against people or businesses on behalf of animals. And, a bit unsettling, the regulatory agencies are actually taking notice and listening to these groups.

Where do we go from here? The trend in legislation will be looking towards more preventative legislation such as

bio-diversity. We should also be looking towards working more closely with IMS and paying more attention to NSF to receive grants to carry on our work. States that have several AAZPA institutions may be moving towards joining forces to defeat legislation and serve as a sounding board for state regulatory agencies. California and Florida have already moved in this direction.



American Association of Zoological Parks and Aquariums

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

AAZPA
Sted

February 23, 1990

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TO: NPG participants for AAZPA Strategic Planning

FROM: D. Zucconi, Long-Range Planning Committee Chairman

I believe the enclosed copy of Clayton Freiheit's letter is self-explanatory. Also be advised that the hotel operates a shuttle van from the airport; go to one of the several hotel display boards located in the baggage claim area and phone Stapleton Plaza for pickup at the area designated for same on the lower level.

Although we do not have a schedule at this time, please plan on a full day (8-5) for both the 16th and 17th, as well as Clayton's hosted dinner on the evening of the 16th.

DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

STEPHEN R. WYLIE

TED A. BEATTIE

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CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

DZ:jo

cc: C. Hoessle, Pres., AAZPA
B. Wagner, Exec. Dir., AAZPA
R. Smith
C. Freiheit, Denver Zoo

denver zoological foundation

15 February 1990

CITY PARK
DENVER, CO 80205-4899
PHONE: (303) 331-4100



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Zoo Director
Paul N. Linger
Assistant Director
John D. Wortman
Curator
William R. Turner
Education
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Veterinarian
José G. Trujillo
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Mr. Dave Zucconi
Director
Tulsa Zoological Park
5701 E. 36 Street, N.
Tulsa, OK 74115

Dear Dave:

Relative to your letter of 2 February concerning the meeting of AAZPA's Nuclear Planning Group (NPG) in Denver on April 16-17, we have made the following arrangements:

- shuttle van from airport*
- 1) We have blocked 25 rooms at Stapleton Plaza Hotel, 3333 Quebec Street, Denver, CO 80207, (303) 321-3500 (Reservation, Confirmation number, Toll Free - 1-800-950-6070). This hotel is convenient to both Stapleton Airport and the zoo. A corporate rate of \$60.00/night (exclusive of tax) has been agreed to, and it is understood that individuals will be responsible for settling their own accounts. The hotel will guarantee the space until 1 April so I encourage participants to call the Toll Free number, 1-800-950-6070, as soon as possible.
 - 2) As we get closer to the time and know how many will attend, we will arrange transportation from the hotel to the zoo and return, for the participants. As we discussed on the phone, my intention is to ask AAZPA to reimburse us for this service. Estimate of this cost is \$150-\$200.
 - 3) Please forward a copy of Bob Smith's proposed schedule for these meetings as soon as possible as this will effect our other planning, e.g.: meals.
 - 4) Our Board Room is equipped with flip charts, marker board, VCR, projection equipment, etc., but we would like to have Smith's precise requirements to be sure that everything runs smoothly.
 - 5) We will plan to serve coffee, lunches, snacks, etc., in our Board room and will absorb these costs at no charge to AAZPA. I am also planning to host the group for cocktails and dinner on the evening of 16 April and assume this is agreeable?
 - 6) If the weather cooperates (mid-April in Colorado can bring anything from mid-70's to a foot of snow)! I hope there will be some time allowed for the NPG to walk around our zoo a bit.

*Cost arrival
4/15
copy #041525
Sonya*





DREHER PARK ZOO

1301 SUMMIT BOULEVARD, WEST PALM BEACH, FLORIDA 33405-2494 • (407) 533-0887
Executive Director, Gail Schneider

April 8, 1990

Dear Kathryn,

After reading Steve Wylie's thoughts on the culture characteristics of our organization and those who serve it, I find that I agree wholeheartedly (a sort of a "wish I'd said that" feeling). However, I'd like to add the following to what he wrote (since he listed his thoughts, I numbered them and will refer to them by number);

Item 2. I agree but see a problem here 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 AAZPA now has a public relations officer, development officer and education officer all geared to some extent toward reaching non animal oriented entities. ie: we are making an effort to change our culture to some extent (Evolution, adaptation for survival).

Item 4. I think that we tend toward work-a-haulism except that we so love what we do that we think we are playing hard but we are still working!

Item 6. Once again, I see some adaptation occurring particularly with regard to solving problems or issues that will effect future generations.

Gail Schneider
Executive Director
Dreher Park Zoo

GMS/jhc





DREHER PARK ZOO

1301 SUMMIT BOULEVARD, WEST PALM BEACH, FLORIDA 33405-2494 • (407) 533-0887
Executive Director, Gail Schneider

Culture conflicts: It seems to me that -

1. We are not in agreement as to whether we are an organization of institutions or of members or both.
2. We don't seem to have a clear idea of which is our client group; zoos and similar institutions; or individual members; or people at large who need to be educated about conservation and about zoos.
3. We seem to have a split opinion as to the best and most appropriate function of AAZPA - to foster and support zoos which will enable them to better fulfill their roles for conservation, education, research and recreation or to be a conservation organization made up of zoos.

Gail Schneider
Executive Director
Dreher Park Zoo

GMS/jhc



Kathryn
Page 2 of 2

Also, I would include Steve's #4 without the comment about drinking and with my addendum about work-a-haulism which I believe comes with dedicated animal work (24 hours a day/7 days a week - they require care).

New item: Who we communicate with, why we do it and how is also a part of our culture, therefore:

- 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, every day people. These people are neither pro or anti, they are busy living average lives; 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 (some of them are ignorant and apathetic to conservation/zoological concerns). ie - We tend to "play to" other zoologists instead of these regular people who are a part of our culture.



Gail Schneider
Executive Director
Dreher Park Zoo

GMS/jhc



DREHER PARK ZOO

1301 SUMMIT BOULEVARD, WEST PALM BEACH, FLORIDA 33405-2494 • (407) 533-0887

Executive Director, Gail Schneider

To: Kathryn Roberts

From: Gail Schneider

#2) (Your's) 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.

2a) We are somewhat cognizant of a need to change this as evidenced by maintaining public relations and development offices which are geared toward reaching people who are not necessarily animal oriented. The public education committee is another example.

#9) (Your's) 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 generally been together for a relatively long time.

9a) Re Good Old Boys organization: Add or change to say or include 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) (Your's) 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.

10) I don't feel as strongly about this as it is stated and wonder how widespread a view this is among women who are members of AAZPA at the professional fellow level? I personally have never been discouraged (opposite of encouraged) from trying for anything I wanted to try for and have been supported by those who actually know my work as a zoo professional. I personally have not noticed a different treatment aside from the "Good Old Boys" mentioned in item 9. However, this is not quite the same thing as what seems to be the issue in #10. Perhaps I've been lucky or haven't noticed but I am uncomfortable with the strength of the emotions in statement 10. If it comes from a broad based feeling among women P.F. members, I'd like to see it worded in a different fashion. Perhaps:

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 noticeably small numbers of female and/or racial minority individuals in leadership roles.



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.

[We are somewhat cognizant of a need to change this as evidenced by maintaining public relations and development officers, and a public education committee, geared toward reaching people who are not necessarily animal oriented. This is a problem not only for AAZPA but for zoos since the world's conservation problems are primarily people caused.]

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 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. AAZPA does not put forth an affirmative action stance with regard to encouragement and support of women and minorities assuming organizational leadership roles. There are noticeably small numbers of female and/or racial minority individuals in leadership roles. This posture is considered to be acceptable within AAZPA.]
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 comes from dealing with animals that need 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) people who are neither pro or anti, who are either apathetic or ignorant of the problem. These people are voters, consumers, potential zoo goers, parents and even legislators. We tend to "play to" other zoologists instead of these people who are a part of our culture.

MINNESOTA ZOO

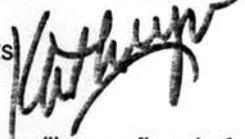
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Minnesota Zoo • Apple Valley, Minnesota • 55124 • 612/431-9200

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

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 5
To <i>Steve Wylie</i>	From <i>Kathryn Roberts</i>	
Co. <i>Oklahoma Zoo</i>	Co. <i>MN Zoo</i>	
Dept.	Phone # <i>(612) 431-9333</i>	
Fax # <i>(405) 424-3349</i>	Fax # <i>(612) 431-9300</i>	



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.
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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.
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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

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purposes only.

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.

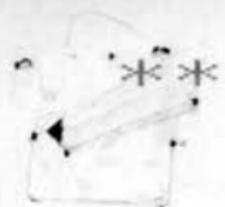
- However, with this strong sales orientation, we have had ill effects on our administration, which some see as being in a very bad state.
- It leaves the general impression of chaos or a beehive, sometimes leading to touch-and-go or hipshooting decisions.
- In this milieu we have big communication problems - 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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purposes only.*

- 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.



** TRANSMIT CONFIRMATION REPORT **

Journal No. : 011
Receiver : 5/4243349/373784
Transmitter : MN ZOOLOGICAL GARDEN
Date : Mar 30,90 14:54
Time : 02'52
Mode : NORM
Document : 05 Pages
Result : 0 K



American Association of Zoological Parks and Aquariums

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

TELECOPIER MEMORANDUM

FAX NUMBER: 304-242-2283

TO: Kathryn Roberts, Director

FROM: Linda Boyd, Administrative Assistant

DATE: 27 March 1990

RE: "Culture" sample

PAGES: 3 TO FOLLOW THIS TRANSMITTAL SHEET.

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

COMMENTS: Kathryn:

Bob Smith just faxed this to me. He will be sending one more sample later. I will fax it to you as soon as I receive it.

The minutes from the Strategic Planning Meeting are being mailed tonight.

If you have any questions, give me a call.

DIRECTORS

SUSAN M. ENGFER

STEVE H. TAYLOR

STEPHEN R. WYLIE

TED A. BEATTIE

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

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

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*Pls copy for
VET & Tomian + send
40 them*

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and circulated.*

CULTURE

BEHAVIOR

Our culture is formal attire: coat and ties for men, business dress for women. Informal dress on Fridays is a welcome relief.

The office appears quiet to outside visitors.

People go out of their way to help.

There is mutual respect in some parts of the office... none in others. In general, people are very friendly and cordial.

Recently, morale was low, to a large extent because there was excessive turnover. People leave because they want to get on with their careers. They cite higher salary offers and opportunities to get involved in other aspects of the profession, such as design.

RITUALS

The most important office ritual is the meeting. This is the way we conduct business. We have meetings with clients, with consultants, and among ourselves. We have five conference rooms in the [REDACTED] Office. In April 1985 alone, there were 60 meetings scheduled in these conference rooms. In addition, there were numerous other meetings that were held without reserving a conference room, or that were held in individual offices. Our meetings are held around an

elongated table, indicative of our hierarchical organization. Usually the senior person sits at the head of the table, although in meetings with clients the head of the table position is studiously avoided. In our formal culture, only peers or near-peers attend meetings; junior people wait to be summoned. The senior person usually leads the meetings and articulates decisions; give-and-take, while not discouraged, is rare.

When an employee leaves, he or she is usually treated to lunch by a group of colleagues. New employees are given an orientation session.

TRADITIONS

We have an unusual workweek: 7:30 a.m. to 5:30 p.m. Monday through Thursday, and 7:30 a.m. to 11:30 a.m. on Fridays. This sets us apart from other firms and the employees like having a more extended weekend.

There is a summer picnic and a Christmas party. There are also tailgating parties at baseball games, raffled baseball tickets, and, from time to time and depending upon interest, discounted symphony tickets, ski trips, and other social activities.

MANAGEMENT STYLE

Strong vertical chain of command. We vs. they relationships prevail in contrast with closely knit family team.

In the past, the management style appears to have put emphasis on correcting mistakes as opposed to emphasis on praising good work.

Employees don't know what makes the firm tick.

Management has usually been aggressive and effective, but appears top heavy when you look at the ratio of management to direct production labor.

The Production Department is capable but occasionally defensive. We tend to make every project a "big deal" and are frequently unable to tailor our services to a given situation or individual client's needs.

Up until recently, the Design Department was led by a strong individual. This is now changing to a more integral team concept.

American Association of Zoological Parks and Aquariums

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



March 19, 1990

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

Immediate Past President
PALMER E. KRANTZ, III

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

CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

TO: Nucleus Planning Group, AAZPA
Strategic Planning

FROM: D. Zucconi, Chairman

Thanks, everybody, for your full participation in our first meeting of the NPG in Washington, D.C.

You are herewith reminded of the "homework" assignment we agreed to:

Culture - K. Roberts (ch), Garibaldi, Schneider, Wylie.

AAZPA Organization - C. Hoessle (ch), Doherty, Taylor, Wheeling office.

Backcast (the "ontogeny" of AAZPA's current status, including surveys, guidelines, etc.) - B. Read (ch), Wheeling office.

Additionally, G. Rabb and U. Seal will develop a statement relative to our global imperatives.

Additionally, D. Myers will survey some key people with respect to the amount of time spent on regulatory activities.

Key Operating Policies (policies mandated as such by either Board vote or member vote) - Wheeling office, Dennler, Farst, Lentz.

Steve Wylie generously volunteered to head-up a task force to explore the "Mission Statement" further (Garibaldi, Myers, Rabb, Taylor, Wagner). As we left it on the table:

"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."

Steve's group will alternately explore a statement that outlines our mission with a series of planks.

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- (c) critical factors for success;
- (d) principal forces in the outside environment.

Please call me if you have any questions about what we're doing.

DZ:bm

CC: C. Freiheit
W. Iliff
S. Robbins
R. Smith
P. Chaffee
W. Conway
G. Rabb
L. Boyd



FAX MESSAGE

TO: Minnesota Zoological Gardens

Company

1300 Zoo Blvd
Street Address

Apple Valley Mn
City State

612-431-9300
FAX NUMBER

ATTN.: _____
Name

Dept./Div.

Subject

FROM: City of Tulsa

Tulsa Zoo
Department

Street Address

Tulsa Ok.
City State Zip Code

918-596-1290
FAX NUMBER

Dave Zucconi 596-2424
NAME TELEPHONE NUMBER

NUMBER OF PAGES SENDING 2
(including transmittal)

Corporate Culture

By Ralph H. Killmann

FAY 431 9300

10: 176 BULLWINK

For Your Info -

MJH

Success in business is determined not by an executive's skills alone, nor by the visible features—the strategy, structure and reward system—of the organization. Rather, the organization itself has an invisible quality—a certain style, a character, a way of doing things—that may be more powerful than the dictates of any one person or any formal system. To understand the soul of the organization requires that we travel below the charts, rule books, machines and buildings into the underground world of corporate cultures.

Culture provides meaning, direction and mobilization, a social energy that moves the corporation into either productive action or destruction. I have encountered many organizations in which this social energy has barely been tapped; whether diffused in all directions or even deactivated, it is not mobilized to help the company. Most members seem apathetic or depressed about their jobs. They no longer pressure one another to do well. Pronouncements by top managers that they will improve the situation fall on the deaf ears of employees who have heard these promises before. Nothing seems to matter. The soul of the organization is slowly dying.

Other companies show considerable energy, but it is driving employees in the wrong direction. The organization lives in an immense culture gap. The social energy pressures members to persist in types of behavior that may have worked well in the past but are clearly dysfunctional today. The gap between the outdated culture and what is needed for organizational success gradually develops into a culture rut—a habitual, unquestioning way of behaving. There is no adaptation or change, only routine motions, despite the fact that the company is unsuccessful. This rut can go on for years, even though morale and performance suffer. Bad habits die hard. Culture shock occurs when the sleeping organization awakes and finds that it has lost touch with its original mission. The new world has left the

insulated company behind—a Rip Van Winkle story on a grand scale.

On the other hand, one has merely to experience the energy that flows from shared commitments among group members to know it—the power that emanates from mutual influence and esprit de corps. Why does one organization have a very adaptive culture while another has a culture mired in the past? Is one a case of good fortune and the other a result of bad luck? On the contrary, it seems that any organization can find itself with an outdated culture if the culture itself is not managed explicitly. I have found that, unattended, a company's culture almost always becomes dysfunctional. Normal human fear, insecurity, oversensitivity, dependency and paranoia seem to take over unless there is a concerted effort to establish an adaptive culture. People cope with uncertainty and perceived threats by protecting themselves, by being cautious, by minimizing their risks, by going along with a culture that builds protective barriers around work units and around the whole organization. An adaptive culture, alternatively, requires risk and trust; employees must actively support one another's efforts to identify problems and adapt to solutions. The latter can be accomplished only by a very conscious, well-planned effort at managing culture.

A company's culture sometimes supports self-defeating individual behavior that persists in spite of its many disruptive effects on morale and performance: doing the minimum to get by; purposely resisting or even sabotaging innovation; and being very negative in general about the organization's capacity to change. Worse, such behavior may even include lying, cheating and stealing as well as intimidating, harassing and hurting others. The most detrimental behavior in the long run, however, is persisting in once-adaptive patterns rather than changing to meet the dynamic complexity of the present. The challenge is to get out of the culture rut,

How Do Cultures Form?

When an organization is born, a tremendous burst of energy is released as members struggle to make it work. A corporate culture seems to form rather

Killmann, Ralph H. "Corporate Culture." In *Psychology Today*, April 1985, pp. 62-69. Adapted from Killmann, R.H. *Beyond The Quick Fix: Managing Five Tracks To Organizational Success*. San Francisco: Jossey-Bass Inc., 1984. Used with permission.

quickly, based on the organization's mission, setting and requirements for success: high quality, efficiency, product reliability, customer service, innovation, hard work and loyalty. The culture captures everyone's drive and imagination. As the reward systems, policies and work procedures are formally documented, they suggest what kinds of behavior and attitudes are important for success.

Such situational forces, while important in shaping culture, cannot compete with actions of key individuals. For example, the founder's objectives, principles, values and especially behavior provide important clues as to what is really wanted from all employees, both now and in the future. Carrying on in the traditions of the founder, other top executives affect the culture of the company by their example.

Employees also take note of all critical incidents that stem from management action—such as the time that so-and-so was reprimanded for doing a good job when not asked to do it beforehand or the time that another worker was fired for publicly disagreeing with the company's position. Incidents such as these become an enduring part of the company folklore, indicating what the corporation really wants, what really counts in getting ahead or, alternatively, how to stay out of trouble. They are the unwritten rules of the game.

A culture may be very functional at first. But in time it becomes a separate entity, independent of its initial purpose. The culture becomes distinct from the formal strategy, structure and reward systems of the organization. In a similar vein, culture becomes distinct from workers and even top managers. All members of the organization are taught to follow the cultural norms without questioning them. After employees have been around for a few years, they have already learned the ropes. Even new top executives who vow that things will be different find out—often the hard way—how the culture is “bigger” and more powerful than they are. A top manager can get individual commitments to some new policy from his subordinates, but after they walk out the office door and once again become part of the corporate culture, the boss finds the new plan bitterly opposed.

Top management is also caught in the grip of the firm's separate and distinct culture. Employees wonder from below why managers play it so safe, why they refuse to approach things differently, why they keep applying the same old management practices that clearly do not work. They wonder why management is so blind to the world around them. Is management “mean” or just “stupid”?

How Are Cultures Maintained?

The force controlling group behavior at every level in the organization—a force that can brainwash workers into believing that what they are doing is automatically good for the company, their community and their family—must be very powerful. Is it magic or is it the psychology of group membership that explains the potency of corporate culture? Social scientists speak of “norms” as the unwritten rules of behavior. In a company, for example, a norm might be: Don't disagree with your boss in public. If a norm is violated, there is immediate and strong pressure to get the offending party to change behavior. Consider, for example, an individual who persists in presenting reservations about the company's new product at a group meeting—just after the boss has argued strongly for investing heavily in its advertising campaign. The bold employee receives stares and frowns, eyes roll—all nonverbal messages to sit down and shut up. If these efforts do not work, the underling will hear about it later, from coworkers if not from the boss.

The human need to be accepted by a group—whether family, friends, coworkers or neighbors—gives the group leverage to demand compliance to its norms. Were such a need not so widespread, groups would have little hold on people other than formal sanctions. The nonconformists and mavericks who defy pressures to adhere to group norms always do so at a considerable price.

Simple experiments conducted by Solomon Asch in the early 1950s demonstrate just how powerfully the group can influence its deviants. The experiments were described to the research subjects as a study in perception. Three lines—A, B and C, all of different lengths—were shown on a single card. Subjects were asked to indicate which of these three lines was identical in length to a fourth line, D, shown on a second card. In one experiment, seven people sat in a row. One by one they indicated their choices. While line C was in fact identical to line D, each of the first six, all confederates of the experimenter, said that line D was identical to A. The seventh person was the unknowing subject. As each person deliberately gave the wrong answer, the seventh subject became increasingly uneasy, anxious and doubtful of his or her own perceptions. When it came time to respond, the seventh subject agreed with the rest almost one-third of the time. Without such group influence there were hardly any errors.

Imagine just how easily such distorted perceptions of reality can be maintained when backed up by formal sanctions—pay, promotions and other rewards.

The group can reward its members so that they ignore the disruptive behavior of "troublemakers." The members collectively believe that everything is fine, continue to reinforce the myth and reward one another for maintaining it. In essence, everyone agrees that the dysfunctional ways can continue without question. Any deviant who thinks otherwise is severely punished and eventually banished from the tribe.

Asch's classic study demonstrates that the impact of a group on its members is very powerful indeed. And if the group is cohesive, if there is a strong sense of community and loyalty, there will be even stronger pressures on each member to adopt whatever the cultural norms specify. Other studies have shown that if the cultural norms of a cohesive group support the organization's mission, the workers' performance will be high; the culture is said to be adaptive.

Alternatively, if the norms endorsed by a highly cohesive group oppose the corporate goals, then the culture will foster low performance and morale. It is better to have an uncohesive group with mediocre performance than a highly cohesive counterculture. The latter will result in consistently low performance and headaches for everyone.

Given the crucial role of corporate culture in shaping behavior, and the especially powerful effects of group norms, one way to turn around a maladaptive company is to change its culture by managing its norms. Even norms that dictate appropriate behavior, opinions and facial expressions can be brought to the surface, discussed and altered.

In my corporate consulting work, I have found it helpful to have all group members (generally in a workshop setting) list the actual norms that currently guide their behavior and attitudes. This can be done for one or many groups, departments and divisions. Sometimes it takes a little prodding and a few illustrations to get the process started, but once it begins members are quick to suggest many norms. In fact, they seem to delight in being able to articulate what was never written in any document and rarely mentioned even in casual conversation between themselves.

In an organization with a culture deeply rooted in the past, some of the norms people list are: Don't disagree with your boss; don't rock the boat; treat women as second-class citizens; put down your organization; don't enjoy your work; don't share information with other groups; treat subordinates as incompetent and lazy; cheat on your expense account; look busy even when you're not; don't reward employees on the basis of merit; laugh at

those who suggest new ways of doing things; don't smile much; openly criticize company policies to outsiders; complain a lot; don't trust anyone who seems sincere. And, ironically, the one common norm that must be violated in this group process is: Don't make norms explicit.

Other frequently listed norms include: Don't be the bearer of bad news; don't say what the boss doesn't want to hear, don't think of things that are not likely to happen; don't spoil the party; don't be associated with an ugly event; see no evil, hear no evil and speak no evil.

As these norms are listed for everyone to see, there is considerable laughter and amazement. The members become aware that they have been seducing one another into abiding by these counterproductive rules. But no individual made a conscious choice to behave this way; rather, as workers entered the organization, they were taught what was expected—often in quite subtle ways. The more cohesive the group, the more forcefully the sanctions are applied and the more rapidly the learning takes place. In the extreme case, a highly cohesive group that has been around for a long time has members who look, act, think and talk like one another.

In the projects in which I had managers and all employees of a company list their norms, it was surprising to discover that most norms cited were negative. In a number of cases, more than 90 percent of the listed norms had at least mildly negative connotations. It may be, of course, that employees felt I was looking for the dysfunctions in their organizations rather than for the adaptive aspects. Then again, maybe many organizations are plagued with a high proportion of negative norms from their bureaucratic cultures.

The next step is for all group members to discuss where the organization is headed and what type of behavior is necessary to move forward. Even when a corporation has inherited a very dysfunctional culture from the past, individual employees are often aware of what changes are needed in order for the organization to adapt and survive. Similarly, they are aware of what work environment they prefer for their own sanity and satisfaction.

A certain amount of planning and problem solving may have to occur before any new direction can be articulated. In groups that have fallen into a culture rut, members are so absorbed with the negatives that they have not spent much time thinking about or discussing what they would prefer. Sometimes it is helpful to ask them to reflect upon their ideal organization: If they could design their own from scratch, what would it be like? This

generally shows what could be changed in the present organization—often things that are accepted merely because they are traditional.

The third step is for all group members to develop a list of new norms for organizational success. What new norms, for example, would encourage a more adaptive stance toward the organization's changing environment? Likewise, what new norms would allow groups to discuss difficult and uncomfortable issues that affect the long-range success of the firm? What cultural norms would bring difficult internal problems out into the open so that they could be resolved?

At this point, employees usually grasp how unwritten rules have affected their behavior. They experience a sense of relief at contemplating a new way of life, realizing that they no longer have to pressure one another to behave in dysfunctional ways. They can create a new social order within their work groups and within their own organization. Part of this sense of relief comes from recognizing that their dissatisfaction and ineffectiveness are not due to their own incompetence: Psychologically, it is much easier to blame the invisible force called culture—as long as they take responsibility for changing it.

In organizations needing to be more adaptive, flexible and responsive to modern times, some of the norms often listed are: Treat everyone with respect and as a potential source of valuable insight and expertise; be willing to take on responsibility; initiate changes to improve performance; congratulate those who suggest new ideas and new ways of doing things; be cost conscious; speak with pride about your organization and work group; budget your time according to the importance of tasks for accomplishing objectives; don't criticize the organization in front of clients or customers; enjoy your work and show your enthusiasm for a job well done; be helpful and supportive of other groups in the organization.

New norms that directly pertain to complex and difficult problems include: Bring uncomfortable issues out into the open; persist in drawing attention to problems even if others seem reluctant to consider the implications of what you are saying; listen to other members' viewpoints even if you disagree with them; encourage zany and bizarre perspectives to insure that nothing important and possible has been overlooked; make people aware when a topic that should generate a heated debate has not.

Spotting Culture Gaps

The contrast between desired norms and actual norms can be immense. My colleague, Mary Jane

Saxton, and I refer to this contrast as a "cult gap." We have developed a measurement tool for detecting the gap between what the current culture is and what it should be: Kilmann-Saxton Culture-C Survey.

The survey was developed by first collecting more than 400 norms from managers and employees in more than 25 different types of organizations. Many of these norms were also developed through projects in which cultural norms were assessed and changed. The final set of 28 norms that appears on the survey was derived from statistical and clinical analysis of the most content norms that were operating in most of the organizations we studied. An example of a norm pair is: A) Share information only when it benefits your own work groups versus B) Share information to help the organization make better decisions. Each employee chooses either A) or B) for each norm pair in two ways: first, according to the pressures the work group puts on its members (actual norms) and second, according to which norms should be operating in order to promote high performance and morale (desired norms).

The differences between the actual norms and the desired norms represent the culture gaps. There are four types of culture gaps, each made up of seven norm pairs. First, there are what we call "task support norms" having to do with information sharing, helping other groups and working with efficiency, such as "Support the work of other groups" versus "Put down the work of other groups." Second, there are "task innovation norms," which stress creativity, such as "Always try to improve" versus "Don't rock the boat." Third, we look at "social relationship norms" such as socializing with one's work group and mixing friendships with business, such as "Get to know people in your work group" versus "Don't bother with people outside your work group." Finally, we examine "personal freedom norms" such as self-expression, exercising discretion and pleasing oneself, such as "Live for yourself and your family" versus "Live for your job and career."

Culture gaps can be surveyed in a work group, a department, a division or an entire organization. By calculating the difference between the norms that are actually in force and those that should be, the four culture-gap scores are obtained. The larger the gap, the greater the likelihood that the current norms are hindering both morale and performance. If the assessed culture gaps are allowed to continue, work groups are likely to resist any attempt at change and improvement. Specifically, culture gaps materialize as an unwillingness to adopt

work methods and innovations, as a lack of support for programs to improve quality and productivity, as lip service when changes in strategic directions are announced and, in the extreme, as efforts to maintain the status quo at all costs.

Our use of the Kilmann-Saxton Culture-Gap Survey in numerous for-profit and no-profit organizations has revealed distinct patterns of culture gaps. For example, in some of the high-technology firms, lack of cooperation and information sharing across groups has resulted in large culture gaps in task support. In the automotive and steel industries, not rewarding creativity and innovation has resulted in large culture gaps in task innovation. In some social-service agencies in which work loads can vary greatly, large gaps in social relationships are found, indicating that too much time is spent socializing rather than looking to get the next job done. Finally, in extremely bureaucratic organizations, such as some banks and government agencies, large gaps in personal freedom are evident. Here, workers' sense of being overly confined and constrained lowers their performance and morale.

The most general finding to date is the presence of large culture gaps in task innovation. It seems that American industry is plagued by significant differences between actual and desired norms in this area—a condition that may relate directly to the frequently mentioned productivity problem in the United States. An industrial culture that pushes for short-term financial results is bound to foster norms that work against efforts at long-term improvement, regardless of what formal documents and publicity statements seem to advocate.

Do all employees of a corporation see the same culture gaps? Apparently not. The smallest culture gaps are found at the top of the organization's hierarchy. Managers believe their own publicity; they say that they reward creativity and innovation but seem to forget that their actions speak louder than their words. By contrast, cultural gaps are largest at the bottom of the hierarchy, where the gaps also reveal alienation and distrust. Here a common norm is: Don't trust management. In essence, workers see management as being up to no good, getting caught up in fads to fool and manipulate employees or thinking that the workers are too stupid to see what's behind management's latest whim.

Closing Gaps

Without a supportive culture, every action by top management will be discounted by the groups below—even top-down efforts to change the culture.

I have seen cases in which executives have tried dramatic changes in their own behavior coupled with symbolic deeds and fiery speeches in order to dictate a new culture to the company—but to no avail. Only when work-group members encourage one another to be receptive to overtures by management can the whole change program be successful. For example, various work groups might include such new norms as: Give management another chance; assume good intentions. Managers and consultants, therefore, have to work especially hard to encourage the work groups, including the executive groups, to meet one another halfway.

How can culture gaps be closed? How can an organization move its culture from the actual to the desired? Can a company be taken out of a culture rut and be put back on track for solving present and future problems? Will the organization survive this culture shock?

When the current culture is at least hopeful, the impact of survey results on workers is almost miraculous. In fact, some change from the actual to the desired norms can take place just by listing the new set of norms. Members start "playing out" the new norms immediately after they are discussed. But when the current culture is cynical, depressed and in a deep rut, the response to the survey results is quite different. Even when large gaps are shown or when a listing demonstrates the tremendous differences between actual and desired norms, employees seem apathetic and lifeless. They respond by saying that their work units cannot change for the better until the level of management above them and the rest of the company change. They believe that the external system is keeping them down.

Curiously, when I do a culture-gap survey at the next highest level, the very same argument is heard again: "We have no power to change; we have to wait for the next level to let us change; they have the power!" It is shocking, after conducting the culture-gap survey for an entire organization, to present the results to the top management group only to find the same feelings of helplessness. Here top management is waiting for the economy to change. In actuality, it is the corporate culture that is saying: Don't take on responsibility; protect yourself at all costs; don't try to change until everyone else has changed; don't lead the way, follow; if you ignore the problem, maybe it will go away.

This is the perfect example of a company in a culture rut, where the shock of realizing the discrepancy between actual and desired norms is just too great to confront. Instead, the organization buries its head and hopes everything will be sorted out by

itself. Even in the face of strong evidence of a serious problem, time and time again I have witnessed this form of organizational denial—a much more powerful and perhaps destructive force than any case of individual denial. The group's power to define reality clouds everyone's better judgment. The bureaucratic culture "wins" again.

One large industrial organization asked me to present a three-day seminar to the chairman of the board, the chief executive officer and the 10 corporate officers on the topic of corporate culture. I suggested that a representative survey of culture gaps be conducted across all divisions in the company. In this way, I could report on the company's specific culture and thus generate a livelier and more interesting discussion than an abstract lecture would elicit. In a couple of weeks, the vice president for human resources called: "No, we better not do this," he said. "I don't think the executive group really wants to know what is going on in the company. Besides, we can't take the chance

of surprising them with your survey results. Who is protecting whom?"

Gaining control of the corporate culture is not possible but necessary for today's organization. When changes in corporate directions are planned, the culture may have to replace the old culture—either for one or more divisions or for the whole organization. Just as old cultures can become out-of-date and nonfunctional, the same can happen with new ones. Other changes in the organization's setting—such as responding changes in strategy, structure and reward systems—can make any culture less functional than before. An important part of managing the corporate culture, therefore, is to continuously monitor and assess norms. If the culture is managed explicitly, it may be just a matter of time before the organization is once again disrupted. If it is managed explicitly, the company can expect significant improvements in both morale and performance; it will be, in the best sense of the word, a well-cultured organization of employees.



American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 • 1688
(304) 242-2160; FAX: (304) 242-2283

March 19, 1990

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TO: Nucleus Planning Group, AAZPA
Strategic Planning

FROM: D. Zucconi, Chairman

Thanks, everybody, for your full participation in our first meeting of the NPG in Washington, D.C.

You are herewith reminded of the "homework" assignment we agreed to:

Culture - K. Roberts (ch), Garibaldi, Schneider, Wylie.

AAZPA Organization - C. Hoessle (ch), Doherty, Taylor, Wheeling office.

Backcast (the "ontogeny" of AAZPA's current status, including surveys, guidelines, etc.) - B. Read (ch), Wheeling office.

Additionally, G. Rabb and U. Seal will develop a statement relative to our global imperatives.

Additionally, D. Myers will survey some key people with respect to the amount of time spent on regulatory activities.

Key Operating Policies (policies mandated as such by either Board vote or member vote) - Wheeling office, Dennler, Farst, Lentz.

Steve Wylie generously volunteered to head-up a task force to explore the "Mission Statement" further (Garibaldi, Myers, Rabb, Taylor, Wagner). As we left it on the table:

"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."

Steve's group will alternately explore a statement that outlines our mission with a series of planks.

We exhort all chairpersons to have their assignments completed in time for the Denver meeting; it would be great if some of the shorter assignments could be finished and circulated to the NPG prior to Denver.

All members of the Long-Range Committee, Advisory Committee and NPG are invited to comment on any/all of the above; please copy in C. Hoessle and myself. In due course, Linda will send copies of the minutes from our Washington meeting.

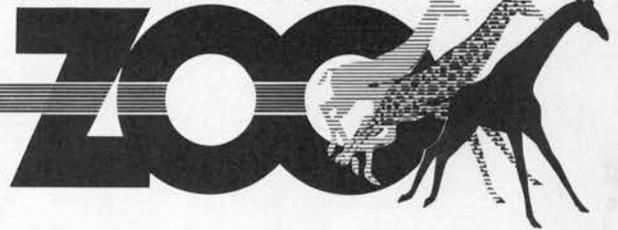
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- (a) positioning;
- (b) key values;
- (c) critical factors for success;
- (d) principal forces in the outside environment.

Please call me if you have any questions about what we're doing.

DZ:bm

CC: C. Freiheit
W. Iliff
S. Robbins
R. Smith
P. Chaffee
W. Conway
G. Rabb
L. Boyd



January 1990

not going

Dear Colleague,

On behalf of the staff of the Fort Wayne Children's Zoo, I would like to invite you to join us May 6, 7, and 8 for the 1990 AAZPA Great Lakes Regional Conference.

Springtime is a busy time at most zoos. Regional conferences are easy to skip. That is why we are working hard to provide you several good reasons to take a break from your spring rush and attend the conference.

You will relax. The conference hotel is the Fort Wayne Hilton, Fort Wayne's best. It is elegant, but very comfortable and relaxing.

You will have fun. Our social schedule is being planned by dedicated fun-hogs. From the opening icebreaker to the final banquet, count on a good time.

You will learn. Many of your colleagues are hard at work preparing papers for presentation. We hope the interesting program will provide inspiration and motivation.

You will get the chance to contribute. Sessions will be open-ended, with time for comments and discussion. Several workshop sessions are planned.

You will visit an interesting zoo. The Fort Wayne Children's Zoo is not just for children. Popular exhibits include the 22-acre African Veldt and the 4.5-acre Australian Adventure.

If those are not enough reasons, how about one more? Each conference delegate will receive their very own copy of our 25th anniversary photo album, personally autographed by zoo director, Earl Wells. **You will treasure this keepsake!**

More conference information will be coming your way in weeks to come, but it is not too soon to begin making plans.

See you in May,

Jim Anderson
Assistant Director
Fort Wayne Children's Zoo

JA:jb

1990 AAZPA Great Lakes Regional Conference

Tentative Schedule

Sunday, May 6

Registration at Fort Wayne Hilton

Early arrivals can visit Historic Old Fort Wayne, 1860 reproduction of original fort.

Icebreaker at Botanical Conservatory, across the street from the Hilton. Plenty to eat and drink.

Monday, May 7

Paper sessions at Hotel all day

Crisis Management

New Exhibits

Conservation

Education

Hosted lunch

Supper on your own

Hospitality suite at Hilton Hotel

Tuesday, May 8

Papers and workshops at Hotel in the morning

Design

Husbandry

Conservation education

Gift shops

Lunch at zoo

Zoo visit

Banquet at Hilton

We will leave you with a memorable evening.

Dancing

Wednesday, May 8

Conference delegates go home

Fort Wayne Zoo staff goes on vacation

CALL FOR PAPERS

When was the last time you worked up a good nervous sweat? Here is your chance: present a paper at the regional conference.

The 1990 AAZPA Great Lakes Regional Conference will be held in Fort Wayne, Indiana, May 6, 7, and 8, 1990. We are trying to organize a meaningful program for the conference, and we seek input from a wide variety of institutions and individuals. We are accepting paper proposals on any zoo or aquarium subject and will develop sessions accordingly.

General and concurrent sessions are planned on crisis management, new exhibits and facilities, pro-active conservation efforts, conservation education, animal husbandry, aquarium management, and gift shops. Papers on other topics are welcome.

Individuals interested in presenting a paper should submit a half-page proposal by March 1, 1990, to Jim Anderson at the Fort Wayne Children's Zoo. Finished papers may not exceed eight pages.

If you have any questions or ideas, please call Jim Anderson, (219) 482-4610.



1990 AAZPA Great Lakes Regional Conference

Fort Wayne, Indiana • May 6, 7, & 8, 1990



Please print or type.

Name _____

Title _____

Institution _____

Street Address _____

City, State, Zip _____ Phone _____

Membership classification:

- | | |
|--|---|
| <input type="checkbox"/> Professional Fellow | <input type="checkbox"/> Supporting |
| <input type="checkbox"/> Affiliate | <input type="checkbox"/> Registered Animal Supplier |
| <input type="checkbox"/> Commercial | <input type="checkbox"/> Non-member Speaker |
| <input type="checkbox"/> Associate | <input type="checkbox"/> Non-member |
| <input type="checkbox"/> Retired or Honorary | |

Name and title as it should
appear on badge:

Membership card # _____

Registration fees:

Member	\$ 75
Member's spouse	\$ 75
Non-member	\$100

Late fees must be charged if registration is post-
marked after April 16.

After April 16:

Member	\$ 85
Member's spouse	\$ 85
Non-member	\$110

Registration fees paid in advance cannot be refunded
after April 30.

Please make checks payable to the Fort Wayne
Zoological Society.

Daily Fees:

Member	\$ 40
Member's spouse	\$ 40
Non-member	\$ 55
After April 16, add \$10	
Icebreaker	\$ 20
Banquet	\$ 30

Please mail Conference Registration Form to:

AAZPA Great Lakes Regional
Fort Wayne Children's Zoo
3411 Sherman Boulevard
Fort Wayne, IN 46808

AMOUNT PAID: \$ _____

1990 AAZPA Great Lakes Regional Conference May 6-9, 1990

HOTEL REGISTRATION FORM — Fort Wayne Hilton

Name _____ Rooming with _____

Institution _____

Address _____

City, State, Zip _____ Phone _____

Arrival Date _____ Departure Date _____

Please check one: Single (\$69.00/night) Double (\$79.00/night)

Check-in time is 3 PM. Check-out time is 12 noon. Reservations will be held until 6 PM. To guarantee your reservation for late arrival you may enclose one night's deposit or guarantee by Visa, Master Card, American Express, Diner's Club, Discover, or Hilton Credit Card.

Credit Card # _____ Exp. Date _____

or Deposit enclosed: \$ _____ Hotel reservations must be received by April 6, 1990.

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P.O. Box 12049
Fort Wayne, IN 46897-6200

AAZPA
StratPles



Brookfield Zoo



Chicago Zoological Society



Internal Correspondence

BROOKFIELD ZOO FAX LINE LEADER SHEET

Date: Oct 1 1990

To: Kathryn Roberts

02 Pages Follow this leader

Fax Number: _____

If you have problems receiving
this fax please call:
708.485.0263 ext. 300

From: George Rabb

Brookfield Zoo Fax Number: 708.485.3532

Message:

708-485-3532

6B
file somewhere...



October 1, 1990

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

Dear Kathryn:

Before this volley goes out to other directors, I would appreciate your thoughts. Target would be to assemble the directors for status reports, and discussion on point 4, at the time of the spring AAZPA Board meeting. This presumes we can find volunteers to take on the various tasks. A lot will depend on AAZPA staff and committee collaboration, especially the planning committae. However, I feel that even now it would be prudent to have this initiative officially separate.

I am thinking that you, Dave Towne, and Bill Donaldson should have more to contribute than the rest of us. However, any suggestions on who might take up tasks would be welcome.

Sincerely,

George E. Rabb

Brookfield, Illinois 60513
708.485.0263 312.242.2650

Zoo Act

October 1, 1990

The idea of forwarding federal legislation to recognize and support zoos and aquariums was broached at the Directors meeting in Indianapolis. It is not a new idea, but one that now more than ever needs active pursuit for the welfare of our institutions and their services to their communities and to the nation.

The idea is (1) to distinguish zoos and aquariums by virtue of their living collections, and the nature of their organizations, (2) to qualify them more fully and extensively for support for their educational, conservation, and scientific services, (3) to diminish or remove legislative and regulatory obstacles to provision of these services by zoos and aquariums, including reducing the overlapping and sometimes conflictual authorities of various agencies.

The goal is to achieve recognition and support as national resources, such as our national parks, wildlife refuges, and historical sites enjoy, but in the context of professional management and standards, such as required of hospitals, schools, and other social service institutions.

To pursue this idea, various elements seem required, to wit:

(1) A basic definition of what a professional zoo and aquarium is. This is not simply a statement, but a framing of the standards that apply. The AAZPA accreditation process provides the appropriate context, but no prescribed standards.

(2) A summarization of what zoos and aquariums are and what they do in fulfilling their various service functions. This was the intent of the document assembled by Nancy Muckenhirn for AAZPA. The document needs to be revised and extended. The materials would cover recreational usage, education services, conservation efforts, and research programs and projects. This is a much larger scope than the data base currently envisioned in AAZPA.

(3) Assembly of a network for political action. The recent "Legislative Questionnaire" from AAZPA is an attempt to start this. Also needed is information on grass roots organizing capacity in local communities on behalf of their zoo or aquarium, starting with membership.

(4) Specification of what is to be accomplished in the legislative initiative, after one or more strategic planning meetings, preferably with the counsel of people familiar with large-scale campaigns in Congress.

(5) Assignment of organizational responsibilities. It is unlikely that AAZPA as a 501 (c) 3 organization could take on this challenge without jeopardizing its tax-free status. Reconstituting AAZPA as a 501 (c) 6, a trade association, is possible but has consequences, such as that individual contributions would not be tax-deductible. A dual arrangement, such as the National Society for Medical research has, is a possibility (a foundation and an associated trade association), rather than simply forming a separate political action committee (PAC). Whatever the best course is organizationally, a coordinator of the initiative will surely be needed and other staffing and services provided to whatever steering/liason committee is needed. A fund-raising effort or financial contribution solicitation is indicated, such as now being done for MMHC, CBSC, and other special efforts.

MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

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

George Rabb
Director
Brookfield Zoo
Brookfield, IL 60513

Dear George,

I have a couple of thoughts as a result of reading your memo.

First of all, I suspect the most important task to occur is to initiate and complete the strategic thinking about the task of securing a Federal Zoo Act.

Assignments and identification of tasks and volunteers could be done in a manner that would be most efficient after the strategic thinking is complete. People would be able to understand and embrace the concept if the outcome and the process for getting the job done has been carefully thought through and articulated. The issues, challenges and rewards would be clear.

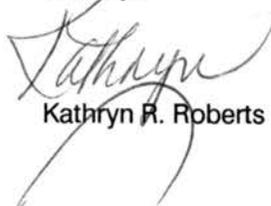
There are, however, obvious tasks which need to be undertaken and could be started before the strategic planning sessions are held. Your first point is a good example of a task to be done. In fact, this task could be approached in at least two very different ways. One way would be to allow the Accreditation committee to begin the work as a committee and proceed in the manner they regularly conduct business. Another way would be to bring them and any one else who should be involved into a day long meeting and have a facilitator press the task to completion. I would encourage using the later method.

Our Strategic Planning group met in Indianapolis and talked about the necessity for including this initiative in the plan. I am confident none of us would want to hold up any progress because the Plan isn't yet complete. The initiative can certainly stand on its own. Being a part of the Plan should not slow it down.

You know that I whole-heartedly support this initiative and will participate in any way I can to see it through. Do you want me to think about serving in the role as facilitator? I know someone who would be very open to helping in that role if we think there should be someone other than me. I would also like to contribute to the content, not just the process. In my mind, this is the future for Zoos. It is vital to us, and I want to help.

Please stay in touch.

Warmly,



Kathryn R. Roberts



MINNESOTA ZOO

George Rabb
Director
Brookfield Zoo
Brookfield, IL 60513

Strengthening The Bond Between People and The Living Earth.

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

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Please stay in touch.

Warmly,

Kathryn R. Roberts

GRB -
FAX to George
10-2-90
DONE.





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: 10/10/90

Number of Pages (including this one: 2)

TO: Kathryn Roberts, Ph.D.
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:

*Please comment on the Proposed Irreversible
Thanks*

10-11-90

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. ~~This~~ I'm assuming these letters will be mailed out after David has received all of the edited copies of the 2 page documents from us/ and has put together a final copy.

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

MINNESOTA ZOO GROUP SALES SPACE AND SERVICE REQUEST

Group Name HOUSE, NEZERKA & FROELICH
 Address 5270 W. 84TH ST
SUITE 500
BLOOMINGTON, MN 55437
 Phone 835 1344
 Contact Person JEANNE MITCHELL
 Staff Contact _____
 Type of Event CHRISTMAS PARTY

Day	Date	Month	Year
SAT	10 1	DEC	1990

Group Size 70-80

Time: from 6 to 12

Location:

- Tropics
- ~~Whale Viewing~~ Aquarium
- Lower Level Concourse
- Theatre
- Puma Pavillion
- Lion's Den
- Lodge: Back room
- Large room
- Entire Zoo
- Other Reindeer ?

House, Nezerka & Froelich
 Certified Public Accountants

<p>Jeanne M. Mitchell</p>	<p>5270 West 84th Street Suite 500 Bloomington Minnesota 55437</p> <p>Telephone 612 835 1344</p>
----------------------------------	---

Custodial:

PERSONNEL NEEDS:

Staff:

Volunteers:

FOOD SERVICE:

Catering Company _____

Address _____

Phone _____

Contact Person _____

SPECIAL INSTRUCTIONS:

Exact party details
to be determined.

Copies to: Activity Managers
 Custodial Staff
 Admissions Staff
 IDG

Monorail
 Volunteers
 Gift Store
 Education

Date Processed 10/5/90

Confirmed _____

Confirmation Number 465

Vancouver Public Aquarium

P.O. Box 3232, Vancouver, B.C. Canada V6B 3X8
Telephone (604)685-3364 Fax (604) 631-2529

Date: _____ Time: _____

Please forward the attached facsimile message to:

Kathryn Roberts

Minn. Zoo (612) 431-9300

This message was sent by:

Jeff Marliave



This message contains a total of 6 pages including this header page. Should you not receive the total number of pages listed, please contact the sender immediately at (604) 685-3364.

ply. check and correct if needed

re AAZPA - NPG action plans

m... ..

2... ..

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

Planning Leader: Kathryn Roberts

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

Dates of Action Plan:

Presented _____ Approved _____

Strategy: 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. Research field for appropriate vendor	Karen Asis		Sept. 1990		
2. Request bids from acceptable vendors	Robt. Wagner Chas. Hoessel	Sept. 1990	Oct. 1990		
3. Select Vendors	Robt. Wagner Chas. Hoessel	Oct. 1990	Mar. 1991		
4. Communicate concepts to Membership	K. Roberts/ NPG	July 1990	Sept. 1990		
5. Specify parameters and options for development		Sept. 1990	Feb. 1991		e.g. either new AAZPA name and logo or ad slogan and logo (separate)
6. Create review team	K. Roberts/ NPG			June 1990	Design staffs and consultants of St. Louis Zoo, Minnesota Zoo, Busch Gardens Vancouver
7. Team reviews, interim Presentation	Asis, review team	May 1991	July 1991		
8. Present to Membership	Asis		Sept. 1991		at annual AAZPA meeting

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

Objective: Conduct market research to determine our audiences and issues by January 1991

Strategy: (A) Review Hill and Knowlton and determine methodology

Planning Leader: K. Roberts

Dates of Action Plan:
Presented _____ Approved _____

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 - questions 5,6,8, 29 (1988 P.R. plan)	J.Marliave	June 1990	July 1990		
2. Recommend methodology	J.Marliave	June 1990	July 1990		Including new questions, statistical criteria
3. Approve recommended methodology	K.Asis, K.Roberts	July 1990	Aug. 1990		

ACTION PLAN

Strategy: (B) 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	K. Roberts		complete	June 19/90	St. Louis Zoo, Minnesota Zoo, Busch Gardens, San Diego Zoo (J.B. Marliave to contact Calgary Zoo and Metro-Toronto)
2. Conduct the surveys	J. Marliave	Aug. 1990	Nov. 1990		- same participants as above.
3. Compilation and analysis of results	J. Marliave K. Asis	Nov. 1990	Jan. 1991		
4. Communicate results through Communique, Regional, National and Board Meetings	K. Asis		Aug. 1991		

ACTION PLAN

Key Result Area: Protect and enhance our image as leaders in environmental and wildlife conservation

Planning Leader: K. Roberts

Objective: Develop a public relations plan based on market research to determine our message by September 1991

Dates of Action Plan:
Presented _____ Approved _____

Strategy: (A) 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	C.Hoessel	June 1990	Aug.1990		note: "team" versus "PR committee" refer to different groups. "Team" must include at least one from PR committee
2. Recruit and organize the team	C.Hoessel	Aug.1990	Sept.1990		
3. Assign tasks to team	K.Asis	July 1990	Oct.1990		
4. Carry out tasks	K.Asis Team Members	Oct.1990	Annual review		
5. Monitor and evaluate the progress and results of the tasks	long-range planning comm.		Annual review		
6. Review and report at all Board meetings and through communique	long-range planning K.Asis	Sept.1990	Annual review		

P.5

JUL 09 '90 14:31 VAN PUBLIC AQUARIUM

ACTION PLAN

Strategy: (B) Coordinate P.R. 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 P.R. staff and/or capabilities	K. Asis		Aug. 1990		
2. Secure willingness to cooperate by sharing instruments, results, ideas.	K. Asis P.R. Comm.	Aug. 1990	Oct. 1990		
3. Develop Mechanism for sharing information	K. Asis P.R. Comm.	Oct. 1990	Jan. 1991		Will assist-AAZPA office and member institutions
4. Implement ongoing sharing and cooperation	K. Asis				Will check periodically and report to Board.

** TRANSMIT CONFIRMATION REPORT **

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Time : 00'35
Mode : NORM
Document : 01 Pages
Result : 0 K

Long Distance
(604) 631-2529

Vancouver Public Aquarium

P.O. Box 3232, Vancouver, B.C. Canada V6B 3X8
Telephone (604)685-3364 Fax (604) 631-2529

Date: August 3/90

Time: _____

Please forward the attached facsimile message to:

Kathryn Roberts (Minnesota Zoo)

(612-431-9300)

This message was sent by:

Jeff Marliave



This message contains a total of 2 pages including this header page. Should you not receive the total number of pages listed, please contact the sender immediately at (604) 685-3364.

Regarding my wording in yesterday's memo, I would like to rephrase my comment regarding Karen Asis' assessment of the Hill and Knowlton study. She felt the report was of little use to her, but my use of the phrase "ripped-off" to characterize her conversation was indiscrete.

Utility should be the operational criterion for judging surveys. Hopefully, attention can now be focused on the issue of achieving cost-effectiveness in the difficult task of assessing public attitudes. I stand by my comments regarding the utility of this past survey and urge that all those who offered to include those few question in future surveys will do so. Finally, I just succeeded in arranging for Metro-Toronto Zoo to include the AAZPA questions in their new survey. Appended are the questions from which I would like to receive the raw numerical data. I look forward to being of as much assistance as possible.

Q5: In your opinion, what is the most important purpose for zoos and aquariums these days? (open-ended)

	Total	Adults	Teens
Education			
For children specifically	38%	38%	22%
In general	27	27	25
Observation	13	11	24
Entertainment	20	21	15
Conservation			
Preservation of animals, species	18	17	19
Research	1	1	2
All Other	2	2	1
Don't Know	10	9	11

Q6: As far as you know, do the zoos and aquariums have educational programs to teach local students about animals, or is that something they leave up to the schools?

	Total	Teens	Adults	
			All	2 + zoo visits last 12 mo.
Have education programs	44%	38%	45%	62%
Leave up to schools	31	42	29	22
Don't know/No answer	25	20	26	17

Q7: As far as you know, are the zoos and aquariums involved in programs to save animals from extinction or is that something they leave for other organizations?

	Total	Teens	Adults	
			All	2 + zoo visits last 12 mo.
Have program	52%	48%	53%	67%
Leave to others	22	32	20	15
Don't know/No answer	26	21	27	18

Q8a: Have you heard or read anything about zoos trying to save animals from extinction or helping endangered species?

	Total	Adults	
		U.S.	Canadians
Have heard or read	58%	58%	69%
Have not	39	39	30
Don't know/No answer	4	4	1

Q29: Think of a thermometer on which zero means you feel very unsupportive and cold toward it, and 10 means you feel very supportive and warm toward something. As I read this list of organizations, please tell me if you have ever heard of each one, and if you have, where you would put your feelings on the thermometer, zero to 10.

SPCA National Wildlife Society
 World Wildlife Society
 Cousteau Society
 AAZPA
 Audobon Society
 Nature Conservancy
 Greenpeace
 Sierra Club

Please append "Animal Liberation Front" to end of list, to maximize data variance, presumably.

Vancouver Public Aquarium

P.O. Box 3232, Vancouver, B.C. Canada V6B 3X8
Telephone (604)685-3364 Fax (604) 631-2529

Date: Aug 02/90 Time: 11:05am

Please forward the attached facsimile message to:

Kathryn Roberts (Minnesota Zoo)

(612)-431-9300



This message was sent by:

Dr. Jeff Marliave

This message contains a total of 4 pages including this header page. Should you not receive the total number of pages listed, please contact the sender immediately at (604) 685-3364.

Karen
301-907-2980
Bob

August 1, 1990

Memorandum: re repeating Hill & Knowlton questions in AAZPA institutional member surveys (St. Louis, San Diego, Busch, Minnesota)

To: Bob Wagner, Dave Zucconi, Karen Asis, Charlie Hoessle, Doug Myers, Gerry Lentz, Kathryn Roberts

From: Jeff Marliave

Amidst some difficulty in getting the type of survey data I wanted from Bob Wagner, and then Karen Asis, namely the raw data, I received the candid comment from Karen that we had perhaps been ripped-off by the Hill and Knowlton survey. From my viewpoint that was definitely the case, because we failed to achieve the kind of analysis I expected to conduct. I have used other public survey data successfully, so this is a real frustration. My statistician, Terry Parker, wrote an explanation of our goals, appended below. There should be no problem, however, in continuing to acquire data on the critical questions (perhaps modified for sake of quantification) extracted by Doug Myers' PR committee in 1988. These questions relate to public awareness of conservation and education programs in zoos and aquariums, and to name recognition of AAZPA relative to other similar organizations. As long as I receive the raw data (actual numbers), we can analyse them.

We failed to determine what percentage increase in name recognition/approval would be significant for AAZPA, but feel certain that the 10% which was arbitrarily targeted by the Myers group would be unattainable, and far beyond the requirements for statistical significance. The entire range for the groups included is 22% (on the 0-10 approval scale), so 3-5% improvement may be a significant gain, whereas 10% would put us on top. That is perhaps impossible, considering the level of familiarity enjoyed by the SPCA (top score). Also, nothing like the Animal Liberation Front was

included to give us an idea of how low the level of approval might go (Sierra Club bottomed out at 61%). I would recommend appending Animal Liberation Front to the end of the list, just to increase variance in responses. Clearly, the top score by SPCA correlated closely to its much lower percentage of non-recognition, along with generally favorable approval.

In any case, I need to be contacted ASAP by any institution which can accommodate these questions in the near future. Otherwise, I will mail a package out within a week or two. I have yet to hear from Calgary or Metro-Toronto as to whether they can help us, as requested by George Rabb. Below are the comments by Mr. Parker on how we hope to deal with data from your own surveys.

Statistical/Methodological Review, Hill & Knowlton Survey
Terry Parker, Vancouver Aquarium
July 30, 1990

The Hill and Knowlton survey provides broad-reaching information about many important factors concerning the roles and public perceptions of Zoos, Aquariums and AAZPA in education and conservation issues. Although findings are given in the text, no inferential statistics are presented, and presumably were not done. Inferential statistical tests are essential for determining the significance of any finding.

I attempted to test the significance of several of the survey's findings (namely those of questions 5, 6, 8 & 29) but could not. The bare minimum needed for inferential statistics are the sample means, sizes and errors.

The sample means are given in the data tables. Some sample sizes are given in the methods section while those of the various breakdown groups (income or education levels, frequent visitors etc.) can be calculated from information given in Appendix 1. The information on sample error is lacking. We are told that the 95% confidence interval for results based on the full sample size of 1005

is "...plus or minus 3.1 percentage points. Results based on smaller breakdowns will have a higher margin of error." (Hill & Knowlton, p. 5). The confidence intervals for these smaller breakdowns are not given and cannot be calculated from the available information.

Ideally, to test the findings, the raw data are needed. This would allow ANOVA (analysis of variance) to be performed. The survey company or a subcontractor of theirs would be in the best position to do these analyses, as a document providing the raw data would be prohibitively large. Alternately, if the significance of the findings are not to be included in the final document, the sample sizes and errors of each data point must be provided. This would permit those interested to calculate t-tests, which, while not as powerful as ANOVA, would be adequate.

As a final note, the surveyors provide an adequate sample size and used good randomization and dispersion techniques in their data collection. However I question the representativeness of this study. The racial breakdown of the sample population is given as 87% White, 7% Black, 3% Hispanic and 1% Asian. This does not reflect the true population distribution.