



Minnesota State Zoological Board.
Zoo-Related Organizations Files.

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The Minnesota Zoo

To: Satch Krantz
President, AAZPA

Date: March 24, 1989

Fr: Linda Boyd , AAZPA Executive Office
Greg Geise, Binder Park Zoo
Kathryn Roberts, Minnesota Zoo
David Thompson, Lowry Park Zoo

Re: Follow-up Report from the March 1-2 Meeting

Our small group was charged with discussing ways the AAZPA can begin to provide a broader array of services to its member zoos. We identified five services which we felt were both identified by the larger group as a need and which we felt were do-able. The five services are:

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Strengthening The Bond Between People and The Living Earth.

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We would propose identifying individuals from member institutions to begin tackling this task. We are sensitive to the issues of product endorsement, forgetting a provider, listing sources for products we believe are inferior, etc.

5. "Tidbits" from Karen.

We discussed the need for "P.R." alerts which would supply zoos with messages that are complementary to the messages being communicated by AAZPA. The alerts could also include "interesting facts" like, "There are more NASA astronauts than zoo directors."

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All of us would like to extend our thanks for hosting this meeting. It is important to stay in touch with the membership, and offer the kind of activities and services which members feel are necessary. Your willingness to listen and affect change is greatly appreciated.

AAZPA



The Minnesota Zoo

March 24, 1989

Dr. George Rabb, Director
Brookfield Zoo
3300 Golf Road
Brookfield, IL 60513

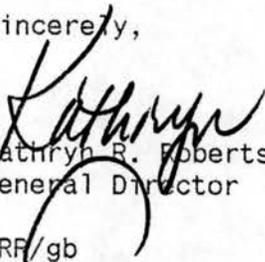
Dear George:

This letter is a request that you act as a sponsor of my application to the AAZPA for an upgrade to the Professional Fellow category. As one of the most respected zoo directors in the country, I would be honored to name you as a sponsor.

I have recently been appointed to the CBSG of the SSC by Ulie Seal, and intend to become active in that group. As you know, I also attended the AAZPA strategy workshop earlier this month. I hope this sufficiently indicates my desire to actively participate and promote the ideals and goals of the AAZPA.

I have taken the liberty of assuming your willingness to write a confidential letter to the AAZPA Executive Office and so I have enclosed a copy of my resume to provide you with additional background on me.

Sincerely,


Kathryn R. Roberts
General Director

KRR/gb

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The Minnesota Zoo

March 24, 1989

Robert Yokel, Director
Miami Metrozoo
12400 S.W. 152nd Street
Miami, FL 33177

Dear Bob:

Last night I attended a work session of the Apple Valley city council to begin the process of clearing the way for the possibility of developing an agreement with PACE to build an amphitheater on the Zoo grounds.

Gary Humphrey, who you so kindly met with on his recent visit to Miami, was almost a personal salesman for our cause. I want to thank you sincerely for taking the time to meet with him.

I'll look forward to seeing you at the next conference.

Sincerely,

A handwritten signature in cursive script that reads "Kathryn".

Kathryn R. Roberts
General Director

KRR/gb

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KATHRYN R. ROBERTS
Minnesota Zoo
Apple Valley, MN 55124
Work: (612) 431-9333

EDUCATION

1976-1978 Ph.D., University of Minnesota, Educational Administration
1973-1975 M.S., Mankato State University, Special Education
1969-1973 B.A., University of Minnesota, Psychology

EMPLOYMENT HISTORY

Current General Director
MINNESOTA ZOOLOGICAL GARDEN
Apple Valley, Minnesota

Responsible for the planning, organization and management of the Minnesota Zoo, with a \$7.8 million operating budget, 150 full-time employees, and serving approximately 900,000 visitors annually.

1985-1986 Coordinator
MINNESOTA OFFICE OF FULL PRODUCTIVITY AND OPPORTUNITY

Responsible for coordination of all income maintenance, support services, and jobs and training programs in the state. Goal was to reduce unemployment while also reducing the number of persons receiving public assistance.

1984-1985 Assistant Commissioner
MINNESOTA DEPARTMENT OF ECONOMIC SECURITY

Managed all administrative and technical staff (225) and services to department of 2,500 employees. Responsibilities included directing in-house information management operation, controlling \$800 million budget, and managing the research function.

1984 Acting Commissioner
MINNESOTA DEPARTMENT OF HUMAN RIGHTS

Responsible for reorganization of department and reduction of backlogged case load from 3,000 to 1,400.

- 1979-1984 Director, Management Analysis Division
MINNESOTA DEPARTMENT OF ADMINISTRATION
- Developed in-house management consultant capabilities in executive branch of Minnesota state government. Directed major management audits in state agencies. Accepted recommendations led to significant operational improvements. Administered State Productivity Improvement Project resulting in training program for participative management techniques and innovative approaches to manage declining resources.
- 1977-1979 Coordinator, Federal Research and Development Grant
MINNESOTA DEPARTMENT OF PUBLIC WELFARE
- Designed and implemented state-wide management information system to monitor and influence deinstitutionalization process. Created training materials to enable implementation of individual rehabilitation plans. Developed and pilot-tested model standards for residential care providers.
- 1974-1977 Staff, Technical Assistance Project
MINNESOTA DEPARTMENT OF PUBLIC WELFARE
- Wrote self instructing manual to develop residential care facilities. Assisted all residential care providers in compliance with state and federal mandates. Developed and implemented needs assessment instrument for twenty-seven state mental health centers.
- 1972-1973 Psychological Research Assistant
HONEYWELL, INC.
- Assisted in design and conduct of studies of human cognitive behavior, concept formation, and development of aids for human decision makers.

RELATED EXPERIENCE

- 1982 Program for Senior Managers in Government
John F. Kennedy School of Government, Harvard University
- 1980 Fellow, Educational Leadership Program
George Washington University
- 1979 Visiting professor - Southern Illinois University
Consultant to Massachusetts Department of Mental Hygiene
- 1977 Conducted management seminars; Rensselaer Polytechnic Institute

References and Publications available upon request



American Association of Zoological Parks and Aquariums

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

APPLICATION FOR UPGRADING TO PROFESSIONAL FELLOW OR AFFILIATE

NAME KATHRYN R. ROBERTS TITLE GENERAL DIRECTOR

EMPLOYED BY Minnesota Zoo BUS. PHONE (612) 431-9299

EMPLOYER'S ADDRESS 13000 Zoo Boulevard, Apple Valley, MN 55124

HOME ADDRESS _____
(Complete only if you want AAZPA mail sent to your home)

Does your employer maintain a collection of captive wildlife? Yes Is it maintained in a facility open to the general public on a regular and predictable basis? Yes

- PROFESSIONAL FELLOW** - (applicants shall have been members for the immediate past two years and currently employed on the staff of an accredited Institution member) - Managerial personnel employed full time for at least three years continuously. Candidates must possess at least a four-year degree. The education requirement may be waived for those who have been employed in zoological facilities for the immediate past eight years, the last four of which shall have been continuous in a full-time management capacity. Applicants must be sponsored by three (3) Professional Fellows, two (2) of whom must be from organizations other than that of the applicant.

LIST SPONSORS: 1. Victor Camp 2. Brian Joseph 3. Ron Tilson *Latman, Pridner, Rendell, Don, ...*

SPONSORS ARE TO SEND THEIR LETTERS TO THE AAZPA EXECUTIVE OFFICE

- AFFILIATE** - Personnel who have been employed full time for the immediate past two years in or by a zoological park, aquarium, wildlife park, oceanarium, society or a related organization veterinarians or scientists who render part-time service to one or more zoological institutions professional colleagues from zoological institutions outside of the Americas; or those persons who otherwise qualify for Professional Fellow but have not been members of the Association for two years.

EMPLOYMENT RECORD (Must be completed by all applicants)

Are you employed at a zoo, aquarium, etc.? YES Society or related organization? ---

Current job title GENERAL DIRECTOR State 4-yr. degree or higher Ph.D.

Date present position began 05/86 Full-time? YES Mgt? YES
(Mo) (Yr)

Tenure verified by Kathryn R. Roberts X
(Print name of CEO) (Signature)

Previous zoological-related job title/facility _____

Date position began _____ Full-time? _____ Mgt? _____
(Mo) (Yr)



The Minnesota Zoo

To: Linda Boyd, AAZPA Executive Office
Greg Geise, Binder Park Zoo
David Thompson, Lowry Park Zoo

Date: March 7, 1989

From: Kathryn Roberts, Minnesota Zoo

A handwritten signature in cursive script, appearing to read 'Kathryn', is written over the printed name 'Kathryn Roberts'.

Telephone: (612) 431-9333

Re: ATTACHED DRAFT OF AAZPA SMALL GROUP REPORT FROM MARCH 1-2 MEETING

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Please review it carefully and call me at the telephone number listed above for corrections and/or additions. If I don't hear from you by March 24th, I will mail it as is to Satch.

Thanks.

KR/gb

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To: Satch Krantz
President, AAZPA

Date: March 7, 1989

Fr: Linda Boyd , AAZPA Executive Office
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Kathryn Roberts, Minnesota Zoo
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The Minnesota Zoo

April 17, 1989

Linda Boyd, Administrative Assistant
AAZPA Executive Offices
Oglebay Park
Wheeling, WV 26003-1698

Dear Linda:

I had staff people look over the AAZPA institution questionnaire for the directory. The only requests for additional helpful information was under the Operations category on the second page of the form.

It would be really helpful if paid attendance and free attendance could be listed separately. I am sure most zoos would find it useful to see the percentage of paid attendance to free attendance.

The only other suggestion is to report concession and gift shop gross revenue. If either the gift shop or other concession is a contract vendor, the percentage of gross revenue payable to the Zoo would be helpful.

I don't know if the list of educational programs is necessary since a cursory review of the 1988-89 directory shows that most zoos offer the majority of the programs.

My only other suggestion is that the information be available in a database format since having access to a word processing disk would not enable the zoos to manipulate and extract the data they were looking for.

Sincerely,

Kathryn R. Roberts
General Director

KRR/gb

*PS - Any decision
been made about
discontinuing all the
regional meetings?*

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



American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 · 1698 (304) 242-2160

cc: David Thompson
Greg Geise
gdk

April 10, 1989

OFFICERS

President
PALMER E. KRANTZ, III
Director
Riverbanks Zoological Park

President-Elect
CHARLES H. HOESSLE
Director
St. Louis Zoological Park

Vice President
DAVID G. ZUCCONI
Director
Tulsa Zoological Park

Immediate Past President
L. RONALD FORMAN
Director
Audubon Park &
Zoological Garden

Executive Director
ROBERT O. WAGNER
AAZPA
Oglebay Park
Wheeling, WV

DIRECTORS

PAUL S. CHAFFEE, D.V.M.
Director
The Fresno Zoo

CLAYTON F. FREIHEIT
Director
Denver Zoological Gardens

EARL B. WELLS
Director
Fort Wayne Children's Zoo

SUSAN M. ENGFER
Director
Cheyenne Mountain Zoological Park

STEVE H. TAYLOR
Director
Sacramento Zoo

STEPHEN R. WYLIE
Director
Oklahoma City Zoological Park

TED A. BEATTIE
Director
Knoxville Zoological Park

DENNIS A. MERITT, JR., PH.D.
Assistant Director
Lincoln Park Zoological Gardens

CHRISTEN M. WEMMER, PH.D.
Associate Director for Conservation
National Zoological Park
Conservation & Research Center

Kathryn Roberts, Ph.D.
Minnesota Zoological Garden
12101 Johnny Cake Ridge Road
Apple Valley, MN 55124

Dear Kathryn,

Many thanks for sending me a follow-up report on your membership services group from the Kansas City Workshop.

Your group offers several excellent ideas for increasing and improving services for the various constituencies which comprise our membership. At this time I will probably consult with Bob Wagner and Charles Hoessle, President-elect, to ascertain implementation of certain recommendations. Also, your report will certainly be utilized in a more formal planning process. I am still working on developing a strategy for developing this plan.

Again, thanks. Please notify the members of your group of my sincere thanks for their help.

Sincerely,

Palmer E. Krantz, III
AAZPA President

PEK/jrp

cc: Robert O. Wagner
Charles H. Hoessle

To: Linda Boyd, AAZPA Executive Office
Greg Geise, Binder Park Zoo
David Thompson, Lowry Park Zoo

Date: March 7, 1989

From: Kathryn Roberts, Minnesota Zoo

Telephone: (612) 431-9333

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AAZPA



American Association of Zoological Parks and Aquariums

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

March 6, 1989

OFFICERS

President
PALMER E. KRANTZ, III

President-Elect
CHARLES H. HOESSLE

Vice President
DAVID G. ZUCCONI

Immediate Past President
L. RONALD FORMAN

Executive Director
ROBERT O. WAGNER

Kathryn Roberts, Ph.D.
Minnesota Zoological Garden
12101 Johnny Cake Ridge Road
Apple Valley, MN 55124

Dear Kathryn,

I want to take this opportunity to thank you for participating in the AAZPA Planning Workshop in Kansas City. Your involvement contributed immeasurably to the success of this most important meeting.

One overwhelming fact emerged from our gathering--the AAZPA faces many unique opportunities and challenges. Therefore, it is imperative that the enthusiasm and momentum generated at the workshop be channeled into positive results.

Within the next 30 days you will receive a summary of the workshop, including those items which the group felt were of the highest priority. Following receipt of the summary, I will attempt to develop a strategy for implementing as many of the recommendations as possible.

Again, thank you for your participation.

Sincerely,

Palmer E. Krantz, III
AAZPA President

PEK/jrp

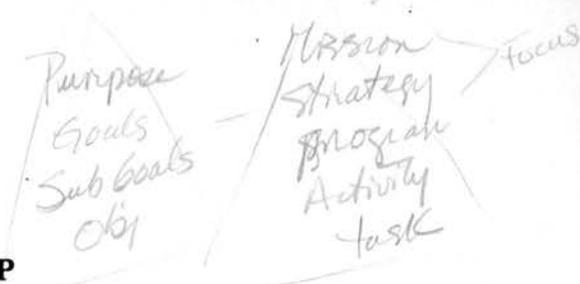
cc: Robert O. Wagner
AAZPA Board of Directors

*I very much enjoyed getting to know you better!
Thanks for your help.
S.*

24 participants

CLRR Coe Lee Robinson Roesch

Purpose = things
Mission = activities
Worth sharing toward



AAZPA MISSION WORKSHOP March 1-2, 1989

Wed. March 1

- 10:30AM Convene Workshop, Purpose of Workshop
Palmer Krantz, AAZPA President
Jon C. Coe, Workshop Facilitator
- 10:45AM Brief History of AAZPA
Bob Wagner, AAZPA Executive Director
- 11:05AM The "Mission", An Historic Perspective
Clayton Freiheit
- 11:25AM Brief Polling of Participants: "What
Should The Future Mission of AAZPA Be and
Why?"
- 12:00PM First Prioritization Process
- 12:20PM Lunch
- 1:30PM "Alternative Mission Directions: Who
Benefits?"
- 2:30PM Favored Directions Brainstorm
- 3:15PM Second Prioritization Process
- 3:30PM Day One Wrap Up
- 4:00PM Adjourn

- lobbying asst
- Political activist
- assertively cars
- data center
to #2005 on tax
claims
available @ all X's

Service Center
Thought provoking conferences
Broadening horizons
i dual
PR

Lead edge of issues & trends
* Vtally concerned about
members needs +
changing to accomm.
* Regulation + support
Hard to be both -
Need to think thru
notes

Thurs. March 2

- 9:00AM Introduce Day Two
Jon C. Coe, Facilitator
- 9:10AM Favored Directions Brainstorm
- 10:00AM Third Prioritization Process
- 10:15AM Coffee Break
- 11:00AM General Discussion
- 12:00PM Workshop Wrap Up & Conclusion*

* Workshop can continue into afternoon if needed

- x 1. Ethics & Standards
- consistency
- x 2. Educ.
- defn of cons.
- 3. Captive Breeding
- 4. Technical Support
- 5. Physical presence
- 6. Involvement of all members
- + 7. Communication
- 8. Plans
- 9. Maximize strength
- 10. Avoid big brother image
- 11.
- 12.

Board of Directors
Committee Chairs
Members @ large

Improved Services.

① data base improvements

- done thru directory
- small grp identify additional items & have available on tape & hard copy

② Buying power

- identify items
- identify how to buy together
ie hardware, software, diapers

③ Legislative Alerts

- highlighted in newsletter
- conservation & non conservation related issues

④ Source book for supplies

- sup identified & ready to start [↑] important

⑤ "tidbits" from Kerner

- PR alerts -
- facts for zoos to use in local press
- quotes which help tell the story locally.

file - AAZPA

Send draft
Stop having
regional mts

... term, strategic planning (a few of the best labels), why we be confused too? What this stuff be called? ... though no one can decide what to do, there is much agreement among experts about some of the characteristics of effective planning:

- It is a continuous, on-going process

periodically, probably annually, or organize into a formal written plan).

- It produces a vision of a desired future.
- It is a process for making *current* decisions, not future ones (but you do take into account the future impact of those decisions while reaching them).

sions) should be made in a "strategic" context, that is, the organization should examine the environment in which it competes, question its fundamental assumptions about its "business," and focus its resources on the achievement of key thrusts which are seen as the most effective means for progress toward its vision.

Suggested Definitions of Words Used in Planning

As stressed in the accompanying article, the definitions given below are not the only definitions used for these words. Other definitions are commonplace. In addition, many of the words used in planning have similar meanings in everyday language (e.g., purpose, goal and objective; program and function) but quite different meanings in the language of planning.

In the list below, the most common definition is given wherever possible. In cases where the most common definition is muddled in general usage, the definition chosen here was derived as indicated in the accompanying article.

GENERAL DEFINITIONS

- **A PLAN:** A set of decisions designed to bring about a desired future.
- **TO PLAN:** To choose a desired future and design means to bring it about.
- **PLANNING:** Without modifiers, "planning" refers to comprehensive organization-wide planning.
- **STRATEGIC:** The adjective "strategic" implies that plans, or other decisions, will be reached in a "strategic" way, i.e., that the organization will examine the environment in which it competes, question its fundamental assumptions about its business, and creatively attempt to conceive its role in a different, more effective way. ("Strategic" is now an overused word with many meanings. It should not simply mean that the organization has strategies nor be simply a substitute for "long range").
- **STRATEGIC PLANNING:** Both long range plans and operating plans should be "strategic" in their formulation. Hence both are part of what is sometimes called "strategic planning."

INTENDED RESULTS

- **FOCUS PROBLEM:** the condition in the environment which the organization chooses to change. The organization's purpose is to remove or improve this problem.

- **PURPOSE:** the ultimate result your organization exists to achieve.

(In other words, your purpose is your organization's reason for existence. It's achievement is an ideal state which may or may not be fully attainable.)

- **GOAL:** a broadly-stated subsidiary result.

- **OBJECTIVE:** a precise, measurable, time-phased result.

METHODS CHOSEN TO ACHIEVE INTENDED RESULTS

- **MISSION:** a statement of the methodological focus of an organization. (What "business" are we in? What "business" should we be in?)

- **STRATEGY** (also corporate strategy): a key, priority method for achieving the long range vision of the organization. It should provide confidence that, if implemented, the organization will show significant progress toward its vision.

- **CORPORATE STRATEGY:** An organization-wide strategy.

- **PROGRAM STRATEGY** or **FUNCTIONAL STRATEGY:** A strategy of a program or functional unit of the organization. Equivalent to a business unit strategy in the for-profit sector.

- **PROGRAM:** a set of activities and tasks designed to achieve, or contribute to the achievement of, the organization's purpose. Programs are designed for the direct benefit of the client base. (See contrasting definition of "Function or Internal Management Area")

- **FUNCTION** or **INTERNAL MANAGEMENT AREA:** A set of activities and tasks designed to strengthen the organization's capabilities to carry out its programs. ("Programs" benefit the external client base; "Functions" strengthen the organization. Fundraising, marketing, board development, personnel, etc. are "functions.")

PLANNING TIMEFRAMES

- **VISION:** A description of the organization in its "ideal" future state—

scale, scope, programs, personnel, finances, management, results being achieved, and capability to work for achievement of its purpose. Often, this is the picture portrayed by the Long Range Plan.

- **LONG RANGE:** The time frame in which the organization seeks to attain its vision. (This can be a period of months, years, or decades, depending on the purpose and methods selected by the organization. Less than five to ten years would be too short for most organizations.)

- **LONG RANGE PLAN:** A description of the desired future the organization seeks to create and means for attaining that future. It is prepared and continuously updated to guide and help determine *current* actions. (This is like the blueprint for a house — you need to see the whole picture before you start building.)

- **MID RANGE:** A time frame which is only used if the organization's long range is quite distant, and its vision is so big (or too big in the eyes of key stakeholders) that it cannot be used effectively to rally support or motivate personnel to effective current action. The "mid-range" period is that in which the organization can show significant movement toward the vision, enough so that it can serve the role of a vision in the corporate plans.

- **OPERATING PERIOD:** The current short range planning period—almost always one year—for which the organization prepares detailed plans and budgets.

- **OPERATING PLAN** or **ANNUAL PLAN:** A short range, detailed plan, often with precise specification of objectives and intended actions.

Future issues of "Planning in Non-profit Organizations" will use the definitions given here. If you have suggestions about improvements, please let us know. We will publish occasional updates of this and other articles when improved versions are developed.

Improved Services & Coord. Services

● Linda will send out directory ques - let us
add data fields
- tape available
- hard copy available

all questions
are in

● Buying power - talk to a buying
NET → buying
- t.p
- biodegradable diapers
- telephones
- fax
- computers

"Independent Sector"
info source for non-profit

● Insurance
of people needing insur.

⑥ Tidbits from
Karen's Office

④ Employee Benefits package
better buying power - Sabin done

● Legislative Alerts
- non conservation issues
- " " "

● Source book for Supplies

Michigan - Battle Creek

MISSION STATEMENT

The mission of the AAZPA is to contribute to the conservation of wildlife through coordinated captive propagation, environmental education and relevant research, to promote the cultural, educational, and recreational benefits of zoos and aquariums; and to continue to improve the standards and practices of the profession it represents.

- SSP
- educ + research
- cultural, educ + rec benefits
- improve standards + practices

Low Eperibaldi

HBR - 2 issues also
♀, Bid involvement

NMF - dev. lang. to define conser + educ.
Lang will be used to determine whether institution is
providing conser + educ prog prior to collecting marine
mammals.

Can we get mid-west zoos together to address
issues of community?
ie buying power for recycling goods

Argue or tension - AAZPA to provide service to
org? or policy setters + regulators?

300M last yr. in Cap. proj. Does
member

3 Alora + found

- use newsletter
- set criteria for using conservation & allowing membership + set priorities

develop central higher ed fac.
to provide academic prog.
leg. alerts - write congress et.

Speakers Bureau

4 provide prices of org. mag/or newsletters

3 provide facts to testify locally

How evaluate effectiveness?

...rt term, strategic planning
 ...few of the best labels), why
 ...we be confused too? What
 ...his stuff be called?
 ...ough no one can decide what to
 ...it, there is much agreement among
 ...experts about some of the charac-
 ...teristics of effective planning:

- It is a continuous, on-going process

periodically, probably annual, or-
 ganize into a formal written plan).

- It produces a vision of a desired future.
- It is a process for making *current* decisions, not future ones (but you do take into account the future impact of those decisions while reaching them).

sions) should be made in a "strat-
 egic" context, that is, the organiza-
 tion should examine the environ-
 ment in which it competes, question
 its fundamental assumptions about
 its "business," and focus its resources
 on the achievement of key thrusts
 which are seen as the most effective
 means for progress toward its vision.

Suggested Definitions of Words Used in Planning

As stressed in the accompanying article, the definitions given below are not the only definitions used for these words. Other definitions are commonplace. In addition, many of the words used in planning have similar meanings in everyday language (e.g., purpose, goal and objective; program and function) but quite different meanings in the language of planning.

In the list below, the most common definition is given wherever possible. In cases where the most common definition is muddled in general usage, the definition chosen here was derived as indicated in the accompanying article.

GENERAL DEFINITIONS

- **A PLAN:** A set of decisions designed to bring about a desired future.
- **TO PLAN:** To choose a desired future and design means to bring it about.
- **PLANNING:** Without modifiers, "planning" refers to comprehensive organization-wide planning.
- **STRATEGIC:** The adjective "strategic" implies that plans, or other decisions, will be reached in a "strategic" way, i.e., that the organization will examine the environment in which it competes, question its fundamental assumptions about its business, and creatively attempt to conceive its role in a different, more effective way. ("Strategic" is now an overused word with many meanings. It should not simply mean that the organization has strategies nor be simply a substitute for "long range").
- **STRATEGIC PLANNING:** Both long range plans and operating plans should be "strategic" in their formulation. Hence both are part of what is sometimes called "strategic planning."

INTENDED RESULTS

- **FOCUS PROBLEM:** the condition in the environment which the organization chooses to change. The organization's purpose is to remove or improve this problem.

- **PURPOSE:** the ultimate result your organization exists to achieve.

(In other words, your purpose is your organization's reason for existence. It's achievement is an ideal state which may or may not be fully attainable.)

- **GOAL:** a broadly-stated subsidiary result.

- **OBJECTIVE:** a precise, measurable, time-phased result.

METHODS CHOSEN TO ACHIEVE INTENDED RESULTS

- **MISSION:** a statement of the methodological focus of an organization. (What "business" are we in? What "business" should we be in?)

— **STRATEGY** (also corporate strategy): a key, priority method for achieving the long range vision of the organization. It should provide confidence that, if implemented, the organization will show significant progress toward its vision.

- **CORPORATE STRATEGY:** An organization-wide strategy.

— **PROGRAM STRATEGY** or **FUNCTIONAL STRATEGY:** A strategy of a program or functional unit of the organization. Equivalent to a business unit strategy in the for-profit sector.

- **PROGRAM:** a set of activities and tasks designed to achieve, or contribute to the achievement of, the organization's purpose. Programs are designed for the direct benefit of the client base. (See contrasting definition of "Function or Internal Management Area")

— **FUNCTION** or **INTERNAL MANAGEMENT AREA:** A set of activities and tasks designed to strengthen the organization's capabilities to carry out its programs. ("Programs" benefit the external client base; "Functions" strengthen the organization. Fundraising, marketing, board development, personnel, etc. are "functions.")

PLANNING TIMEFRAMES

- **VISION:** A description of the organization in its "ideal" future state—

scale, scope, programs, personnel, finances, management, results being achieved, and capability to work for achievement of its purpose. Often, this is the picture portrayed by the Long Range Plan.

- **LONG RANGE:** The time frame in which the organization seeks to attain its vision. (This can be a period of months, years, or decades, depending on the purpose and methods selected by the organization. Less than five to ten years would be too short for most organizations.)

— **LONG RANGE PLAN:** A description of the desired future the organization seeks to create and means for attaining that future. It is prepared and continuously updated to guide and help determine *current* actions. (This is like the blueprint for a house — you need to see the whole picture before you start building.)

- **MID RANGE:** A time frame which is only used if the organization's long range is quite distant, and its vision is so big (or too big in the eyes of key stakeholders) that it cannot be used effectively to rally support or motivate personnel to effective current action. The "mid-range" period is that in which the organization can show significant movement toward the vision, enough so that it can serve the role of a vision in the corporate plans.

— **OPERATING PERIOD:** The current short range planning period—almost always one year—for which the organization prepares detailed plans and budgets.

- **OPERATING PLAN** or **ANNUAL PLAN:** A short range, detailed plan, often with precise specification of objectives and intended actions.

Future issues of "Planning in Non-profit Organizations" will use the definitions given here. If you have suggestions about improvements, please let us know. We will publish occasional updates of this and other articles when improved versions are developed.

Jeff Williamson - Brookfield
Deputy Director - Buying power

What is the
name of the man
sitting next to
me?

can't remember
Dave — ?



American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 · 1698 (304) 242-2160

January 17, 1989

Kathryn Roberts, Ph.D.
Minnesota Zoological Gardens
12101 Johnny Cake Ridge Road
Apple Valley, MN 55124

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

CHRISTEN M. WEMMER, Ph.D.

Dear Kathryn,

These are exciting times for the AAZPA. Our conservation programs are gaining international recognition, we have recently established a Public Relations/Development office near Washington, DC and the Conservation Endowment Fund has just exceeded one million dollars in principal.

However, we have topics that need to be addressed in order to ensure that our future remains bright. Our profession, both the AAZPA and our individual zoos and aquariums, still struggle to find its niche in the minds of the American public. Even our own members question the role of the AAZPA as it wrestles with a variety of zoo-related issues.

In 1986 a five-year plan was developed to guide the financial and human resource growth of the Association. As a result of the plan, the Association is now in excellent shape to face the challenges of the next several years. Herein lies the problem--just what are the major challenges facing zoos, aquariums and the AAZPA?

In an effort to address this most important issue, I would like to invite you, along with members of the Board of Directors and other members, to attend a planning workshop on 1st and 2nd March 1989, in Kansas City, Missouri. These dates immediately precede the Boards midyear meeting. During those two days, I hope to identify issues that are of concern to the membership so that the Board of Directors and staff will have a very clear understanding of priorities. The workshop will be conducted in a round table format and I hope to be able to utilize the services of a professional facilitator.

Please fill out the bottom portion of this letter and return to me no later than 27 January 1989. This is necessary in order to replace those who cannot attend with colleagues who represent a like constituency. Once we have assembled a list of participants you will receive information regarding room reservations from Ralph Waterhouse.

*Research info
Congressional info
Wagner, update on
AAZPA info
The Hall of Fame*

Kathryn Roberts, Ph.D.
Page 2
January 17, 1989

I would consider it a personal favor if you attend. I look forward to seeing you in Kansas City.

Sincerely,



Palmer E. Krantz, III
AAZPA President

PEK/jrp

Yes, I will attend the AAZPA Planning Workshop. (Mar. 1-2)

No, I cannot attend.

Kathryn R. Roberts, General Director
Minnesota Zoological Garden
13000 Zoo Boulevard
Apple Valley, MN 55124

MINNESOTA ZOO

13000 Zoo Boulevard
Apple Valley, MN 55124

FAX: (612) 431-9300

Telecopier Transmittal Sheet

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FAX #: (803) 256-6463

To: Palmer Krantz

Company: Riverbanks Zoo

From: Kathryn Roberts

Total number of pages 2 (Including this cover sheet)

Comments/Instructions:

fax
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MINNESOTA ZOOLOGICAL GARDEN

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Today's Date 2-02-89

Department Per (person)

Contract # _____

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Hsk Mr Foster

Quantity	Stock Number	Unit	Description	Unit Price and Discount	Unit Price after Discount	Total Price
1		1	Round trip airfare for Kathryn Roberts to Kansas City			\$296
			LU Mpls 3/1 ^{NW 7:55 AM} Arr KC 9:24 AM			
			Return 3/2 ^{NW 5pm}			
			to attend AAZPA Strategic Plan Wkshp			
		3/1	NW Flight 221			
			Lu Mpls to 7:55 AM			
			Arr KC 9:24 AM			
		3/2	NW 224			
			Lu KC 5pm			
			Arr mpls 6:18			
			12 am 1:38			

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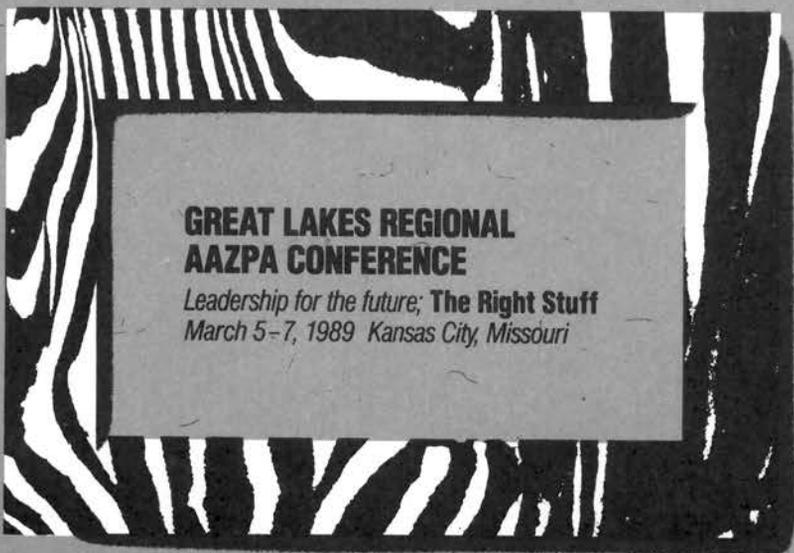
1989 AAZPA Great Lakes Regional Conference
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Kansas City, Missouri 64132

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**GREAT LAKES REGIONAL
AAZPA CONFERENCE**
Leadership for the future; The Right Stuff
March 5-7, 1989 Kansas City, Missouri

DEAR AAZPA MEMBER,

"JAZZ IT UP" in Kansas City this March. We want to welcome you to the Great Lakes Regional AAZPA Conference, March 5-7, 1989. We are planning lots of special events to warm you up. The conference will include:

SUNDAY - MARCH 5

Registration
Ice Breaker

MONDAY - MARCH 6

REGISTRATION
CONTINENTAL BREAKFAST (provided)
ROUND TABLE DISCUSSION
GENERAL SESSION
Welcome
Opening Remarks
Conservation
Lunch (provided)
Concurrent Sessions
Animal Management
Development/Marketing
Education
Film Festival
Hospitality Suite

TUESDAY - MARCH 7

REGISTRATION
CONTINENTAL BREAKFAST (provided)
CONCURRENT SESSIONS
Innovative Zoo Exhibit Design
Development/Marketing
Education
Lunch (provided)
Tour of the Kansas City Zoo
Reception
Banquet

Besides being the location of the Great Lakes Regional Conference, Kansas City has many cultural activities. The conference will be held at the Hyatt Regency Hotel. While the weather may be wintery (be prepared for 20 to 50 degrees) the newly finished LINK between the Hyatt Hotel and the internationally renowned Crown Center will keep you warm and toasty at all times. Crown Center is a city within a city featuring 60 shops and restaurants, two hotels and the headquarters of Hallmark Cards, Inc.

A short trolley ride from the hotel is the scenic and historic Westport, with its many shops, restaurants and clubs. Up the street from Westport is Kansas City's jewel, the Plaza. The nation's first outdoor shopping center features 187 shops and restaurants in beautiful Spanish architecture. The Plaza was built in 1904 by the J.C. Nichols Company. Again, all these locations can be reached by traveling on the Trolley, an inexpensive ride from downtown all the way to the Plaza, including the Hyatt Hotel.

Transportation from the airport to the Hyatt Hotel is available. The most reasonable price is the KCI shuttle bus (only \$10 one way). Limousine service from the Hyatt Hotel to the airport is \$12 (reservations necessary). Driving to Kansas City? Consider visiting Squaw Creek or Grand Island before or after the Conference. Witness the geese and sandhill crane migration at its peak. Over 120,000 sandhills pass by Grand Island, Nebraska each spring.

CONFERENCE REGISTRATION

Save \$10 by registering 21 days before the conference.

Name _____ (as it should appear on badge)

Spouse's Name _____

Institution _____

Title/Department _____

Business Address _____

Phone () _____

AAZPA Classification _____

Membership number Category

Please return form plus your remittance to:
1989 AAZPA GREAT LAKES REGIONAL CONFERENCE
Kansas City Zoo, 6700 Zoo Drive, Kansas City, Missouri 64132
Information Hotline: 816 333-7406

ALL REGISTRANTS

Total enclosed \$ _____

Please make checks payable to the 1989 AAZPA Great Lakes Regional Conference

FULL CONFERENCE REGISTRANTS ONLY

- Member \$75
- Non member \$100
- Member Spouse \$75
- Late Fee \$10 (after February 11, 1989 postmark)

DAILY REGISTRANTS ONLY

- Member \$40
- Member Spouse \$40
- Non member \$55
- Daily fee includes sessions and coffee breaks, but does not include the Ice Breaker or Final Banquet.
- Ice Breaker \$15
- Final Banquet \$30

Please Check Dates Attending

- Monday 3/6
- Tuesday 3/7



American Association of Zoological Parks and Aquariums

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

file
AAZPA

OFFICERS

25 April 1989

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PALMER E. KRANTZ, III

President-Elect
CHARLES H. HOESSELE

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Immediate Past President
L. RONALD FORMAN

Executive Director
ROBERT O. WAGNER

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

Dear Kathryn:

Enclosed is a summary report on the AAZPA Planning Workshop held in Kansas City on 1-2 March 1989. Please review it and notify me if you have any questions regarding its contents. At this point, I am continuing to gather data relative to the use of a professional planner to better formalize the process.

Once again, let me thank you for participating in this most important meeting. Hopefully, our brief time together will result in a much stronger organization.

DIRECTORS

PAUL S. CHAFFEE, D.V.M.

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STEVE H. TAYLOR

STEPHEN R. WYLIE

TED A. BEATTIE

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

CHRISTEN M. WEMMER, Ph.D.

Sincerely,

AMERICAN ASSOCIATION OF
ZOOLOGICAL PARKS AND AQUARIUMS

Palmer E. Krantz, III
AAZPA President

PEK/jrp

Enclosure

AAZPA WORKSHOP
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On 1-2 March 1989, the Board of Directors of the American Association of Zoological Parks and Aquariums met in Kansas City, Missouri for two days of intense discussions regarding the current and future status of the Association. The Board was assisted in its deliberations by a group of carefully selected members representing a cross-section of the Association's membership--large and small zoos, aquariums, society and governmentally operated institutions, for-profits and commercial members. Members of the AAZPA staff also contributed immeasurably to the discussions.

While a variety of topics were addressed throughout the workshop, three subjects received the most attention: the AAZPA mission statement; the role of the Association in its conservation endeavors; and the role of the Association in assisting its members in business matters. Two other topics were also discussed in some detail--the importance of communication between the AAZPA and all of its members and the perception by some members that the Association has developed a "big brother" attitude.

As the enclosed summary indicates, these discussions stimulated a host of ideas and suggested solutions by the participants. In many respects, this active interchange of thoughts and ideas was the highlight of the workshop. The enthusiasm for what we are about and what we can collectively accomplish was felt by each participant. Hopefully, many of these excellent ideas can be implemented with little trouble; however, it is important that this workshop be viewed as the beginning of a more formal planning process. During the coming months, I, along with the AAZPA staff and interested members, will attempt to secure the services of a professional planner to assist in this effort.

The success of this workshop was due in large part to the volunteer efforts of Jon Coe of Coe Lee Robinson Roesch. Jon served as the workshop facilitator, and his obvious love for our profession was a tremendous motivator for us all.

Palmer E. Krantz, III
President, AAZPA

AAZPA PLANNING SESSION

Kansas City, Missouri
1-2 March 1989

CO-FACILITATORS

Jon Coe, Landscape Architect
Coe, Lee, Robinson, Roesch
924 Cherry Street
Philadelphia, PA 19107

Palmer Krantz, Director
Riverbanks Zoological Park
P.O. Box 1060
Columbia, SC 29202

PARTICIPANTS

Charles Hoessle, Director
St. Louis Zoological Park
Forest Park
St. Louis, MO 63110

Steve Taylor, Director
Cleveland Metroparks Zoological Park
3900 Brookside Park Drive
Cleveland, OH 44109

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

Stephen Wylie, Director
Oklahoma City Zoological Park
2101 NE 50th
Oklahoma City, OK 73111

L. Ronald Forman, Director
Audubon Park & Zoological Garden
P.O. Box 4327
New Orleans, LA 70178

Christen Wemmer, Ph.D.
Associate Director/Conservation
NZP Conservation & Research Center
Front Royal, VA 22630

Robert Wagner, Executive Director
AAZPA
Oglebay Park
Wheeling, WV 26003

Linda Boyd, Administrative Assistant
AAZPA
Oglebay Park
Wheeling, WV 26003

Paul Chaffee, DVM, Director
The Fresno Zoo
894 West Belmont Avenue
Fresno, CA 93728

Thomas Foose, Ph.D., Conservation Director
AAZPA Conservation Director's Office
12101 Johnny Cake Ridge Road
Apple Valley, MN 55124

Clayton Freiheit, Director
Denver Zoological Gardens
City Park
Denver, CO 80205

Karen Asis, Public Relations Officer
AAZPA Public Relations/Development Office
4550 Montgomery Avenue, Suite 940N
Bethesda, MD 20814

Earl Wells, Director
Fort Wayne Children's Zoo
3411 Sherman Boulevard
Fort Wayne, IN 46808

Sabin Robbins, Development Officer
AAZPA Public Relations/Development Office
4550 Montgomery Avenue, Suite 940N
Bethesda, MD 20814

Susan Engfer, Director
Cheyenne Mountain Zoological Park
4250 Cheyenne Mountain Zoo Road
Colorado Springs, CO 80906

George Felton, Director
Greater Baton Rouge Zoo
P.O. Box 60
Baker, LA 70704

Gerald Lentz, Mgr./Zool. Operations
Busch Gardens
P.O. Box 9158
Tampa, FL 33674

Douglas Myers, Executive Director
San Diego Zoo
P.O. Box 551
San Diego, CA 92112

William Dennler, Director
Toledo Zoological Gardens
2700 Broadway
Toledo, OH 43609

Ralph Waterhouse, Director
Kansas City Zoological Gardens
6700 Zoo Drive
Kansas City, MO 64132

Louis Garibaldi, Director
New York Aquarium
Boardwalk and West 8th Street
Brooklyn, NY 11224

Warren Thomas, DVM, Director
Los Angeles Zoo
5333 Zoo Drive
Los Angeles, CA 90027

David Thompson, Executive Director
Lowry Park Zoo
7530 N. Boulevard
Tampa, FL 33604

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

Nancy Falasco, Director
Brandywine Zoo
1001 North Park Drive
Wilmington, DE 19802

Gregory Geise, Executive Director
Binder Park Zoo
7400 Division Drive
Battle Creek, MI 49017

Sherry Sheng, Director
Washington Park Zoo
4001 S.W. Canyon Road
Portland, OR 97221

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

MISSION STATEMENT

The mission of AAZPA is to contribute to the conservation of wildlife through coordinated captive propagation, environmental education and relevant research, to promote the cultural, educational, and recreational benefits of zoos and aquariums; and to continue to improve the standards and practices of the profession it represents.

I. HISTORY

- 1924 - Chartered.
- 20 September 1971 - Voted independence (membership 636).
- November 1971 - Charter meeting in Wheeling, West Virginia.
- 3 January 1972 - Opened office in Wheeling, West Virginia.
- 19 January 1972 - Charter officially approved by State of West Virginia.
- 1972 - Accreditation established.
- 1974 - First institution accredited.
- 1974 - Began formally participating in the five regional conferences.
- 1975 - Membership slightly over 1,800. Budget approximately \$100,000.
- 1975-76 - Began publishing all the Association's publications, including NEWSLETTER, ANIMAL EXCHANGE, Conference Proceedings, Directory, etc.
- 1975 - Management School established. We now have nearly 600 graduates.
- September 1976 - Code of Professional Ethics adopted in Baltimore, Maryland.
- September 1977 - Formal retention of Washington Legislative Representative and Institution dues established according to percentage of Institution's annual operating budget - San Diego, California.
- 1978 - Began formally funding ISIS through annual operating budget.
- March 1980 - Conservation set as the Association's highest priority - Tulsa, Oklahoma.
- September 1980 - Accreditation voted as mandatory requirement for Institution membership in Chicago, Illinois.
- June 1981 - Conservation Coordinator's Office established. Began developing SSP programs.
- 1984 - Conservation Endowment Fund established.
- 1986 - Long-Range Planning Committee formed, as well as Conservation Subcommittee.
- 1986 - Long-Range Plan adopted by the Board.
- 1987 - Hill & Knowlton Study Commission.
- 4 March 1988 - Mandatory standards regarding giant panda adopted by the Board.
- May 1988 - Went to court against the U.S. Department of the Interior.
- 1988 - Added a Conservation Biologist to the staff of the Conservation Director's Office.
- 1988 - CEF exceeded \$1 million.
- 1988 - Entered into the first formal agreement with a national marketing firm and Kellogg Company.
- 1988 - Established the Public Relations/Development Office in Bethesda, Maryland and hired two more professional staff members.

II. Mission - Brainstorm Exercise

EXPLANATION OF PROCESS

The facilitators asked the participants the question, "What do you think the Mission of the AAZPA should be in the future and why?" Each participant was then asked to reply, going sequentially around the room in a counter-clockwise direction and continuing until all comments were presented. A summary of each comment was written on one of three flipcharts at the front of the room. The first list was captioned "Activist Role," the second, "Service Role" and the third, "Other." Each participant designated which list his/her comment was to be placed upon. The lists were then displayed on the walls around the room. These lists are presented herein as Figure 2 - "Activist Mission"; Figure 3 - "Service Mission"; and Figure 4 - "Other."

A prioritization process then followed in which each participant was given ten colored adhesive-backed dots. Participants then got up and placed dots next to the items on the lists which they thought were the most important elements of the mission that AAZPA should address. The number of dots received are recorded in parenthesis after each item.

The "Mission Brainstorm Summary" (Figure 1) places the items from the three brainstorm generated lists in rank according to number of dots received (total number shown in parenthesis). In some cases, two or more list items were combined when their intents were clearly parallel (and their numbers of dots were combined as well).

"Education" received 34 dots and "Communication" received 26 dots. If these parallel endeavors were combined, they would total 60 dots moving them to the highest rank, followed by "Ethics and Standards," "Captive Breeding," "Involvement of All Members," etc.

II. MISSION BRAINSTORM SUMMARY (Figure 1)

- 1) ETHICS AND STANDARDS (41)
Consistency of Development
Implementation
Avoid "Big Brother" Perception
- 2) EDUCATION *(34) (60)
Definition of Conservation
Arousal of Commitment
- 3) CAPTIVE BREEDING
Broaden, Coordinate (29)
- 4) COMMUNICATION *(26) (60)
Among Members
Public - Leadership Role
Public Relations
- 5) INVOLVEMENT OF ALL MEMBERS (21)
(including outside constituencies)
- 6) PLANNING (20)
Visionary
Future Oriented
- 7) TECHNICAL SUPPORT (18)
Coordination through AAZPA
- 8) PHYSICAL PRESENCE (17)
Focus of Conservation
- 9) MAXIMIZE STRENGTH (15)
Total Resources
(Service <-----> Activist)
- 10) BUSINESS SURVIVAL (11)

MISSION BRAINSTORM

What Should Mission of AAZPA be in the Future and Why?

II-A. "Activist" Mission (Figure 2)

- 1) Moral/Ethics - Better Defined (5)
- 2) Outside Influence (1)
- 3) Communication (26)
 - a. Each other - within institutions
 - b. Public
 - c. Coordinated effort
- 4) Standards
- 5) Education Roles - Conservation (14)
- 6) ISIS - SSP - Conservation (3)
- 7) Arouse Awareness and Cause (14)
 - a. Commitment
- 8) Coordinate Captive Breeding (Non-SSP and SSP) (26)
- 9) Real Planning (20)

(Future oriented approach)
- 10) Rewrite Mission Statement (1)
- 11) We Provide Proactive Leadership (10)
 - a. Conservation/Legislation
- 12) Physical Presence (17)
 - a. Zoos/Aquariums should become focus of conservation activities
- 13) Strong Internal Leadership (4)

MISSION BRAINSTORM

II-B. "Service" Mission (Figure 3)

- 1) Help Each Other (1)
 - a. Accreditation
 - b. Publications
- 2) Continue to Add Services
- 3) Staff Development (1)
 - a. All levels
- 4) High Service Demands
- 5) Communication Between Members Through AAZPA Information Data Base (3)
- 6) Technical Support (3)
 - a. Public relations - education - insurance, etc.
- 7) Clearinghouse of Information
- 8) Recruit and Train Professional Staff (9)
- 9) Involve All Special Interest Groups (Constituents) and Communicate (6)
- 10) Teaching Business Standards and Practices Among Members
- 11) Highest Priority - Business Survival (11)
- 12) Maximize Strength of Our Total Resources - Permits, Surveys, Animal Management, etc. \$1 Billion Business (15)
- 13) Crystalize Positions and Support (11)

MISSION BRAINSTORM

II-C. "Other" Mission (Figure 4)

- 1) Friendship (1)
- 2) Consistency of Standards (25)
- 3) Enforcing Standards
- 4) Broader Participation/Representation (15)
- 5) Improve Mission Statement (1)
- 6) Organizational Structure (9)
 - a. Carry out the mission
- 7) Galvanize Support (between Other and Service Mission)
- 8) Nonmember Involvement (2)
- 9) Global Responsibility vs. Local Interest (2)
- 10) Avoid "Big Brother" Image (correct past image) (11)
- 11) AAZPA Definition of Conservation (16)
- 12) Evaluate Site of Organization (3)
- 13) Service to Humanity (2)

AAZPA IN SUPPORT OF MEMBERS - CONSERVATION
III. Brainstorm Exercise

EXPLANATION OF PROCESS

In the second brainstorm exercise, the facilitators posed the question, "What should the AAZPA do in support of its members in the area of conservation?" The group suggested that the main areas of effort included, "Setting the Tone for Members," "Establishing Standards," "Providing Services," "Introducing and Supporting Legislation," and "Forming Partnerships with Other Conservation Organizations." Each participant then suggested activities and directions the AAZPA could take and placed his/her suggestion under the appropriate heading. Again, the brainstorm process continued around the room until the group had no more suggestions to offer. The resulting lists are recorded as Figures 6-11.

Again, an evaluation process followed in which participants placed colored dots next to the items they considered most important. The total number of dots are recorded in parenthesis after each item. The highest rated items in each category were then placed on the summary sheet (Figure 5).

III. AAZPA IN SUPPORT TO MEMBERS - CONSERVATION - SUMMARY (Figure 5)

Actions of AAZPA to Support Members and Institutions in Conservation

SETTING TONE

- 1) Define "Conservation" (9)
- 2) Public Relations Effort (6)

STANDARDS

- 1) Develop Standards of Conservation Involvement for Accreditation (11)

SERVICES

- 1) More Professional Staff (13)
- 2) Public Relations Crisis Management Plan (8)
- 3) Technical Support (7)
- 4) Public Relations Effort (6) (see "Tone" - total 12)

LEGISLATION

- 1) Proactive: Introduce Legislation (16)

PARTNERSHIP WITH OTHER ORGANIZATIONS

- 1) Recruit and Train Conservation Biologists (11)
- 2) Provide Training in Management Techniques In and Out of Zoos and Aquariums (7)

CONSERVATION BRAINSTORM

III-A. SETTING TONE (Figure 6)

- 1) Define Conservation and Follow the Definition (9)
- 2) Public Relations Efforts (6)
- 3) Get Bad Zoos Out of Business (5)
- 4) Goals (3)
- 5) Public Mission Statement and Five-Year Plan (2)
- 6) Policy Statement of Global Issues (1)
- 7) Coordination of Purchases, Sources (1)

III-B. STANDARDS (Figure 7)

- 1) Define Standards for Conservation Involvement-Accreditation (11)
- 2) Maintain High Standards of Professional Animal Care
- 3) Species Standards
- 4) Set Protocols (1)

CONSERVATION BRAINSTORM

III-C. SERVICES (Figure 8)

- 1) Publications
- 2) Actively Pursue Corporate Funding (2)
- 3) Traveling Exhibits (3)
- 4) Information Service (Data Base) (3)
- 5) Public Relations Efforts (6)
- 6) Non-SSP Exotic Animals
(Set up Committee) (1)
- 7) Coordinate North American Captive Stock
(Set up Committee)
- 8) Technical Support (7)
- 9) Technical Manuals About Legislation
- 10) Coordination of Captive-Breeding
Programs (3)
- 11) More Professional Staff (13)
 - a. Education Coordinator
 - b. Legislation Coordinator
- 12) Advise of Granting Agencies
- 13) Clearinghouse (International Conservation)
and What You Can Do (1)
- 14) Provide Wildlife Conservation Resources
to Public Relations and Marketing
Coordinators
- 15) Develop Public Relations Crisis
Management Plan (8)
- 16) Lending Library for Members and Outside
- 17) Annual Evaluation of Effective Inventory
- 18) Legislative Alerts
 - a. State and National
- 19) Provide Articles and Services for
Individual Newsletters (2)
- 20) Support for Horticulture Groups
- 21) Explore Quarterly Magazine
- 22) Coordinate Educational Travel,
Lectureships
- 23) Speaker's Bureau (1)
- 24) Organize Conservation Retreats (3)
- 25) Modernize Awards System (2)

CONSERVATION BRAINSTORM

III-D. STATE AND FEDERAL LEGISLATION (Figure 9)

- 1) Proactive - Introduce Conservation Organizations to Legislators (16)
- 2) Zoological Institutions as National Resources (1)

CONSERVATION BRAINSTORM

III-E. INTEGRATION OF INTEREST GROUPS
(Figure 10)

- 1) Develop Forums for Discussions and
Consensus Building (1)
- 2) Special Interest Groups Used
as Advisers (1)
- 3) Special Support Groups
- 4) More Interaction with
Horticulturists
- 5) Working Through Board Contacts

III-F. PARTNERSHIP WITH OTHER
ORGANIZATIONS (Figure 11)

- 1) Recruiting and Training Conservation
Biologists (11)
- 2) Training in Management Technique
In and Out of Zoos (7)
- 3) Increase Involvement with
International Community (2)
- 4) Expand Activities (1)
- 5) Coordinate with Nonmember Breeding
Facilities and Programs

AAZPA IN SUPPORT OF MEMBERS - BUSINESS SURVIVAL

IV. Brainstorm Exercise

In the third brainstorm exercise, facilitators asked the question, "What should the AAZPA do in support of members to help the business aspects of running a zoo, aquarium or support service?" This approach is based upon the fact that a zoo or aquarium must be financially viable in order to successfully pursue its goals in conservation, recreation, education and research.

The brainstorming proceeded to each participant consecutively around the room twice. Thereafter, suggestions were made by show of hands. The resulting list is shown as Figure 13.

Again, each participant was issued an equal number of dots which he/she then placed next to the items felt to be most important. The prioritized list is presented as the Summary list, Figure 12.

IV. AAZPA SUPPORT OF MEMBERS IN BUSINESS - SUMMARY (Figure 12)

- 1) AAZPA Data Base - Polling and Surveys (19)
- 2) Group Buying Power (14)
- 3) Image Campaign (13)
- 4) Psychographic Study Help (11)
- 5) Zoo Director Meetings (9)
- 6) Expand Cause Marketing (6)

IV-A. BRAINSTORM

ACTIONS OF AAZPA TO SUPPORT MEMBERS AND INSTITUTIONS
IN BUSINESS SURVIVAL (Figure 13)

- 1) Recycling - toilet paper, etc. (4)
- 2) Insurance (4)
- 3) Food Services - tuna, South American beef, paper products, etc. (4)
- 4) Permits
- 5) Staff Recruitment - Investment on Education (2)
- 6) Safety (2)
- 7) Labor Relations (1)
- 8) Energy Conservation (2)
- 9) Design of Service
- 10) Communicate with People About Successful New Exhibits (1)
- 11) Develop Professional T.V. Spot and Share Costs
- 12) Source Book for Supplies/Equipment (1)
- 13) Share Personnel Information (1)
- 14) Share Legislation Not Related to Conservation (1)
- 15) Business Income (3)
- 16) AAZPA Capital Improvement Endowment Fund (3)
- 17) Add Business Assistant Consultant to Staff
- 18) National Polling Surveys (7)
- 19) Image Campaign for Zoos (13)
- 20) Interface with Groups Dealing with Similar Animals
- 21) Assist Nonmembers Dealing with Accreditation
- 22) Review Relations with Others, i.e., Societies (2)
- 23) Find Donors for Equipment
- 24) Public Membership Program
- 25) Psychographic Study Help (11)
 - a. Consumer Research

ACTIONS OF AAZPA TO SUPPORT MEMBERS AND INSTITUTIONS IN BUSINESS SURVIVAL (cont.)

- 26) Do Internal Task Analysis - Strategic Planning (1)
- 27) Look for Cooperative Opportunities (1)
- 28) Examine All Revenue Sources and Share with Members
- 29) Expand Marketing Base (Wall Street Journal) (1)
- 30) Expand Cause Marketing Base (6)
- 31) Use Group Power to Buy Services: Airfare, Fax, Telephone, etc. (14)
- 32) Legislative Alerts and Other Updates
- 33) Employee Training (1)
- 34) Non-SSP Animal Management Assistance (4)
- 35) Be More Comfortable Making Money So We Can Meet "The Cause" (2)
- 36) More Information on Other Nonprofits at Conference (3)
- 37) Training Board Members
- 38) Assist with Governance Changes (1)
- 39) Assist in Becoming More Profit Oriented (3)
- 40) Commercialism (activities) - Define (2)
- 41) (Annual) Zoo Director Meetings (9)
- 42) Public Relations Help (4)
- 43) AAZPA Directory - Data Base, Update Yearly (12)
- 44) Clearinghouse on Board Issues
- 45) Tell Story About Us Being Businesses (1)

V. General Discussion

EXPLANATION OF PROCESS

An open discussion was led by AAZPA President, Palmer Krantz. Participants were encouraged to express their comments, concerns and criticisms in a constructive way. All comments were summarized on the General Discussion list (Figure 15) and Complaints list (Figure 16).

The listed items were again prioritized using the dots, and the highest ranking items are shown on the General Discussion Summary (Figure 14). Note that if Education and Public Relations are interpreted in their broadest definitions and combined from all of the listed items within these definitions, they would have an aggregate of 29 dots.

V. GENERAL DISCUSSION SUMMARY (Figure 14)

- 1) Target Education Activities; i.e., Public Relations (broad definition)
(29) (9)
- 2) Need Strategic Plan Vision for Future (15)
- 3) Revisit Long-Range Plan (Five-year plan) (14)
- 4) Lack of Member Understanding (14)
- 5) Why Not Change AAZPA Structure (9)
- 6) Crisis Management - Who Develops Story (9)
- 7) Business Endowment (6)
- 8) Assets \$5-\$7 Billion! Get Act Together

V-A. GENERAL DISCUSSION (Figure 15)

- 1) Consistency of Regulations and Standards Is an Issue (4)
- 2) How do Voluntary Committees Impact Organization (consistency)?
- 3) Lack of Member Understanding of Issues/Decisions - Quick Communication is Necessary (14)
- 4) More Participation by Members and Board
- 5) Crisis Management - Who Speaks/Who Develops "Story"? (6)
 - a. AAZPA support posture?
- 6) How Does Board/President Become Aware of Issues?
- 7) Need to Market to Members (2)
 - a. Use education and public relations expertise
- 8) Evolving Standards Cause Confusion - Hard to Keep Everyone Up to Speed (1)
- 9) Need Well-Defined Process for Responding to Press (AAZPA Officers and staff) (3)
- 10) Too Accessible to Press
- 11) Need Public Relations Policy (1)
- 12) Calls from Press Should Go to Karen's Office
- 13) Difficult to Manage Who Speaks to Press in Institutions
- 14) Remember We Are a Member Organization (7)
 - a. Decisions need to represent members
 - b. Need ways to nurture/support
 - c. Pay more attention to process of decision making
- 15) Society of Institutions
- 16) Don't Get Good Response on Questionnaires
- 17) Battle to Get People to Listen and Read
- 18) Current Organization Not Set Up to Handle All These Ideas
- 19) Why Not Change the Structure? (9)
- 20) Can Organization Contract with Zoos?
- 21) Could Have Contributed Resources

V-A. GENERAL DISCUSSION (cont.)

- 22) Can't Depend on Volunteers
- 23) Need to Look at Staffing; i.e., Deputy Director (4)
- 24) Need to Look at Change in Board Structure
- 25) Should We Pay an Executive Board?
- 26) Need More Board Meetings? (3)
 - a. Association pays for travel costs
- 27) Restructure Board Meetings (1)
 - a. Agendas same
 - b. What should we accomplish?
- 28) Need Strategic Planning and Build a Vision for Future (15)
 - a. Help from Organizational Consultant
- 29) Revisit Long-Range Plan (14)
- 30) God Help Directors Without a Plan for Year 2000
- 31) Financial Plan Goes "Hand in Glove" (2)
- 32) Plan---->Structure - Pay for Planning
- 33) Need to Constantly Reevaluate Plans for Strengths and Weaknesses (1)
- 34) Business Endowment (6)
- 35) Friends of AAZPA Made Up of Donors (fantastic Board potential)
- 36) Assets = \$5-\$7 Billion - Get Act Together! (9)
- 37) If We Ran AAZPA Like Our Zoos, We Would Be Better Off
- 38) Big Picture! - How Do We Impact Individual Members?
- 39) Small Zoos Can't Afford All New Efforts, but Would Benefit from Them
- 40) Need to Sell New Program and Benefits (3)
- 41) Need to Accomplish Diversity with Membership
- 42) Individual Zoos Need to Continue to Evolve and Not Wait for AAZPA

V-A. GENERAL DISCUSSION (cont.)

- 43) Individual Organizations Do Great With Education
and Don't Need to Look to AAZPA
- 44) Conservation Endowment Dollars Can Be Used for Things Other Than SSP
- 45) Have Sessions for Specific Groups; i.e., education
- 46) Take Advantage of Public Attention to "Our Issues and Our Role";
i.e., rain forest, etc.
- 47) Target Communication/Education Activities; i.e., elephant conservation
in Africa (9)
- 48) AAZPA/SSP Expertise in Helping Wildlife Population (2)

V-B. COMPLAINTS (Figure 16)

- 1) Knee-Jerk Responses (3)
- 2) Have "Ticked Off" Groups in Past; i.e., horticulturists - no longer associated with organization
- 3) Becoming Regulatory (8)
- 4) Organization Deals Only With Conservation - SSP Only
- 5) Not Enough Services (4)
- 6) When in Trouble, Don't Get Support (4)
- 7) Don't Put Our Dollars Where Our Mouth Is (6)
- 8) Don't Represent Smaller Constituencies (5)
- 9) Not Addressed Roadside Zoo Issue, etc., Which Saps Our Strength (9)
- 10) Don't Communicate Accomplishments - Want More . . . (4)
- 11) "Old Boys" Network (13)
- 12) Committees Without Regulation Are Not as Active - No Clear Mission (7)
- 13) Haven't Acknowledged All Collateral Activities; i.e., Marketing Has No Legitimate Place (10)
- 14) Don't Recognize Collateral Activity Success
- 15) Membership Ill-Prepared for Votes (18)

- VII. Education: Toward a Definition
- VIII. Conservation: Toward a Definition

During the general discussion, and earlier during discussion of what AAZPA could do to support members in conservation, suggestions were made to define what is meant by "Education" and "Conservation." While it was not efficient to attempt specific definition of these terms with such a large group, several participants listed what they thought were key components of each definition in hopes that this would assist the AAZPA in future definition of these important concepts. These ideas are presented in Figures 17 and 18.

VI-A. EDUCATION: TOWARD A DEFINITION (Figure 17)

- 1) Public Programs (Schools, etc.)
- 2) Transmitting Message to Achieve
 - a. General public
 - b. Formal programs
 - c. Special audience
 - d. Visitors
 - e. Staff
- 3) Exhibition/Interpretation
- 4) Association-Wide Education
- 5) Special Activities
- 6) Public Relations Component

VI-B. CONSERVATION: TOWARD A DEFINITION (Figure 18)

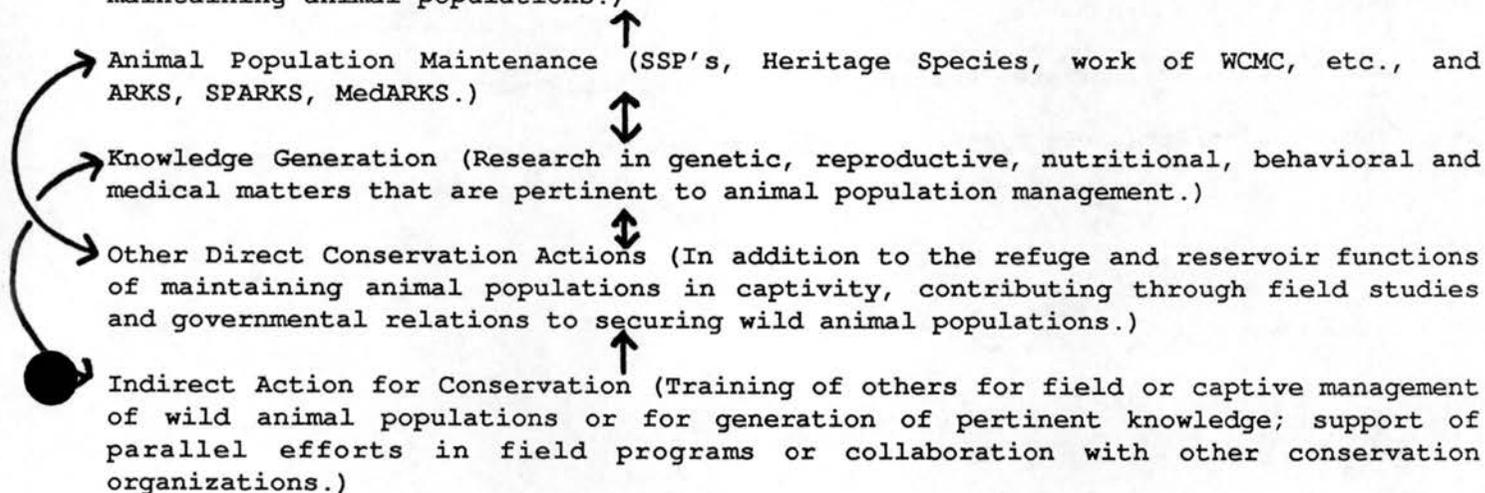
- 1) Wise Use of Resources (Volunteer) - Heavy Hitters, Clean-Up, etc.
- 2) Strategic Plan
- 3) Business/Financial Plan (Support)
- 4) Use of Professional Guidance (Paid)
- 5) Who Will Develop Plan
 - a. Committee of past presidents
 - b. Trustees and representatives of government authorities
 - c. Outside high level organization of experts
 - d. Zoo special interest groups
 1. Zoo vets
 2. Zoo horticulturists
 3. International zoo educators
 4. Etc.
- 6) Develop Zoo Data Base from Accreditation Documents

VI-C. Further Thoughts on Defining Conservation for the AAZPA (Figure 19)

Dr. George Rabb, who was instrumental in proposing these definition elements, later submitted the following expanded presentation of Environmental and Resource Conservation Practices for which AAZPA could provide a leadership role.

Environmental and Resource Conservation Practices (Figure 19) - (A leadership function: setting examples of good stewardship with materials; energy sources; prudent buying, etc.)

Communications on Conservation (Education, broadly speaking, adjusted for different segments of audience, in various media, with goals of arousing awareness and attracting support for conservation, especially as practiced by our institutions in maintaining animal populations.)



VIII. Working Groups

The full workshop was adjourned after lunch of the second day. Approximately one half of the participants stayed on to form four "Working Groups," which convened to further develop ideas which had emerged during the regular session. The working groups addressed the subjects of Public Relations (Figure 19), AAZPA Services (Figure 20), Communications (Figure 21), Conservation (Figure 22) and Strategic Planning (Figure 23).

The participants in each group were:

1. Public Relations: Karen Asis, Sabin Robbins, Jerry Lentz.
2. Services: Kathryn Roberts, Linda Boyd, David Thompson, Greg Geise.
3. Communications: Christen Wemmer, Paul Chaffee, Bob Wagner.
4. Conservation/Strategic Planning: Palmer Krantz, Charles Hoessle, George Rabb, Doug Myers, Tom Foose, Jon Coe, Sherry Sheng, Lou Garibaldi.

VII-A. WORKING GROUP - PUBLIC RELATIONS (Figure 20)

- 1) Media Placement - Subject Emphasis
- 2) Organize Promotions
- 3) Crisis Management Plan
- 4) Pro-Active Campaign
- 5) Internal Relations
- 6) Advertising/Marketing
- 7) Provide Articles to Zoos for Publication
- 8) Publications
- 9) Speaker's Bureau
- 10) Training at Institution Levels for Public Relations/Practitioners
- 11) Compile Resources - Videotapes, Slides, etc.
- 12) Psychographic Profiles

VII-B. WORKING GROUP - SERVICES (Figure 21)

Our small group was charged with discussing ways the AAZPA can begin to provide a broader array of services to its member zoos. We identified five services which we felt were both identified by the larger group as a need and which we felt were do-able. The five services are:

1. Improving a data base.

Most of the data available about all of the member zoos is now found in the AAZPA directory. The information which is found in the directory is collected through a biennial survey. Boyd has agreed to forward a copy of the survey to the rest of us for us to review and make suggestions for additions and deletions. We understand the directory was automated this year. The information that is collected is now electronically stored and made available through the hard copy directory. We discussed the possibility of providing disks to member institutions, rather than having it only available at the Association Office. This would allow zoos to manipulate the data and answer questions and free up AAZPA staff time.

We would like to continue to discuss data collection and dissemination. All four of us are willing to continue working on this task.

2. Buying power.

During our meeting, we heard many times that our zoos are part of a billion dollar business. We would like to suggest a group be formed to identify items which could be purchased for collective benefit. The group would also be charged with identifying how the products would be purchased, whether storage would be necessary, etc. We have identified some people who would be willing to tackle the task.

3. Legislative alerts.

There is a need for members to get information about legislative issues which impact zoos. This may include issues about conservation and non-related conservation issues. We understand issues are now reported through the newsletter. We think there are ways to communicate this information to make it appear more accessible and timely.

4. Source book for supplies.

We would propose identifying individuals from member institutions to begin tackling this task. We are sensitive to the issues of product endorsement, forgetting a provider, listing sources for products we believe are inferior, etc.

5. "Tidbits" from Karen.

We discussed the need for "P.R." alerts which would supply zoos with messages that are complementary to the messages being communicated by AAZPA. The alerts could also include "interesting facts" like, "There are more NASA astronauts than zoo directors."

Finally, we had a general discussion about our current regional meetings. We felt quite strongly that two regional meetings would meet the need of the members. We assume regional meetings sap the resources of our staff. Members typically choose one regional meeting to attend. Offering two should be adequate, encourage higher attendance, and free up valuable time for our AAZPA staff.

VII-C. WORKING GROUPS - COMMUNICATIONS (Figure 22)

Potential Alleviation of Internal Communications Problem.

- 1) Directors only meeting - perhaps at Pittsburgh.
- 2) Issues oriented session - reports of pending regulatory issues for Board action.
- 3) NEWSLETTER not read. Reformatting required?
- 4) Better focus on education and other programs.
- 5) Explore quarterly magazine for more "newsy" articles on important issues - in other words, issue oriented.
- 6) Farm out NEWSLETTER to Public Relations function.
- 7) Prepare more videotapes - similar to the SSP production, on other issues.
- 8) Prepare videos, inexpensively, on issues, rather than sending them by mail.

VII-D. WORKING GROUPS - CONSERVATION (Figure 23)

- 1) Moral Mission
- 2) Conservation Education
 - a. Long timeline
- 3) Captive Propagation
 - a. Short timeline
- 4) Business Survival
- 5) Increase Knowledge/Appreciation of Wildlife--->Ecosystem--->Human Welfare
- 6) Support of Parallel Efforts
- 7) Support of Wildlife/Plant Diversity

WHAT: Wise utilization of natural resources to prevent waste and ensure continued availability.

HOW: Environmentally wise practices.

Necessity - Prime Service----->Public Education/Communication

Necessity----->Animal Population Maintenance (SSP, Heritage Species, other species)

Knowledge Generation (research - population, genetics, nutrition, etc.)

Direct Action in Field (e.g. - field studies; government interactions)

Indirect Action (e.g. - training; support of parallel organizations)

- Conservation:
1. Environmentally Wise Practices
 2. Public Education; Communication
 3. Animal Population Maintenance
 4. Knowledge Generation
 5. Direct Action in Field (include support of parallel generations)

VII. Working Groups - Strategic Planning (Figure 24)

It was felt that this workshop verified the need for a far more thorough strategic planning process for the AAZPA. This process should be lead by a professional facilitator with experience in organizational and institutional planning. The facilitator would give direction, establish deadlines and, when necessary, demand input; but the real work would be done by the AAZPA participants. George Rabb and Douglas Myers will investigate the availability and probable cost of excellent facilitators they each know and will report back to President Krantz.

George Rabb stressed that the many ongoing programs and activities of AAZPA and its members, some of which are urgent, should not slow down nor become delayed during what will clearly be an extended planning process.