Minnesota State Zoological Board. Zoo-Related Organizations Files.

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Version 3
August 20, 2018

June 18-19, 1990
Tulsa, OK

June Mtg.

Loose

Image -
Conservation orgs agree c your position
Need stronger formal relationships c other conserv. orgs
We need to be seen as supporting other orgs + v'ce versa
Update of publications, etc

* American Elasmo branch Assoc.
- concerned c shark issue - harvesting

Elasmo Branch

Communications required

On National Institutes for the Environments
Study being done on feasibility by NSF

Loose?

Data on research
Data on investing in zoo supporting protected areas?

Someone design software leads thinker process to the plan?

* "Bio Diversity Funding" - Source of $

* Alec - Is Zoo keeping control only relating to Mn Zoo or others?
Says - lots serious control issue - Going to have out + we will end up doing - Need to be patient

Our strategic plan

- continue to bring along Rd + Conservation goals
- commitment to expand SSP resp
- work c CBSG

Peri speak to Ann Byers? c Shirley Johnston

* Send young scholars report to David

publish

Zoo Biology approached ~~AAZPA~~ to take over mag. - Up to publisher

"Rottites"

Themes

- collect data & make available
- communicate & members more, better etc
-

1) Director's mtg. > wksp — 4 million people
2) Bring Bd members to wksp sponsored by ~~AAZPA~~ to assist c leg issue

'Perceptions Press' - monitor anti AZ grps.

Agenda for director's mtg

National Zoo Coalition for legislative issues

3 person committee on c transport - To Bd mtg in St. Louis

Does image belong c̄ AR discussion?
Goo wants good mktg research

PR - * Image building / org.
demographic + graphic data?

Can we identify our audience?

Logo + title archaic & needs to be re-done

<u>What to do c̄ a rights</u>
Coalitions - National Soc. for a Research - formalize
Perceptions Press - Keeps up + doc. on a activities
Major advisor to NIH
Identify the gaps

KRA needs to be new, different, + innovative

* Maybe don't need a KRA in this area

divie out extra tasks
review doc + send to us

What does a rights hit us c̄?
1) euthanasia
2) marine mammals in captivity
3)
4)

Symptom

→ What about selling of parts

→ Welfare of the species vs individuals

Individual institutions should meet or exceed AAZPA guidelines

Crisis mgmt -
rd hot spots

L.G. Image - gps get lumped as environmentalists that need to define - environmentalist
conservationists
ie PETA + PAWS say they are ↑
Correct image + identifying players

* "Minority mentorship program" in a case positions

* Change cultural statements again

Objectives - must be measureable
What measures? end results
activities
Symptoms
Methodology (action plan style)

When will we be in 5 yrs
How Quantify? Quantity
Quality
Cost
Time

Assignment of T.F out outside

Likely response to strategy?

KRA: Protect & enhance our image as leaders in environmental & wildlife conservation

Obj 1: Devl an easily rec. identity to improve name recognition by Sept 1991

Strat: Contract with prof. for input, concurrence & devl.

Obj 2: Conduct market research to determine our audiences & issues by ~~Sept 91~~ Jan 1991

Strategy A: Review Hill & Knowlton &

Sound like action steps

~~Strategy B.~~ Determine methodology

Strategy B: ~~Assess~~ Implement ~~Assess~~ method & Communicate the Results

Objective 3: Develop a public relations plan based on our market research to deliver our message by Sept 91

~~Strategy A: Assess the results of our market research~~

Strategy ~~B~~: Create a team to develop an implementation ~~team~~ plan

Strategy B: ~~Use~~ Coordinate PR skills + info. within member institutions

Contract c prof for input, concurrence + dev.

Action plan:

① Research field for appro. vendor

② Request bids from acceptable vendors

③ Select vendor

④ ~~Specify~~ ~~Develop~~ parameters + options for development

⑤ Review ~~proposals~~ presentation by Bd.

⑥ Bd selects candidate

⑦ Brings to membership

* Forward MMtg stuff to Charlie
* Send method for M. Res to Jeff
* Write for Communique + fax to Charlie H.

Change by-laws + Articles of Incorporation
- Your reps directed as to change
- anyone can enter

Need KRA leaders
Action plan leaders

Advisory grp will worry about implementation system
Monitoring by LR Plng.

August - Advisory Grp meets + reviews doc
critiques, answer questions etc.

Bob presents to Bd @ same x

Implementation probably done by staff

Cost-benefits done by August by staff

Next issue of Communique - what's going on = plng
from orig. LRP, H+K, PR document
at their interests + needs - follow thru
Broadly based grp - representing everyone
A, aquariums + Canadians

Continuity - needs to be done every yr.

Talk about @ regionals, national

LR Plng Co.

Who gets the plan? Advisory Co.

How often reviewed?

AMERICAN ASSOCIATION

OF

ZOOLOGICAL PARKS AND AQUARIUMS

BYLAWS

BYLAWS
OF THE
AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS

ARTICLE I. Officers and Board of Directors.

Section 1. Officers and Board of Directors.

The affairs of the Association shall be managed by an elective Board of Directors of four (4) officers and nine (9) other members. The officers shall be a President, President-Elect, Vice President and Past President. The Executive Director of the Association shall also be a member of the Board of Directors ex officio without the right to vote, and he shall serve as Secretary of the Board of Directors.

The elective officers shall serve from the conclusion of the Annual Business Meeting closest to their election through the next Annual Business Meeting, or until their successors are elected, whichever is later. They may not serve for more than two (2) consecutive terms in the same office. The other directors shall serve from the conclusion of the Annual Business Meeting closest to their election through the next three (3) Annual Business Meetings, or until their successors are elected, whichever is later; and they may not serve two (2) full terms consecutively.

The terms of the nine (9) directors who are not officers shall overlap, with three (3) directors elected for full terms each year.

The Directors may adopt such rules and regulations for the conduction of business as they deem advisable, within limits of the Charter and Bylaws, and may appoint such agents as they consider necessary. The Directors shall establish standing committees to assist in the management of Association affairs. No member of the Board of Directors entitled to vote shall receive compensation for service as a Director.

Section 2. Executive Committee.

The Executive Committee of the Board of Directors shall be the four (4) elective officers, one additional Director, elected annually by the Board of Directors at the time of the annual Board meeting of the Association, and the Executive Director ex officio without the right to vote.

This committee shall transact other business between meetings of the Board of Directors only when necessary. In such matters, the Executive Committee shall have and may exercise any and all powers of the Board of Directors; but all actions shall be subject to ratification by the Board of Directors at its next meeting. The Board of Directors is expected to uphold any commitments of obligation incurred in good faith and for expediency by the Executive Committee.

Three (3) voting members shall constitute a quorum of the Executive Committee, and three (3) votes shall be required for any official action by this committee.

Section 3. Meetings.

The Board of Directors shall hold two (2) regular meetings annually to consider adoption of the annual budget, reports and recommendations of committees, work of the Executive Director, actions of the Executive Committee and other appropriate business.

A special meeting shall be called by the President at the request in writing of seven (7) members of the Board of Directors, or by the President upon his own judgment of necessity. Notice thirty (30) days in advance shall be required for such special meetings.

A majority of the Board of Directors (seven (7) members) shall constitute a quorum for the transaction of business. Seven (7) votes shall be required for any official action by the Board of Directors, where not otherwise specified in these Bylaws.

Section 4. Vacancies.

A vacancy in a directorship or any elective office except those of the President and President-Elect shall be filled

by appointment by the Board of Directors. Persons filling such vacancies must meet all qualifications that would be necessary for election by the membership. Appointees shall serve only until the next regular election, but may stand as candidates for regular terms.

In the event of death, permanent disability, resignation or other causes vacating the office of President, the President-Elect shall become President; and the office of President-Elect shall become vacant until the next regular election.

Section 5. Absences.

Any officer or other director absent from a meeting of the Board of Directors shall notify the President or the Executive Director of the reason for absence. The Board of Directors shall decide in each instance if the absence is excusable. Two consecutive unexcused absences shall disqualify any member, and his position on the Board of Directors shall be declared vacant.

Section 6. Duties of Elective Officers.

The elective officers shall perform the usual duties of their offices and such other duties as may be determined by the Board of Directors in accordance with the Bylaws. The President shall be an ex officio member of all committees, except the Nominating Committee and Ethics Board, without the right to vote.

ARTICLE II. Committees, Service Commissions and Advisors.

Section 1. Charter and Bylaws Committee.

There shall be a Charter and Bylaws Committee of nine (9) members appointed for three-year terms. The nine (9) members shall serve overlapping terms, with three (3) members appointed for full terms each year. The incoming President shall make the appointments for full terms, fill other vacancies and designate the chairman and vice-chairman for the year. This committee shall annually review the Charter and Bylaws of the Association and shall recommend changes, if any, to

the Board of Directors in accordance with Article IX of these Bylaws.

Section 2. Nominating Committee.

There shall be a Nominating Committee of five (5) members appointed annually. The incoming President shall appoint one (1) member from the current Board of Directors and three (3) members who have not held an elective office within the previous three (3) years and have been Professional Fellow members in good standing for five (5) years or more. The Immediate Past President (or, in the event of his unavailability, the temporally closest predecessor) shall serve as a member and as chairman of the committee.

Pursuant to Article IV of these Bylaws, this committee shall submit to the membership nominations for elective offices and the Board of Directors as described in Article I, Section 1, of these Bylaws and for the Ethics Board as described in Article II, Section 5, of these Bylaws. This committee shall not nominate any of its members for such service.

Section 3. Membership Committee.

There shall be a Membership Committee of nine (9) members appointed for three-year terms. The nine (9) members shall serve overlapping terms, with three (3) appointed for full terms each year. The incoming President shall make the appointments for full terms, fill other vacancies and designate the chairman and vice-chairman for the year.

This committee shall review applications for membership or changes in membership status in accordance with Article VI of these Bylaws and make recommendations for action to the Board of Directors. This committee shall also review periodically, but at least once every five (5) years, the status of all Related Organization and Registered Animal Supplier members and make appropriate recommendations for action to the Board of Directors. The committee shall also promote memberships and perform related duties.

Section 4. Accreditation Commission.

There shall be an Accreditation Commission, a committee of nine (9) Professional Fellows appointed for three-year terms. The nine (9) members shall serve overlapping terms, with three (3) members appointed for full terms each year. The incoming President shall make the appointments for full terms and fill other vacancies. He shall also designate the chairman and vice-chairman for the year, but they must have at least one year's previous service on the committee.

This committee shall establish professional standards for member institutions, subject to the approval of the Board of Directors. On the basis of those standards, the committee shall have evaluations made of institutions applying for professional recognition. Following its review of an evaluation, this committee shall, by majority vote of its entire membership, grant or deny accreditation on behalf of the Association. This committee shall review periodically, but at least once every five (5) years, the continuance of accreditation of all accredited institutions.

This committee may also from time to time advise or recommend other actions to the Board with respect to maintenance of professional standards and practices by member institutions. Appeals by applicant institutions of decisions of the Accreditation Commission may be made to the Board of Directors.

Section 5. Ethics Board.

There shall be an Ethics Board, a committee of five (5) Professional Fellow members elected by the voting membership for three-year terms. The five (5) members shall serve overlapping terms, with at least one (1), but not more than two (2), members elected to full terms each year. Vacancies on the committee may be filled by appointments by the Board of Directors. Appointees shall serve only until the next regular election, but may stand as candidates for regular terms. This committee shall elect its chairman and vice-chairman annually.

This committee shall establish and maintain a professional code of ethics governing members of the

Association, subject to the approval of the Board of Directors. The committee shall investigate any formal written complaints of violations of the Code of Professional Ethics, initiate investigations on its own and make recommendations for appropriate action to the Board of Directors.

Section 6. Other Committees.

The Board of Directors may establish standing committees not otherwise provided for in the Bylaws, and the President may establish such special committees as may be required from time to time to carry out the objectives of the Association.

All standing committees not specified in these Bylaws shall be appointed for terms of three (3) years, with one-third (1/3) of the members of each committee appointed for full terms by the incoming President, who shall also have the right to fill vacancies for unexpired terms. In the initial establishment of a standing committee, the President shall appoint the entire committee as follows: one-third (1/3) of the members to serve one-year terms, one-third (1/3) of the members to serve two-year terms and one-third (1/3) to serve three-year terms. The chairman and vice-chairman of a standing committee shall be designated anew each year by the incoming President.

Special committees appointed by the President shall be of such size and their members shall have such terms as directed, but not to exceed three (3) years.

Section 7. Committee Requirements.

Chairmen of all committees must be Professional Fellows, and members of Bylaws and standing committees must be members of this Association; but nonmembers may serve on special committees. Excepting the Executive Committee, members of committees may not serve more than two (2) full terms consecutively.

Unless otherwise indicated in the Bylaws, committees will function in accordance with rules and regulations set forth by the Board of Directors; and their work is subject to the approval of the Board of Directors.

Statements relating to terms of service shall be understood to mean the period from the conclusion of one Annual Business Meeting through the subsequent Annual Business Meeting.

Section 8. Service Commissions.

Service Commissions may be established from time to time by the Board of Directors for special purposes. Their functions and relationships to the Association will be as defined by the Board of Directors.

Section 9. Advisors.

The President may appoint such Advisors as he deems necessary to assist him in carrying out the objectives of the Association.

ARTICLE III. Executive Director.

The Board of Directors may appoint or employ an Executive Director who shall serve at its pleasure. Under the general supervision of the President and the Board of Directors, he shall be responsible for the day-to-day operation of the Association, for providing material to and coordinating the work of committees, service commissions, advisors and agents and for promoting and conducting the programs of the Association within policy guidelines of the Board of Directors in accordance with the Charter and Bylaws.

The Executive Director shall have the authority to employ personnel for the Association as provided for by the Board of Directors or its Executive Committee and to terminate the employment of such personnel. He shall have full authority, as well as the responsibility, to supervise the work of such personnel.

He shall attend all meetings of the Board of Directors and its Executive Committee, but shall not be entitled to vote. He may also attend all meetings of Bylaws, standing and special committees in an ex officio capacity without the right to vote.

The Executive Director shall be bonded in an amount set forth by the Executive Committee, and the Association shall pay the cost of such bond.

ARTICLE IV. Nominations and Elections.

Section 1. Nominations.

Nominations of candidates for officers, other directors and members of the Ethics Board shall be made by the Nominating Committee. In addition to its own selections, the Nominating Committee must place the name of any qualifying Professional Fellow on the election ballot for position of Director or Vice President when that name has been submitted to the committee not less than seventy-five (75) days prior to the Annual Business Meeting by a petition of nomination containing the signatures of at least ten percent (10%) of the number of Professional Fellow members in good standing on 31 December of the preceding year.

All nominees must be Professional Fellows who have been Professional Fellow members in good standing for five (5) years or more at the time of election. The Nominating Committee must offer slates with no less than two (2) candidates for every vacant position, excepting that of President-Elect, for which a single nomination can be made, and those of President and Past President, for which it shall normally name the previous President-Elect and the immediately retiring President respectively.

The chairman of the Nominating Committee shall notify the candidates of their selection, or nomination by petition, and shall secure in writing their consent to have their names placed in nomination. Each candidate's governing authority or superior must also submit a letter stating that he/she may serve, if elected, and carry out the duties of the office, including attendance at Board of Directors or Ethics Board meetings, as appropriate, and the Annual Business Meeting of the membership. If such letters are not received, he/she shall be regarded as not qualifying and such name shall not be placed in nomination.

Section 2. Elections.

Elections of officers, other directors and members of the Ethics Board shall be by secret ballot mailed no later than sixty (60) days before the annual Board meeting. The Executive Director shall prepare and mail the official ballot and enclosures to all eligible voting members. The ballot shall provide for votes for persons other than the official nominees. Each voting member shall mark the ballot and return it in the official envelope provided and no other, postmarked no later than thirty (30) days prior to the annual Board meeting. The ballots shall be returned to and tabulated by a public accounting firm designated by the Board of Directors. The accounting firm shall certify the results to the Executive Director, who shall notify the candidates in writing of the election results. Elections to the Board of Directors and Ethics Board shall be in order by number of votes, with vacancies for full terms being filled first and other vacancies in sequence.

The President shall be called upon to cast an additional vote in the event of a tie. In such instances, the auditor shall telephone the President to obtain the vote.

ARTICLE V. Meetings.

Section 1. Annual Business Meeting.

The Association shall regularly hold one business meeting for the membership in the fall of each year, the date and place to be approved by the majority of members in attendance at the meeting when the selection is made. Meeting invitations must be approved by the Board of Directors before presentation to members for selection and approval. The business of the annual meeting shall include reports of the Board of Directors, necessary action by the membership on resolutions and on recommendations of the Board, presentation of professional papers by members and other appropriate items.

Section 2. Special Meetings.

Special meetings to consider a specific subject may be called by the Board of Directors upon the written request

of fifty (50) voting members or upon its own initiative. Notice of any special meeting shall be mailed to each member at least thirty (30) days in advance, stating time, place and information on the subject(s) to be discussed. Business which is not specified in the call for the meeting may not be transacted by the membership at a special meeting.

Section 3. Regional Meetings.

Regional meetings of the membership may be scheduled and held in various places, with the approval of the Board of Directors. The primary purpose of regional meetings is to provide for the exchange of professional information. Although business of the Association may be informally considered, no action binding on the Association may be taken at such meetings.

Section 4. Quorum.

In any mail referendum or at the annual business or special meetings, a quorum shall be a majority of participating voting members, provided that at least fifty (50) participate.

Section 5. Conduction of Meetings.

All meetings of the membership shall be conducted subject to normal parliamentary procedures and to such other rules and regulations as may be set forth by the Board of Directors. Host organizations for meetings must meet requirements established by the Board. Management and fiscal accountability for meetings will rest with the Association.

Section 6. Resolutions.

Resolutions and actions affecting the entire membership must be presented to the Board of Directors and approved by a majority of the Board of Directors (seven (7) members) before they may be presented to the membership for action, either by mail ballot or during the Annual Business Meeting or a special meeting of the membership. Approval by a majority of qualified members attending such a meeting or casting a mail ballot

shall be necessary for adoption. These resolutions shall be binding upon all members in all classifications, effective upon publication in an official publication of the Association or upon receipt of a copy of the resolution by the member, whichever comes first.

In an emergency, a resolution may be adopted by a two-thirds (2/3) majority of the Board of Directors. Such emergency resolutions become binding upon all members immediately upon notification and remain in effect unless rejected by the voting membership in a mail ballot or during the Annual Business Meeting or special meeting of the membership. The Board must present emergency resolutions for ratification by the membership within ninety (90) days of their adoption.

ARTICLE VI. Membership Requirements and Classifications.

Section 1. General Requirements.

Any person, institution, society, related organization or corporation properly nominated and willing to abide by the Charter and Bylaws and all other rules and regulations of the Association, may be elected to membership by the Board of Directors, provided they meet the requirements set forth in the various sections of this Article VI. Applications for Related Organization, Registered Animal Supplier and Professional Fellow membership must first be reviewed by the Membership Committee, which shall make recommendations to the Board of Directors; a two-thirds (2/3) majority vote of the Board of Directors is required for election. Applicants for Institution membership qualify by obtaining Accreditation. All members in all classifications must be reviewed periodically, and at least once every five (5) years to determine if they continue to qualify for their current classification.

The Board of Directors shall charge the Executive Director with the responsibility of reviewing applications for Associate, Affiliate, Society and Commercial membership and with administratively reclassifying members when it is apparent that such members no longer qualify for the

classification of membership currently held. Such applications and reclassifications shall be reported monthly to the Board of Directors for review.

Employees of commercial companies with zoological business interests may not hold an individual membership unless the company is a member.

When processing for Professional Fellow or Affiliate, only current, continuous service will be considered for tenure qualifications. When reapplying within one year, this requirement may be waived, as long as AAZPA membership has been maintained.

Sponsorship requirements are set forth on the membership application forms.

Section 2. Institution.

Institution members shall be zoological parks, aquariums, wildlife parks and oceanariums as defined in Article III of the Charter of the Association. They shall have regular and predictable visiting hours which are convenient to the general public and which constitute more than a token opening. Their collections shall be comprehensive and not merely holdings of domestic or semidomestic animals or meager collections of wild animals.

Applicants for Institution membership must apply and qualify for accreditation. Accredited Institution members shall be entitled to vote on all issues of the Association. Such vote is to be cast by the chief executive officer of the institution or his/her authorized representative, who must be a voting member of the Association.

Institution members may apply to enroll their noncontiguous wildlife breeding facilities, game farms and conservation centers into AAZPA membership, as long as such facilities are not open to the general public on a regular basis. Such facilities shall not be subject to accreditation requirements nor privileges, but will be required to undergo periodic inspections and review.

Section 3. Society.

Society members shall be organizations providing assistance to zoological parks, aquariums, wildlife parks or oceanariums as defined in Article III of the Charter. Applications for Society membership must be endorsed by the chief executive officer of the associated Institution member. In the event the associated facility has not opened to the public, this requirement may be waived. Institution membership and accreditation for the associated facility must be obtained once the facility is open in order for the society to maintain membership.

Society members shall not have the right to vote.

Section 4. Related Organization.

Related Organization members shall include, but not be limited to, zoological parks, aquariums, wildlife parks or oceanariums outside the Americas, game parks and wildlife ranches not open to the public on a regular basis; the following wildlife establishments: research facilities, survival centers, breeding farms and nature centers; or professional zoological organizations or associations that wish to be identified with, support and participate in the Association's programs.

Related Organization applicants holding wildlife shall undergo an inspection in accordance with procedures and requirements established by the Board of Directors prior to the application being submitted to the Membership Committee and Board of Directors for their vote.

Related Organization members shall not have the right to vote.

Section 5. Professional Fellow.

Professional Fellow members shall be persons who are currently employed full time in a management capacity in or by an AAZPA Accredited Institution, as defined in Article VI, Section 2 of the Bylaws, and who are ultimately responsible to the administrative head of these institutions, or those who are employed full time in a management capacity by this Association.

Applicants for Professional Fellow shall have been employed continuously in a management capacity for the immediate past three (3) years from date of application, and must possess at least a four (4)-year degree from an accredited institution of higher learning, or shall have been employed for the immediate past eight (8) years, the last four (4) of which shall have been in a management capacity. In addition, applicants for Professional Fellow shall have been an individual member for the immediate past two years from date of application.

Management status must be verified by the applicant's chief executive officer. For purposes of definition, management-level employees shall be those who participate in the decision-making processes that influence and direct the operations, planning, purposes and goals of the institution. Persons with supervisory responsibilities only shall not be considered management personnel.

Professional Fellows shall have the right to vote; and all but employees of this Association shall be eligible to hold elective office.

Professional Fellows may be reinstated following a lapse in their employment upon verification by the chief executive officer that the individual is employed in the capacity defined above, provided that no more than one year has elapsed and AAZPA membership has been maintained.

NOTE: By special action of the Board of Directors, there are some Professional Fellow members who retained their Professional Fellow status, even though they do not meet the current requirements. Those persons shall retain the above status as long as AAZPA membership is maintained, but will not be eligible as candidates for election. Also, there are a few other Professional Fellow members serving as employees of societies who are eligible to hold office even though not on the staff of an accredited institution.

Section 6. Affiliate.

Affiliates shall be persons who have been employed full time continuously for the immediate past two (2) years

from date of application by a zoological park, aquarium, wildlife park, oceanarium, society or related organization; veterinarians and other scientists who render service to one or more zoological institutions; colleagues from zoological institutions outside of the Americas; persons who otherwise qualify for Professional Fellow but have not been members of the Association for two (2) years; or persons reapplying for membership who have been Professional Fellows but have been out of the profession for more than one year.

Applications must be endorsed by the candidate's chief executive officer to verify tenure.

Affiliates shall not have the right to vote or hold elective office.

Section 7. Associate.

Associates shall be persons who are interested in the objectives of the Association and wish to support them, and those who have other than a commercial interest in AAZPA.

Associates shall not have the right to vote or hold elective office.

Section 8. Retired.

Upon retirement, Professional Fellows may become Retired members, without payment of dues, provided they have served the Association for the last five (5) consecutive years as Professional Fellow members.

They shall enjoy all membership privileges, excluding the right to vote and hold elective office. Retirement means the termination of regular employment due to age or health, in accordance with the standard retirement policies of the member's employer.

Section 9. Honorary.

Honorary members shall be persons who are not qualified to be Professional Fellow members and who by reason of their interest in and service to zoological parks,

aquariums or to the Association have substantially promoted the goals for which this Association was formed, as stated in Article IV of the Charter. Candidates for Honorary membership shall be elected by the Board of Directors. Honorary members shall enjoy all membership privileges, except the right to vote and hold elective office.

Section 10. Commercial.

Commercial members shall be companies or individuals supplying or servicing the zoological park, aquarium, wildlife park or oceanarium fields.

Commercial members shall not have the right to vote or hold elective office.

Section 11. Registered Animal Supplier.

Registered Animal Suppliers shall be companies or individuals supplying zoological institutions with animal specimens for exhibition/captive propagation. Applicants shall hold a valid dealer's license issued by the U.S. Department of Agriculture, Animal and Plant Health Inspection Service and all applicable state permits or the equivalent issued by appropriate governmental agencies of other countries.

Registered Animal Supplier applicants shall undergo an inspection in accordance with procedures and requirements established by the Board of Directors prior to the application being submitted to the Membership Committee and Board of Directors for their vote.

Registered Animal Suppliers shall not have the right to vote or hold elective office.

ARTICLE VII. Membership Dues and Services.

Section 1. Dues and Services.

Annual membership dues and services shall be established by the Board of Directors for each membership classification.

Section 2. Dues Payment.

Membership dues are based upon the calendar year and are due the first of January. Those approved for membership after 1 July of each year shall have their first year's annual dues prorated to fifty percent (50%), but will not receive membership privileges at the annual conference that year. Members in arrears of dues sixty (60) days may be expelled from membership by the Board of Directors.

ARTICLE VIII. Suspension and Expulsion of Members.

The Board of Directors may, for cause, suspend or terminate any membership in any classification by a two-thirds (2/3) vote.

Sufficient cause for suspension or termination of membership shall be a violation of the Charter, Bylaws, or any rule, practice or resolution adopted by the Association, or any conduct prejudicial to the interests of the Association. Such members shall be notified of the charges by certified mail to the last recorded address at least fifteen (15) days before the next Board of Directors meeting. The notification shall include the time and place of the Board of Directors meeting. The member shall have the opportunity to appear in person or by representation to present his/her defense of the charges before any formal action is taken by the Board of Directors.

Notwithstanding the above provision, upon the written recommendations of the Ethics Board, Membership Committee, Accreditation Commission or the Executive Director, the Board of Directors by a two-thirds (2/3) vote may suspend or temporarily revoke AAZPA membership. Such action may be taken through written ballots, as well as in meetings of the Board of Directors. Suspension or temporary revocation of membership status shall remain in effect during any appeal of such action, and only the Board of Directors may reinstate such member. The Board of Directors must act within a year following suspension or temporary revocation of membership to provide for a formal review of the matter, as delineated above. If reinstated, there shall be no impairment of a member's seniority.

Following action by the Board of Directors to terminate, suspend or temporarily revoke membership, the member shall be notified immediately thereafter by certified mail of the action taken; and this action becomes effective upon this notification. No public statement shall be released regarding this action until and unless a member is suspended or expelled, and any official notice thereafter shall consist only of a brief and factual statement of action.

ARTICLE IX. Amendments.

The Charter and Bylaws Committee shall submit proposed amendments or revisions to the Board of Directors for approval. In addition, proposed amendments may be submitted to the Board of Directors by a petition signed by at least ten percent (10%) of the number of voting members as of 31 December of the preceding year. Amendments submitted by petition do not require the approval of the Board of Directors. The Board of Directors shall cause all approved, proposed amendments or revisions and all proposed amendments submitted by petition to be submitted to all voting members of the Association for vote by mail ballot on or before ninety (90) days following such approval or receipt of a petition by the Board at a duly called meeting of the Board of Directors. If at least two-thirds (2/3) of those voting approve such a proposal, it shall become effective as an amendment to the Bylaws. Mail ballots shall be considered valid and counted only if received in the Association's principal office within sixty (60) days from the date of the mailing of ballots to the voting members.

ARTICLE X. Parliamentary Procedure.

The Board of Directors shall be the final authority in interpretations of the Charter, Bylaws and other rules of the Association. The current edition of Sturgis Standard Code of Parliamentary Procedure governs the Association in all situations not provided for in the law or in its Charter, Bylaws or adopted rules.

ARTICLE XI. Seal.

The Association shall have a seal of such design as the Board of Directors may adopt. The Board of Directors shall determine its use, and it shall not be used otherwise.

Adopted by Incorporators:

14 December 1971 in Wheeling, West Virginia

Adopted by Membership:

5 October 1972 in Portland, Oregon
11 October 1973 in Houston, Texas
3 October 1974 in Philadelphia, Pennsylvania
18 September 1975 in Calgary, Alberta, Canada
22 September 1977 in San Diego, California
4 October 1979 in St. Louis, Missouri
18 September 1980 in Chicago, Illinois
7 July 1981 by mail ballot
31 December 1984 by mail ballot

Rev. 4/88

Fx Sp. Interest
Corp List to
Steve Taylor

Objective 3

Strategy A:

1. Identify team members
   Hoessle — Aug 9

2. Recruit & organize the team
   ABIS & Hoessle — Sept. 15

3. Assign tasks to the team
   ABIS — Oct 15

4. Carry out tasks
   Team members + ABIS — on-going

5. Monitor & evaluate the progress & results of the tasks ~~task~~
   Long Range Plng Co — On-going

6. Review & report at all Bd mtgs & thru Communique
   Long Range Plng Co + ABIS — On-going

Objective 3

Strategy B:

~~(1) Identify which institutions currently have PR Skills + plan staff~~

(1) Identify which institutions currently have PR staff and/or capabilities
ASIS Aug 1 90

(2) Secure willingness to cooperate by sharing instruments, results, ideas etc.
ASIS + PR Co. start Aug 1 Oct 1 90

(3) Develop mechanism for sharing information
ASIS - PR Co. start Oct 1 - Jan 1 90

(4) Implement ongoing sharing & cooperation
ASIS Ongoing

Action Plan

Obj 1 - Strategy 1

1. Research field for approp. Vendor
   Staff — Sept 90

2. Request bids from accep. Vendors
   Staff — Oct 90

3. Select Vendors
   Staff/Bd — Mar. 91

4. Communicate concepts to membership
   Roberts/NPG — July - Aug - Sept

5. Specify parameters & options for dev.
   Feb 91

6. Create review team from St. Louis, Mn (Minnesota), Busch, Van (Vancouver)

7. Team reviews interim presentation
   May - June - July 91

8. Bring to membership
   Aug. 91

Action Plan

Obj 2 - Strat A

(1) Statistical + methodological review of H+K - questions 5, 6, 8, 29 (1988 PRCom)
Mahilave July 31

(2) Recommend methodology
Mahilave July 31

(3) Approve rec. methodology
NPG sub co + ASIS Aug 7th

Obj 2 - Strategy B

(1) Determine institutions who can include items in ~~this~~ ~~existing~~ upcoming planned survey instruments
NPG June 20
St Louis, S. Diego, Busch, Mn

(2) Conduct the surveys etc.
Same places as above Nov 30

(3) Compilation and analysis of results
J. Mahilave + ASIS Jan 0, 1990

(4) Communicate the results thru the Communique, Regional mtgs, nat'l mtg, Bd mtgs etc.
ASIS All 1991

KRA: Protect + enhance our image as leaders in environmental + wildlife conservation

Obj 1: Develop an easily recognizable identity to improve name recognition by Sept 1991.

Strategy: Contract with professionals for input, concurrance + development.

Objective 2: Conduct market research to determine our audiences + issues by Jan. 1991.

Strategy A: Review Hill + Knowlton + determine methodology

Strategy B: Implement, assess + communicate the results

Objective 3: Develop a public relations plan based on our market research to deliver our message by Sept. 1991.

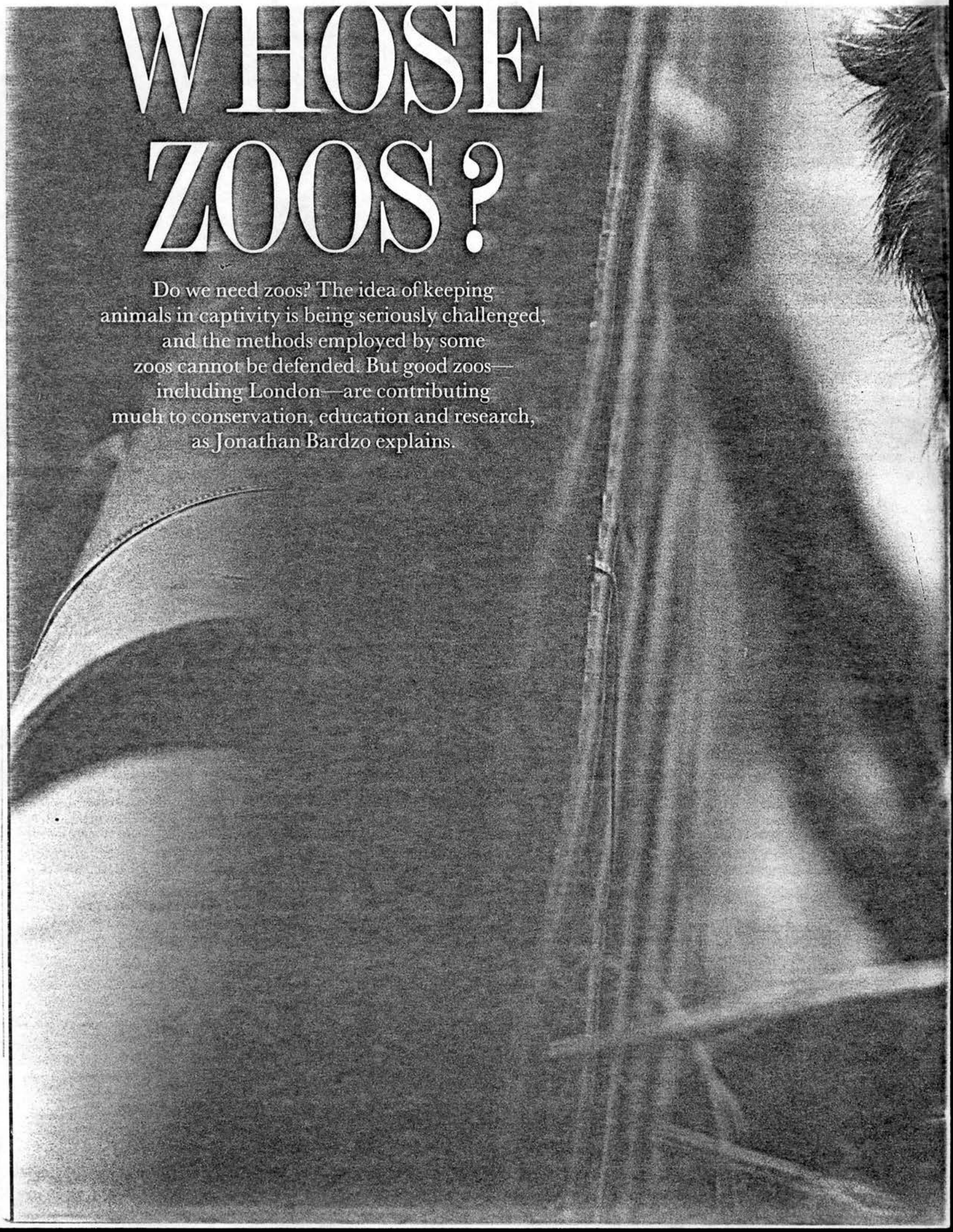
Strategy A: Create a team to develop an implementation plan

Strategy B: Coordinate PR skills + information within member institutions

THE ILLUSTRATED
LONDON NEWS

WHOSE ZOOS?

Do we need zoos? The idea of keeping animals in captivity is being seriously challenged, and the methods employed by some zoos cannot be defended. But good zoos—including London—are contributing much to conservation, education and research, as Jonathan Bardzo explains.



One of the chimpanzees in London Zoo manipulating a new feeding device which stimulates the animals and results in their increased awareness.

London Zoo is a national treasure. Even more importantly, it is an international resource and a trend-leader among the world's zoos. None of this may be obvious to the casual visitor. Many people who go to the zoo are content simply to experience wild animals at close quarters. Others may be upset by the perception that the animals have been deprived of their natural environment or by the idea that fellow beings have been "imprisoned".

The proliferation of nature films has given us a view of wild animals that is difficult to match in the captive environment. A vociferous and media-conscious anti-zoo lobby has also raised serious questions about the justification of keeping animals in captivity and, by extension, of the need for zoos to exist. It is a pertinent debate, and one in which zoos have not presented their case very well.

The word "zoo" is itself a problem. It is used to describe a range of establishments, from a roadside menagerie crammed with tiny cages in which a few animals are kept in squalid conditions, to a $64-million-a-year institution with 1,400 staff and conservation projects all over the world. Critics of zoos, and zoos responding to criticism, generally make little effort to distinguish between these two extremes, and consequently tend to be tarred with the same brush. Good zoos do themselves no favours by staying honourably quiet about bad ones.

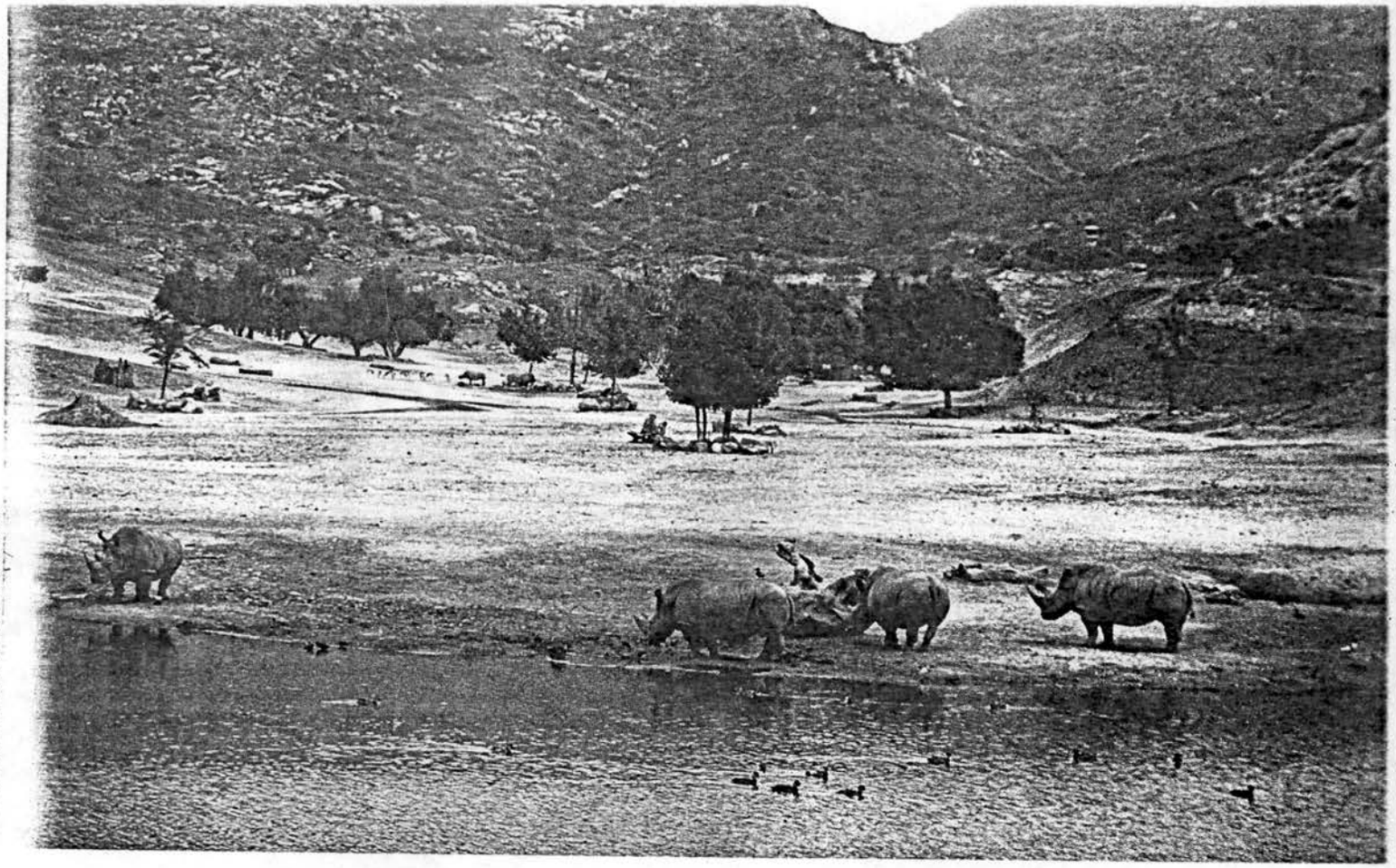
Zoos also suffer from the fact that the public perception of them is largely based on ignorance. The nature films that so stimulate our interest in animals seldom show the darker side of life in the wild—the lingering deaths from disease, starvation or inept predators—and, as a result, what most people want to see is a peaceful and naturalistic setting. Many recent zoo constructions have tried to meet this need.

In the 1970s it was reflected in the spread of safari parks, which gave an impression of freedom because, in effect, it was the people who were in cages while the animals roamed around them. The freedom was usually quite false. Lions which chose to rest in the shade and out of public view were frequently rounded up and forced back into the open so that visitors got their money's worth. The get-rich-quick philosophy that dominated so many safari parks is in sharp contrast to the objectives of the modern zoo.

The treatment of gorillas at Gerald Durrell's Jersey Zoo, in the Channel Islands, is a good example of current trends. Gorillas have traditionally been exhibited in thickly-barred cages. In Jersey Zoo now there is a 21-metre-long gorilla house with a large, outdoor, grassy enclosure covering nearly 2,000 square metres. It has two large hillocks in the middle which give subordinate members of the family group the opportunity to move freely about while staying out of sight and avoiding confrontations. It is a simple concept—good for the gorillas and good for the visitor—showing the animals in an authentic setting.

In the United States, where corporate and private funding can reach astronomical proportions, there has been a move to build more and more sophisticated facilities to provide environments which encourage the animals to behave naturally. The Bronx Zoo in New York, for example, opened its Jungle World in 1985. The building occupies nearly one acre and is spectacular both in its presentation of the animals and in its educational message. The interior caters to the needs of tropical forest species essentially by recreating a jungle habitat. It also took years of planning and construction and $34 million. Luckily, the Zoo has a cadre of donors willing not only to provide the funds but also to wait the years necessary to bring the project to fruition. Their European counterparts are not generally so lucky.

For insects and other invertebrates, as well as fish, more satisfactory conditions can be provided more easily; but these



PHOTOGRAPHS © ZOOLOGICAL SOCIETY OF SAN DIEGO

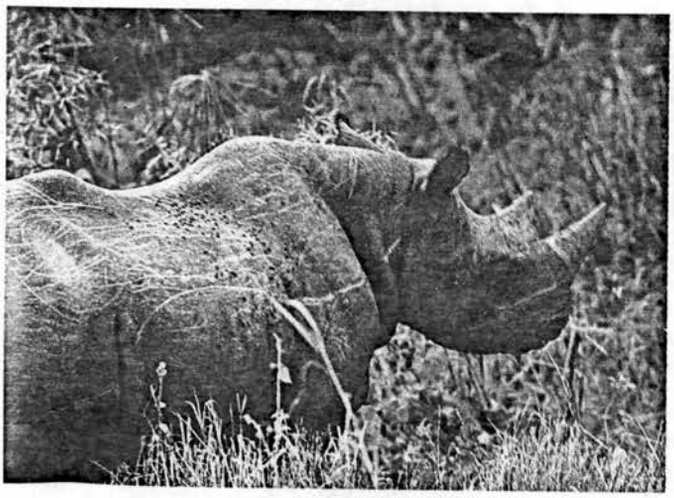
creatures have not always been displayed to their best advantage. Often they have been simply placed in bare tanks with nothing to interest the visitor. All that is changing. At Cincinnati Zoo's insect house an imaginative approach has been taken to get the visitor involved in the exhibits, using macro videos, naturalistic settings, a walk-through butterfly area and a lively graphics presentation. Some of the insects are even kept with small vertebrates which prey on them. The insect house has become the zoo's most popular building.

Although providing a naturalistic environment can please many people, it does not necessarily fulfil the behavioural requirements of the animals. Some zoos have long argued that if animals were properly fed and housed then their welfare was being adequately addressed. There has been a growing concern, though, that abnormal or stereotypic behaviour in an animal, such as pacing up and down or pulling out its hair or feathers, indicates that all is far from well. The response of some zoos has been to try to provide plenty of mental stimuli for their animals.

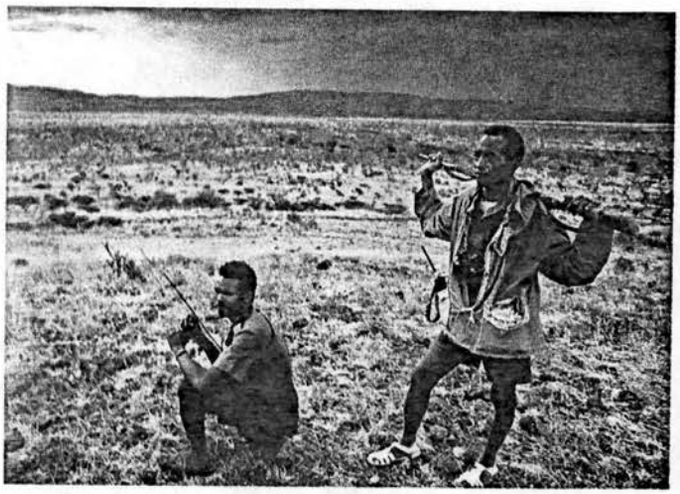
Northern white rhinoceros female and calf, above left, in San Diego Zoo and, above, part of the zoo's breeding programme.

A solution which has been adopted by London Zoo is to employ an animal behaviourist to invent simple devices which not only provide the animal with something to do but also encourage typical normal behaviour. For example, a tape of gibbon-calls now plays several times a week over Regent's Park. The Zoo's gibbons respond as if another troop were in the area and brachiate energetically across their enclosure, calling to warn off any possible interlopers. For the

Below, a black rhino in a protected area in Kenya, and two of the armed men necessary to guard this endangered species.

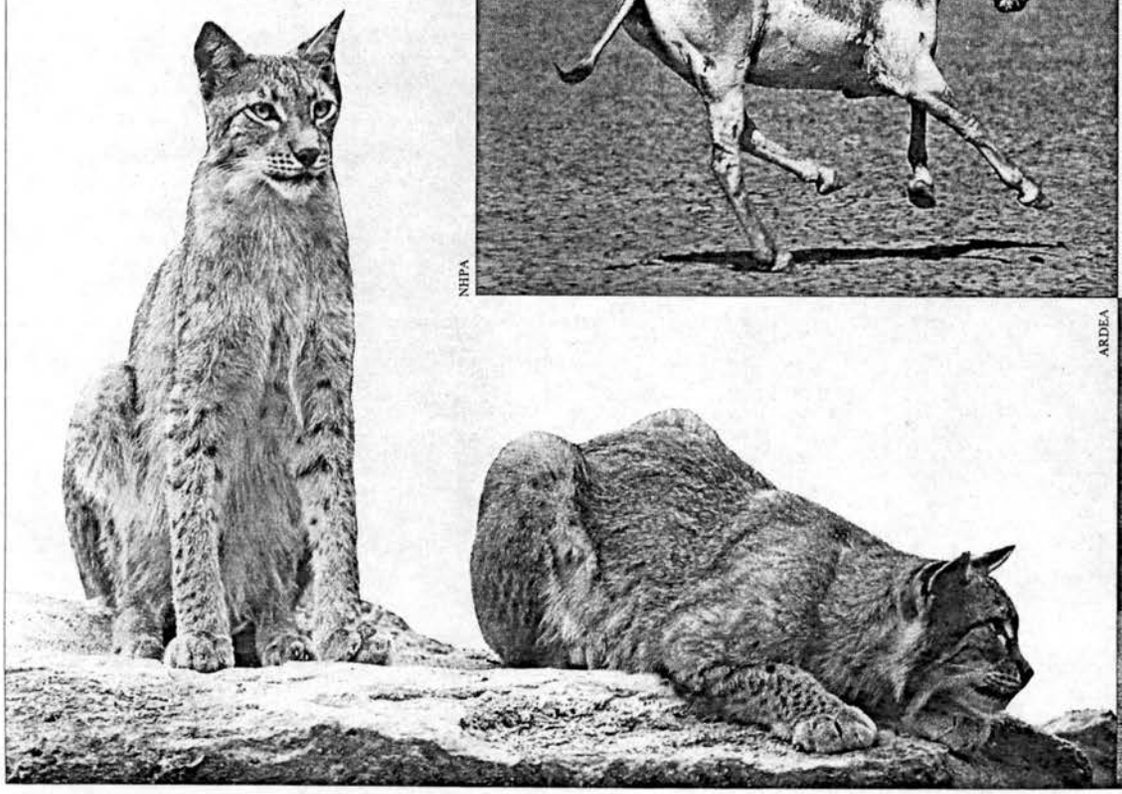


PHOTOGRAPHS BY RICHARD DUDLEY-SMITH

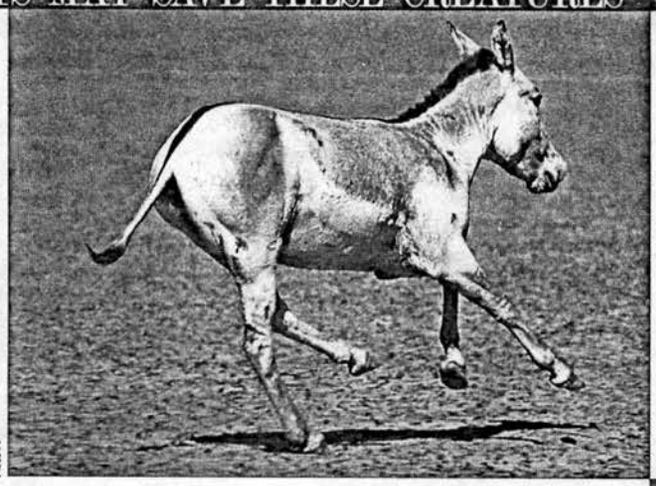


CONSERVATION PROJECTS MAY SAVE THESE CREATURES

The European Lynx, one of the small cats threatened with extinction.



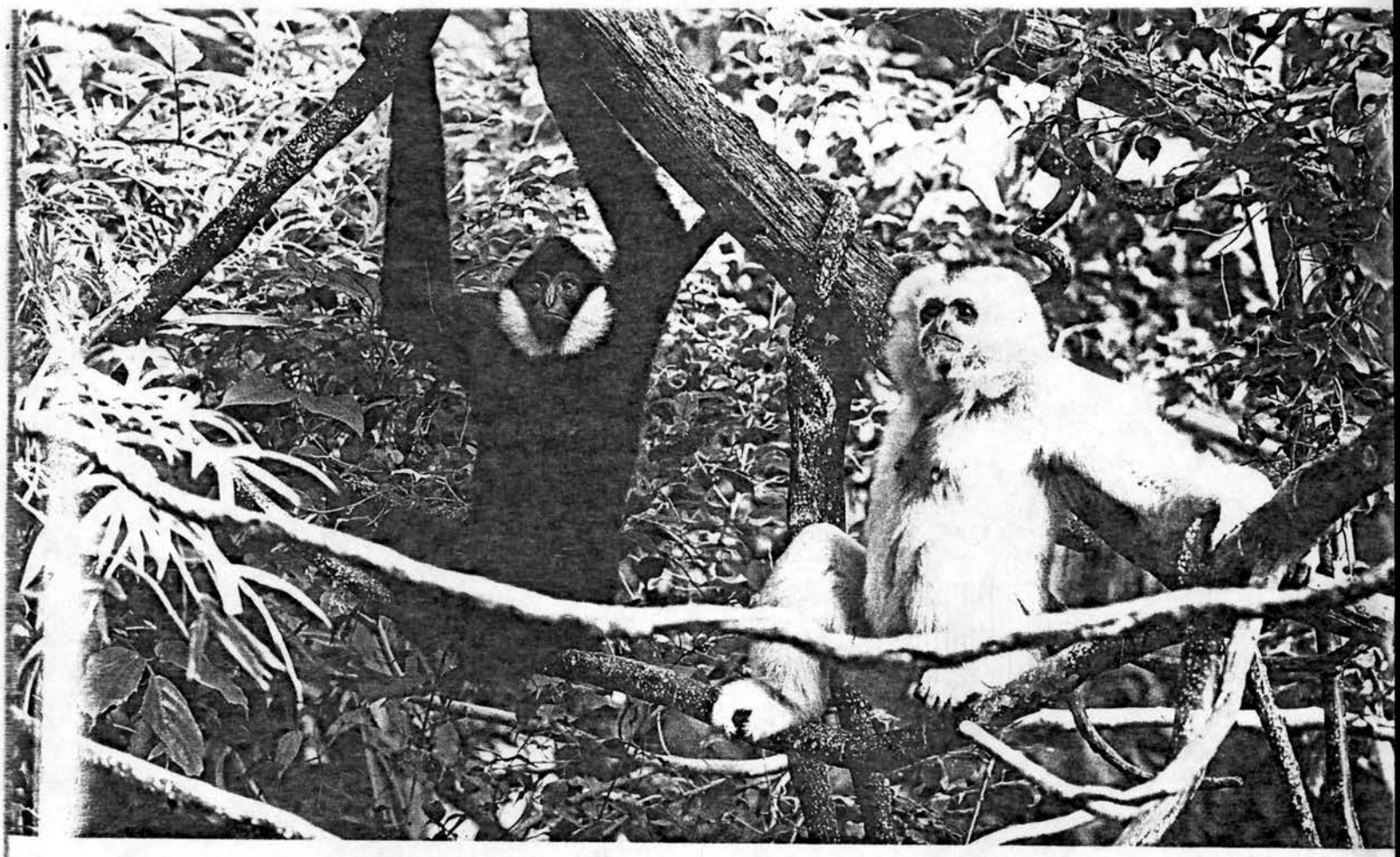
NHPA



NHPA

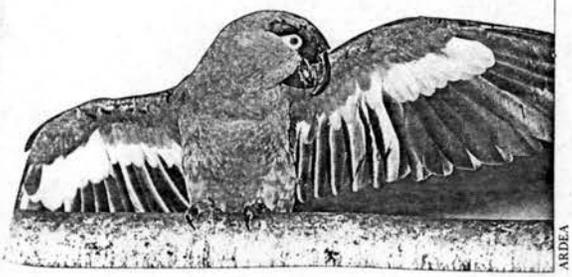
Left, the onager or Indian wild ass; below, the addax, which formerly roamed the entire Sahara area; right, the golden-headed tamarin, indigenous to Brazil; all of which have been released into the wild to boost the declining local populations.

ARDEA



NHPA

The thick-billed parrot, one of the species of bird involved in the conservation projects run by zoos.



ARDEA

chimpanzees and gorillas large pipes have been attached to their cages, with holes drilled in the top. Food is placed inside and the apes spend their time poking sticks into the holes, trying to manipulate the food to the ends of the pipes where they can reach it and reap their reward.

These simple devices, and others for different species, have resulted in increased activity and alertness which is good for the animals and interesting for the public. London Zoo is now expanding its environmental enrichment programmes to other species and it is likely that other zoos will soon hire their own specialists to improve the quality of life of their charges.

Motivated by an awareness of the need to upgrade animal welfare, a few responsible zoos have contributed to draft legislation laying down minimum standards of zoo animal husbandry for the whole of the European Community. Now under consideration by the European Commission in Brussels, this measure is an exemplary effort to force sub-standard animal collections either to improve or to close down. There is a growing trend among zoos to participate not only in the development of internal regulations but also in the promotion of international conservation treaties such as the Convention on International Trade in Endangered Species of Wild

Above, the white-cheeked gibbon in New York's Jungle World, in the Bronx, which was built for tropical forest species.

Above left, the gorilla enclosure at the Jersey Wildlife Preservation Trust, a zoo deeply involved in conservation.

Fauna and Flora (CITES). This requires a much wider understanding of wildlife management, law and policies than zoos have previously had to deal with, but they recognise it is essential if they are to move with the times.

One of the principal aims of CITES is to remove the threat to wild animals posed by international trade. The thinking zoos are leading the way by reducing their own demands on wild populations. This is done in two ways. The first is to keep more animals of fewer species, maintaining the right social groupings and increasing the number of species that breed. These days most zoo animals are captive-bred. The other way is to obtain new animals, when they are needed, from other zoos rather than from nature.

In the UK the Joint Management of Species Group, composed of 12 British and Irish zoos, manages a list of threatened or rare species as a co-operative programme. The animals are exchanged and moved between institutions in care-

fully orchestrated genetic management programmes to minimise the deleterious effects of inbreeding and to improve production, with no commercial gain for anyone. Any British zoo can join the group so long as it agrees to give up its own rights and let the scientists decide where the animals should be.

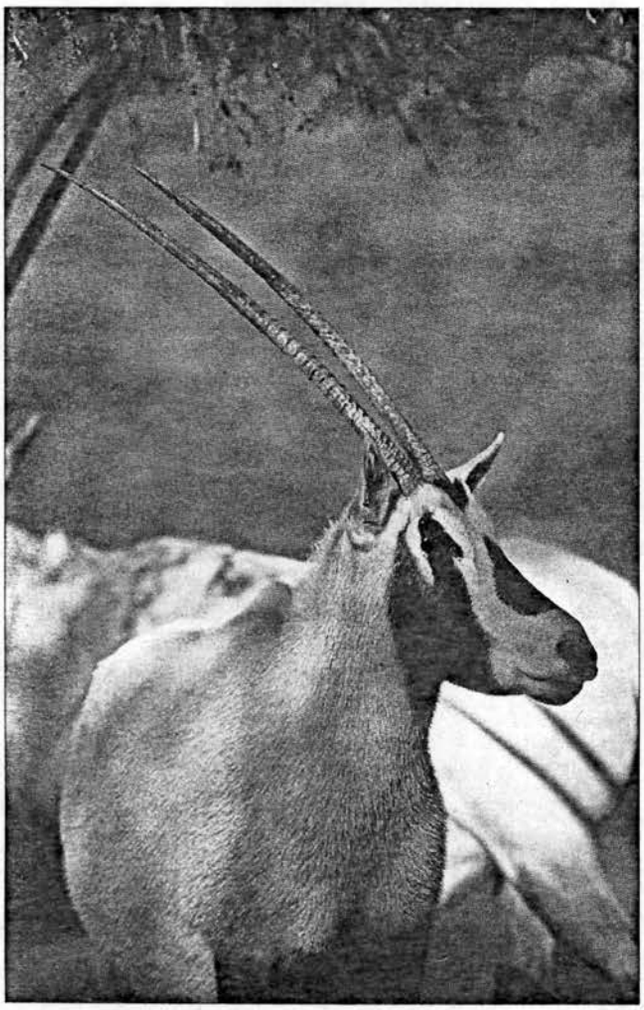
Similar programmes are being co-ordinated at international level. Here the scientists really come into their own. Many animals are moved around the world but it would be easier, cheaper and less stressful for everyone if their sperm could be moved instead. London Zoo's Institute of Zoology is doing pioneering work in this field, but it is at an early stage and sometimes there is no substitute for the living body.

This is certainly so in the case of the rhinoceros. The San Diego Zoo is spending hundreds of thousands of dollars to revamp and expand its rhino facilities and to develop a programme for the highly-endangered northern white rhino. There are only about 40 of these animals left in the world, of which 11 are in captivity. To increase the population as quickly as possible a second breeding group is being set up at San Diego, with three rhinos going from Dvur Kralove in Czechoslovakia and one from Sudan's Khartoum Zoo. The arrangements have also involved London Zoo and West Germany's Gelsenkirchen Zoo: moving fully-grown adult male rhinos across the world is not a simple process.

Rare animals are seldom taken from the wild by reputable zoos, and then only as part of a co-operative venture in conjunction with other zoos as well as international and local conservation bodies. The trend is increasingly for animals to go the other way—from zoos back to the wild. Arabian oryx, scimitar-horned oryx, addax, onagers, red wolves, golden-lion tamarin, Jamaican hutias, European lynx, several birds of prey, thick-billed parrots and Puerto Rican toadlets are some of the species which have been released into the wild to reintroduce or boost declining local populations. Zoos such as London, Jersey, San Diego and Cologne have all contributed animals as well as personnel and expert advice to these projects.

London Zoo is co-ordinating an international project for the reintroduction of the Arabian or white oryx into Oman—reported below—and the addax into Niger, and its scientific expertise is also being put to good use in other ways. In Kenya, for example, where most rhinoceroses are held in protected areas, it is helping in the management of the contained populations. On the basis of observations at London, techniques have been developed to identify when female rhinos are sexually receptive and also to suggest when they are pregnant—invaluable information when the birth of every rhino is important to the species' survival. Individual rhinos are closely monitored and provided with extra protection when it is needed: a female with calf is a sitting target. One critical problem with small, isolated populations is that to avoid harmful inbreeding and maintain genetically sound groups certain animals must be moved from one population to another. Here, too, London Zoo is providing help, its conservation geneticist identifying the right animals to move.

But London also recognises the need for local people to develop expertise in managing and handling their own wildlife. It has established a training programme to provide hands-on experience at the Zoo for vets from less-developed countries to learn about animal immobilisation, darting, handling and exotic animal medicine in general. These



A SPECIES SAVED

Project White Oryx is one of the world's most successful conservation efforts. Originated in London nearly three decades ago, when the handsome animal had been hunted almost out of existence, the project was taken up by London Zoo and by Phoenix Zoo in Arizona, and then by others, with such success that today there are more than 1,000 surviving—half of them in Arabia, the others spread in zoos in many parts of the world.

The Arabian oryx—*Oryx leucoryx*—is one of four species, and the only one to be found outside Africa. It was first mentioned in 400 BC by Ctesias, and on sighting a herd in 1656 the Carmelite friar Vincenzo Maria wrote: "They all have two horns, two or three cubits high . . . I myself believe these creatures to be those which some writers describe as unicorn." Smallest of the antelopes, and the only white one, the Arabian oryx has thin, sharp-tipped horns up to three feet long, and is wily, fast and sturdy. These qualities are vital to its survival in arid desert lands where it may have to live for months without water, and travel vast distances to find it. One animal is known to have survived for 11 months without drinking, another to have travelled nearly 100 miles to reach water.

The oryx was hunted not only for its meat but because it was believed that any man who caught one would take on its virtues of courage, strength and endurance. In earlier times it was more than a match for its hunters, but the introduction of the automatic rifle and fast jeeps in the 1950s decimated the herds. By 1962 only a few were left.

In that year Operation Oryx was set up by Lt-Col Leofric Boyle of the Fauna and Flora Preservation Society of London, together with the newly-formed World Wildlife Fund and the Survival Service Commission of the International Union for Conservation of Nature and Natural Resources. With much difficulty three animals—two males and a female—were captured in the Rub' al Khali, the "empty quarter" of southern Arabia, and they were sent, together with another female given by the Sultan of Oman to London Zoo, to the then newly-opened zoo in Phoenix. This zoo had both a suitable climate and space in which

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Black leopards in the New York Zoological Society's Jungle World.

activities not only demonstrate the growing link between field conservation and captive management but underline the commitment of some of the better zoos to the world's wildlife and not exclusively to their own self-interest.

The reasons for this are not always appreciated. To begin with, it is becoming increasingly obvious that the great untouched wilderness, where animals live in the freedom and balance of nature, is a fantasy. The destructive consequences of human interference in the environment are evident everywhere. As human populations expand and the need for development grows with them, the world's remaining wild places will be fragmented. Their constriction means that both the habitats and the animals they nurture will have to be managed if they are to survive. Protected areas will effectively become "mega-zoos" in which many of the techniques and specialist knowledge already developed in zoos will be directly applicable.

In Kenya, where rhinos are now having to be placed in strictly-guarded sanctuaries, much of the expertise involved in moving them around, the monitoring of their reproductive state and the long-term genetic management of the remaining isolated groups have been developed at London Zoo, among others. Nor is this the exception. The futures of many other species, such as kouprey and tamaraw (wild Asian cattle species), spix macaws and partula snails, are dependent to varying degrees on captive-breeding techniques and technical support from the zoo world.

It is an exciting time for zoos committed to the conservation ethic. They have often been lambasted as an irrelevance to wildlife, but the trend-setters are among the foremost conservation organisations in the world. And the Zoological Society of London is one of the front-runners □

to reproduce the white oryx.

The project began to grow. The Sultan of Kuwait sent a lone female to Phoenix in the autumn of 1963, and in the following spring two new pairs were sent from the King of Saudi Arabia's farm near Riyadh. Two of these nine proved non-reproductive, so seven oryx became known as the "World Herd Founders"—three from Rub' al Khali, three from Riyadh and one from London.

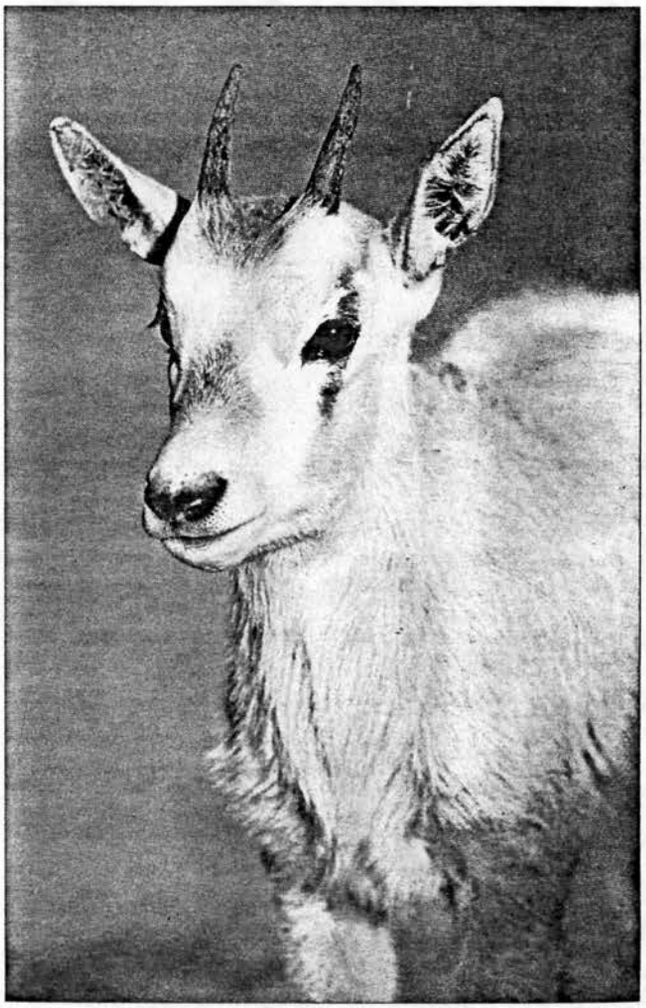
The first calf was born to this herd in October, 1963, the second in the spring of 1964, and from these a gestation period of 260 days was recorded. But from the first four years of breeding there emerged seven males in a row, which limited calf production to the founder female for the first seven years of the programme. Controlled breeding is slow, for putting a pair in the same pen does not mean that they will immediately mate, but the careful programme developed healthy, vigorous calves, and prolonged the breeding potential of the founder herd. The founder cow, called Edith, lived at Phoenix for 16 years and produced 13 calves.

The birth rate increased and in 1972, when there were 35 oryx at Phoenix, six were transferred to San Diego to relieve crowding and prevent the possibility of an epidemic wiping out the herd. In 1976 another eight animals were sent to San Diego, and four to Brownsville in Texas to establish another centre. Two years later the first Arabian oryx were returned to the Middle East—four males from San Diego, three females from Phoenix and a fourth from Los Angeles—all going to the newly-opened Shaumari reserve in Jordan.

To increase the safety margin, part of the herd was distributed to European zoos—to Berlin, Antwerp and Zürich—with an agreement that when a number equal to their original stock was bred the new animals would be sent to London.

In the Middle East the situation remained bleak. The last known oryx in the Jiddat al Harasis of Oman, whose tribesmen had for centuries been proud and protective of their wild herds, had been killed by hunters in October, 1972. At the Sultan's request the trustees of the world herd in America agreed to provide animals to restock the Jiddat al Harasis, and 14 animals were sent. In 1982 the gates were opened and the first herd of Arabian white oryx was released into the wild. The work continues, and a species has been saved.

PATRICIA JELLICOE



PHOTOGRAPHS COURTESY PHOENIX ZOO

Cleveland Metroparks Zoo
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Cleveland, Ohio 44109
(216) 661-6500

FAX
216-351-2584

STEVE H. TAYLOR
Zoo Director

KEY RESULTS AREA: IMPROVE THE AAZPA PUBLIC IMAGE OF CONSERVATION

it's member institution

How to measure or quantify:

1. Number of articles appearing in national publications that represent the AAZPA as an organization committed to conservation.

2. Number of national exposures other than publications that successfully carries our message (PSA, TV exposure etc)

3. Number of articles in the Communique that reflect our message accurately.

4. Number of times the Executive Director supports institution actions by representing our message accurately.

5. Number of "wins" in issues where animal rights people square off with the "establishment".

Past Performance:

AAZPA members have handled PR crises with defense-posture reactions, allowing negativism to govern their behavior. Turning the other cheek to critics and avoiding participation in issues has been part of this defensiveness. Different institutions have developed different media policies, with different results, in terms of internal damage control. Member institutions have undertaken education programs which could have sown seed of opposition by not overtly considering all PR ramifications. AAZPA has perhaps tended to promote its specific programs directly, that is, attempting to define and rationalize to the public some fairly difficult conservation concepts related to SSP's, although AAZPA opposition, in terms of animal rights activism, has not necessarily related to programs at all. There has been a lack of proactive promotion of specific achievements of AAZPA members in coordinated fashion. Professional organizations only tangentially related to AAZPA (fish and wildlife, resource management) are not as familiar with AAZPA as might be wished.

New Objectives:

1. Develop a specific strategy for dealing with animal rights issues.

2. Develop a method for responding to issues in a pro-active way.

3. Develop additional ways to communicate the organization's message to the publics it wants to reach.

4. Adopt standard positions on controversial issues to avoid adding conflict.

5. Assist in promoting a common image for all member institutions, not just those involved in SSP's.

6. Assist member institutions toward well-defined education and conservation goals which work toward enhancing our public image.

Available Strategies: **(These strategies do not necessarily correspond with the objectives.)**

1. -determine list of "hot" areas
   -identify the position AAZPA wants to take
   -Collect supporting information
   -Communicate to the membership and outside

2. -continue strategic planning process to stay on top of emerging issues
   -develop mechanism which encourages discussion of new and different ideas
   -develop mechanism to involve as many new and good thinkers as possible
   -develop reward structure for people who address new ideas in a constructive way.
   -Hold annual Director's meetings to discuss strategies and keep everyone informed

3. -determine the audiences we want to reach which have the largest impact
   -create a method for reaching those audiences.

4. -Examine existing data bases to identify informative trends in public attitudes
   -Obtain personality profiles of typical animal rights activist regarding motivation and develop arguments acceptable to the mentality traits identified.
   -Determine where general public most likely to sympathize with animal rights concepts.
   -Work toward developing questions which remain unanswered regarding public opinion on humane issues.

5. -Collect baseline data on opposition interest groups. Build central data base for use in refutations of opposition stances ie. comparative statistics on membership support.

marketing task

Molly Hood
* Market research

- Crisis mgmt
- white paper
- Inc. list of publications
- investigate publishing yr'ly mag

In our area?

OBJECTIVES: Protect & preserve the concept of animals in controlled conditions

Protect & enhance the zoo & aquarium image with customers

Protect & enhance zoos & aquariums as leaders in the area of environmental & wildlife conservation

Avoid & fight regulations that would interfere with zoo & aquarium business operations

STRATEGIES: Defend the concept of animals in controlled conditions by generating zoo & aquarium stories on the benefits

Position zoos & aquariums as positive environmental & conservation leaders

Seek support from & educate third parties (environmental groups, government, news media)

Develop consistent, coherent & honest positions on issues

WORKSHEET FOR DETERMINING OBJECTIVES AND STRATEGIES IN A KEY RESULT AREA

KEY RESULT AREA: _____

How Measure	Past Performance	New Objectives	Available Strategies	Best Strategies and Rationale

Strategies

A strategy is a main route that leads to an objective. When a strategy is adopted, the various kinds of resources to carry it out are committed to it.

An objective is what you are seeking to achieve. It is a destination.

A strategy sets out how you are going to achieve the objective. It is a broad route to the destination.

An objective is an "end," while a strategy is a "means" to the end.

Most objectives require a combination of several strategies carefully selected from many alternatives.

To be successfully implemented a strategy needs step-by-step action planning that spells out who must do what and when.

Robert F. Smith
San Diego, California
November, 1989

MKT research

dvl new logo + name
Conduct market research on audience
repeat Hill + Knowlton research

develop the message

deliver it

1.) develop an easily recognizable name + logo

2) Conduct market research to determine audience + issue

3) develop a public relations plan to deliver your message. using results of market research

date them - maybe more than 1
or no more than $___

assess results of 1&2

Create team to dvl plan

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

Objective 1: Develop an easily recognizable ~~name + logo~~ identity to improve name recognition for the organization by Sept. 1991

Strategy:

~~A. Hire consultant to determine~~ give ~~whether should~~ concurrance of need for change

~~B.~~ Contract prof. for concurrance ~~of~~ input ~~of~~ development

Objective 2: Conduct market research to determine our audiences + issues by

Strategies: ~~develop conduct public opinion~~

A. Review Hill + Knowlton

B. Determine methodologies for research

C. Implement ~~the res strat~~ the methodology

D. Communicate the Results

~~A. Review existing materials~~

A. Develop + implement

June 20, 1990

"Tip Sheet" for Doing Action Planning and Performing a Cost/Benefit Analysis

Key Result Areas (KRA) and their Strategies should not be viewed as "business as usual." Rather, they are a commitment to putting resources behind those actions which the Strategic Planning Group has determined will achieve the organization's mission. They emphasize doing things that are new, better and different.

Preparing an Action Plan is just like making a list of tasks you want to accomplish in a day's work. The main differences are: more people are involved, the timing is more precise, more information is provided, and it covers much more than one day's work.

The Action Plan form we are using is simple and well-proven.

It starts with a heading at the top which spells out the wording of a specific Strategy. It also provides for stating the KRA involved and its Objective(s).

In our planning system we need at least one Action Plan for each Strategy.

Next, under the column reading "Action Steps," list the major steps that have to be taken to make implementation of the Strategy happen. These steps should be listed in the chronological sequence in which you believe they should be taken.

It is not necessary to become finely detailed in listing the steps. However, the steps should not be so broad, lumpy, or abstract in their language, that we cannot later determine progress (or lack of progress) toward their completion.

Going on...for each Action Step we need to indicate who is logically responsible for doing it. This can be an organization or an individual. It is probable that in some steps more than one organization or individual are responsible. Whatever the case, use the "Who Responsible" column to show the parties. If more than one organization or individual have a shared responsibility, use the REMARKS column to explain and to indicate who is recommended to chair the joint effort.

On the Action Plan form, for each step you will see there are 3 columns calling for dates: Starting Date, Scheduled Completion Date and Actual Completion Date. "Starting Date" means when a step should begin. "Scheduled Completion Date" is your recommended deadline for finishing the step. "Actual Completion Date" will be used later when we note when the step, in fact, has been completed.

The REMARKS column has many uses. Several examples are shown at the top of the column on the Action Plan form. The best Action Plans usually have many useful entries in this column.

Other Tips

Keep in mind that an Action Plan is a plan. It is meant to layout clearly and specifically things that have to be done in the future. However, when you are immersed in preparing one, it is easy to assume it is a report on things already done, putting yourselves under unwarranted stress when looking ahead to the date the Action Plan will be presented. At this point in our process, we are still planning, not doing. That comes later.

Participation is a key to successful implementation. To the degree time permits, consult with the organizations and individuals whom you believe should be responsible for taking Action Steps. Obtain their inputs. This is a bridge to gaining understanding, commitment and action.

Cost/Benefit Analysis

This deals with the familiar issue: Is it worth it?

As with almost every attempt to improve things, there are costs and benefits connected with implementing an Action Plan.

Start out by putting in the space provided at the top of the form the wording of the Strategy (and Key Result Area it serves), which you are addressing with an Action Plan.

The form will assist in determining benefits, costs and net benefits (after subtracting costs). It is meant to be a helpful guide/work sheet.

It leads us to think through, and put on paper, what we believe are predictable benefits that the Action Plan will provide in each of the years in our planning period. As far as practical, these should be quantified. But, when it is unrealistic to do this, we need some kind of narrative description of the benefits.

The form also helps us to take the same approach for detailing the costs anticipated each year.

And last, there is the bottom line: do the benefits outweigh the costs? And if they do, by how much? This is the "Net Benefit Summary."

Remember, the form is meant as a guide/work sheet. Modify it so it best suits your needs as you do the Cost/Benefit Analysis. Back it up with the numbers, specifics, assumptions and narrative explanations which show your thinking and conclusions.

To assist you in determining cost estimates, you also have a Resource Requirements Sheet. This is a check-off of types of resources you will need...and is a tool for showing the amount you believe you will need in each category.

When you present your Action Plans to others for review and approval, it helps to provide photocopies of your Action Plans, Resource Requirements Sheets and Cost/Benefit Analyses for all the group. It also will help to have transparencies made of them for use on an overhead projector.

Robert F. Smith
Decatur, Illinois
June 20, 1990

RESOURCE REQUIREMENTS AND ESTIMATED COSTS FOR ACTION PLAN THAT ACCOMPANIES

KRA _____

STRATEGY _____

PEOPLE

FACILITIES (office, equipment, material, other)

OUTSIDE SUPPORT (e.g. computer service time; consultants)

TRAVEL

FINANCIAL

TIMING CONSIDERATIONS (e.g. when will most important resources be needed?)

COST/BENEFIT ANALYSIS FOR ACTION PLAN

KRA _____

STRATEGY _____

Show the benefits and costs that are anticipated in each year by implementing this Action Plan. If capital costs and personnel additions or reductions are anticipated, they should be shown.

ACTION PLAN BENEFITS:	First Year	Second Year	Third Year	Fourth Year	Fifth Year
(List and describe briefly)					

ACTION PLAN COSTS:

Capital Costs					
Additional personnel costs					
Other additional costs					

NET BENEFIT SUMMARY -- State how the benefits outweigh the costs

For instructional use only in developing planning methods. Not for distribution.

ACTION PLAN

DATE: 9/5/86

PAGE 1 OF 2

KRA # 3 — Become the low cost producer

OBJECTIVE A — Reduce cost/ton 4%

OBJECTIVE B — Reduce manhours/machine hour 12%.
We will additionally track trends of improved profit/employee which should result from the KRA # 3 strategies

STRATEGY A — Lower direct and indirect labor and material usage costs

KRA PLANNING LEADER:
T. K. Breitfuss

INDIVIDUALS RESPONSIBLE FOR STRATEGY ACTION STEPS:
R. G. Holmes

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, etc.)
1. Develop statistics on actual usage and efficiency of:					
A. Cement	M. T. Hennings R. G. Holmes	11-86	04-87		A & B) To be developed by M. T. Hennings and R. G. Holmes with a system for tracking progress toward goals
B. Manhours/Machine Hour	M. T. Hennings R. G. Holmes	11-86	04-87		
C. Steel	J. Zicaro Region Engineers	11-86	06-87		C & D) To be developed by J. Zicaro and Region Engineers with a system for tracking progress toward goals
D. Other Materials (spacers, etc.)	J. Zicaro Region Engineers	11-86	06-87		
For each Plant, Region					
2. Establish an achievable goal (% reduction) by location for each of the following:					
A. Cement	Region Managers	A. 05-87	05-87		A & B) Using information provided by M. T. Hennings and R. G. Holmes
B. Manhour/Machine Hour		B. 05-87	05-87		
C. Steel		C. 07-87	07-87		C & D) Using information provided by J. Zicaro and Region Engineers
D. Other Materials (spacers, etc.)		D. 07-87	07-87		

CONTINUATION SHEET

ACTION PLAN

KRA # 3

STRATEGY REFERENCE A

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, etc.)
3. Convey to each location the established goals and timetables:					
A. Cement	Region Managers	A. 05-87	05-87		This must be a written instruction giving each location's established goals.
B. Manhours/Machine Hour		B. 05-87	05-87		
C. Steel		C. 07-87	07-87		
D. Other Materials (spacers, etc.)		D. 07-87	07-87		
4. Track the progress toward each goal	Plant Managers District Managers	07-87	Monthly		Using tracking systems provided in Action Step 1.
5. Act on the variances from goal performance on a monthly basis	District Managers	07-87	Monthly		
6. Train Q. C. personnel in mix design, aggregate testing, concrete testing, etc.	Region Engineers	01-87	Continuing		Regional Q. C. and Superintendent meetings should be held on an annual basis
7. Review progress of each location and adjust goals and timetables as required.	AD - HOC Committee: T. K. Breitfuss - Chairman M. W. Piche' J. P. Zicaro	07-88	09-88		

June 20, 1990

KNOWING AND ANALYZING THE COMPETITION

By Robert F. Smith

In strategic planning in recent years, more and more attention has been given to gathering information about competitors and then drawing useful comparisons and contrasts from such data.

Generally called "competitive analysis", this part of the planning process requires collecting facts from a variety of sources. With such data, an analytical procedure can be followed to determine where one's own organization, products and services stand in comparison to those of principal competitors.

Building The Data Base

The first task is building the data base. This works best when you try to put yourself in the shoes of each of the major competitors. That frame of mind helps in pulling together everything you can about the competitors' customers, products, services, market research, market segments, unique niches, marketing/sales programs, budgets, strength and depth of management and other staff, financial resources, strategic and operational planning/budgeting, information systems, image in the marketplace, technologies, research and development capabilities, relationships with suppliers, existing litigation and exposure. With such information, the guess work can largely be removed when comparing one's own situation with that of the competitors.

Analyzing The Data

What is needed now is a tool for analyzing the data. An instrument for this is the "Competitive Matrix." Such a tool is shown below, followed by an explanation of its use.

Competitive Matrix

"Critical Factors for Success"	"Our Side"	Competitor A	Competitor B	Competitor C	Competitor D
1.					
2.					
3.					
4.					

You can put narrative statements of comparison in the boxes of the Matrix or use quantified evaluations, e.g. on scale of 1 to 10, how do we compare with the others?

It is important to understand the Matrix's two-dimensional nature. Down the vertical column on the left are what are known as "Critical Factors for Success." These are criteria which are the bases for comparing one's own position against the competitors'. How well organizations perform against the Critical Factors for Success determines who wins and who loses in the competition of the market place. Critical Factors for Success can be selected from the categories of competitive information listed earlier. For example, market research, research and development, service delivery, information systems.

The Critical Factors can be shown in priority of their importance and can be weighted to indicate the degree of precedence which some have over others.

Across the Matrix are a series of columns for the names of the major competitors (our own name is usually the first column heading).

Then, in the Matrix boxes which make up the grid, we can place narrative statements of comparison or quantified evaluations of relative strengths (as on a scale of 1 to 10) for us and our competitors against all the Critical Factors for Success. This can range from simply saying "stronger" or "weaker" all the way to entering quantified evaluations, which, when combined with the weighted ranking of the Critical Factors, provides comparisons with considerable reliability.

This makes possible an advance from top-of-the-mind judgments about competitors to more thoughtful and objective comparisons. Going through this procedure (including the recorded reasoning for the evaluations) is "competitive analysis."

Beyond these steps, there is the option, too, of creating a "competitor information system." Such a system, on a continuing basis, gathers data, organizes and interprets it, and then periodically disseminates the results to the strategic planning team and to other people in the organization who are involved in planning, organizing and evaluation witin their own functional specialties.

Robert F. Smith
San Diego, California
June 20, 1990

INVOLVEMENT MATRIX FOR CHARTING THE FLOW OF A PROCESS, CLARIFYING ROLES

CODE

C = Concurs (is consulted; needs to agree)
R = Responsible to get a step accomplished
A = Authorizes; approves
I = Is informed

PROCEDURE

Indicate in CRAI columns below the names and/or titles of individuals involved in each step of the process or administrative activity

Process or Administrative Activity

Steps (chronologically)	C	R	A	I	Remarks
1.					
2.					
3.					
4.					
5.					

Robert F. Smith, Tampere, Finland, February, 1985

WORK DISTRIBUTION CHART

(From US Army Organization Training Program, 1942)

Organization Unit: _____

Manager: _____

Date Prepared: _____

Major Work Clusters	Team Member "A"	Team Member "B"	Team Member "C"	Team Member "D"	Remarks
1.					
2.					
3.					
4.					

Note: In order to make it easier to prepare this chart, have each team member prepare an individual Task List first.

Robert F. Smith
Napa, California, February, 1985

TASK LIST

Team Member: _____

Date Prepared: _____

Tasks	Percent of Work Time	Remarks	Work Cluster of which it is a part (to be inserted later)

Robert F. Smith
Napa, California, February, 1985

STRATEGIES & TEAMS, INC.
ROBERT F. SMITH
APRIL 20, 1988

MARKET SEGMENT: _____

MY DEPARTMENT: _____

SUPERVISOR'S CUSTOMER/CLIENT EXPERIENCE MATRIX

CUSTOMER/CLIENT'S MAIN NEEDS & EXPECTATIONS	HOW BEING MET NOW BY MY OWN AND OTHER OTHER DEPTS?	WHAT MORE SERVICE CAN BE ADDED (OR CHANGED)?	WHAT CAN BE DISCONTINUED?	WHAT SHOULD BE ADDED AND/OR DISCONTINUED?	CRITERIA USED IN MY DECISIONS	ESTIMATED NET COST FOR CHANGES	REMARKS

Guest Services
Gift Store
Food Service

SERVICE IMPROVEMENT WORKSHEET

SERVICE CATEGORY	WHAT NEEDS DOING	BY WHOM	WHEN			REMARKS
			MONDAY	30 DAYS FROM NOW	OTHER LATER DATE	

Note: Hypothetical only. Not meant to be a specific organization. Illustrative of a large and complex enterprise...in this case the example is a zoological garden.

EXAMPLE OF DECISION-MAKING MATRIX

This matrix is a tool for clarifying who is involved in making important decisions...and what the kinds of involvement are.

Use the legend below, or write what each player's part is, in the boxes below each job title.

LEGEND:

M = Makes the decision
R = Does the homework and recommends the decision
C = Is consulted before decision is made
P = Should participate in making the decision
I = Is informed of decision once it is made

Important Decisions	Affected Curator	Chief Veterinarian	Director of Scientific Research	Manager of Marketing and PR	General Managers of the zoo	Director of Education	Director of Horticulture	Director of Finance	Director of Human Resources	Board of Trustees
Create a new building or exhibit										
Acquire a new animal species										
Select a research topic for funding										
Acquire new capital equipment costing $100,000 to $250,000										
Create new organization-wide policies										
Corporate reorganization										

Robert F. Smith, Chicago, Illinois, May, 1990

American Association of Zoological Parks and Aquariums

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ROY A. SHEA

R. GREGORY TARRY

8 June 1990

MEMO TO: STRATEGIC PLANNING COMMITTEE

FROM: LINDA BOYD, PLANNING COORDINATOR *Linda*

SUBJECT: MATERIALS FOR MEETING IN TULSA

The following are enclosed:

1. Revised list of critical factors for success - Marliave
2. Revised list of Cultural Characteristics of the AAZPA - Roberts
3. Legislation Task Force Report - Wylie
4. Conservation Task Force Preliminary Report - Seal

Membership Services Task Force Chairman Taylor and Image Task Force Chairman Lentz will mail their reports to you sometime next week. As Ulie is in Ethiopia, I was not able to determine when his final report will be forthcoming.

The meetings of the Nucleus Planning Group will be conducted from 9:00 a.m. until 5 p.m. on Monday and Tuesday, 18-19 June at the Westin Hotel.

/ljb

Enclosures

Copy to: Bob Smith

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

AAZPA NPG: Critical Factors for Success

Membership Support, Volunteer Participation (***)

Communicating AAZPA goals and the status and progress of committees and SSP groups to AAZPA members is the first step toward obtaining fullest support. Avenues of communication, including input and feedback routes, need to be better established and made effective so that all members may become involved. Availability of a large volunteer force is essential.

Dedicated Professional Staff (**)

AAZPA staffing levels must be adequate to meet goals and assigned tasks. Staff members must be those best qualified for their jobs. These staff need a high level of committment and must be seen to succeed in achieving AAZPA goals.

Good Public Image (**)

AAZPA members enjoy broad public support, but suffer from opposition by special interests. Achieving balance in media and press coverage is of continuous concern. This factor integrates with a proactive posture.

Credibility in Conservation (**)

As with public image, the conservation goals and successes of AAZPA members are broadly recognized, but competition for donations and opposition by special interest groups has deleteriously affected credibility of conservation efforts in the past. Further organization of conservation efforts, development of professional expertise, and more proactive positioning will enhance credibility.

Stability of Financial Resources (**)

AAZPA must continue to obtain adequate funding for its staff and programs, and will need to ascertain that member commitments are as long range as AAZPA programs.

Meeting the Needs of Members

The work objectives of AAZPA must be in line with, and adapt to the changing needs of members. This factor involves both realities and perceptions, underscoring the critical requirement for successful communication.

Proactive Posture

This factor relates strongly to the public image and conservation-credibility of AAZPA. AAZPA staff and members must anticipate crises and pre-empt media/press negativism or legislative crises in a proactive fashion. AAZPA is a fundamentally successful organization, but has previously suffered by arriving in situations where knee-jerk reactions seemed required. Where appropriate, AAZPA must assume national leadership and/or international involvement in key conservation areas.

KEY RESULT AREA: LEGISLATIVE PLAN

PREFACE:

For the past few years, the AAZPA has employed a Legislative Coordinator on a contractual basis. This person has essentially worked with and through the Association's Legislative Committee, which is composed of nine members. This person's responsibilities have largely been that of monitoring legislative activities and assisting in the formulation of responses and positions on these matters. As of June 1, 1990, the Association added a full-time member to its professional staff who is responsible for its legislative functions.

HOW TO MEASURE OR QUANTIFY:

A. Over 100 legislative issues surface each year that require time and effort in order to decide their degree of relevancy to the profession.

B. Approximately 1500 man hours per year are spent by the Association's Legislative Coordinator on legislative matters; this does not include the number of man hours contributed to the Association by members involved with legislative activities.

C. The total cost to the Association for legislative involvement has averaged approximately $55,000 (fees and travel expenses) per year. Approximately the same amount is expended by others, on behalf of the Association, in the pursuit of legislative matters.

PAST PERFORMANCE:

A. There have been too many legislative issues and no identified priority by which to address them.

B. There has not been enough manpower available (paid or volunteer) to oversee legislative matters.

C. The Association has occasionally been criticized for failing to address <u>all</u> of the legislative issues that affect <u>all</u> of its members. (This is no doubt an unrealistic goal.)

D. The Association has had difficulty in arriving at a position on some issues, and on occasion may have avoided those that were controversial.

E. The Association has been unable to react to legislative issues or challenges on a timely basis.

F. Reaction to legislative matters has been more "knee-jerk" than the result of preplanned responses or position statements.

G. Association members have not been overwhelmingly responsive to legislative issues.

NEW OBJECTIVES:

A. Identify legislative priorities and exert a more concentrated effort toward addressing these priorities.

B. Expand the manpower base assigned to legislative-related activities.

C. React to legislative challenges on a more timely and effective basis.

D. Establish a more proactive aggressive stance on pertinent legislative issues by being prepared.

E. Make Association members more aware of legislative challenges.

AVAILABLE STRATEGIES:

Listing Issues

A. Formulate a list of legislative priorities.

B. Formulate position statements based on a pertinent data base.

C. Create a method for enhancing the decision-making process; re-evaluate the Legislative Committee process.

D. Identify methods for impacting legislation; possibly retain outside firm/person to assist with legislative issues.

E. Develop a phone/FAX/mailing network.

F. Educate members about the legislative process, their elected representatives, and appropriate committees on which they serve.

BEST STRATEGIES AND RATIONALE:

A. Formulate a list of legislative priorities.

- An action plan cannot be developed if desired accomplishments are not known.

- These priorities should be identified by appropriate staff and Association members who have the broadest perspective and knowledge of our legislative challenges.

B. Formulate position statements based on a pertinent data base.

- This will enable the Association's membership to work together and support a consensus that can be corroborated by meaningful statistics.

C. Enhance and strengthen the decision-making process.

- The committee process often slows down the "wheels of progress" because decisions are sometimes not made on a timely basis; individual attention to a legislative issue by appropriate parties, which is then followed by a consensus of opinion and a position statement (if required), will enable the Association to react more effectively.

D. Identify methods for impacting legislation.

- The addition of an experienced and knowledgeable Legislative Coordinator to the Association's professional staff will improve our ability to address legislative issues; the retaining of an outside firm or legislative specialist will also enhance our ability to impact specialized or high visibility items.

E. Develop a phone/FAX/mailing network.

- The ability for us to communicate with our membership on a more expedient basis will greatly improve our potential for impacting legislative issues.

F. Educate members about the legislative process.

- The general membership of the Association will need to know who their elected representatives are and on which committees they serve. These officials need to be educated about <u>our</u> causes and philosophies through their constituents.

- The general membership needs to have a more thorough knowledge of laws and regulations.

SRW:dsc

6/6/90

Form coalitions
- w AAU & bus related
taxes

DEVELOPMENT OF AAZPA CONSERVATION PROGRAMS

OBJECTIVE 1: Integrate existing and future AAZPA programs with global captive breeding and field conservation efforts.

Strategy 1: Develop a continuous and efficient liason and communication system between AAZPA Board, WCMC, and AAZPA staff with IUCN CBSG, SSC, ISIS and other global and world regional conservation organizations.

Strategy 2: Participate in the development and implementation of a global master plan which identifies priority species and habitats (including, but not limited to the Global Species Heritage Program being developed by IUCN CBSG).

Strategy 3: Create state of the art workshops with U.S. Fish and Wildlife Service, IUCN and other agencies to plan and implement SSP masterplans, including reintroduction programs.

OBJECTIVE 2: Expand SSP and studbook programs as rapidly as possible to meet regional and global conservation needs. (This will require at least a doubling of existing programs by 1995).

Strategy 1: Streamline existing procedures to minimize meeting times, travel expense and other associated costs, including but not limited to, the development of increasingly "user friendly" software programs to support genetic and demographic management.

Strategy 2: Recruit more individuals to manage SSP and taxon advisory groups, including but not limited to, the development of better methods for recognizing the efforts of species coordinators.

OBJECTIVE 3: Establish an AAZPA Conservation Biology School, with the objective of training curatorial and other staff in techniques and procedures relevant to the management of SSPs and taxon advisory groups.

Strategy 1: Create a task force to discuss goals, budget, nature of curriculum, teaching methods, sites, and relationship to existing programs.

Strategy 2: Create a self-sustaining training program, utilizing the human and other resources of a number of AAZPA institutions.

OBJECTIVE 4: Provide assistance and encouragement for the development of scientific programs in support of the SSP, including but not limited to, projects aimed at solving specific husbandry problems.

Strategy 1: Encourage the evolution of organized scientific programs in zoos and aquariums by: (1) developing and disseminating model research protocols (e.g., those related to participation by outside scientists, collection and shipment of

biological materials, permit requirements, animal welfare regulations, etc.), and (2) developing a means by which zoo biologists and cooperating institutions can be recognized for their work (e.g., awards for Excellence in Zoo and Aquarium Science).

Strategy 2: Organize and develop scientific expertise in support of the SSP through the formation of a WCMC Scientific Advisory Committee, including the identification of recognized experts in relevant disciplines (e.g., in molecular genetics, systematics, nutrition, behavior, and reproduction).

Strategy 3: Encourage and assist SSP committees in the identification of critical research priorities, including but not limited to the identification of qualified investigators to help complete specific projects.

Strategy 4: Encourage SSP committees to seek outside funding by developing a database of potential funding sources for various research projects.

OBJECTIVE 5: Seek, procure and disseminate funding for AAZPA conservation efforts.

Strategy 1: Establish protocol, proposal evaluation criteria and guidelines for administering AAZPA Conservation Endowment Fund monies.

Strategy 2: Compile appropriate data, including a list of project priorities, to allow AAZPA Development staff to seek appropriate corporate, fundation and grant support for existing and planned conservation programs.

OBJECTIVE 6: Develop more efficient means of disseminating critical biological data in support of the SSP.

Strategy 1: Develop a more efficient publication system, including but not limited to the publication of research news, workshop proceedings and husbandry guidelines for specific species.

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
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ROY A. SHEA

R. GREGORY TARRY

June 7, 1990

DRAFT

TO: Strategic Planning Committee

FROM: Steve H. Taylor, Chair, Membership Services Task Force

SUBJECT: Progress Report as of June 6

"Expand and Improve Membership Services" received more positive response than any other KRA at our meeting in Denver (14 votes to Conservation's 12 votes). All planning, both formal and informal, done by AAZPA in the last few years has indicated that our membership feels that the services provided, primarily by the staff, are of the utmost importance to the members.

There are many services provided AAZPA members, accreditation, educational brochures, directory, newsletter, animal exchange, etc. In addition, there are ever-expanding services in legislation and government relations and conservation. In my opinion, the membership is aware of these services, if not all together appreciative.

Improving and expanding Membership Services may be an important KRA, but objectives may be limited as membership services currently provided are appropriate and substantial. In my opinion, and I believe the opinion of past planning groups, the majority of improvements and any expansion of membership services in the '90s will primarily occur in legislation and conservation. This should be done by maintaining our current level of traditional (but very important) membership services, such as newsletter, animal exchange, directory, accreditation, etc.

Our Committee has worked on developing objectives for the KRA entitled Membership Services. Excellent written correspondence was received from both the Wheeling office and the Bethesda office.

From all sources, the following objectives emerged:

1. Establishing a Database
2. Increase level of publication
3. Recruit and train professional staff.
4. Crystallize position and support (Position Papers).
5. Maximize Strength of our total resources (group purchasing discounts)
6. Crisis Management Plant
7. Investigate publishing quarterly magazine (or Zoo Biology)

Dave Zucconi suggested "selecting only the most important ones and leaving the rest for future deliberations of the L-R Planning Committee." From staff and Committee input, I would suggest that #2 and #7 be combined and #4 and #6 belong in KRA - "Clarify our Image." The report attached reflects this thinking.

ST/ms

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

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R. GREGORY TARRY

June 7, 1990

DRAFT

KRA - Expand and Improve Membership Services

1. Continue to establish database.
Strategy:

a. Use Public Relations Committee (or other) to survey membership to determine most useful statistics.

b. Utilize ISIS and SSP Statistical data

c. Computerize Directory information.

d. Determine if other information should be part of Directory database.

Notes and Rationale:
The Directory, SSP and ISIS are excellent resources of zoo and aquarium data. This statistical information is important to all of us.

2. Increase Level of Publication
Strategy:

a. Establish past practices. Establish which publications are part of our regular dues structure and an applicable part of membership, either individual or institution. Which pamphlets and booklets have been utilized? Which have to be paid for by user fees?

b. Determine if there is a need for additional publications, especially a quarterly magazine or a scientific publication. ie Zoo Biology

c. Establish a methodology so that all publications are consistent in format and professionally designed.

Notes and Rationale:
Publications currently include Directory, Communique, Animal Exchange, Conference (both Regional and National) Proceedings, Manual of Federal Wildlife Regulations, Zoo & Aquarium Fundamentals and various booklets and pamphlets. These are extremely useful to the membership and some are supplied with every membership. Other publications have been suggested if funding is available or if they can be printed and sold to members and others at cost. The organization may benefit by evaluating existing publications and developing a consistent format.

3. Maximize the Strengths of our total resource
Strategy:

a. Evaluate existing promotions such as Kellogg's and Ralston Purina. Evaluate existing joint-purchase and discount programs.

DRAFT

b. If evaluation is positive, continue to develop additional opportunities.

Notes and Rationale:
Now that AAZPA has a development staff, we can actively pursue additional AAZPA and member promotions. Joint purchasing agreements may be of help to some zoos and aquariums.

MINNESOTA ZOO

Strengthening The Bond Between People and The Living Earth.

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

June 4, 1990

To: Jerry Lentz
Fr: Kathryn Roberts and Jeff Marliave

Re: Planning Task

Attached is a draft for your review. Jeff and I have spent a fair amount of time sending this back and forth for review and changes. I would suggest that you review the product and fax it as soon as possible to Linda Boyd. I would guess she is doing a mailing today or tomorrow with all of the small group reports.

Please feel free to make changes and edit as you see fit. Let us know if there is anything else we can do.

See you next Monday!

cc Charlie Hoessle

Cultural Characteristics of the AAZPA CHANGE AGAIN by category religious 5-10-90

Zoo/Aquarium Specific

1. We are dedicated to the responsible stewardship 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. parenthetical gorce

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 on issues that affect aquariums. - rewarded

5. 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.

6. ~~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.

General

7. We are cautious about letting new-comers into our ranks. They must prove themselves before they are accepted.

8. We are passionate and intense about our profession.

9. 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.

10. 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.

11. AAZPA ~~does~~ has not put forth an affirmative action stance with regard to encouragment 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. ~~AAZPA has no plans to change.~~

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

13. We value rituals. We like to have award presentations, big banquets and speeches.

14. We don't like to be regulated or governed by others, particularly when it comes to matters we strongly believe in.

15. 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.

16. We tend not to always be savvy in our approach to issues.

17. We are slow to change.

18. We are not particularly formal. We tend to be casual in our appearance (dress) and manner.

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.

17 action steps

Uke

DEVELOPMENT OF AAZPA CONSERVATION PROGRAMS

Tulsa June 17-18, 1990

OBJECTIVE 1: Integrate existing and future AAZPA programs with global captive breeding and field conservation programs.

Strategy 1: Develop a continuous and efficient liaison and communication system between AAZPA Board, WCMC, and AAZPA staff with IUCN/SSC/CBSG, SSC, ISIS, and other global and world regional conservation organizations.

Strategy 2: Participate in the development and implementation of a global master plan which identifies priority species and habitats including the Global Heritage Species Program being developed by the SSC.

Strategy 3: Conduct state-of-the-art workshops with the U.S Fish and Wildlife Service to develop joint Recovery and SSP Plans including reintroduction programs, with SSC Specialist Groups, and with other agencies, where appropriate.

OBJECTIVE 2: Expand SSP and studbook programs as rapidly as possible to meet regional and global conservation needs. This will require at least a doubling of existing programs by 1995.

Strategy 1: Streamline existing procedures to minimize meeting time, travel expense, and other associated costs including development of increasingly 'user friendly' software to support genetic and demographic management and husbandry of SSP species.

Strategy 2: Recruit more individuals to manage SSP and taxon advisory groups including development of better methods for recognizing the efforts of species coordinators.

Strategy 3: Develop simple sets of measures of effectiveness of individual SSP programs in achieving goals of the program and of a species status in captivity.

boil down to 3 obj.

OBJECTIVE 3: Establish an AAZPA Conservation Biology School, with the objective of training curatorial and other staff in techniques and procedures relevant to the management of SSP programs and taxon advisory groups.

Strategy 1: Appoint a task force to develop a draft document including goals, budget, outline of curriculum, teaching methods, sites for the schools, and indicating the relationship of the School to existing programs.

Strategy 2: Establish a self-sustaining program in terms of organization, faculty, scheduling, curriculum development, and financial support utilizing the human and other resources of as many AAZPA institutions as possible.

OBJECTIVE 4: Provide assistance and encouragement for the development of scientific programs in support of the SSP and species conservation including projects directed at solving specific captive husbandry problems.

Strategy 1: Encourage the development of organized scientific programs in zoos and aquariums by (1) developing model research protocols providing guidance in participation by outside scientists, collection and shipment of biological materials, permit requirements, animal welfare regulations, etc., and (2) developing a means by which zoo biologists and cooperating institutions can be recognized for their work.

Strategy 2: Organize and develop scientific expertise in support of the SSP through the formation of a WCMC Scientific Advisory Committee, to assist in the identification of recognized experts in disciplines relevant to the particular problems of a species management program (disease, ecology, behavior, nutrition, systematics, molecular genetics, and reproduction).

Strategy 3: Encourage and assist SSP committees in the identification of critical research priorities, including the identification of qualified investigators to participate in specific projects.

Strategy 4: Encourage SSP committees to seek outside funding by developing a database of potential funding sources for research projects.

OBJECTIVE 5: Seek, procure, and disseminate funding for AAZPA conservation programs.

Strategy 1: Establish, policy, goals, protocol, proposal evaluation criteria, and guidelines for administering AAZPA Conservation Endowment Fund monies.

Strategy 2: Compile appropriate data and project summaries with project priorities, to allow AAZPA development staff to seek appropriate corporate, foundation, and grant support for existing and planned conservation programs.

OBJECTIVE 6: Develop more efficient means of disseminating biological data in support of SSP programs.

Strategy 1: Develop a ~~more~~ efficient publication system, including the publication of research news, workshop proceedings, and husbandry guidelines for specific species.

MEASURES of 'CONSERVATION RESOURCES'

OBJECTIVE 1:

1. Number of joint programs with written master plans.

2. Movements of SSP animals between countries or regions in accordance with joint master plans.

3. Number of programs for species in their range countries (involving people, money, training, and other resources from the participating zoos.

4. Supported field projects.

5. Supported protected areas in range countries.

6. Written global master plans produced.

7. Working groups formed to implement master plans.

8. Joint workshops held and proceedings published.

OBJECTIVE 2:

1. Listing and number of organized SSP programs.

2. SSP master plans and husbandry manuals produced and distributed.

3. Supported and improving software packages available and used by species coordinators and regional studbook keepers. Integration of ISIS data sets with studbooks and SSP programs.

OBJECTIVE 3:

1. Schools (training workshops) held and attendance.

2. Number of different individuals trained and number of AAZPA with trained individuals.

3. Briefing books and training materials prepared and available for distribution.

4. Appointment of a task force.

5. Securing of faculty, facilities, and funding for the Schools.

6. Zoo staff supported by institutions to attend the School.

ITEMS ASSIGNED TO ME DURING THE DENVER MEETING

not to be included in report

Wild Animal Auctions - AAZPA and a number of its committees have been concerned about the proliferation of wild animal auctions during recent years. The consensus is they are extremely profitable and offer the general public an incredible array of wildlife. Currently, few states have any regulations on the operation of wild animal auctions, and both APHIS and USDI require only appropriate permits or Captive Bred Wildlife registration for those purchasing various species. Because of the proliferation and the number of species and specimens involved, the USDA is contemplating formal regulations for the operation of wild animal auctions - much in the same fashion as promulgated for those exhibiting animals to the public (the Animal Welfare Act).

Less-than-Professionally Managed Collections - A number of years ago, AAZPA formed a special committee to look at the operation of less-than-professionally managed collections with an eye toward the development of animal care standards. Based on a number of factors, the committee was unsuccessful and the task was temporarily abandoned.

It is important to note that AAZPA has assigned a special committee to review the matter of wild animal auctions and the role our institutions and Registered Animal Suppliers are playing in such auctions. Some of the information to be collected as a result of that committee's efforts will likely address at least a portion of the concerns expressed regarding less-than-professionally managed collections. It is also important to note there are many vociferous members of AAZPA who hold we should not be involved in any way, shape or form in the establishment of standards and that such is the responsibility of the state and federal regulatory agencies.

Increased Cost of Energy and Travel - Both these items will be among many that will be incorporated into AAZPA's expanded data base. It is my plan to see that such expanded data base occurs as part of the functions of the Conservation Center staff. The data base itself will be maintained and monitored at the Executive Office in Wheeling and will greatly expand that which we have already established as a result of information gleaned from directory questionnaires.

International Society of Zooculturists (ISZ) - It is my understanding that the ISZ was formed because AAZPA regional and annual conferences had expanded the scope of the topics covered to include marketing, public relations and other nonanimal-related issues. It is in no way a threat to AAZPA, nor should it be considered as a "group" to be brought under our umbrella. The same sort of phenomena occurred a few years ago with the establishment of the Association of Zoo and Aquarium Docents. Their members felt that AAZPA and its conferences were addressing far too many animal-related subjects to be of continued interest to zoo docents.

SUPPORT FOR CONSERVATION PROGRAMS IN THIRD WORLD COUNTRIES - Some Third World countries are critical of North American zoos and aquariums regarding such huge expenditures for new exhibits as opposed to expending those funds on in situ conservation activities. I personally believe there is some merit to the criticism coming from some in the United States and many in emerging nations. A viable and workable solution has been proposed that would strongly urge institutions to include in their campaigns to raise funds for new exhibits that 10% of the money raised would go to an in situ conservation project in the country or "setting" depicted in the proposed new exhibit. In many respects, the suggestion is somewhat Biblical, in that it suggests a conservation "tithe."

Combined Expenditures for Zoo and Aquarium Conservation Efforts - This information, like that previously noted, will be included in the Association's planned data base. It is my plan to include not only costs related to expenditures for conservation programs, but also guesstimates on the amounts expended for participation in SSP and other captive-breeding programs. I believe such figures will exceed $25 million.

Surplus Animals - How to Deal with Them - In my opinion, this is absolutely a critical issue that must be addressed by the Association and its members. Programs like 60 Minutes, 20/20 and others have only scratched the surface, Currently, there is a matter being reported on in many major newspapers involving the transportation of animals in which several died. The public does not become overly concerned when similar tragedies occur in the transportation of cattle, sheep, goats and poultry; but the transportation of captive wildlife is another matter altogether. Moreover, euthanasia of healthy specimens is yet unacceptable to many directors of our member institutions, as well as their staffs and governing authorities. I believe for our SSP programs to be truly successful, the issue of surplus, especially males, is going to have to be addressed in the development of master plans.

Dealers - How to Relate to Them - Several years ago, the Association developed new and more stringent requirements for participation in AAZPA by those trafficking in wildlife. As a result, several members dropped out. Since then, many of the few remaining Registered Animal Suppliers have been the center of controversy; and a few have been involved in violations of the AAZPA Code of Professional Ethics, which resulted in action by our Board of Directors. During its March 1990 meeting, the Board enacted a moratorium on applications for Registered Animal Supplier membership. Further, a committee continues to study the entire question of the appropriateness of AAZPA continuing to have animal suppliers as part of its membership.

Robert O. Wagner

Robert O. Wagner
AAZPA Executive Director

ROW/ljb

American Association of Zoological Parks and Aquariums

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

Not included

June 13, 1990

To: Strategic Planning Committee

From: Steve H. Taylor
Bill Dennler

Subject: Professional Interest Groups

There are a number of non-governmental organizations that directly or indirectly impact AAZPA. Some organizations are almost entirely composed of AAZPA members, while others have few or no AAZPA members. Some organizations are informal, while others operate with paid memberships and official bylaws. AAZPA has benefitted with its relationship with some of these organizations and has also been in opposition to some of these organizations.

The following is a partial list of such groups:

Aquariums
AAZK
AAZV
MMIG (Marine Mammal Interest Group)
Zoo Horticulturist
IMATA (International Marine Animal Trainers Association)
IUDZG
Zoo Educators
Zoological Societies
CAZA (other state zoo associations)
CBSG
ISIS
Zoo Culturist
Commercial Members
Animal Dealers
Bird Curators
AAM (American Association of Museums)
HSUS
World Wildlife Fund
Botanical Garden Association
Local and National Conservation Group

AAZPA can not be everything to everybody, and formation of new organizations should not be seen as an indication of voids in AAZPAs procedure and operation. The board and membership needs to be knowledgeable of these groups and work with them whenever possible.

ST/db

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

Immediate Past President
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7 May 1990

MEMO TO: ADVISORY and NUCLEUS GROUPS OF STRATEGIC PLANNING COMMITTEE

FROM: LINDA BOYD, PLANNING COORDINATOR *Linda*

SUBJECT: REVISED MINUTES OF DENVER, COLORADO MEETING

Enclosed are the revised minutes of the Strategic Planning Committee Nucleus Group meeting which was held in Denver, Colorado from 16-17 April. I inadvertently left out the "Threats" from outside the Association in the minutes distributed on 20 April. Please discard those minutes and replace with the enclosed.

This will also serve to remind you to make your reservations at the Westin in Tulsa and to submit your Task Force reports to me as soon as possible.

Thanks for your attention to this matter.

/ljb

Enclosure

Copies to: AAZPA Board of Directors
Warren Iliff
Sabin Robbins
Bob Smith

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

STRATEGIC PLANNING COMMITTEE MEETING

DENVER, COLORADO - 16-17 APRIL 1990

The meeting of the Nucleus Planning Group of the Strategic Planning Committee was called to order in the Board Room of the Denver Zoological Gardens on Monday, 16 April at 9:00 a.m. Our host, Clayton Freiheit, welcomed the Board to Denver and introduced his Administrative Assistant Joe Truijillo and Executive Secretary Sara Green. In attendance were: David Zucconi (Chairman), Charles Hoessle, Bob Wagner, Steve Taylor, David Jenkins, Louis Garibaldi, Steve Wylie, Gail Schneider, Jerry Lentz, Bill Dennler, Ulie Seal, Bruce Read, Jeff Marliave, Kathryn Roberts, Don Farst, Bob Smith (Facilitator) and Linda Boyd (Planning Coordinator). Absent were: Jim Doherty, Palmer Krantz and Doug Myers.

Culture Task Force Chairman Kathryn Roberts presented her committee's report. There was much discussion with respect to our internal problem of "isms," establishing goals and how to achieve them, the separation between animal and nonanimal people, aquarium people not seeing themselves fitting into the SSP program, the lack of a defined goal to bring everyone into that system, and not giving even weight to all facets of the zoological profession. It was suggested that some things did not need to be changed and that there is an evolutionary process going on. Roberts is to be the editor and continue to increase the culture list. Those persons having things to add are to contact her.

Wagner presented the Key Operating Policies Task Force report, stating that the Charter & Bylaws, Ethics Code, accreditation program and giant panda standards were the Association's key operating policies. Farst noted that all our actions can be pinned to the Bylaws, Ethics Code and accreditation program. It was felt that not everyone has the background of these policies to rely on and, therefore, they need to be distributed to our members. It was suggested that our more crucial guidelines be added to our data base plan book.

Organization Task Force Chairman Hoessle explained the Association's organizational chart which he had distributed, noting it showed the relationship of the committees and our members to the Board. Wagner's staff organization chart was also discussed. It was suggested that we need to know how our staff relates to the committees, members, etc., as we are a whole new organization now that staff has expanded. It was noted that the chart should also show other organizations that have an impact on our Association. After Seal, Jenkins and Taylor worked on compiling an organizational chart, Seal indicated the information depicted was far more complicated than shown. He is to put a narrative with the chart and give the information to us for the data base plan book.

Doug Myers' report on legislative matters was distributed to the committee. Seal is to edit it to include the amount of time our members spend on legislative matters, and Wagner is to continue with the assignment by contacting Kris Vehrs, Don Bruning and Ed Schmitt. It was noted that citizen groups are continuing influencing legislation.

Backcasting Task Force Chairman Read presented his report which was compiled from past NEWSLETTERS/COMMUNIQUES. He is to prepare a synopsis of the major accomplishments of the Association with Wagner's help. Wagner is to send Read the updated history of the Association which was prepared for the Directory and the history of the Wild Animal Propagation Trust.

Wylie presented the report on the mission statement. After some discussion, the following was approved: 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.

There was much discussion with respect to values. It was stated that recreation should be included in our statement of values, as our visitors are educated through recreation. Conservation is our goal, and the other values are vehicles to achieve this. Training was another area mentioned in which we should focus our attention. A committee with Roberts as chairman, Taylor, Jenkins, Lentz and Read was appointed to prepare a list of values. The Nucleus Planning Committee agreed on the following:

VALUES

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

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

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

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

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

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

The Nucleus Planning Committee was then divided into four groups to prepare lists of critical factors for success, with the following results:

CRITICAL FACTORS FOR SUCCESS

Membership Support - Volunteers (3)

Dedicated Professional Staff (2)

Good Public Image (2)

Credibility (2)

Financial Resources/Stability (2)

Meets Needs of Its Members

Proactive Posture

Marliave is to refine the list of critical factors for success.

The groups were then given the assignment of listing strengths and weaknesses within the Association, with the following results:

STRENGTHS

Professionalism and Member Commitment (4)
Code of Professional Ethics (3)
Accreditation Program (3)
Financial Support (2)
Popularity of Product
Functional Organization with Existing Programs
Legislative Interaction
Common Interest in Animals
Conservation Efforts
Comradery of Members
Strong Representation of Zoos and Aquariums
History and Tradition

WEAKNESSES

Lack of Communication of Our Message (2)
Slow to Change (2)
Lack of Sufficiently Trained Conservation Technicians
Perception of Membership
Fund-Raising for SSP Programs
Lack of Volunteers
Canada/U.S. Legislative Assistance
Everything to Everyone
Lack of Networking with Other Organizations
Lines of Communication Not Followed
Lack of Response from Its Members
Zoos vs. Aquariums
Special Interest Groups with Own Agendas
Lack of Understanding of Small Institutions' needs.
Not Proactive Enough
Membership Structure
Organizational Relationships Are Unclear

The next assignment was to list the opportunities and threats from outside the Association, with the following results:

OPPORTUNITIES

Rising Popularity of Zoos & Aquariums (4)
International Accessibility (3)
Development of High Tech Equipment to Manage Information & Communications (2)
Increasing Opportunities in Academic Arena (2)
Greater Funding Potential
Growth Opportunities
Society Demonstrates Opportunity to Develop Environmental Leaders
Renewed Interest in Science Education
Mobilization of Visitors and Members
Professional Recruitment
Continuity of Resources and Programs
Trends in Attitudes and Leisure Time
Proactive Exploitation of Our Product

Dennler and Taylor were given the homework assignment of addressing special interest groups.

THREATS

Increased Concern for Animal Rights (3)
Depressed Economy (3)
Competition for Dollars and Attention (3)
Negative Public Opinion (2)
Increased Cost of Business (2)
Increased Legislation and Regulations (2)
Stronger Impact to Legislation
Duplication of Effort
Shortage of Competent Employees
Urbanization of North America
Global Conservation Crisis
Changing Demographics
Loss of Biodiversity

There was some discussion with regard to the standards of third world zoos/aquariums, wild animal auctions, amounts of money spent on conservation efforts, etc. Wagner is to "flesh out" these other issues.

Seal suggested that using surplus animals for financial gain should be discussed. It was stated that such was a social and humane issue. Hoessle noted that botanical gardens developed plants that have an economic value. "Positioning" is to be held until our next meeting.

The final assignment to the four groups was to identify key result areas, which were as follows:

KEY RESULT AREAS (KRA)

Expand and Improve Member Services (establish database) (14)

Develop Our Conservation Resources (12)

Develop a Legislative Plan (10)

Clarify Our Public Conservation Image (7)

Develop a Specific Strategy to Deal with Issues Brought by Animal Rights Groups (6)

Develop a Proactive "Zoos & Aquariums" for the 21st Century (4)

Ensure Planning Process Continuity (4)

Develop a Comprehensive Animal Management Plan (3)

Consolidate Offices to Save Dollars (1)

Examine the AAZPA Staff and Its Relationship to Committees/Members

The following task forces were assigned:

Membership Services - Chairman Taylor, Dennler, Schneider, Zucconi

Conservation - Chairman Seal, Read, Doherty, Krantz

Legislation - Chairman Wylie, Farst, Garibaldi, Myers

Image - Chairman Lentz, Hoessle, Marliave, Roberts

TASK FORCE ASSIGNMENTS

1. Establish tentative objectives.
2. Develop strategies (see worksheet attached).
3. Come up with likely responses to our strategies. How can we influence responses to be what we would like?
4. Determine if the KRA language needs to be revised.
5. Determine if the tentative objective(s) look okay.

Upon completion, the assignments are to be sent to Boyd for compilation and distribution to the rest of the committee for study before the next meeting scheduled for 18-19 June in Tulsa, Oklahoma. The meeting was adjourned at 3:00 p.m., Tuesday, 17 April 1990.

Linda Boyd

Linda Boyd
Planning Coordinator
7 May 1990

WORKSHEET FOR DETERMINING OBJECTIVES AND STRATEGIES IN A KEY RESULT AREA

KEY RESULT AREA: _____

Backcasting

How Measure	Past Performance	New Objectives	Available Strategies	Best Strategies and Rationale

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
A•A•Z•P•A 1924

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20 April 1990

MEMO TO: ADVISORY and NUCLEUS GROUPS OF STRATEGIC PLANNING COMMITTEE
FROM: LINDA BOYD, PLANNING COORDINATOR Linda
SUBJECT: MINUTES OF DENVER, COLORADO MEETING

Enclosed are the minutes of the Strategic Planning Committee Nucleus Group meeting which was held in Denver, Colorado from 16-17 April. Please let me know as soon as possible if you have any additions, deletions or corrections.

Task Force Chairmen are asked to submit their reports to me as soon as completed so they can be distributed to the rest of the committee for their study prior to our next meeting in Tulsa, Oklahoma from 18-19 June.

Chairman Zucconi has already supplied you with a hotel reservation form for the Westin in Tulsa. Please note that reservations must be made before 27 May. The meetings should conclude around 5 p.m. on Tuesday. Steve Wylie has offered a tour of the Oklahoma City Zoo either after or before the meetings.

Please call if you have any questions.

/ljb

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Doug Myers' report on legislative matters was distributed to the committee. Seal is to edit it to include the amount of time our members spend on legislative matters, and Wagner is to continue with the assignment by contacting Kris Vehrs, Don Bruning and Ed Schmitt. It was noted that citizen groups are continuing influencing legislation.

Backcasting Task Force Chairman Read presented his report which was compiled from past NEWSLETTERS/COMMUNIQUES. He is to prepare a synopsis of the major accomplishments of the Association with Wagner's help. Wagner is to send Read the updated history of the Association which was prepared for the Directory and the history of the Wild Animal Propagation Trust.

Wylie presented the report on the mission statement. After some discussion, the following was approved: 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.

There was much discussion with respect to values. It was stated that recreation should be included in our statement of values, as our visitors are educated through recreation. Conservation is our goal, and the other values are vehicles to achieve this. Training was another area mentioned in which we should focus our attention. A committee with Roberts as chairman, Taylor, Jenkins, Lentz and Read was appointed to prepare a list of values. The Nuclear Planning Committee agreed on the following:

VALUES

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

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

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

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

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

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

The Nuclear Planning Committee was then divided into four groups to prepare lists of critical factors for success, with the following results:

CRITICAL FACTORS FOR SUCCESS

Membership Support - Volunteers (3)

Dedicated Professional Staff (2)

Good Public Image (2)

Credibility (2)

Financial Resources/Stability (2)

Meets Needs of Its Members

Proactive Posture

Marliave is to refine the list of critical factors for success.

The groups were then given the assignment of listing strengths and weaknesses within the Association, with the following results:

STRENGTHS

Professionalism and Member Commitment (4)
Code of Professional Ethics (3)
Accreditation Program (3)
Financial Support (2)
Popularity of Product
Functional Organization with Existing Programs
Legislative Interaction
Common Interest in Animals
Conservation Efforts
Comradery of Members
Strong Representation of Zoos and Aquariums
History and Tradition

WEAKNESSES

Lack of Communication of Our Message (2)
Slow to Change (2)
Lack of Sufficiently Trained Conservation Technicians
Perception of Membership
Fund-Raising for SSP Programs
Lack of Volunteers
Canada/U.S. Legislative Assistance
Everything to Everyone
Lack of Networking with Other Organizations
Lines of Communication Not Followed
Lack of Response from Its Members
Zoos vs. Aquariums
Special Interest Groups with Own Agendas
Lack of Understanding of Small Institutions' needs.
Not Proactive Enough
Membership Structure
Organizational Relationships Are Unclear

The next assignment was to list the opportunities and threats from outside the Association, with the following results:

OPPORTUNITIES

Rising Popularity of Zoos & Aquariums (4)
International Accessibility (3)
Development of High Tech Equipment to Manage Information & Communications (2)
Increasing Opportunities in Academic Arena (2)
Greater Funding Potential
Growth Opportunities
Society Demonstrates Opportunity to Develop Environmental Leaders
Renewed Interest in Science Education
Mobilization of Visitors and Members
Professional Recruitment
Continuity of Resources and Programs
Trends in Attitudes and Leisure Time
Proactive Exploitation of Our Product

Dennler and Taylor were given the homework assignment of addressing special interest groups.

There was some discussion with regard to the standards of third world zoos/aquariums, wild animal auctions, amounts of money spent on conservation efforts, etc. Wagner is to "flesh out" these other issues.

Seal suggested that using surplus animals for financial gain should be discussed. It was stated that such was a social and humane issue. Hoessle noted that botanical gardens developed plants that have an economic value. "Positioning" is to be held until our next meeting.

The final assignment to the four groups was to identify key result areas, which were as follows:

KEY RESULT AREAS (KRA)

Expand and Improve Member Services (establish database) (14)

Develop Our Conservation Resources (12)

Develop a Legislative Plan (10)

Clarify Our Public Conservation Image (7)

Develop a Specific Strategy to Deal with Issues Brought by Animal Rights Groups (6)

Develop a Proactive "Zoos & Aquariums" for the 21st Century (4)

Ensure Planning Process Continuity (4)

Develop a Comprehensive Animal Management Plan (3)

Consolidate Offices to Save Dollars (1)

Examine the AAZPA Staff and Its Relationship to Committees and Members

The following task forces were assigned:

Membership Services - Chairman Taylor, Dennler, Schneider, Zucconi

Conservation - Chairman Seal, Read, Doherty, Krantz

Legislation - Chairman Wylie, Farst, Garibaldi, Myers

Image - Chairman Lentz, Hoessle, Marliave, Roberts

TASK FORCE ASSIGNMENTS

1. Establish tentative objectives.
2. Develop strategies (see worksheet attached).
3. Come up with likely responses to our strategies. How can we influence responses to be what we would like?
4. Determine if the KRA language needs to be revised.
5. Determine if the tentative objective(s) look okay.

Upon completion, the assignments are to be sent to Boyd for compilation and distribution to the rest of the committee for study before the next meeting scheduled for 18-19 June in Tulsa, Oklahoma. The meeting was adjourned at 3:00 p.m., Tuesday, 17 April 1990.

Linda Boyd

Linda Boyd
Planning Coordinator
20 April 1990

WORKSHEET FOR DETERMINING OBJECTIVES AND STRATEGIES IN A KEY RESULT AREA

KEY RESULT AREA: _____

Backcasting

How Measure	Past Performance	New Objectives	Available Strategies	Best Strategies and Rationale

Apr. 16-17, 1990
Denver, CO

American Association of Zoological Parks and Aquariums

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ROY A. SHEA

R. GREGORY TARRY

9 April 1990

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.

/ljb

Enclosures

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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.

Service org. to its members

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.~~ treat aquariums differently than zoos.

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 encouragment 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.

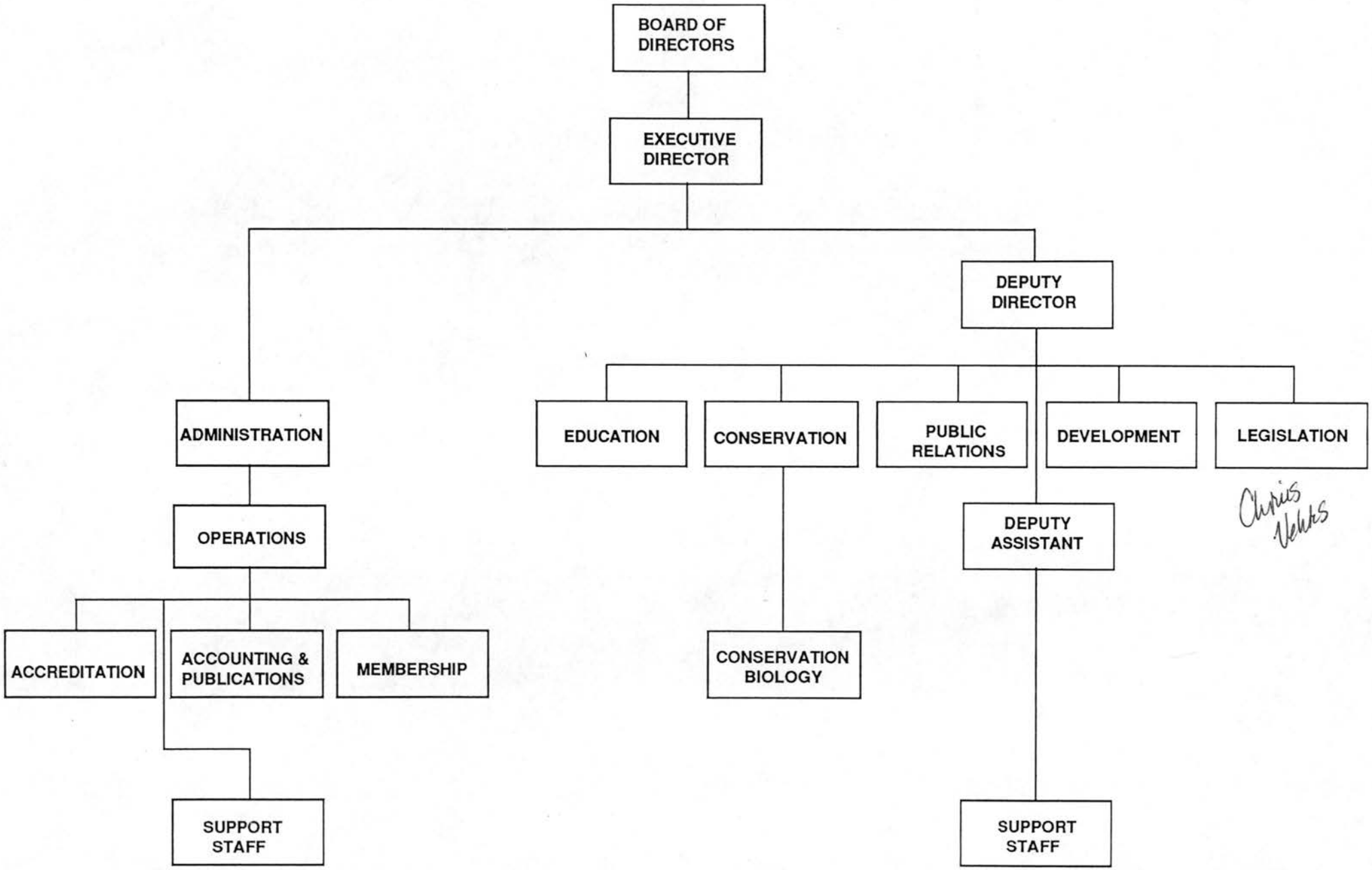
18. We seems not to be particularly religious.

19. We love to gossip.

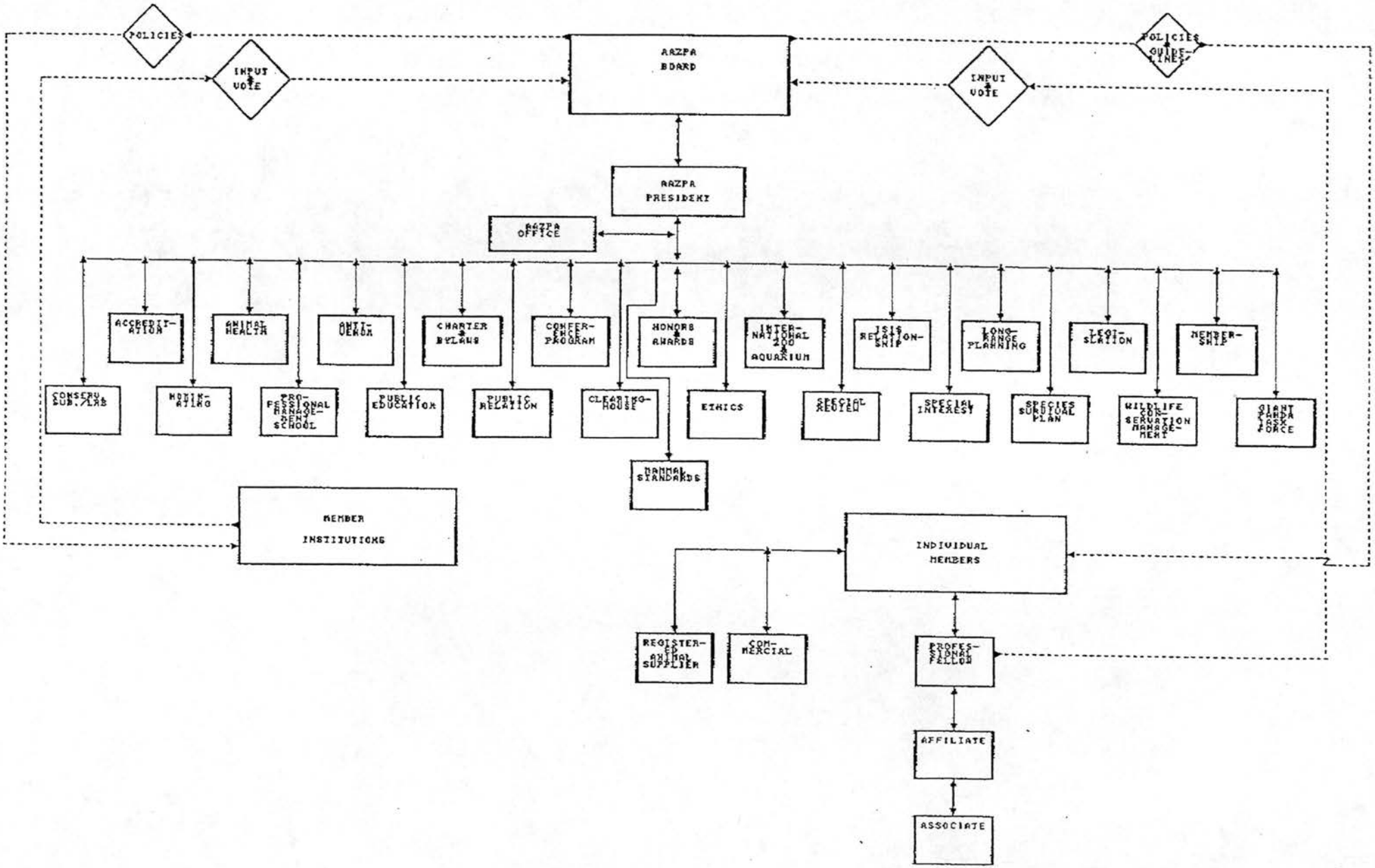
20. We are a congenial and social group; we work hard and play hard; an association of friends. We tend toward workaholism, which comes from dealing with animals that need need care 24 hours a day/7 days a week.

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.

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
ORGANIZATIONAL CHART



AAZPA ORGANIZATIONAL CHART



DRAFT - APRIL 4, 1990

APR 05 '90 08:32 ST LOUIS ZOO P.2/2

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5 April 1990

MEMO TO: STRATEGIC PLANNING COMMITTEE

FROM: ROBERT WAGNER, EXECUTIVE DIRECTOR R. Wagner.

SUBJECT: KEY OPERATING POLICIES

As the attached will attest, I just recently distributed key operating policies to those on that specific task force.

I have asked for the three other participants to advise me if they think additional materials should be included. If such advice is received, I will copy and bring those materials with me to Denver. In the meantime, I wanted to get the materials in your hands for advance study. Please bring them with you to Denver.

I look forward to seeing you soon.

ROW/ljb

Enclosures

Copy to: Bob Smith

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4 April 1990

MEMO TO: BILL DENNLER, DON FARST and JERRY LENTZ

FROM: BOB WAGNER, EXECUTIVE DIRECTOR R. Wagner.

SUBJECT: KEY OPERATING POLICIES

The major key operating policy of the Association is couched in our Charter & Bylaws, which are published biennially as part of the Association's Directory. While the Charter of the AAZPA is intact since adopted in 1971, the Bylaws have been amended numerous times. It is noteworthy that on each occasion the amendments have been strengthening, never weakening. Enclosed is a copy of the current Bylaws.

The Code of Professional Ethics is, in my opinion, the second most important Association operating policy. Enclosed is the material relating to the Code of Professional Ethics which appear as a portion of the Association's Directory. Included are some rulings or interpretations of the Code which could be construed to be key operating policies. Such are listed as AAZPA Code of Professional Ethics - Addendum.

Another key operating policy would be the Association's accreditation program, in that the Bylaws require that institutions become accredited before participation as members. The next major operating policy is the Association's mandatory standards with respect to giant panda loans (copy attached). There are a host of other materials developed by the Association and adopted by various Boards throughout the Association's history. Many of them are important documents, but are not "policies." The overwhelming majority are guidelines; i.e., surplus animal guidelines, SSP and studbook guidelines, elephant handling guidelines, etc.

If any of you believe more information is required, please advise me and I will make every attempt to assemble those materials. If I have not heard from you by 11 April, I will prepare the enclosed materials for distribution to all Strategic Planning Committee participants for the Denver meeting.

Thanks for your help.

ROW/ljb

Enclosures

Copies to: Bob Smith
David Zucconi

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Director
The Fresno Zoo

EARL B. WELLS
Director
Fort Wayne Children's Zoo

SUSAN M. ENGFER
Assistant Director
Santa Barbara Zoological Gardens

STEVE H. TAYLOR
Director
Sacramento Zoo

STEPHEN R. WYLIE
Director
Oklahoma City Zoological Park

17 March 1988

Dear Institution Director:

Enclosed are materials which our Board of Directors feels are of the utmost importance. They include a position statement from World Wildlife Fund on exhibition loans of giant pandas; a resolution on giant pandas which was recently adopted during the General Assembly of the IUCN in Costa Rica; a letter to me from Frank Dunkle, Director, USDI/Fish & Wildlife Service; and the report of the AAZPA's Giant Panda Task Force (GPTF) with the new Association standards for giant panda loans.

Ed Schmitt, Chairman of the GPTF is to be commended for his extraordinary efforts in this matter. His report was unanimously adopted by our Executive Committee and Board of Directors during their recent meetings in Monterey, California. The Board then unanimously moved to make the AAZPA's new standards on giant panda loans mandatory and included that any deviation by our members would be considered a violation of the Association's Bylaws and Code of Professional Ethics. The new standards become effective upon your institution's receipt of this mailing. Please utilize these materials in discussions with members of your staff, your governing authority and news media representatives.

Additionally, you should follow these standards closely in any giant panda loan negotiations with Chinese authorities.

Most sincerely,

AMERICAN ASSOCIATION OF
ZOOLOGICAL PARKS AND AQUARIUMS

Robert O. Wagner

Robert O. Wagner
Executive Director

ROW/ljb

Copies to: AAZPA Board of Directors
Giant Panda Task Force
Legislation and Wildlife Conservation & Management Committees
Frank Dunkle, Marshall Jones, Charles Dane, and Richard Robinson, USFWS
Sharon Cleary, State Department
Richard Block, WWF-US
Tom Foose, AAZPA Conservation Coordinator
Kris Vehrs, AAZPA Legislative Representative

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10 March 1988

Report of the Giant Panda Task Force

The AAZPA Giant Panda Task Force (GPTF) was appointed by President Forman in mid-October 1987. Members of the Task Force are: Charles Hoessle, Dr. Don Bruning, Dr. Devra Kleiman, Dr. Tom Foose and Dr. George Schaller, Special Advisor.

The committee was charged with the exploration of four initial tasks. Those are as follows:

1. Collaborate with Chinese colleagues, the U.S. Fish and Wildlife Service (USFWS), the IUCN Captive Breeding Specialist Group and other relevant bodies in ascertaining the effect of short-term loans on the panda's welfare in nature and propagation in captivity.

2. Consult with appropriate Chinese and North American authorities on loan mechanisms and coordination so as to prevent non-conservation oriented loans from becoming detrimental to the panda's welfare.

3. Provide such technical assistance to Chinese zoo biologists as may be useful to Giant Panda propagation.

4. Explore long-term propagation and research programs designed to improve Giant Panda breeding, management and survival in captivity and in nature.

Progress has occurred in both items 1 and 2, but given the highly political nature of the subject and lack of official AAZPA involvement until recently, actual contact and exchange of information with our Chinese colleagues has just recently begun.

Notification of the development of the Task Force, its goals and objectives and a copy of the AAZPA Panda Guidelines were mailed in early November to the following individuals:

Richard Block, Director of Public Programs, World Wildlife Fund-U.S.
Dr. Bruce Bunting, Vice President in Charge of Asian Affairs, World Wildlife Fund-U.S.

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R. E. Carr, Chief Executive Officer, Zoological Board of Victoria
Dr. Chen Tso Hsin, CITES Scientific Authority, Academia Sinica, P.R.C.
Sharon Cleary, OES/ENR, Department of State
Charles Dane, Acting Chief, Office of Scientific Authority, U.S.F.W.S, U.S.D.I.
Christopher Elliott, Conservation Officer, China Programme Coordinator, World Wildlife Fund-International
Dr. Fan Zhi Yong, CITES Management Authority, Academia Sinica, P.R.C.
Annie J. Fu, Chinese Zoo Association
Dr. Gao De Zhan, Minister of Forestry, P.R.C.
Lynn Hardie, Editor & Education Coordinator, TRAFFIC/U.S.A.
Dr. Richard L. Jachowski, Acting Chief, Federal Wildlife Permit Office
Dr. David Jones, Director of Zoos, London Zoo, British Zoo Federation
Dr. John Kelly, Director, Taronga Zoo, Sydney
Li Wei Quan, Deputy Administrator, China Wildlife Conservation Association, P.R.C.
Dr. Li Yang Wen, Deputy Secretary General, China Wildlife Conservation Association and Liaison, Chinese Association of Zoological Gardens
Dr. Liu Shanghua, Division Chief, Zoos and Botanical Gardens, P.R.C.
Grenville Lucas, Chairman, Species Survival Commission-IUCN
Cary Mueller, Director, Auckland Zoological Park
Dr. Qing Jianhua, Ministry of Forestry, P.R.C.
Dr. Qu Geping, Environmental Protection Office, P.R.C.
R. K. Robinson, Chief, Branch of Permits, Office of Management Authority
Dr. Arne Schiotz, Director, IUDZG, c/o Danmarks Akvarium
Dr. Ulysses Seal, IUCN-CBSG

It was envisioned that the mailing could provide the impetus for development of a coordinated effort by various conservation groups and governmental agencies both nationally and internationally in the administration of strategies involving panda loans. Response to the mailing was positive and has provided insight on the current feelings relative to panda loans.

As a result of the mailing, a WWF-US staff member contacted the Chair and later visited me at Brookfield. We discussed the current panda situation, particularly the pending meeting of WWF-International and the 17th General Assembly of IUCN. It was decided to convene a meeting of interested parties to be sponsored by AAZPA, IUCN, and WWF-U.S. Additionally, it was determined that the number of participants should be restricted. The meeting was held at Brookfield on 15-16 February.

Attendance at the meeting included:

Richard Block, Director of Public Programs, World Wildlife Fund-U.S.;
Dr. Don Bruning, Chairman, AAZPA Wildlife Conservation and Management Committee;
Dr. Bruce Bunting, Vice President in Charge of Asian Affairs, World Wildlife Fund-U.S.;
Dr. Charles Dane, Chief, Office of Scientific Authority, U.S. Department of Interior, Fish and Wildlife Service;
Christopher Elliott, Conservation Officer, China Programme Coordinator, World Wildlife Fund-International;
R. K. Robinson, Chief, Branch of Permits, Office of Management Authority, U.S. Department of Interior, Fish and Wildlife Service;

Dr. George Schaller, Director, Wildlife Conservation International-New York Zoological Society;
Dr. George B. Rabb, Deputy Chairman, Species Survival Commission-IUCN;
Edward C. Schmitt, Chairman, AAZPA Giant Panda Task Force; and
Robert O. Wagner, Executive Director, AAZPA.

The Giant Panda loan situation, both in the United States and worldwide is to the point of creating a black eye for conservation. AAZPA, while actively working to establish a conservation image, is being perceived to be actively destroying that same image faster than we can build the base of support. Many peer conservation groups perceive that AAZPA has regulatory authority over its member institutions. Those groups additionally feel that AAZPA and its member institutions must initiate and strongly support a conservation ethic relative to the Giant Panda and Giant Panda loans. This example would be welcomed by related zoo associations worldwide. It is felt by many conservation organizations that panda loans of any type directly contribute to the continuing removal of specimens from the wild, that monies derived from such loans are not always being applied in a beneficial fashion to the conservation of the species and that, if loans continue, they will directly contribute to the demise of the species.

The concerns raised are difficult to address and the complex issue is volatile and shrouded in governmental bureaucracy, both nationally and internationally. Compromise is difficult, if not impossible. Given this present scenario plus the added fact that currently there are eight known panda loan initiatives actively being pursued at one political level or another in the U.S., the necessity for the Brookfield meeting is evident.

Prior to the Brookfield meeting several events occurred that had a direct impact on its content. Two organizations, WWF-International and IUCN-SSC, met before the meeting and drafted policy statements relative to Giant Panda conservation and loans. Additionally, USFWS had prepared a policy statement, however, the agency waited until after the meeting to submit the position statement for approval.

WWF-International concluded a meeting in mid-January of its conservation committee in Gland, Switzerland. WWF-International, at that meeting, developed a position statement relative to panda loans. This position statement is provided as Appendix A.

In early February, at its 17th General Assembly in Costa Rica, the IUCN adopted a resolution on the conservation of the Giant Panda. The resolution had been developed by IUCN-SSC and submitted by the Flora and Fauna Preservation Society (FFPS). That resolution is provided as Appendix B.

USFWS-USDI Permit Office has developed a position statement and submitted this to the Director for approval. Mr. Dunkle's letter of 4 March outlining the Service's concerns and their position on Giant Panda loans is included as Appendix C.

An agenda containing several items was developed and discussed at the Brookfield meeting. A synopsis of those discussions is as follows:

1. **Effects of loans on captive propagation efforts and conservation programs.**
   It was felt that currently loans were having a negative effect on both propagation efforts and conservation programs. The difficulty of ascertaining the individual specimens involved in loans prior to their occurrence, and the difficulties in ascertaining the financial arrangements or the allocation of funds involved in such loans is perceived as having a detrimental effect on the species.

2. **Origin of specimens utilized in loans.**
   Again, it was felt that some specimens utilized in loans were either directly or indirectly (salvaged) from the wild and thus continued to contribute to the species decline. Additionally, specimens labelled incompatible were not being utilized in artificial insemination attempts.

3. **Status of the captive populations of pandas including those in Chinese zoos, those being maintained by the Department of Forestry, and those specimens kept in institutions outside of China.**
   Currently, it is estimated that there are approximately 69 pandas in captivity including those involved in loan situations. There are approximately 18 pandas outside China. Approximately 62 pandas were "rescued" during the bamboo die off, 25 were subsequently released back to the wild, 25 turned over to zoos and 12 were lost.

4. **Status of the Chinese programs for captive propagation and related conservation programs.**
   There are currently 11 pandas at the Wolong Research and Conservation Centre; there are no figures for other research stations. It is estimated that the new station under construction at Cheng Du will hold up to 30 individuals and no surplus is available from zoos. Several other reserves are in various stages of planning, some are ostensibly being supported by panda loan monies. It is feared that these additional reserves will rely on pandas from the wild, thus accelerating the decline of the wild population. Poaching continues to be a problem.

5. **Status of the wild population.**
   WWF-International is currently completing a census of the wild population. Although exact figures will never be available, due to problems involved in and related to censusing methods, it is estimated the figure will be approximately 1000-1100 individuals.

6. **Analysis of the long-term projection of the panda population.**
   Analysis is difficult due to a lack of a quantified data base. Studbook, studbook techniques, specimen identification and other additional basic population managerial techniques are needed. Development of a long-term management program is crucial but basic data collection and specimen identification must occur before those initiatives can begin.

7. The current disposition of conservation funds generated through the panda loan program.

Disposition of funds earmarked for conservation continues to be problematic. The numerous agencies involved, the secrecy surrounding financial arrangements, and the apparent discrepancies in what is actually expended, all lead to the necessity of a better coordinated method of distribution.

As a result of the Brookfield meeting, several points relative to Giant Panda loans emerged:

(1) All permit applications involving panda loans will be reviewed with emphasis being applied to the commercial aspect of those loans. This is based upon WWF's position and that of the USFWS Wildlife Permit Office and Office of Scientific Authority.

(2) USFWS Office of Management Authority will send all permit applications involving pandas to AAZPA/WCMC for review and comment.

(3) It was recommended that a committee/board be developed to assist both the Chinese and the borrowing institution in the allocation of monies designated for panda conservation resulting from a panda loan/rent arrangement. Membership will include, but not be limited to, AAZPA, IUCN and possibly WWF at a later date. It is felt that this committee, if accepted by AAZPA and our Chinese colleagues, is essential to satisfy the questions that continue relative to the financial arrangements and allocation of funds involved in all loan arrangements.

(4) The initiative to discuss the concept of this advisory committee/board with our Chinese colleagues could occur during a technical meeting on panda captive management to be conducted in China in August of 1988. WWF-International and AAZPA are attempting to organize this meeting.

(5) AAZPA was requested to assist in the development of the agenda for the China meeting and to identify key participants for the various components. Preliminary discussions on both items occurred during the latter phases of the Brookfield meeting.

(6) Due to the political sensitivity of the subject matter, the committee/board structure and function would be introduced and discussed during informal periods and/or sessions of the China meeting.

It has become apparent in a very short period of time that strict regulation of panda loans is inevitable. Additionally, very tight controls on any monies raised by such loans, controls such as the third party (committee/board) allocation, may be a necessity before any permits will be issued or the concept of loan arrangements supported by conservation groups such as WWF. AAZPA has achieved over the past several years the status of a conservation organization.

AAZPA is being looked to for guidance. Many (conservation organizations) feel that AAZPA is using or misusing the Panda Guidelines. These organizations and others are actively attempting to eliminate panda loans of any type. It is felt that AAZPA must initiate a positive, responsible course of action.

Based upon the information received from numerous sources and the actions implemented by the various organizations and agencies outlined in this report, the AAZPA GPTF would submit the following recommendations to the AAZPA Board of Directors for their consideration:

... that the proposed position statement on Giant Pandas be approved by the Board and further that the position statement be adopted as AAZPA mandatory standards and any deviation by our members would be considered a violation of the Association's Bylaws and Code of Professional Ethics;

... that the Board endorse AAZPA participation in the continued development of and attendance at the China panda conference being developed by AAZPA and WWF-International;

... that the GPTF be actively involved in the proposed panda meeting;

... that the GPTF be directed to actively pursue the development, in conjunction with IUCN and other appropriate agencies, the committee/board described in this report;

... that the GPTF continue to work with various governmental agencies to resolve any issues arising from proposed panda loans;

... and that,

the GPTF continues to work with WWF-International and other similar organizations to develop a policy acceptable to all that would allow for loans of Giant Panda which would contribute to conservation of the species both in situ and ex situ.

The AAZPA Board of Directors unanimously approved these six recommendations at their recent meeting in Monterey, California. The AAZPA Position Statement on Giant Pandas is attached as Appendix D.

Respectfully submitted,

Edward C. Schmitt, Chairman
AAZPA Giant Panda Task Force

ECS/bjp
Enclosures: Appendix A
Appendix B
Appendix C
Appendix D

APPENDIX A

WWF POSITION STATEMENT ON EXHIBITION LOANS OF GIANT PANDAS

Introduction

The giant panda (*Ailuropoda melanoleuca*) is endemic to the People's Republic of China. It has become known throughout the world as a symbol of all endangered species.

The wild population of giant pandas is now restricted to six areas in the mountains of Gansu, Shaanxi and Sichuan Provinces in central China. The Chinese Ministry of Forestry has established twelve reserves to protect the animal and its habitat. WWF is assisting in the preparation of management plans for these reserves as well as a management strategy for the entire panda habitat. The main threats to the panda are clearance of its forest habitat for agriculture, poaching, illegal logging and the mass flowering of its staple food, bamboo.

A survey carried out by the Chinese authorities from 1974-1977 estimated that 1,000-1,100 pandas remained in the wild. A joint China/WWF survey is currently in process and will be completed in 1988.

There are reported to be more than 80 pandas in captivity in China. Outside China there are 18 pandas in zoos. Captive breeding has presented difficulties, whether through natural breeding or artificial insemination, and at present the captive population is not self-sustaining.

In-situ Conservation

WWF encourages China to strengthen its praiseworthy efforts to maintain a viable population of giant pandas in the wild by protecting pandas and their habitat, both inside and outside reserves. In the event of mass flowering of bamboo rescue operations should be undertaken to save starving pandas where necessary. These pandas should be released as fast as possible in suitable areas.

Ex-situ Conservation

WWF considers that it is essential for the survival of the species to maintain a viable captive population of giant pandas. All potential breeding animals in captivity should be included in an integrated breeding programme, whose main objective should be to provide animals for reintroduction into the wild. WWF urges zoos outside China which hold pandas to contribute fully to this breeding programme.

Exhibition Loans

In recent years there have been an increasing number of exhibition loans of pandas to captive collections outside China. WWF recognises that these loans attract considerable public interest. The funds generated may benefit ex-situ conservation in China.

However, WWF has become increasingly concerned that since these loans subtract potential breeding animals from the captive populations, they do not form a useful part of an integrated breeding programme. WWF has raised this issue with the relevant organisations in China on several occasions. It has been suggested that the loans be restricted to animals which are either too old or too young to breed. However it is difficult to specify an age above which pandas are too old for breeding, and it would appear unwise to subject young animals, which might reproduce in the future, to the risks of international travel.

Therefore, WWF urges zoos outside China and the Chinese authorities to cease their involvement in exhibition loans of giant pandas, once the loans underway in Calgary, Canada, and Sydney and Melbourne in Australia are completed. WWF will not associate itself with any further loans in future. WWF also urges the Chinese authorities to halt the use of giant pandas in circuses.

Experience in other countries has shown that commercial activities related to endangered species tend to put pressure on the wild population. In this context WWF shares the concern of Professor Hu Jinchu, one of China's leading panda experts, who has stated that it is necessary to stop the capture of pandas for zoos to save the species from extinction*.

* "China Daily", Beijing, 15 July 1987

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January 1988

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APPENDIX B

IUCN RESOLUTION ON GIANT PANDAS

CONSERVATION OF THE GIANT PANDA

RECOGNIZING that the giant panda, *Ailuropoda melanoleuca*, is endemic and now unique to the People's Republic of China, and has been a species of great interest to biological science for over a century;

APPRECIATING that the Government of the People's Republic of China has devoted much attention and considerable financial resources to the conservation of the giant panda;

NOTING that the giant panda is a species that is unusually well-known to the peoples of the world, and, through use of its image by WWF, has come to symbolize the universal need for wildlife conservation to governments and peoples of the world;

UNDERSTANDING that there may be fewer than 1000 of these animals in the wild and 100 in captivity, critically low numbers for survival of the species;

RESOLVING that every effort should be made to keep the giant panda from extinction;

The General Assembly of the IUCN, at its 17th Session in San José, Costa Rica, 1-10 February 1988:

1. COMMENDS the Government of the People's Republic of China for wildlife laws and regulations that protect the giant panda and for establishment of reserves to maintain the giant panda's natural environment;

2. STRONGLY ENCOURAGES the Government of the People's Republic of China to respond to increasing worldwide concern for the survival of the giant panda by adopting a comprehensive conservation plan for the species and fully implementing that plan as quickly as possible, including full utilization of the scientific, technical and educational resources of institutes and universities of the People's Republic of China.

3. SPECIFICALLY RECOMMENDS adooption of a long-term strategic and tactical conservation plan for the giant panda.

4. CALLS UPON all agencies and individuals in the People's Republic of China to cooperate in such a long-term conservation plan, preferably under a single directorate so that actions can be coordinated and controlled to best effect in securing the giant panda in its natural environment, in preventing poaching and habitat destruction, and in ensuring that any animals held in captivity contribute to the maintenance and perpetuation of the giant panda population as a whole;

5. URGES authorities of the People's Republic of China to provide for the early rehabilitation to the wild of pandas rescued from temporarily or permanently degraded habitats;

6. FURTHER URGES that all organizations and institutions now holding giant pandas cooperate fully to incorporate these animals in an international program for captive propagation and that the free interchange of captive specimens for this purpose be facilitated by all governmental and intergovernmental agencies concerned;

7. RECOMMENDS that the effects of other activities involving giant pandas that may not directly contribute to the conservation of the species, especially temporary exhibitions, be investigated by the appropriate authorities and scientists of the People's Republic of China in consultation with international conservation groups and the zoo associations of several countries, and that until the issues involved in these matters are resolved that careful consideration should be given before further loan agreements are made.

8. FURTHER RECOMMENDS that, in consideration of the low population numbers of the species, scientists and governmental authorities of the People's Republic of China specifically consider the proposition that any exhibitions of giant pandas should only be adjunct to and completely compatible with an international captive breeding program for the species, and that such exhibits should be designed for the education of people about the biology and conservation of the giant panda; and that any revenues specially generated from exhibitions should only be devoted to support specific aspects of the conservation plan for the species and accounted for in keeping with this goal;

9. ACKNOWLEDGES AND APPLAUDS the efforts of WWF, Wildlife Conservation International-New York Zoological Society, Zoological Society of London, and others in assisting in the conservation of the giant panda by lending expertise and giving financial support to colleagues and agencies of the People's Republic of China; and

10. AGREES to stand ready, within available resources, with its member organizations and WWF to assist responsible authorities in the People's Republic of China in the development and implementation of a comprehensive conservation plan for the giant panda, including design and execution of needed research, advice on park and reserve management, coordination of captive breeding programs, establishment and management of an international studbook, and development of popular education projects.

APPENDIX C

United States Department of the Interior

FISH AND WILDLIFE SERVICE
WASHINGTON, D.C. 20240

TAKE PRIDE IN AMERICA

ADDRESS ONLY THE DIRECTOR,
FISH AND WILDLIFE SERVICE

In Reply Refer To:
FWS/OMA

MAR 4 - 1988

Dr. Robert O. Wagner
Executive Director
American Association of Zoological
Parks and Aquariums
Oglebay Park
Wheeling, West Virginia 26003

Dear Dr. Wagner:

As you are aware, permits for temporary exhibition loans of giant pandas have become an issue of concern to the U.S. Fish and Wildlife Service (Service). Several American zoological institutions are reportedly negotiating with authorities in China for panda loans in the immediate future.

The purpose of this letter is to clarify the Service's current position on applications for panda loan permits, and to solicit your assistance in resolving this issue. At the present time, there is not enough information available to determine whether any panda permit applications would meet the strict criteria of the Endangered Species Act and the Convention on International Trade in Endangered Species of Wild Fauna and Flora. The Service will not be able to take final action on any applications until there has been an opportunity to discuss further with counterpart agencies in China the effects of such loans on wild or captive breeding populations, as well as how funds raised from the loans would be used to enhance the survival of the species.

It is the responsibility of the Service to obtain this information. I have directed the appropriate offices of the Service to pursue an immediate effort with counterpart agencies in China, as well as appropriate international organizations, to obtain the necessary information and assurances. Your association is in a special position to assist in this effort. I would therefore like to ask for your assistance in communicating the Service's position to the chairman and members of your board of directors, as well as to your member institutions. In addition, any information or assistance your association may wish to provide would be welcome.

Sincerely,

Frank Dunkle

FRANK DUNKLE
DIRECTOR

APPENDIX D

AN AAZPA POSITION STATEMENT ON GIANT PANDAS

In the world of wild animals, the strange and delightful giant panda is unexceeded in public interest and affection. This interest and the panda's gravely endangered status makes it a particularly effective and poignant tool in the increasing educational effort to raise public consciousness of the plight of the earth's vanishing species. In support of this effort and for avowed reasons of international friendship, Chinese authorities have recently sent giant pandas on short-term loans to zoos in the Orient, Scandinavia, Europe and North America. Chinese forestry and zoological authorities have sought help from loan recipients in the form of support for government programs, especially for giant panda propagation or protection in China. The number of such loans is greatly increasing.

THE PANDA'S PLIGHT:

It is thought that there may be fewer than 1,000 giant pandas remaining in nature. This perilously tiny population is severely fragmented; there are only a few breeding populations of as many as 50 pandas remaining. Poaching of pandas continues, even in the reserves, and wild habitat is shrinking before expanding human pressures.

The emerging picture of the panda in nature, which will soon be clarified by a new study, is that of a dying species. Its wild populations appear too small and too fragmented to long survive without extraordinary efforts in species and habitat protection and management and, possibly, population augmentation.

In China, there are said to be about 100 pandas in captivity in various facilities of the Ministry of Forestry and in Chinese zoos. Breeding programs have not yet resulted in a self-sustaining captive population.

Many of the pandas in Chinese institutions were rescued from various plights, including die-offs of bamboo - their principal food. However, very few rescued pandas have been returned to nature, and many captive pandas in China are kept alone and have no opportunity to breed. Only a few pandas sent to foreign zoos on short-term loans have been captive bred. Short-term loans do not result in propagation.

THE SHORT-TERM LOAN PROGRAM

We must assure that short-term loans do not prove detrimental to the panda's future by removing pandas from possible captive breeding programs in China, or by preventing their reintroduction to nature, or by encouraging the removal of pandas from the wild.

STANDARDS

While there continues to be a high level of interest in short-term loans, it is important that AAZPA members seeking loans do so with the welfare of the giant panda uppermost in mind.

The Panda Task Force, after consultation with officials representing IUCN-SSC, WWF, and USFWS, therefore recommends to zoos that:

1. The welfare of the individual animals and the survival of the species must have the highest priority when arranging any loan.

2. Loan arrangements must respect the goals of the resolution on giant panda conservation by the General Assembly of the IUCN, February 10, 1988, which

   a. called for a comprehensive long-term conservation plan, preferably under a single directorate in the People's Republic of China, to ensure the existence of the giant panda in the wild and to ensure that animals held in captivity contribute to the maintenance of the giant panda population as a whole.

   b. recommended that further short-term loans be made only after careful consideration and that Chinese authorities and scientists investigate the effects of such loans in consultation with conservation organizations and zoo associations (such as AAZPA) and,

   c. further recommended that in consideration of the low population numbers of the species, scientists and governmental authorities of the People's Republic of China specifically consider the proposition that any exhibitions of giant pandas should only be adjunct to and completely compatible with an international captive breeding program for the species,

      <u>and</u> that such exhibits should be designed for the education of people about the biology and conservation of the giant panda;

      <u>and</u> that any revenues specially generated from exhibitions should only be devoted to support specific aspects of the conservation plan for the species and accounted for in keeping with this goal.

3. A contracting zoo and their Chinese counterparts understand that the zoo's contribution to giant panda conservation would only be allocated through the agency of a panda conservation committee endorsed by the AAZPA. (This committee would have representatives from IUCN-SSC, AAZPA, and other appropriate organizations. It would work with appropriate Chinese authorities to designate the funds for specific and appropriate aspects of long-term conservation plans for the species, covering both captive and wild populations.)

4. AAZPA members should only accept animals for short-term loans which are adult specimens physiologically incapable of reproduction, preferably adult males and preferably animals that are captive born.

5. Transfer of animals should be done as infrequently and as quickly as possible.

6. Giant pandas must be accompanied during shipment by persons knowledgeable and capable of caring for the animals at all times.

7. Proper facilities must be available in advance of the arrival of animals.

8. Institutions arranging for loans of giant panda should:

   a. Carefully review the minimum standards for care developed by the National Zoological Park and determine if those standards are met.
   b. Advise the Chairman of AAZPA's Wildlife Conservation and Management Committee, the AAZPA Conservation Coordinator and the AAZPA Panda Task Force of their plans and seek WCMC approval. We have been informed by U.S. Fish and Wildlife Service officials that in the case of panda import permits, AAZPA will be requested to review all permit applications submitted to USDI.
   c. Consult the permit office of the U.S. Fish and Wildlife Service regarding permit requirements.
   d. Have proper permits and permission from the Chinese authorities to export the animals from the People's Republic of China.
   e. Make certain that the institution and its Chinese counterpart cooperate with the AAZPA Giant Panda Task Force to clearly formulate financial and logistical arrangements before any animals are shipped.
   f. Ensure that the zoo's governing authorities and any other involved supporters (mayors, governors, etc.) are aware of AAZPA, IUCN, and WWF positions on short-term giant panda exhibition loans.

BREEDING LOANS

In respect to animals held in zoos on a long-term basis, the Task Force recommends that the IUCN resolution of February 10, 1988 be followed, including the precept that all organizations holding giant pandas cooperate fully in an international program for captive propagation and that free interchanges of specimens for this purpose be facilitated by all agencies concerned.

Further, the Task Force strongly suggests that:

a. AAZPA institutions should not seek ownership of animals,
b. breeding loans should be of sufficient duration to permit the opportunity for reproduction and raising of offspring,
c. only institutions prepared to support financially and conduct pertinent research and to promote reproduction of the animals should engage in such loan activities.
d. that accurate information on all animals held must be made available to the international studbook for the species.

10 March 1988

THE AMERICAN ASSOCIATION OF
ZOOLOGICAL PARKS AND AQUARIUMS

PREAMBLE TO THE CODE OF PROFESSIONAL ETHICS

The continued existence of zoological parks and aquariums depends upon recognition that our society is, or at least should be, based on the respect for the dignity of not only the animals we care for, the people we serve, but most importantly, each other. Members of the American Association of Zoological Parks and Aquariums (members) play an important role in the preservation of our heritage. To fulfill this role, we must understand the relationship we share with the public, the animals under our care and with each other. A consequent obligation of members is to maintain high standards of ethical conduct. Members must have the courage and foresight to live up to their responsibilities within principles of professionalism.

A code of ethics provides standards by which we can judge our professional conduct. We must find within our consciences the point against which to test our actions. It is the desire to maintain the respect and confidence of fellow members and the society they serve that should provide us with the incentive for the highest degree of ethical conduct. The possible loss of that respect and confidence can be one of the most severe sanctions one could suffer. So long as our profession is guided by these principles, ours will continue to be a respected profession.

CODE OF PROFESSIONAL ETHICS

The following Code of Professional Ethics of the American Association of Zoological Parks and Aquariums (AAZPA) shall form the basis for all disciplinary actions of the AAZPA.

Deviation by a member from the AAZPA Code of Professional Ethics or from any of the rules officially adopted by the Board of Directors supplemental thereto, or any action by a member that is deterimental to the best interests of the zoo and aquarium profession and the AAZPA, shall be considered unethical conduct by a member; and the member shall be subject to investigation by the Ethics Board of the AAZPA and, if warranted, to disciplinary action by the AAZPA Board of Directors. The Code is intended as an inspirational guide for members and as a basis for disciplinary action.

This Code cannot apply to nonmembers; it does define the type of ethical conduct the public has a right to expect, not only of staff members of an institution but also of their nonprofessional employees and associates in all matters pertaining to professional zoological park and aquarium employment. A director of a member institution should ultimately be responsible for the conduct of his or her employees and associates in the course of carrying out this Code of Professional Ethics.

The Obligations of Professional Ethics set forth here are aspirational in character and represent the objectives towards which every member should strive.

The Code's Mandatory Standards, unlike the Obligations of Professional Ethics, are mandatory in character. The Mandatory Standards, to be uniformly applied to all members, establish a minimum level of conduct below which no member may fall without being subject to disciplinary action. The Code makes no attempt to prescribe either

disciplinary procedures or penalties for violation of Mandatory Standards. The severity of judgment against a member found to be in violation of a Mandatory Standard shall be determined by the character of the offense and the attendant circumstances. The Ethics Board, in applying the Mandatory Standards, may find interpretive guidance in the basic principles embodied in the standards and in the objectives reflected in the Obligations of Professional Ethics.

The Board of Directors of the AAZPA shall have the sole power of interpreting this Code of Professional Ethics; and its decisions shall be final, subject to all provisions of the Charter and Bylaws. The Ethics Board of the AAZPA shall recommend action to be taken in such matters, subject to review by the Board of Directors, and exercise such additional authority as may be delegated to it by the Board of Directors consistent with the Charter and Bylaws.

I. OBLIGATIONS OF PROFESSIONAL ETHICS

In order to promote high standards of conduct in our profession, the AAZPA has formulated the following basic principles for the guidance of its members:

AS A MEMBER OF THE AAZPA, I PLEDGE TO:

A. Realize that I have moral responsibilities not only to my professional associates, my fellow employees, and the public, but also to the animals under my care.
B. Display the highest integrity, the best judgment or ethics possible, and use my professional skills to the best interests of all.
C. Deal fairly with members in the dissemination of professional information and advice.
D. Use only legal and ethical means when seeking to influence governmental legislation or regulations.
E. Issue no statements to the public which I know to be false or misleading.
F. Maintain high standards of personal, professional, and business conduct and behavior.
G. Promote the interests of AAZPA and do my full share of all work required of me by AAZPA.
H. Cooperate with qualified zoos, aquariums, and other breeders in breeding programs of endangered and other species.
I. Aid the professional development of those who enter the zoological park and aquarium profession by assisting them to understand the functions, duties, and responsibilities of the profession.
J. Seek opportunities to be of constructive service in civic affairs and, to the best of my ability, advance the understanding of all nature to the community in which I live.
K. Make every effort to assure that exotic animals do not find their way into the hands of those not qualified to care for them properly.
L. Encourage publication of significant achievements in breeding husbandry, medical technology, architecture, etc., in the appropriate publications generally familiar to members.
M. Endeavor at all times to improve zoos and aquariums.

II. MANDATORY STANDARDS

1. MAINTAINING INTEGRITY AND COMPETENCE OF THE ZOOLOGICAL PARK AND AQUARIUM PROFESSION
   a. A member shall make no materially false statement or deliberately fail to disclose a material fact in connection with his or her application for membership in AAZPA.
   b. A member shall not endorse the application for membership in AAZPA of a person known by that member to be unqualified in respect to character, education, length of service, or some other relevant factor.
2. MISCONDUCT
   a. A member shall not violate a Mandatory Standard.
   b. A member shall not solicit the aid of another individual to circumvent, or assist another to violate, a Mandatory Standard.
   c. A member shall not knowingly engage in activities contrary to local, state, federal or international laws, as such laws relate to our profession; and a member will, to the best of his or her ability, cooperate with governmental agencies regulating animal welfare and animal transactions.
   d. A member shall not engage in conduct that adversely affects, or is prejudicial to, the concepts and ideals of the AAZPA.
3. DISCLOSURE OF INFORMATION
   a. A member shall not knowingly misinform the receiving party regarding animal records or specimen disposition.
   b. A member shall not alter animal records or alter the facts concerning age, condition, or other material information about any animal in order to affect the sale, trade, loan or other transaction with respect to such animal.
   c. A member shall immediately bring to the attention of the Ethics Board of the AAZPA any information concerning a clear violation of a Mandatory Standard.

AAZPA CODE OF PROFESSIONAL ETHICS - AN ADDENDUM

The policies outlined below have been previously adopted by the AAZPA Board of Directors and are considered to expand the interpretation of the AAZPA Code of Professional Ethics that was developed to guide ethical conduct of all members:

Animal Auctions (1981)

AAZPA members offering wildlife for sale at auctions attended by the general public are in violation of the AAZPA Code of Professional Ethics, specifically Item K, which states, "As a member of AAZPA, I pledge to...Make every effort to assure that exotic animals do not find their way into the hands of those not qualified to care for them properly."

Use of ANIMAL EXCHANGE (1984)

Individuals may utilize ANIMAL EXCHANGE to purchase specimens if the following criteria are followed: the individual should, during the initial contact, identify his or her intentions and make the seller aware if the specimen(s) will go to the purchaser's private collection and not the zoo in question (adopted by the Ethics Board at the direction of the AAZPA Board).

Notification of Ethics Code Violations (1986)

Copies of all official Board actions on violations of the Code of Professional Ethics will be sent to the director of the violator's institution. Such action will be published in NEWSLETTER, eliminating names and other identifying factors, to act as a guide for all Association members.

Procurement of SSP Animals (1986)

Attempts by members to circumvent AAZPA conservation programs to procure specimens of SSP animals are detrimental to the Association and its conservation programs. Such action may be detrimental to the species involved and could be construed as a violation of the Association's Code of Professional Ethics. All Association members should work through SSP species coordinators and appropriate propagation groups in efforts to procure specimens of SSP species.

ETHICS BOARD

The following explanation is provided for members of AAZPA regarding the Ethics Board. The Ethics Board is the only elected committee of AAZPA (other than the Executive Committee) and consists of five members. The Ethics Board proposed guidelines on the functioning of the committee for consideration during the San Diego Annual Conference in 1977, which the AAZPA Board unanimously adopted as follows:

1. All Ethics Board matters will be handled in accordance with the objectives and standards of the Association's Code of Professional Ethics.
2. Matters called to the attention of the Ethics Board must be in writing and addressed to the Chairman or any member of the Ethics Board. The ethics charge must be signed by the complainant and must contain a full statement of the matter he/she wishes to be reviewed by the Ethics Board.
3. An individual filing an ethics complaint shall be advised that full disclosure of the matter will be made available to all parties concerned. At this time, the complainant has the right to withdraw the complaint; and thus, the matter will be closed.
4. The Ethics Board will at all times maintain the absolute integrity of all persons concerned.

5. It must be clearly understood that the Ethics Board has no authority to administer any disciplinary action. The Ethics Board's role is investigatory, and it is responsible for submitting a detailed summary of ethics matters to the AAZPA Board of Directors, who will take final action on the matter.

The following procedures are hereby established:

1. The Chairman of the Ethics Board will distribute copies of all duly received ethics complaints to members of the Ethics Board and to the AAZPA President, Executive Director and the AAZPA Board member appointed as Ethics Board liaison representative. All such correspondence shall be marked "Personal and Confidential." The Chairman will request each recipient to render an opinion as to the validity of the complaint, give a recommendation on how best to proceed and recommend what action should be taken on the charge.
2. The Chairman shall review all recommendations received and then establish a final determination in the matter, request a site visitation by members of AAZPA or take whatever action is determined appropriate to properly resolve the issue.
3. The Chairman shall advise all parties involved of the ultimate action taken by the Ethics Board and submit the committee's recommendations to the AAZPA Board of Directors for its final action.
4. Once the Ethics Board has referred an ethics matter to the AAZPA Board of Directors, the Ethics Board will no longer be involved unless directed to perform additional service by the AAZPA Board of Directors.

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
A•A•Z•P•A 1924

American Association of Zoological Parks and Aquariums

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

OFFICERS

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CHARLES H. HOESSLE

President-Elect
DAVID G. ZUCCONI

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

Immediate Past President
PALMER E. KRANTZ, III

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CHRISTEN M. WEMMER, Ph.D.

CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

March 19, 1990

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

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

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.

In preparation for our Denver meeting, please be thinking about:
(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

TICKETS TO BE DELIVERED 4/3/90

DENVER

Sunday, April 15 (Easter)

NW #645 Dep. Mpls. 7:15 p.m. Arrive Denver 8:24 p.m.

HOTEL: Stapleton Plaza Hotel ($60/night).
Confirmation #041525 Sonya
3333 Quebec St. (303) 321-3500
(For a free shuttle van from the airport, go to one of the hotel display boards located in the baggage claim area and phone Stapleton Plaza for picup at the area designated for same on the lower level.)

Tuesday, April 17

Denver - Mpls. Return

NW #566 Dept. Denver 5:00 p.m. Arrive 7:58 p.m.

PRICE: $628 for either, 25% penalty, 7 day advance.

American Association of Zoological Parks and Aquariums

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

Save for mtg.

February 23, 1990

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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

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.

DZ:jo

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

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

denver zoological foundation

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

15 February 1990

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:

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.

staff
Clayton F. Freiheit
Zoo Director
Paul N. Linger
Assistant Director
John D. Wortman
Curator
William R. Turner
Education
Richard C. Cambre, D.V.M.
Veterinarian
José G. Trujillo
Administrative Assistant
Thomas A. Peterson
Marketing Officer
Dian L. Little
Development Coordinator

officers
Robert G. Bonham
President
James B. Kurtz
Exec. Vice President
Horace F. Phelps
Vice President
Mrs. Alida Talmage
Vice President
Roger E. Johnson
Treasurer
Mrs. Forrest McGrath
Secretary

trustees
Joseph B. Blake
Robert P. Davison
Carolyn B. Etter
Don D. Etter
Mrs. John Gharst
Mrs. Edwin Grant
Mrs. Beverly Haddon
Mrs. Louis Halsell, Jr.
Horace N. (Bud) Hawkins III
Emmett L. Haywood
Sidney G. Hoskins
Mrs. Thomas Keesling
Ms. Ann Kiley
Brian W. Klepinger
Mrs. Walter Koelbel
Robert B. Moch
Mrs. James S. Ogsbury III
Mrs. Osgoode Philpott, Jr.
Fred L. Pundsack
Edward A. Robinson
Dr. Robert Sawyer
Mrs. Joseph H. Silversmith, Jr.
Thomas A. Siratovich
Dr. John G. Stuart
Mrs. Louis J. Swiatek
Ms. Marilyn E. Taylor
Ms. Liz Telea
Mrs. William G. Temple
Mrs. Mary Lou Walters
Mrs. Patrick M. Westfeldt

honorary life trustees
Herman F. Feucht
William H. Kistler
J. Churchill Owen
Dr. Conrad M. Riley
James E. Stokes
Charles L. Warren

I shall plan to attend at least some of the sessions. Please let me know if you have any problems or questions regarding the above. We are looking forward to having the NPG here.

Best regards,

Clayton F. Freiheit
Director
DENVER ZOOLOGICAL GARDENS

cc: C. Hoessle
R. Wagner
L. Boyd

KRA

1. optimize image, ~~AAZPA~~ + members

2. maximize conservation potential

3. reexamine organization, staff/volunteer interfacing

Jeff
G. Lopez
Kathryn
Ollendic

631-2529 (614)
988-7322 (513)
421-9300 (612)
~~781-0900~~ 647 7969 (314)

Proactive in

1) Conservation programs
2) advocacy
3) excellence
4) communication

backcasting - Denver Mtg.

THE AAZPA

Its History

The AAZPA was formed in 1924 and was initially affiliated with the American Institute of Park Executives. On 1 January 1966, the AAZPA became a professional branch affiliate of the newly formed National Recreation and Park Association. Throughout its years as a branch affiliate of other professional organizations, AAZPA had little opportunity to chart its own course. During early years, many zoos were operated as part of local park and recreation departments. The 1950s and 1960s witnessed a growing awareness on the part of the public toward conservation and the rapidly vanishing wilderness areas of the world.

As the public became more mobile, they began visiting zoological facilities in vastly increased numbers. While many such facilities rose to the occasion and capitalized on the new conservation ethic, many others were somewhat stymied. During this time, AAZPA was undergoing substantial changes in its philosophy and method of operation. Federal, state and local legislative measures were being considered which would have substantial impact upon the operation of zoos and aquariums; and because the Association was a branch affiliate of a much larger professional organization, it could do little to stem the tide of restrictive legislation.

Therefore, our members in attendance at the annual conference in Salt Lake City, Utah voted overwhelmingly on 20 September 1971 to separate from the National Recreation and Park Association and to immediately form an independent association. It was determined that such would allow AAZPA to better pursue and further expand its involvement in conservation, science and education. As a result of this decisive vote, the officers and directors met in Wheeling, West Virginia on 20 November 1971 to form a new association and to file its charter for incorporation. AAZPA formally opened its Executive Office in Oglebay Park, Wheeling, West Virginia on 3 January 1972. The incorporation was subsequently approved by the State of West Virginia on 19 January 1972.

From this rather meager beginning, the Association now represents virtually every major professionally operated zoological park, aquarium, wildlife park and oceanarium on the North American continent and most of the professional staff members employed therein. Additionally, the Association has the opportunity on occasion to become the spokesman for the more than one million zoological park and aquarium society members who offer support to their local zoological facilities.

The Association's striving for higher levels of professionalism was evidenced by the enthusiastic support of the voting membership in adopting numerous changes to the Bylaws immediately following our separation from NRPA. New requirements for membership called for a higher commitment on the part of the applicant and a much more careful review of applicants by the Executive Office staff, Membership Committee and the Association's Board of Directors. Accreditation of institutions, long considered a worthwhile objective of the Association, was enacted in 1972. Initially, accreditation was available on a voluntary basis, but was made mandatory during the Chicago Annual Conference in 1980. The result of that action is that all Institution members of AAZPA must be accredited for the continuance of membership. A Code of Professional Ethics, again attesting to the membership's concern for more professionalism, was adopted in 1976 during the Annual Conference in Baltimore, Maryland.

Providing its members with professional publications has always been an important obligation of the Association and one of its pursued objectives. Until 1975, the only publications offered were the Directory and the NEWSLETTER, both provided through the dedicated efforts of volunteers. Currently, the Association provides a wide variety of publications, most of which are compiled in three-ringe binders, affording an opportunity for updating as new information becomes availabl Of major importance is the massive AAZPA MANUAL OF FEDERAL WILDLIFE REGULATIONS, recently republished in a two-volume set, to keep our members apprised of the late federal regulations on wildlife and the wildlife species which are afforded protection. Another important publication is the Association's book, ZOOLOGICAL PARK AND AQUARIUM FUNDAMENTALS, edited by Karen Sausman and written by more than thirty leaders in the field of zoological park and aquarium management.

The bringing together of zoo and aquarium professionals, as well as those interested in zoological park and aquarium management, is another important servic of the Association; and the popularity of such meetings is ever increasing. AAZPA conducts an annual conference during the fall of each year and five regional confe ences during early spring. Collectively, more than 50% of the Association's membe ship gathers for such meetings. Proceedings from these meetings are also provided Moreover, the Association also hosts a School for Professional Management Development for Zoo and Aquarium Personnel, providing students an opportunity to gain expertise in management techniques, and a School for for Applied Zoo & Aquarium Biology, providing a basic knowledge and understanding of natural history and zoo animal specialty fields.

The Board of Directors voted unanimously during its midyear meeting in Tulsa, Oklahoma in 1980 that conservation become the Association's highest priority. At that time, the Board authorized the Executive Director to employ another senior staff person, whose responsibilities would be to put the Association's conservatio endeavors into force. Additionally, they accepted the concept of a master breedin plan, which later became known as the Species Survival Plan. This conservation program is growing in stature and is meeting both the dreams and commitments of th Association's members.

The Association embarked upon its first formal fund-raising effort in 1984 wi the establishment of the Conservation Endowment Fund. The initial effort was to secure contributions from Institution, Society, Related Organization and commercia members. The Board of Directors has restricted the fund, making only the interest derived from investments available for conservation projects.

Each year the Association's membership reflects a dramatic increase. Such growth attests to the commitments made by those concerned with the collective endeavors of zoological parks and aquariums, as well as those charged with their management.

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, Californi

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 Subcommitte

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.

DRAFT - April 13, 1990
Bruce Read, St. Louis Zoo

AAZPA HISTORY

VIA THE NEWSLETTER

for the Strategic Planning Committee of AAZPA

1971 - Oct. - The NRPA and the AAZPA jointly announce that on Sept. 1971 that the AAZPA will become independent.

The AAZPA and the USDI worked together to draft the Animal Welfare Act of 1970.

Animal Health News reported that virulent strains of Newcastle Disease have been encountered in the US and that this disease is now listed as a reportable disease.

Zoo Image

1. Zoos and Aquariums should make stronger efforts at placing their positive programs before the media.

2. Zoo and Aquarium professionals should write good, clear articles on zoo goals, and have them printed prominently.

3. Zoo and Aquarium professionals should involve themselves with humane society activities.

4. News media should become more extensively involved in our annual meetings, and chairmen of sessions should be encouraged to emphasize the dignity of what good zoos are trying to achieve.

5. Aquarium and Zoo professionals should serve lay organizations in the capacity of natural history consultants.

Nov. - List of animals restricted by official AAZPA action:

Provision One

1. Monkey-eating Eagle (Pithecophaga jefferyi) June,1967
2. Javan Rhinoceros (Didermoceros sondaicus) June,1967
3. Sumatran Rhinoceros (Didermoceros sumatrensis) June,1967
4. Zanzibar Red Colobus (Colobus badius kirkii) Dec,1967
5. Golden Lion Marmoset (Leontideus rosalia) Dec.,1967
6. Mountain Tapir (Tapirus pinchaque) Sept.,1969
7. Mountain Gorilla (Gorilla gorilla beringei) Sept.,1969

Provision Two

1. Orang-utang (Pongo pygmaeus) June,1967
2. Aldabra Tortoise (Testudo gigantea) June,1967
3. Galapogus Tortoise (Testudo elephantopus) June,1967

Resolutions Passed by the AAZPA at the Salt Lake City Conference

1. Resolution to Adopt Certain Recommendations to Improve the Management and Propagation of Captive Crocodilians

A discussion occurred on the Seamak Zoogad System - Zoological Data Storage, Retrieval and Analysis System developed by Dr. U. S. Seal and Dr. D. G. Makey

1973 - May - AAZPA urges coordination of surveys and questionnaires.

The AAZPA Board cautions all members to check details with dealers before transacting business involving any endangered species and not assume that all stock is correctly documented on lists of animals provided by dealers.

July - Accreditation Program starts

Dec. - Conservation of Wildlife Committee restructured

1974 - Feb - ISIS was adopted by the Board and membership at the Oct, 1973 meeting.

Nov. - The Bylaws were amended to allow the membership to present amendments by petition.

1975 - Jan.- The AAZPA Management School was founded.

Oct. - The membership voted to support the proposed amendments to the Charter and Bylaws, as follows:

There is no longer reference made to nonprofit institutions, nor to personnel employed in profit making facilities.

A Membership Committee has been established and specifically charged with the responsibility of membership review: both for new applications and of existing memberships.

Dec. - A joint resolution from the IUCN, AAZPA and Conservation organizations intended to promote responsible and professional conservation in the world's zoological parks, aquariums, and botanical gardens.

1976 - March - The Board of Directors urges that the members applying for Endangered Species or Marine Mammal permits first send the applications to: The Chairman, AAZPA Conservation Wildlife Committee, for committee evaluation before submitting them to the governmental agencies involved.

The Ethics Board was established.

April - AAZPA policy on keeping exotic pets passed by the Board.

Sept. - The Code of Professional Ethics was published in the Newsletter for the membership to review.

1977 - May - The Board of Directors recently made an important membership ruling. All new Institution/Society members will be accepted into AAZPA for a 24 month probationary period, providing they meet the established requirements for membership. During this 24 month period, new Institution/Society members will receive full membership services, but must apply for and receive AAZPA Accreditation. Any new Institutional/Society members that do not receive Accreditation during this 24-month period will be dropped from the membership roles.

Sept. - Revision of the Bylaws concerning Officers and the Board of Directors, Committees, Meetings, and Membership.

Nov. - The Board of Directors urge that the U.S. Department of Agriculture, through its Animal and Plant Inspection Service, expand its authority under the existing Animal Welfare Act to include provisions for the inspection and licensing of all aviculture and hobbyists, in the same manner that USDA/APHIS administers their Animal Welfare Act for certain warm-blooded mammals.

Dec. - A special Board meeting to formalize the contract between AAZPA and ISIS.

1978- July - An explanation was published in the Newsletter on the Ethic Board and its function.

The official response to the Department of the Interior's publication of the advances notice for the proposed rule making regarding captive wildlife regulations was published.

Nov. - The Board adopted Guidelines for the Disposition of Surplus Animals.

The Board adopted Guidelines for the Disposition of Wild Animals from Zoos and Aquariums.

1979 - Aug - AAZPA supports the Fish & Wildlife rule making on captive wildlife regulations.

Sept. - Changes in the Bylaws to the status and classification of members.

Nov. - The Board urge the Members of the U.S. Congress to maintain the integrity of the Endangered Species Act and to reauthorize it without weakening amendments.

1980 - July - The Bylaws committee recommended membership changes and method to submit amendments to the Board and membership for approval.

Oct. - The Board determined that conservation become the Association's highest priority (from the midyear meeting in

Tulsa).

Dec. - The SSP committee was established and Tom Foose was hired as the Conservation Coordinator for AAZPA

1981 - Jan - The Board urges that the Animal Exchange not be circulated (copied and distributed) beyond members of the recipients staff.

March - Accreditation by Dec. 31, 1985 is now mandatory to continue to be an institutional member.

April - The Board voted to stand firm of the Code of Professional Ethics, section K concerning the participation of members in auctions. The Board ruled that members could not provide animals to auctions attended by the general public.

1982 - Feb. - Memorandum of Participation in SSP programs was published.

June - Section 1 of the Animal Care Contingency Plan has been mailed to all Institutional and Related Organizational Members.

1983 - Feb. - The Report of the Animal Surplus Guidelines Committee was published.

1984 - March - The AAZPA's Species Survival Plan booklet was distributed to Institutional members.

The Conservation Endowment Fund was authorized by the Board.

Nov. - A Memo of Understanding was signed between AAZPA and the FWS for handling seized wildlife. The Board established a Clearinghouse Committee to form a clearinghouse to aid in this agreement.

The Board passed a motion that all officials of AAZPA, including committee chairman, should, when appropriate, provide copies of official correspondence and position papers which directly impact upon the institutions subject to the correspondence or position papers, at least simultaneously with sending such materials to government agencies. The Board further urged that members provide the Association with copies of permit applications and other documents prior to sending them to government agencies.

1985 - Nov. - The Board established the Zoo and Aquarium Special Interest Committee.

Dec. - The AAZPA begins to develop a formal long-range plan. The Board established the Long-range Planing Committee.

1986 - May - The Board set the SSP meetings prior to the Annual Conference.

The Board established the system of having each Board member to act as a liaison for one year to one or more committee (s).

The Board published guidelines on the short and long term loans of Giant Pandas.

The Board published a directive on the Procurement of SSP Animals.

Jun - The AAZPA Board further developed guidelines concerning attendance at SSP propagation group meetings - the meetings are open to all institutional representatives.

Nov. - The Long-range Plan for AAZPA is published in the Newsletter.

1987 - Dec. -The Board ratified the AAZPA Position Statement "Short Term Loans of Giant Pandas".

The Board formed the AAZPA/ISIS Relationship Task Force to determine the future relationship of AAZPA and ISIS.

1988 - Jan. - The results of the Hill and Knowlton Survey were published in the Newsletter.

April - The revised set of guidelines "An AAZPA Position Statement on Giant Panda Loans" was mailed to all directors of member institutions noting the standards were mandatory.

June - AAZPA files court action against the U.S. Department of Interior (concerning Giant Panda loans & permits).

Aug - Update on the AAZPA/WWF court action regarding Giant Pandas.

The AAZPA files suit in support of the Secretary of Commerce and the Administration of the National Marine Fisheries Service for the issuance of a permit to the John G. Shedd Aquarium to import six false Killer Whales.

Nov. - The AAZPA Board of Directors agrees that disciplining and handling of elephants in captivity is at times necessary to ensure the safety of keepers, other employees and the public, as well as for the welfare of captive elephants.

Since no consensus of appropriate and acceptable elephant handing protocol exists, the AAZPA Board of Directors has formed a special task force comprised of representatives from the AAZPA's Asian elephant propagation group, which operates as part of the Associations Species Survival Plan, and other experts to conduct a comprehensive study of elephant training practices by our members and to recommend possible alternatives to current techniques.

The Special Review Committee seeks input on AAZPA standards, especially regarding the off-premises use of captive wildlife.

1989 - Dec. - The Board adopted the Long-Range Plan for AAZPA.
Opening the PR/Dev office in Bethesda
Hiring Karen Asis and Sabin Robbins
The purchase of a Conservation Center in Bethesda

The Reinterpretation of Lacey Act & Welfare Act backcasting Denver Mtg.

~~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 agressively 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, CITES 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.

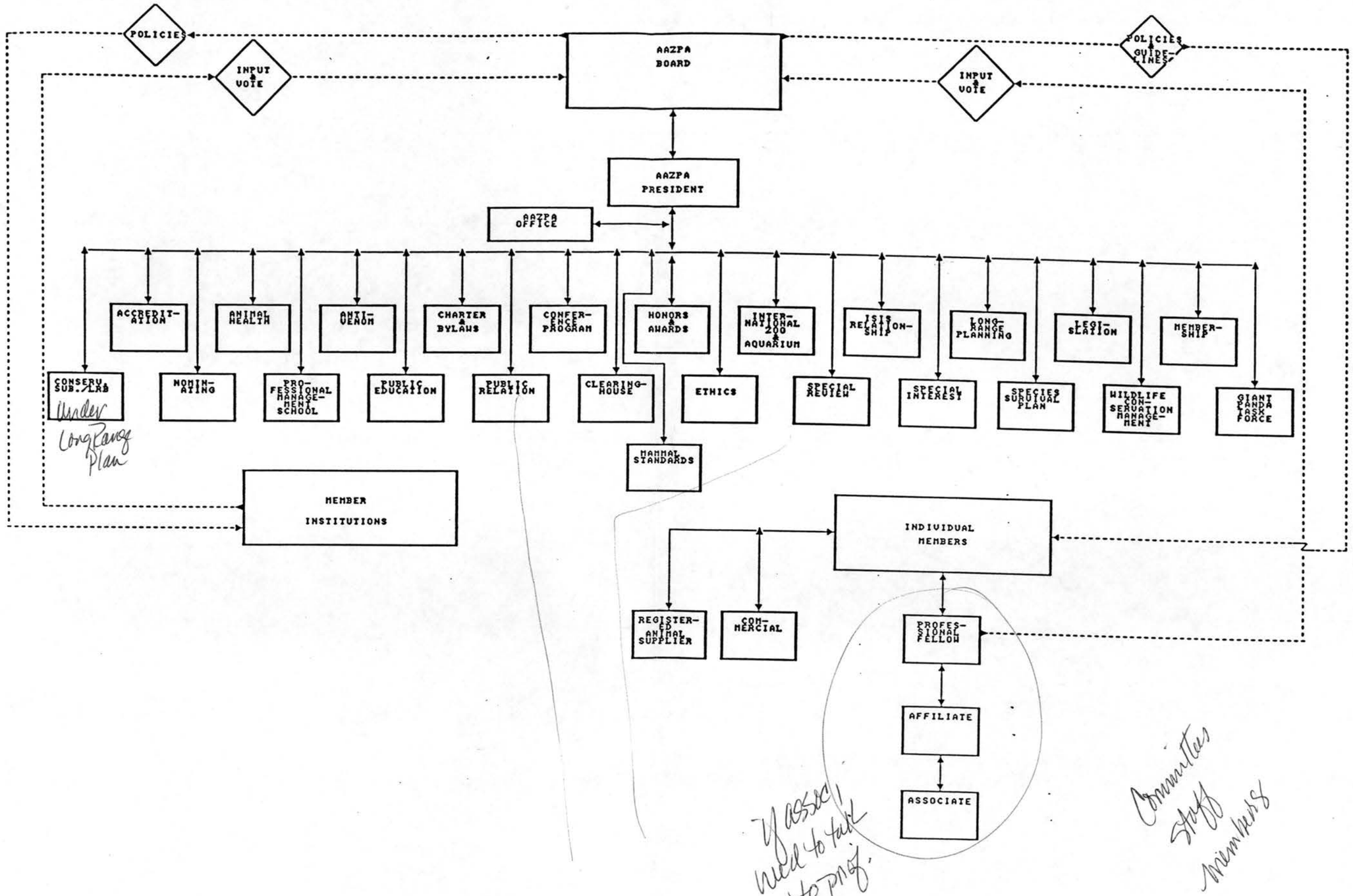
Early on there were individuals and groups that differed from the goals of AAZPA and were to become the animal rights groups. We underestimated the animal rights movement when it started to gather momentum in the early '80's and it has gained too much ground. In the beginning, they were not as well funded 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

unfinished business - Wagner to finish - who provides direction

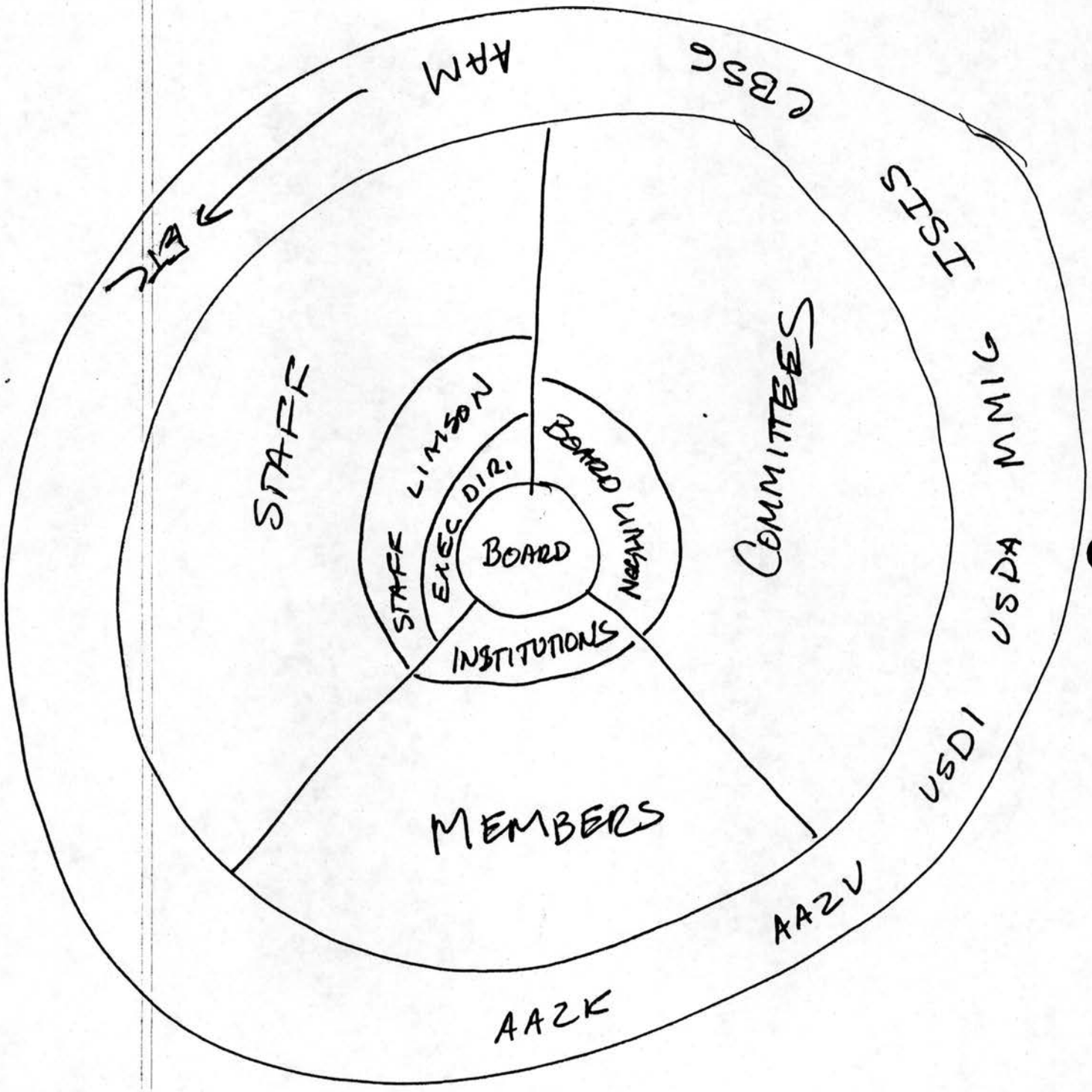
bio-diversity. We should also be looking towards working more closely with IMS and paying more attention to NSF to receive grants to carry on our work. States that have several AAZPA institutions may be moving towards joining forces to defeat legislation and serve as a sounding board for state regulatory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

AAZPA ORGANIZATIONAL CHART



DRAFT - APRIL 4, 1990

Charles Hoessle
St. Louis Zoo



Steve
10/10/01

Bob Smith
Dave Zuccari
Linda Boyd

Bob Wagner
Charlie Hessle
Steve Taylor
David Jenkins
Lou Genchaldi
Gail Schneider
Jerry Lentz

Ulie Seal
Bruce Reed
Jeff
Steve Wylie
Lynn
~~Wave~~ Forst
Don

Bill Donker

4-16

① Culture - comments = how we behave, a still photograph.
- We all figure we are a people + ∴ leads to mission statement supporting
- Institutions vs. individuals
* Are we conservation gp or ~~broader~~

Themes
2nd class citizens - other groups
Culture reflects org. defn. of what it is

Name separates zoos from aquar.

● We treat aquariums differently than zoos.

* We tend to be more 'pius' about our mission - + pat each other on the back rather than tell our story well. -Lou

"Tend not to be sure of ourselves..." Bruce

REVISE AS NECESSARY

② Key operating policies - Accepted Wagner's report

③ Organization Structure
Re-do - Ulie

5 billion global business

● ④ Backcasting - more work to complete

4-16 mtg.

Mission of AAZPA is to foster & support excellence in the purposes of zoological parks & aquariums.

* New task - define conservation values

4.17 Recommendation to change language re: Special Interest Grp" Will be discussed @ June mtg.

* Issues to consider - Should we be selling a + a parts in tiger skins for 2-05,000 rather than offering for free
  - cultural issue

  Should we work in captive programs c̄ private owners?
  We can sell dead a parts + r violate ethics charges

Survival of Species
- high prof. standards + practices
- coordination
- support + sharing of info
- providing advocacy
- in situ + ex situ

4-17

KRA - can also be called priorities

For this exercise
- no 'do more than we do now'
- new, better & different
- not too many - limit to 3 or 4

areas which demand highest attention & action.

Strategic plan envelopes annual plan & budget

Wants us to develop "candidate" KRAs

KRA → Objectives → Strategies → Action Plns

x certain
quantifiable

✓ defn. of strategy

Assignment -

1. Establish tentative objectives
2. Develop strategies
3. Come up w/ likely responses to our strategies.
4. Does KRA language need changing?
5. Tentative obj. look ok?

What can you measure?
- End results
- Activities
- Symptoms
- Methodology

In what terms?
- Quantity
- Quality
- Costs
- Time deadline

In 1st part of May

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.

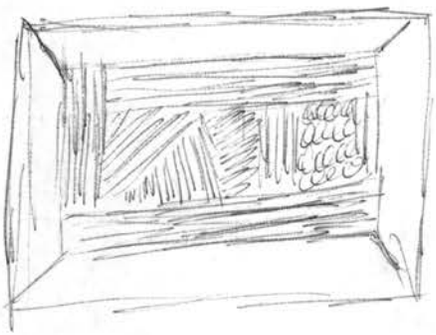
WORKSHEET FOR DETERMINING OBJECTIVES AND STRATEGIES IN A KEY RESULT AREA

KEY RESULT AREA: _____

How Measure	Backcasting Past Performance	New Objectives	Available Strategies	Best Strategies and Rationale

Steve Wylie
legislation - a set down & talked
about topic

KRA's

- Consolidate AAZPA office in Washington
- Put together legislative plan
- Develop a specific strategy to deal w/ unfair ~~practice~~ issues brought by Animal Right grps.
- 

Improve Public Conservation Image
- develop specific strategy for ∝ rights
- develop pro-active Zoos + Aquariums of 21st Century

Jeff - 604-631-2529

Jerry. 813-988-7322

Charlie 314-~~781-0900~~ 647-1969

April 16, 1990
Strategic Planning Committee

In order to insure that we have transportion available (to the airport) for those of you who will be departing early on Tuesday, April 17, 1990, please fill out the bottom portion of this sheet. Thank You.

NAME _____

AIRLINE _____

FLIGHT DEPARTURE TIME _____

TIME WISHING TO LEAVE ZOO _____

Key Result Areas

2nd *

1. Develop our Conservation Resources — Saul Dougherty Kranty Read
   - obj: Fund SSP Programs.
   - obj: Establish a Conservation Biology School.

1st *

✓ 2. Expand Improve Member Services ① — Taylor Zaccani Gail Bill Dember
   - obj: Establish Mgt. database.

4th

✓ 3. Create/Develop Clarify Our Public Conserv. Image ① — Lentz Kenny Hoessle Jeff

4. Ensure Planning Process Continuity
   - obj. LPR Com. to review annually.
   - obj. Review after 5 years.

5. Consolidate Offices — Save $

* 3rd

6. Develop Leg. Plan. — Wylie Dahf

*

7. Develop a Specific Strategy to Deal with Issues Brought by Animal Rights Groups.

8. Develop a Proactive "Zoos + Aquarium" for the 21st Century."

9. Develop a Comprehensive Animal Mgt. Plan ①
(a.) SSP/Studbook Training
(b) Integrate Globally
(c) University Environment.
(d) Research

~~10. Examine the Reorganization of AAZPA Staff and its Relationship to its Members.~~

1. Membership Support - Vol. III
2. Dedicated Prof. Staff "
3. Good Public Image "
4. Credibility "
5. Financial Resources/
   stability "
6. Meets Needs of members
7. Proactive Posture

Critical Factors
for Success

Opportunities

International Accessibility
II

Dev. of high tech Equip. to manage info + comm. - I

Rising Popularity of 2 + 3
III

Increasing Oppt. in Academia Area. - I

- Greater Funding Potent.

Growth Opportunity

Society Demon. Oppt. to Dev. Environ. Leaders

Renewed Int. in Science Edu.

- Mobilization of Visitors + Members

OPPORTUNITIES

- Professional Recruitment
  Continuity of Resources
  + Programs

  Follow trends in
  Attitudes + Leisure Time

- Proactive Exploitation
  of Our Product.

THREATS

- Neg. Public Opinion-I
- Stronger Impact to Leg
- Competition for Dollars + Attention -II
- Increased Cost of Bus.-I
- Depressed Economy-II
- Increased Leg. Reg. -I
- Duplication of Effort
- Shortage of Competent Employees.
- Increased Concern for Animal Rights -II
- Urbanization of N.A.
- Global Con. Crisis

Threats

Changing Demographics

Loss of Biodiversity

Strengths

1. Professionalism & Member Commitment - III
2. Popularity of Product
3. Functional Organization with Existing Programs
4. Legislative Interpretation
5. Financial Support - I
6. Common Interest in Animals
7. Code of Ethics - II
8. Accreditation Program - II
9. Conservation Efforts
10. Comradarie of members
11. Management School
12. Strong Rep. of 2+A
13. History & Tradition

WEAKNESSES

1. Lack of sufficent Trained Conservation Tech.
2. Lack of Communication of our Message - !
3. Perception of Membership
4. Fund-Raising for SSP Programs
5. Lack of Volunteers
6. Canada / U.S. Legis. Asst.
7. Everything to Everyone
8. Lack of Networking to other organizations
9. Lines of Communication not Followed.
10. Lack of response to Requests.

Weaknesses

11. Zoos vs. Agu.
12. Special Interest Groups with Own Agenda
13. Lack of Understanding of small inst.'s needs.
14. Slow to Change - 1
15. Not Proactive Enough
16. Membership Structure
17. Organizational Relationships Are Unclear.

5 Major threats + opportunities

Economic
Social
Political
Techno
Competitive

THREATS

- negative public opinion +
- Stronger impact on legislation
- competition for dollars + support + attention
- higher operating costs
- national economic indicators

OPPORTUNITIES

- International accessibility
- High tech - info mgmt
- Our cause is popular common cause
- Expansion in academic arena
- More funding opportunities
- Growing membership / institutional members + indV. members
- promote future education to dev. ~~leaders + conservationists~~ environmental leaders

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.

Strengths/Opportunities

- International accessibility is growing
- High tech equip being devl which will allow us faster + better communication
- public ~~opinn~~ support of

Increased costs for running AAZPA

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
A•A•Z•P•A 1924

American Association of Zoological Parks and Aquariums

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

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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

9 April 1990

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.

/ljb

Enclosures

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

THE GLOBAL AND LOCAL ROLE OF ZOOS IN CONSERVATION OF BIODIVERSITY AND PREVENTION OF SPECIES EXTINCTION

Christchurch, New Zealand

28 March 1990

U. S. Seal, CBSG

Loss of Biodiversity and Species:

There has emerged on the rapidly changing face of our planet a pattern of increasing numbers of animal and plant species reduced in distribution, populations, and numbers. Even species relatively numerous in total numbers are being fragmented into small isolates with no exchange between them. Small populations face genetic, demographic, and environmental risks as a result of their size and isolation. In the extreme case a species is reduced to one population, oscillating and shrinking in numbers, losing genic diversity, and subject to abrupt reductions or extinction through the random whims of natural events or man. The extreme has become commonplace with captive populations the only short term hope for survival for dozens of vertebrate species worldwide.

Recognition of impending loss and effective response has demanded the development of new tools of viability analysis and survival planning strategies, formulation of strategies for removal of animals from the wild, their captive management as populations, and preparation of offspring for return to wild habitats. Working arrangements, frequently international, are required between wildlife and forestry agencies, the field biologists, and the captive breeding community to achieve these goals. The conflicts of differing agency missions, the antipathy towards placement of animals in captivity as a conservation measure, the uncertainty of success particularly for

reintroductions, and the new costs of a collaborative program frequently have resulted in delay of effective action until few animals remain. Emotions then run high and an effective negotiation process is required. A major element in this process is formulation of biological population models which serve as a common point for negotiation.

Perhaps 3000 vertebrate species and subspecies will require a captive propagation program during the next 50 years to avoid extinction. This time in captivity must be as brief an interlude as possible. There are about 1000 zoos on the planet, representing about 5 billion dollars in capital investment and at least 2 billion dollars per year in operating budgets, that potentially can provide the personnel and space for these species. Each region needs to utilize these resources for endangered species in its region as well as those from other parts of the world. There are perhaps 40 zoos in the Australasian Region that can play key and essential roles in the conservation of endangered species in this region. This need and capability provides a focus for zoo conservation goals for the next century. The removal of the last individuals of a species from the wild generates the need for captive management directed at return of animals to the wild and for greatly increased knowledge of the biology of the species if reintroduction is to succeed. The zoo and wildlife biologists of tomorrow will be specialists in small population biology and management of populations too small to survive without assistance - megazoos.

Zoos' Role in Conservation:

Zoos' participation in the conservation of species is expanding rapidly from their original passive role as exhibitors of exotics to full scale participants in the process of conservation. The scope of activity ranges from education and training to species preservation to species reintroductions to habitat protection and restoration. Zoos recent contributions to species conservation may be divided, for convenience, into 5 phases.

The first phase began with systematic keeping of records and preparation of studbooks.

Second the development of central data bases allowing management of species as global populations to achieve sufficient numbers and genetic founder stock.
Third the development of species survival plans based upon population biology to provide efficient management guidance to achieve the genetic and demographic goals for conservation of the species.

The fourth phase has been the participation with wildlife agencies in the rescue of critically endangered species (the basket cases) from oblivion by desperate measures such as bringing all specimens into captivity. This phase has benefited from the previous development of the Species Survival Plans and the more recent rapid development of Population Viability Analysis and Population Viability Assessment tools. It has also been assisted by the rapidly increasing recognition that we are losing the battle to save many vertebrate species in developed countries as well as other parts of the world.

The fifth phase, just beginning, is the collaboration with the conservation biology and wildlife management communities to develop new captive populations with adequate founder stock of species recognized as endangered. Both of these phases have involved the participation of zoo personnel in field and research activities - an increasing sphere of expertise in biology beyond that of captive management.

The sixth phase, also involving zoo personnel, is return of species to the wild either in reintroductions or releases. This is requiring the development of new knowledge about most of these species in the face of profound skepticism by ecologists and wildlife biologists.

The seventh phase is the participation in support and protection of reserves and parks to sustain species in 'natural ecosystems' or habitat protection. This also will be involving zoo personnel in field research activities and in the training of professionals in the rudiments of intensive species management.

Each of these phases will involve our curators and keepers in activities outside of the zoo and often in other countries. In parallel with these activities are training of foreign nationals in our zoos, the development of funded education and public information programs as an integral part of zoo exhibition programs, the increase in scientific staff to include population biologists, reproductive biologists, experts in nutrition, and behavioral ecologists. The funding to participate in these programs will frequently have to come private donors who are persuaded that support of activities outside the local community are an essential part of the conservation responsibility of zoos. This is becoming easier with the global recognition of the environmental crises we are facing.

In the initial phase of this process zoos have been moving from a position as consumers of wildlife to the development of captive propagation and self-sustaining populations. This is reflected in the changing composition of collections with a decline in the numbers of species and an increase in the numbers of each species held in individual institutions. Also a larger proportion of species held are of conservation importance.

The necessity to manage populations of species has required a new order of cooperation and collaboration among institutions. This process of population management across collections has required new standards of record keeping and pooling of genetic and demographic data in a form suitable for preparation of studbooks and scientific analysis. This stage is reaching its maturity in the regional management programs and in the preparation of species management plans based upon small population biology. These plans have reached a level of biological and management sophistication undreamed of 10 years ago and with no parallel or equal in any other part of the biological world including medical research or wildlife management. The problems posed by this need for efficient long term small population management have served to stimulate interest and research by

the academic community on these problems. Indeed the zoo community has organized and financed most of the major workshops on small population biology held in the past 10 years.

Recognition of the movement of the captive breeding community from the pariahs of conservation to grudging acceptance to actively sought participants is seen in the new IUCN policy on captive breeding. This policy suggests that vertebrate taxa with a current census below 1000 in the wild require close and swift cooperation between field conservationist and captive breeding specialists to make their efforts complementary and minimize the likelihood of these extinction of these taxa. These programs need to be coordinated internationally.

This is just the beginning. Outlines of our directions for the next 10 years are becoming apparent. Estimates of the magnitude of the crisis in vertebrate species extinction indicate that 3000 taxa may become extinct in the next 50 years unless we can establish captive populations as a part of their preservation. For example, a recent list of threatened birds lists more than 1000 species including 18 in New Zealand (15 endemics) and 34 in Australia (33 endemics) and 137 in Indonesia of which 91 are endemics. Many of these species are not now held in captivity or are present in too few numbers to provide adequate founder stock. This means that we will be establishing new captive populations. In extreme cases, like the California condor, black-footed ferret, and red wolf we had to bring all of the known remaining animals into captivity.

Our current program in Madagascar, in collaboration with the Primate Specialist Group and the Government of Madagascar plans to develop at least 12 new captive populations of lemurs of mostly taxa with fewer than 200 remaining in the wild. This programs includes extensive support of 2 facilities in Madagascar, field studies, training, and plans for support of several reserves. This program is being expanded to reptiles, other mammals, birds and some fresh water fish. There are zoos, aquariums, and research institutions from 5 countries currently collaborating in these projects.

Population Viability Assessment:

The concept of risk is used to define the targets for recovery, and is used to define recovery itself. Risk, not surprisingly, is a central issue in endangered species management. Unfortunately, there is ample reason to suppose that we (as humans) are not "naturally" good at risk assessment. Recovery will be more often successful if we could do this better. There is a strong need for tools that would help managers deal with risk. We need to improve estimation of risk, to rank order better the risk due to different potential management options, to improve objectivity in assessing risk, and to add quality control to the process (through internal consistency checks). Among the risks to be evaluated are those of extinction, and loss of genetic diversity.

In the last several years such tools have been developing. The applied science of

April Mtg.

GLOBAL PERSPECTIVES ON ZOOS

15 April 1990

U. S. Seal

Historical

The primary international perspectives were provided by personal contacts as members of the profession, visits to zoos in other countries, and to buy and exchange animals. Much of the animal trade was conducted through dealers. There were animal collecting expeditions conducted by some zoos but these were occasional and limited in scope. The only international organization - the IUDZG is exclusively composed of directors and was limited to the Western world. A few zoos - notably NYZS, Jersey, Smithsonian, Frankfurt, Berlin, and London have had international programs which included support of field programs and reserves. Participation in international professional organizations was minimal because few of the keeper staff had college degrees and few of the curatorial staff had graduate degrees in their speciality.

Now

The development of regional programs is well established in North America, Europe and Australasia and is beginning in India, Japan, Southeast Asia, China, MesoAmerica, and Brazil. The SSP programs serve as a world model and have provided impetus to the development of global programs. ISIS serves as a global database and information system for animals in captive collections. There is active participation in the IUCN, SSC and its Specialist Groups, CITES, and international professional organizations. The AAZPA and its member institutions are major supports of the CBSG. There are a number of international collaborative programs for rescue and conservation of endangered species on all continents which include support of reserves and field research programs. Memebrs of zoo staff spend time on international field projects as a part of their curatorial activities. Further development of international programs in collaboration with the SSC and IUDZG is being explored with the Global Heritage Species Program. Active intervention in national legislation has influenced the language and outcome of bills on environmental issues as well as animal walfare.

The Future

The Future

It may be useful to think about the roles, functions, and activities of zoos over the next 10 and 50 years in terms of the rapid changes that are occurring in our perception of communications, information, and global threats to the environment. There are several axis that are useful to me for organizing my thinking about zoos. One axis is in terms of geographic scope of activities (local, country, regional, and global). Another is in terms of functions or roles (culture, animal management, information, and reources). A third is

I see zoos as cultural centers, animal management centers, information centers, and resource centers.

Cultural Centers: This encompasses the traditional recreational function of zoos which has engaged most of the budgets and functional activities of management. This would be reflected in marketing and public relations budgets and personnel time. Attraction of attendance from the local geographic area is seen as the major determinant of income, survival, and success. This emphasis is local and failure to meet these needs may lead to economic difficulties which seem to be a major determinant of director turnover. Many zoos have been and are the locations for community events. The scope of presentations is expanding into museum type activities.

Animal Management Centers: This function has increased in scope and budget with the reduced availability of animals because of reduced numbers in the wild and legislation which has greatly increased the cost of animal transactions particularly across national borders. This function has become increasingly complicated and expensive. Staff are now college educated, most zoos have full time veterinarians, and a variety of specialists are employed by zoos (behaviorists, ecologists, reproductive biologists, nutritionists, population biologists). The proportion of time and resources spent on husbandry has gotten smaller, although the effectiveness has greatly increased in terms of survival and reproduction. Much recent attention has been given to population based management plans which inherently require cooperation among multiple institutions. This interaction has been primarily regional but the beginnings of multiregional collaborations are underway.

Information Centers: It is here that the tradional function of education might fall. Also the information programs that are both public relations and marketing are usually presented in educational terms. A broader role has been developed by WWF in its programs to use zoos as public funding resources through use of educational and promotional

Information Centers: It is here that the tradional function of education might fall. Also the information programs that are both public relations and marketing are usually presented in educational terms. A broader role has been developed by WWF in its programs to use zoos as public funding resources through use of educational and promotional programs that focus on the participation of the local zoo and others in conservation programs - particularly those under the auspices of WWF.

Resource Centers: Skilled people required to manage the collections as a resource for field conservation and wildlife or biological problem solving. Physical resources for captive propagation. Funding for species and reserve conservation. Animals for reintroduction programs.

April 14th

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Our current program in Madagascar, in collaboration with the Primate Specialist Group and the Government of Madagascar plans to develop at least 12 new captive populations of lemurs of mostly taxa with fewer than 200 remaining in the wild. This programs includes extensive support of 2 facilities in Madagascar, field studies, training, and plans for support of several reserves. This program is being expanded to reptiles, other mammals, birds and some fresh water fish. There are zoos, aquariums, and research institutions from 5 countries currently collaborating in these projects.

Population Viability Assessment:

The concept of risk is used to define the targets for recovery, and is used to define recovery itself. Risk, not surprisingly, is a central issue in endangered species management. Unfortunately, there is ample reason to suppose that we (as humans) are not "naturally" good at risk assessment. Recovery will be more often successful if we could do this better. There is a strong need for tools that would help managers deal with risk. We need to improve estimation of risk, to rank order better the risk due to different potential management options, to improve objectivity in assessing risk, and to add quality control to the process (through internal consistency checks). Among the risks to be evaluated are those of extinction, and loss of genetic diversity.

In the last several years such tools have been developing. The applied science of

Additional "Culture" items

- Aquariums exhibit few endangered or threatened species and have not historically been driven by the "breeding imperative" of most zoos. Aquariums only recently began to focus on breeding but not necessarily for production of threatened species as much as for "knowledge and technique".

- Aquariums feel they are treated as if their most high profile issues are not critical issues to the rest of the zoo community — especially the cetacean issue.

- As much as we preach education, "breeding" appears to be the prime preoccupation.

- We seem to need to make decisions unanimously and anything else is perceived as disloyal or disruptive

- We are reactive (often too slow as well) and not as active as we should be.

- We are haunted by the public image of "circus", and the exploitive past ie "P.T. Barnum" legacy.

(2) Advocacy

Represent its members' interest to government agencies and other organizations that ~~will result~~ further the cause of ~~world~~ worldwide conservation

Promoting Zoost Aquariums

~~- Value~~

✓ - Commitment to conservation
- pursuit of excellence for orgs + members
✓ - Communication
- cooperation ~~rather than competative~~
✓ - Information mgmt
~~- Survival~~
✓ - advocacy
- high prof. standards + practices
~~Value of regulation~~

Information Management / Communication

(4) Cooperation
Working with each other to further our professional goals.

(1) Pursuit of Excellance -
~~We promote excellen~~
Strive for excellence from our institutions + members with high professional standards + practices.

Values

Commitment to Conservation

Encourage and coordinate ~~sou~~ captive propagation programs ~~and associated environment~~ ~~research~~, and environmental education. research

(3) Commitment to Conservation

Encourage the coordination of animal mgmt programs, both in ~~and~~ captivity and in the wild. ~~Environmental~~ Conservation Education and research are an important component of these programs.

(5) Self Regulation

~~Promote~~ embrace the Code of Ethics + Accreditation ~~program~~ ~~self ex tools~~ which ~~continues~~ ensures to high prof. ~~standards~~ standards + behaviors.

Mission - support Z + A

Highest Value - Conservation

through (a) propagation
(b) education

- proactive posture in devl of conserv. programs
advocation of philosophies
pursuit of excellence
info mgmt + communicat -
advocacy
excellence
communication

Critical Factors for success

① Proactive in ~~developing conservation~~ our purposes!

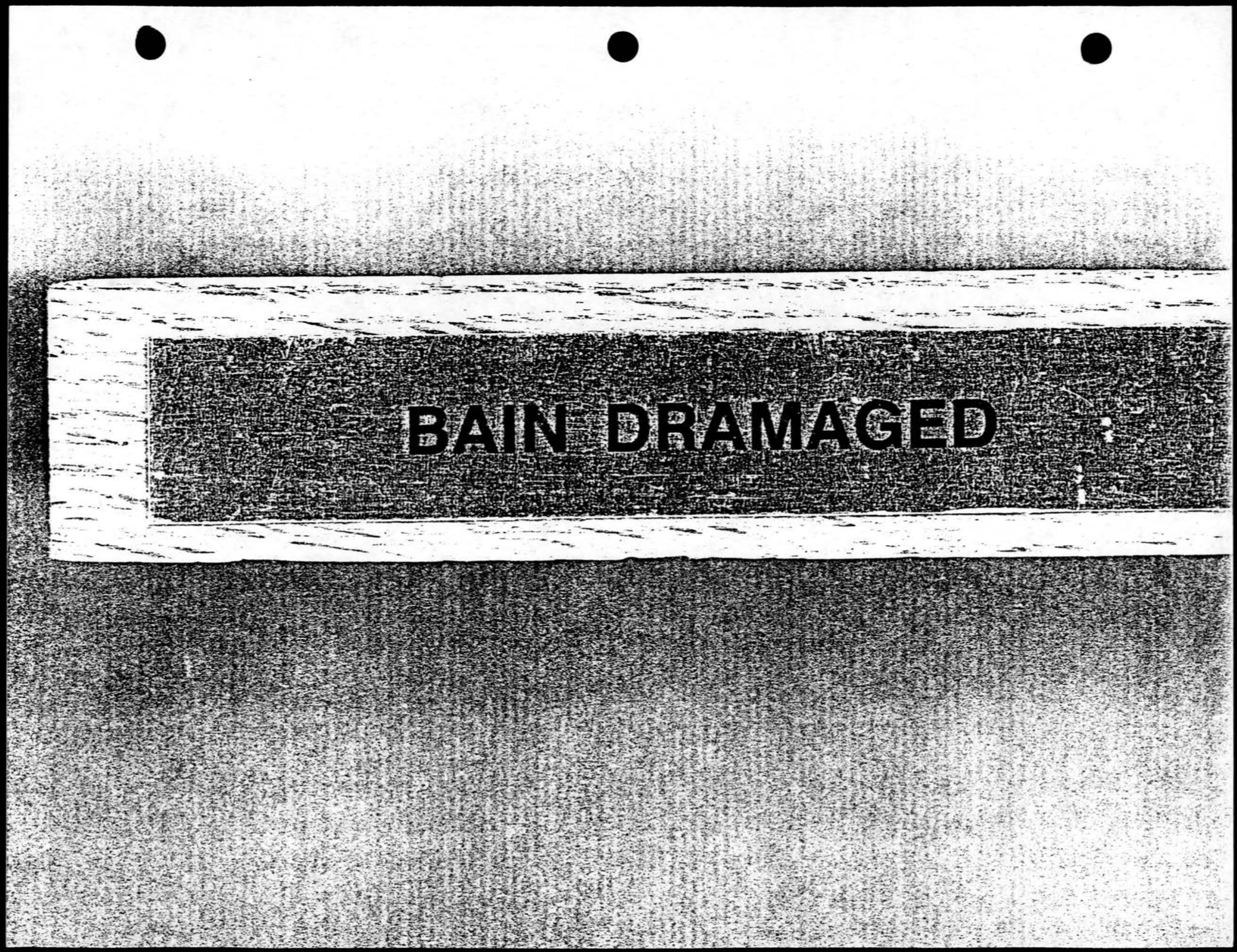
2) ~~legislation~~ advocacy
~~animal rights~~
1) – conservation

② Excellence

Main internal strengths 5 items
" " weaknesses

STRENGTHS	WEAKNESS
tradition	can't keep up = change
membership - representation	lack of self criticism
consistent staff	too reactive
consistency of members - prof. fellows	caste membership
Good financial strength	Vendor members -
Good products	
code of ethics → Good self regulations	
accreditation process	
Commitment to cause	

recruitment of young blood


BAIN DRAMAGED

GLOBAL PERSPECTIVES ON ZOOS

15 April 1990

U. S. Seal

Historical

The primary international perspectives were provided by personal contacts as members of the profession, visits to zoos in other countries, and to buy and exchange animals. Much of the animal trade was conducted through dealers. There were animal collecting expeditions conducted by some zoos but these were occasional and limited in scope. The only international organization - the IUDZG is exclusively composed of directors and was limited to the Western world. A few zoos - notably NYZS, Jersey, Smithsonian, Frankfurt, Berlin, and London have had international programs which included support of field programs and reserves. Participation in international professional organizations was minimal because few of the keeper staff had college degrees and few of the curatorial staff had graduate degrees in their speciality.

Now

The development of regional programs is well established in North America, Europe and Australasia and is beginning in India, Japan, Southeast Asia, China, MesoAmerica, and Brazil. The SSP programs serve as a world model and have provided impetus to the development of global programs. ISIS serves as a global database and information system for animals in captive collections. There is active participation in the IUCN, SSC and its Specialist Groups, CITES, and international professional organizations. The AAZPA and its member institutions are major supports of the CBSG. There are a number of international collaborative programs for rescue and conservation of endangered species on all continents which include support of reserves and field research programs. Memebrs of zoo staff spend time on international field projects as a part of their curatorial activities. Further development of international programs in collaboration with the SSC and IUDZG is being explored with the Global Heritage Species Program. Active intervention in national legislation has influenced the language and outcome of bills on environmental issues as well as animal walfare.

The Future

The Future

It may be useful to think about the roles, functions, and activities of zoos over the next 10 and 50 years in terms of the rapid changes that are occurring in our perception of communications, information, and global threats to the environment. There are several axis that are useful to me for organizing my thinking about zoos. One axis is in terms of geographic scope of activities (local, country, regional, and global). Another is in terms of functions or roles (culture, animal management, information, and reources). A third is

I see zoos as cultural centers, animal management centers, information centers, and resource centers.

Cultural Centers: This encompasses the traditional recreational function of zoos which has engaged most of the budgets and functional activities of management. This would be reflected in marketing and public relations budgets and personnel time. Attraction of attendance from the local geographic area is seen as the major determinant of income, survival, and success. This emphasis is local and failure to meet these needs may lead to economic difficulties which seem to be a major determinant of director turnover. Many zoos have been and are the locations for community events. The scope of presentations is expanding into museum type activities.

Animal Management Centers: This function has increased in scope and budget with the reduced availability of animals because of reduced numbers in the wild and legislation which has greatly increased the cost of animal transactions particularly across national borders. This function has become increasingly complicated and expensive. Staff are now college educated, most zoos have full time veterinarians, and a variety of specialists are employed by zoos (behaviorists, ecologists, reproductive biologists, nutritionists, population biologists). The proportion of time and resources spent on husbandry has gotten smaller, although the effectiveness has greatly increased in terms of survival and reproduction. Much recent attention has been given to population based management plans which inherently require cooperation among multiple institutions. This interaction has been primarily regional but the beginnings of multiregional collaborations are underway.

Information Centers: It is here that the tradional function of education might fall. Also the information programs that are both public relations and marketing are usually presented in educational terms. A broader role has been developed by WWF in its programs to use zoos as public funding resources through use of educational and promotional

Information Centers: It is here that the tradional function of education might fall. Also the information programs that are both public relations and marketing are usually presented in educational terms. A broader role has been developed by WWF in its programs to use zoos as public funding resources through use of educational and promotional programs that focus on the participation of the local zoo and others in conservation programs - particularly those under the auspices of WWF.

Resource Centers: Skilled people required to manage the collections as a resource for field conservation and wildlife or biological problem solving. Physical resources for captive propagation. Funding for species and reserve conservation. Animals for reintroduction programs.

Final draft

VALUES

- Cooperation

  Working with each other to further our professional goals.

- ~~Pursuit of Excellence~~

  ~~Striving for excellence from our institutions and members with high professional standards and practices.~~

- Committment to Conservation

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

- Self Regulation

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

- Advocacy

  Representing its members interest~~s~~ to legislative bodies governmental agencies and others ~~which~~ will ~~otheill~~ result in furthering the ~~causes~~ mission of ~~worldwide~~ comservation. zoological parks + aquariums

- Information Management and Communication

  Development and management of databases relevant to our mission and the timely distribution of current information.

Committment to Community - Enc. excell. in ~~our~~ rec + cultural events + programs which strengthen our institutions in their communities.

I'm sending this one to Ann Mcr. She'll love it!

The Creation

In the beginning there was the plan
And then came the assumptions
And the assumptions were without form
And the plan was completely without substance
And the darkness was upon the faces of the Workers
And they spake unto their Group Leaders saying:
"It is a crock of shit and it stinketh"
And the Group Leaders went unto their Section Heads, and sayeth:
"It is a pile of dung, and none may abide the odour thereof"
And the Section Heads went unto the Managers and sayeth unto them:
"It is a container of excrement, and it is very strong, such
That none here may abide by it"
And the Managers went unto their Director, and sayeth unto him:
"It is a vessel of fertilizer, and none may abide its strength"
And the Director went unto the General Manager, and sayeth:
"It contains that which aids plant growth, and it is very strong"
And the General Manager went unto the Vice-President, and sayeth
Unto him:
"It promoteth growth, and it is very powerful"
And the Vice-President went unto the President and sayeth unto him:
"This powerful new plan will actively promote the growth and
Efficiency of the department and this area in particular"
And the President looked upon the plan, and saw that it was good
And the plan became policy.

March 16, 1990
Workshop - DC

AMERICAN ASSOCIATION OF ZOOLOGICAL PARKS AND AQUARIUMS
A•A•Z•P•A 1924

American Association of Zoological Parks and Aquariums

EXECUTIVE OFFICE AT OGLEBAY PARK, WHEELING, WV 26003 - 1698
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CLAUDIA E. COLLIER

ROY A. SHEA

R. GREGORY TARRY

1 March 1990

MEMO TO: STRATEGIC PLANNING COMMITTEE MEMBERS

FROM: LINDA BOYD, ADMINISTRATIVE ASSISTANT

SUBJECT: MEETING IN WASHINGTON, D.C. ON 16 MARCH

A Metro System Pocket Guide is enclosed for those wishing to save both time and money in getting from the airport to the Manor Inn. Take the Yellow Line to Gallery Place and transfer to the Red Line in the direction of Shady Grove. Get off at the Bethesda station. As you walk up the stairs to the street, you will see the Crestar Bank, proceed past the bank about one and a half blocks to the Manor Inn, 7740 Wisconsin Avenue.

If you have not already done so, please make your reservation at the Manor Inn (800) 874-0050.

Let me know if I can be of any further assistance.

/ljb

Enclosure

Copy to: Bob Smith

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

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			ROBERTS/KATHRYN		
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	AR MINNEAPOLS/STPAUL	638P			OSTOP JET
		SEAT	08-C **BOARDING PASS ISSUED**		
			ROBERTS/KATHRYN		

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Tulsa Zoo

TULSA PARK AND RECREATION DEPARTMENT

5701 E. 36th St. North • Tulsa, Oklahoma • 74115 • 918/596-2400

January 29, 1990

Memo to:
C. Hoessle, St. Louis Zoo
B. Dennler, Toledo Zoo
J. Doherty, New York Zoological Soc.
D. Farst, DVM, Gladys Porter Zoo
L. Garibaldi, New York Aquarium
P. Krantz, Riverbanks Zoo
G. Lentz, Busch Gardens
J. Marliave, Ph.D., Van Couver Aquarium
D. Myers, San Diego Zoo
B. Read, St. Louis Zoo
K. Roberts, Ph.D., Minnesota State Zoo
Gall G. Schneider, Dreher Park Zoo
U. Seal, Ph.D., Veterans Hospital
S. Taylor, Cleveland Zoo
B. Wagner, AAZPA
S. Wylie, Oklahoma City Zoo

The above-mentioned individuals, and myself, constitue the Nuclear Planning Group for AAZPA's Strategic Planning effort. I sincerely appreciate the willingness and interest you have shown in supporting this important project.

Meeting dates, places and related information (to date):

Lv Mpls. 3/15 11:40 AM

Lv DC 3/16 4:45 pm

3/15 by bpm

Corp # 044010 D9

March 16, Friday, Washington, D.C. (Rooms have been blocked until March 1 at the Manor Inn, on Wisconsin avenue, 5 miles from the Zoo. Cost: $57 plus tax (+ $62.70), includes cont. breakfast. Call their toll-free number (800-874-0050) to reserve your individual room; tell them you're with AAZPA. On the morning of March 16, we'll take the Metro to the National Zoo where we'll begin our meeting at 9:00 a.m. in the Zoo's Board Room. Lunch will be provided.

April 16, 17, Denver.

June 18, 19, Tulsa.

Robert Smith, Strategies & Teams, Inc. will be facilitating all of our sessions; I am enclosing a brief outline of the process design. Linda Boyd will keep us honest and on-track by serving as Planning Coordinator.

Tulsa Zoo

TULSA PARK AND RECREATION DEPARTMENT

5701 E. 36th St. North • Tulsa, Oklahoma • 74115 • 918/596-2400

Many of you have a copy of P. Krantz's summation of the AAZPA Mission Workshop held in Kansas City last year. I would be glad to send a copy to those of you who do not have and would like one; just let me know.

Again, thanks for your willingness to participate and we'll see you in D.C.

Dave Zucconi

DZ:bm
CC:Advisory Committee, AAZPA
Strategic Planning Process
R. Smith, Strategies & Teams, Inc.
P. Chaffee, DVM, Fresno Zoo
W. Iliff, Dallas Zoo

Robert F. Smith
President

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

MORE ON DESIGN OF THE PROCESS

AAZPA PLAN FOR PLANNING

Recommended by Bob Smith

I. Where we are and how we got here

1. Revisit mission -- comprehensive statement of the purpose(s) and nature of AAZPA.
   -- what do we do for whom, where, how?

2. Our positioning (actual). That is, how is AAZPA perceived by its key internal and external publics.

3. Our key values ("driving forces").

4. Our AAZPA culture.

5. Our key policies.

6. Our organization structure.

7. "Backcasting" along critical dimensions of the enterprise. This is history. Statistical and narrative. With attention to trends. It includes our successful and unsuccessful strategies in the past (big ones).

8. Critical factors for success in our mission (e.g. quality of professional staff, marketing, cost containment).

9. Main internal strengths and vulnerabilities.

II. Assumptions about the outside environment

1. Selecting major dimensions of the outside environment...and forecasting changes in them. Identify trends.

2. Identifying main opportunities and threats.

3. Our present situation in relationship to the main opportunities and threats.

III. Raising major planning issues that have not been identified in Parts I and II

IV. Where we want to go and how we're going to get there

1. Our desired positioning. How we want AAZPA to be perceived.

2. Our principal priorities for action, for change. Where we most need to do things that are new, better and different...called Key Result Areas (KRA)...the parts of our enterprise in which we most need to make things happen.

3. Specific, quantified, time-certain objectives in each KRA.

4. Strategies and Action Plans (including resource requirements, cost/benefit analyses).

5. Likely responses to our strategies. How can we influence responses to be what we would like them to be?

6. Determine if contingency plans are needed. If so, assign task forces to prepare first drafts...and recommend "trigger" points when the contingency plans should be implemented.

7. Plan for communicating the plan.

8. Provisions for effective interaction between this strategic plan and existing AAZPA long-range plan, annual budgeting and control (including measurement and reporting).

9. Impact of this plan on AAZPA organization structure.

10. Provisions for progressive review of action planning and implementation, and for environmental monitoring.

11. Critique our planning process this time around.

Robert F. Smith
San Diego, California
November, 1989

Phillips-Ramsey
ADVERTISING & PUBLIC RELATIONS

An Organization Has Cultures

Much as a country or a region of the world can be said to have a culture, with recognizable characteristics, an organization has a culture.

If it has functional specialist groups and different geographic locations, each of them will have its own culture that is a sub-culture of thw whole -- influenced by the whole and influencing the whole. The principle holds true for even further sub-groupings.

An organization's managers have been called the "keepers of the culture".

What are the dimensions of a culture? How can one be described? Culture is the implicit, informal, potent system of "norms" in an enterprise. It is assessed best in terms of actual behaviors of real people. "Culture gaps" exist in varying degrees between these actual behaviors and the behaviors desired for and by the organization's members. The latter behaviors would reflect the values explicitly adopted by an enterprise's managers and its board.

Even informally, culture starts with values that show through what people do... like the conversational observation, "around here people tell the truth even if it hurts."

Culture has to do with how we do things in our group and sub-groups. For example,

1. How we listen and talk to one another.
2. How we behave at meetings.
3. How we confront problems.
4. How we reach decisions.
5. How we reward and punish.

Culture also has to do with our roots. It reflects our history and our current events.

6863 FRIARS ROAD, SAN DIEGO, CALIFORNIA 92108 (619) 574-0808

Culture is reflected in our rituals (like how we recognize newcomers, promotions, departures). The way we dress and chat, where we sit at meetings.

And in our traditions, too (like those connected with annual meetings, holiday parties, and other important occasions).

Culture surfaces in our organization's personality. For example, are we relaxed and open or are we up-tight and secretive. Do we give credit to others, accept blame when it's ours to accept...or are we self-centered and defensive.

How about story-telling? Can we identify much-relished "stories" that get passed along over the years? Who have been our principal story tellers?

Are there even myths that we enjoy perpetuating as color elements in our culture?

As an organization, are we leaders or followers? Are we agile and adaptive or are we set in our ways, and slow to modify as outside circumstances demand change.

This is not all there is to culture, but it is much of the heart of it.

Robert F. Smith
Hyannis, Massachusetts
July 17, 1985

CULTURE

The environment and climate created by the key values we believe in...and the behavior and performance which are rewarded and punished.

CRITICAL FACTORS FOR SUCCESS

Those characteristics which an organization must possess in order to succeed in a highly competitive industry. The scoring on them determines winners from losers.

Who is the man sitting on my left?

Dm Forst - Brown

PLANNING (LONG FORM)

The continuous, formal process employed by management to identify future opportunities and market needs...to determine objectives...and to decide how to invest company resources in order to achieve objectives.

MISSION

business definition

A comprehensive statement which defines the purpose and nature of an organization of people.

In business the needs of the customer are its basis.

It should be future-oriented and provide direction. It helps select the best strategies from among alternatives. It provides focus and concentration.

BENEFITS OF MISSION STATEMENT

Orients toward future.

Provides overall "grand strategy."

Infers which businesses we will not be in.

Provides direction.

Helps in selection among alternate strategies.

(Continued)

MISSION STATEMENT BENEFITS

Differentiates us.

Positions us.

Allows concentration of resources on a market niche.

Is an element of control in a decentralized company.

Can be long, medium of form.

MISSION

To develop, manufacture and market temperature and pressure control systems of suitable quality for the comfort, industrial and marine market segments, worldwide.

—The Controls Division
of ISS Electronics A/S

SISU
MISSION STATEMENT

To provide tailor-made, cost-effective solutions for customers in Finland and worldwide who need state-of-the-art technology and high-demand performance in their heavy-duty on-and-off road transport tasks.

MISSION STATEMENT

"Rational creativity with European vision."

Design Board
Behaeghel & Partners

EXAMPLES OF MISSION STATEMENTS

As compiled by

Robert F. Smith, Strategies & Teams, Inc; and

Dr. Cynthia Wood, Presidents Association of AMA

1. IPCO's Corporate Mission

   IPCO's (manufacturer and distributor of health care products) Mission is to develop and distribute throughout the world health care products and services of a growth rate above the industry average. Our strategy is to secure a significant position in selected areas of our business while maintaining a diverse and projectable balance of products and services.

2. Dynalectron's Corporate Mission

   To provide quality technological services of a diverse and specialized nature to industries, institutions, and governments, which will satisfy the clients' objectives and improve their levels of performance.

3. Ahlstrom

   Ahlstrom is a technology-driven company using its very special and strong technology to produce superior products and services for sophisticated industry uses.

4. The Valspar Corporation

   "...to concentrate on the basic business of consumer paints, chemical coatings, and specialty coatings. To continue as one of the 10 largest coatings companies in the country by growing internally and by acquisition."

5. Otis Elevator Company

   "Moving people and material vertically and horizontally over relatively short distances."

6. Hope Architects and Engineers

   "To provide the highest quality architectural and engineering services, and to create buildings and environments of significance and lasting value."

7. Textron

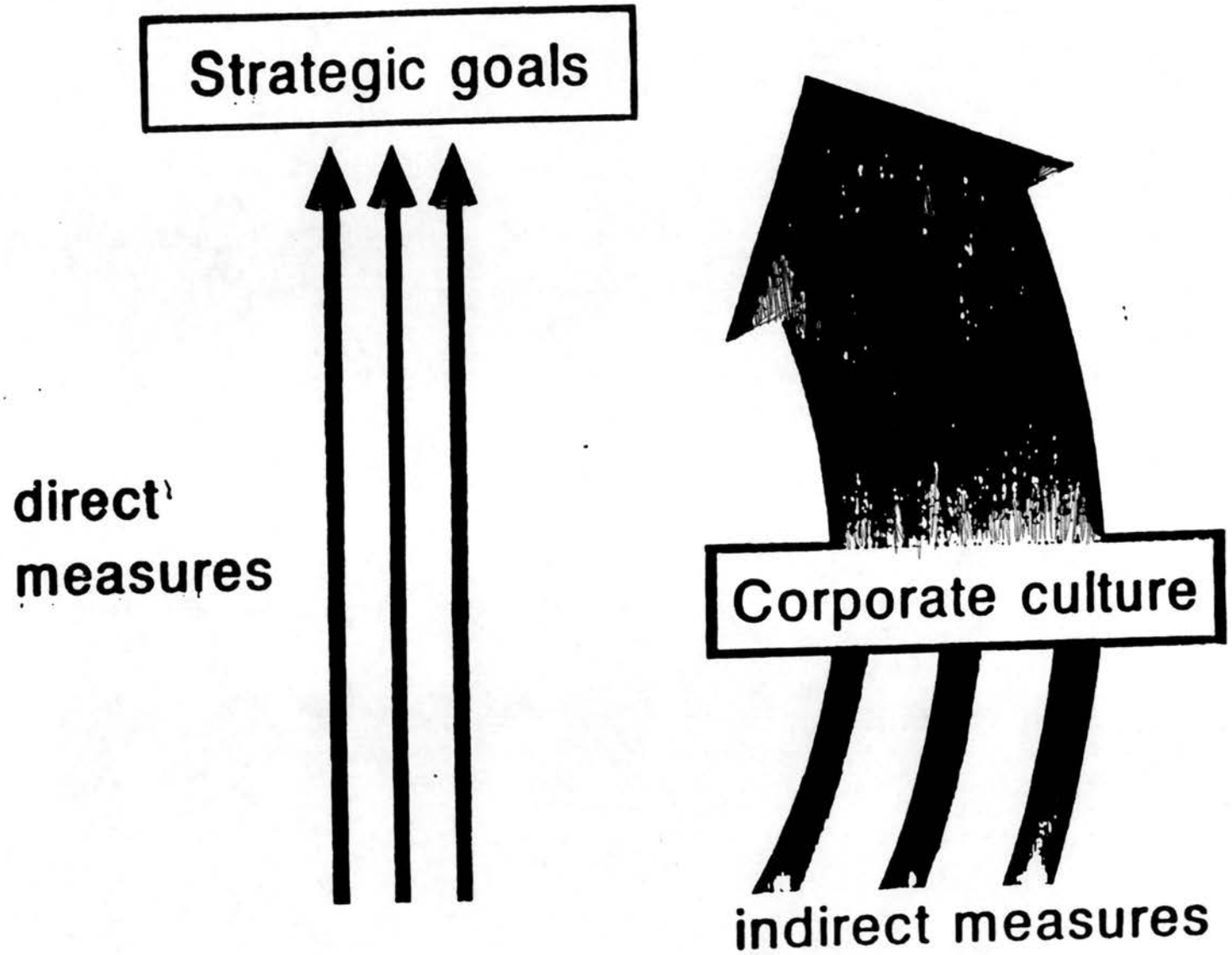
"...to help, financially, and with constructive counsel, those who would build the substancial enterprises of tomorrow...we search for opportunities of merit-merit founded in products, services, market perception, financial form, management structure or other positive elements - opportunities to build significant businesses."

8. Zoological Society of San Diego (operator of San Diego Zoo and San Diego Wild Animal Park)

"...dedicated to increasing understanding and appreciation of the inherent worth of all life forms by exhibiting animals and plants in natural settings and applying its efforts and influence to the conservation of the earth's wildlife."

9. Industrial Quimica del Nalon, S.A.

"...competitively produce and sell quality chemical and related industrial products both in the domestic and export markets; to satisfy the needs of customers and contribute to their development.


Strategic goals
direct
measures
Corporate culture
indirect measures

ORGANIZATIONAL VALUES

"Shared beliefs which energize action in a consistent manner."

VALUES

The driving forces which an organization tries to live by as it pursues its mission and seeks to accomplish its objectives.

FORD MOTOR CO. VALUES

THE CORPORATE FOCUS...

1. People
2. Quality

PRODUCES...

3. Profit

SISU VALUES

Profitability

Growth

Customer-orientation

Service in all ways

Specialization ("We're niche folks")

Fighting spirit!

PHILLIPS-RAMSEY, INC.

KEY VALUES

1. **Creativity**
   Creative thinking and problem solving is of key importance throughout the organization. This, of course, is not limited to the Creative Department.

2. **Dedication/Commitment**
   Phillips-Ramsey employees possess an intense drive and passion for the business that translates into a dedicated, committed effort in everything we do. No "settling".

3. **Care/Pride/Quality**
   An uncompromising degree of care and pride is demonstrated by the agency's staff. This pays off in the quality of the work that is produced.

4. **Results for Clients**
   Achieving positive results for our clients is the lifeblood of the agency. This is the business we're involved in.

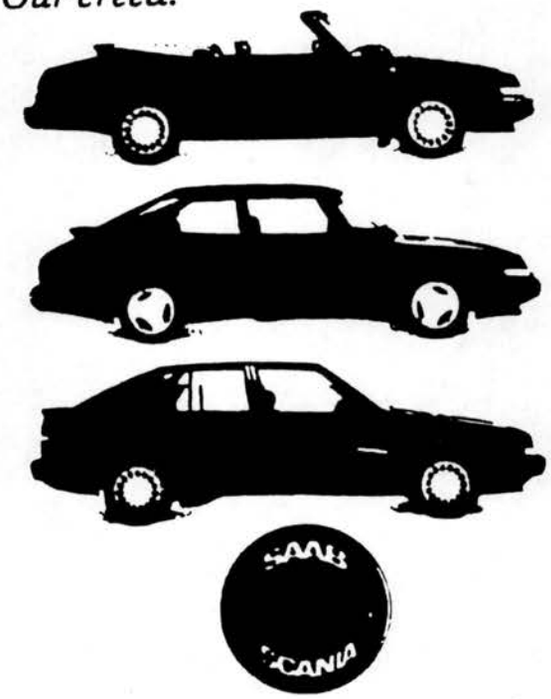
5. **Profitability**
   Assuming that the key values above serve as our strict guidelines, this key value should be quite attainable and be viewed as our ultimate goal.

OUR CREEDS

A fundamental set of beliefs in ...

the power to take charge
the courage to go your own way
the resolution to pursue what you want
the intuition to demand quality
the sophistication to express a dynamic image in a dignified manner
the willingness to take risks in the quest for excellence
the reluctance to compromise
the wisdom to insist upon safety
the determination to be a step ahead

Your creed.
Our creed.



SAAB

KEY RESULT AREAS (KRA)

The Key Result Areas of a company demand highest priority attention and action. They are mostly determined by an enterprise's internal strengths and areas for improvement, matched off with outside opportunities and threats.

In a broad sense, a company's mission can be thought of as its grand strategy embracing all the Key Result Areas.

CHARACTERISTICS OF BEST OBJECTIVES

Quantified

Specific

Time-certain

Progress-measurable

Unit-generated

Compatible with one another

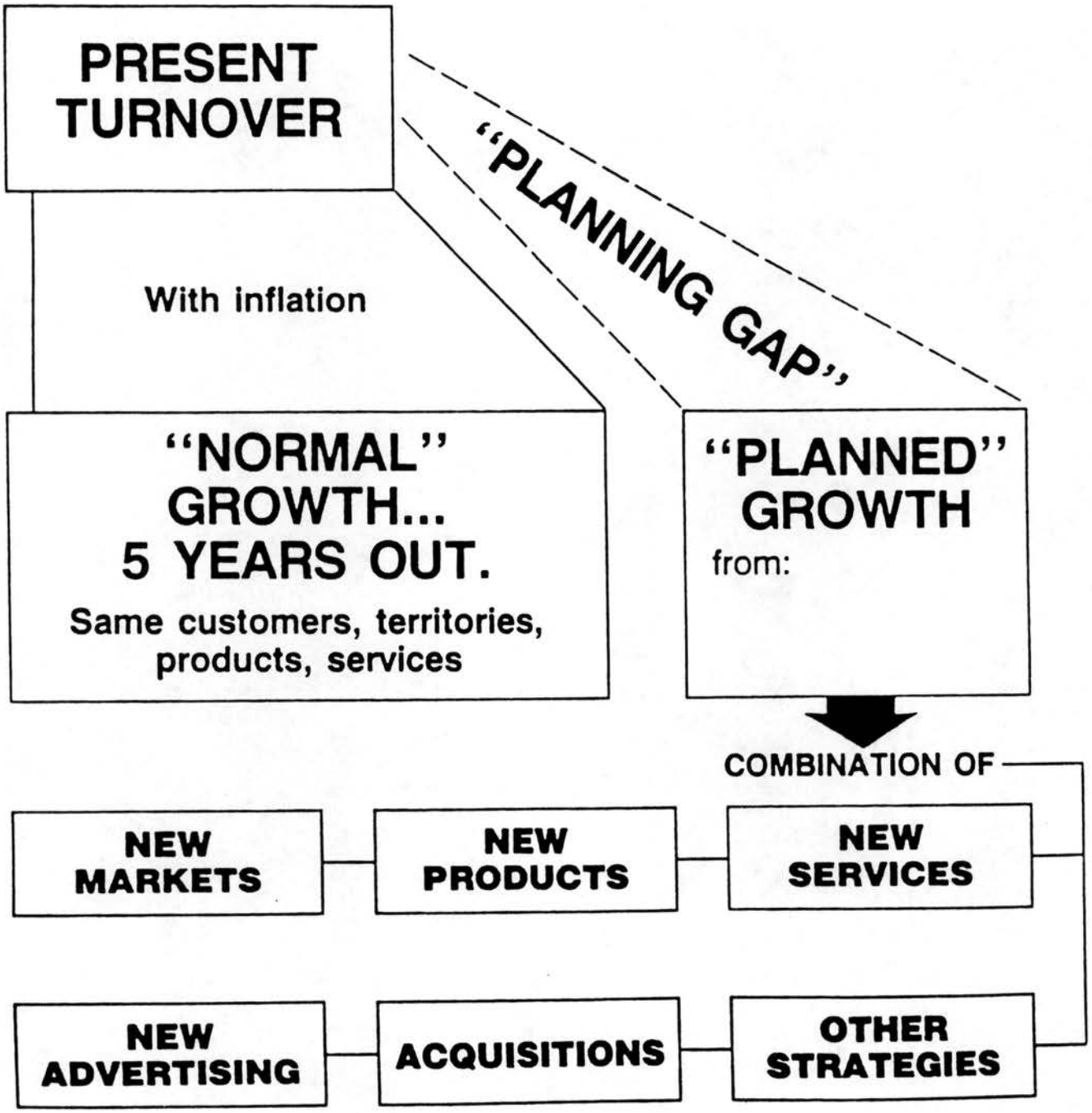
Understood

Acceptable (people willing to commit)

Challenging

Attainable

KEY RESULT AREA: INCREASING TURNOVER



Strategies

A strategy is a main route that leads to an objective. When a strategy is adopted, the various kinds of resources to carry it out are committed to it.

An objective is what you are seeking to achieve. It is a destination.

A strategy sets out how you are going to achieve the objective. It is a broad route to the destination.

An objective is an "end," while a strategy is a "means" to the end.

Most objectives require a combination of several strategies carefully selected from many alternatives.

To be successfully implemented a strategy needs step-by-step action planning that spells out who must do what and when.

Robert F. Smith
San Diego, California
November, 1989

ACTION PLAN

Planning Leader_____

Dates of Action Plan:

Presented_____Approved_____

Key Result Area:

Objective:

Strategy:

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)

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)

ACTION PLAN

For instructional use only in developing planning methods. Not for distribution.

DATE: 9/5/86

KRA # 3 — Become the low cost producer

PAGE 1 OF 2

OBJECTIVE A — Reduce cost/ton 4%
B — Reduce manhours/machine hour 12%.
We will additionally track trends of improved profit/employee which should result from the KRA # 3 strategies

STRATEGY A — Lower direct and indirect labor and material usage costs

KRA PLANNING LEADER:
T. K. Breitfuss

INDIVIDUALS RESPONSIBLE FOR STRATEGY ACTION STEPS:
R. G. Holmes

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, etc.)
1. Develop statistics on actual usage and efficiency of:					
A. Cement	M. T. Hennings R. G. Holmes	11-86	04-87		A & B) To be developed by M. T. Hennings and R. G. Holmes with a system for tracking progress toward goals
B. Manhours/Machine Hour	M. T. Hennings R. G. Holmes	11-86	04-87		
C. Steel	J. Zicaro Region Engineers	11-86	06-87		C & D) To be developed by J. Zicaro and Region Engineers with a system for tracking progress toward goals
D. Other Materials (spacers, etc.)	J. Zicaro Region Engineers	11-86	06-87		
For each Plant, Region					
2. Establish an achievable goal (% reduction) by location for each of the following:					
A. Cement	Region Managers	A. 05-87	05-87		A & B) Using information provided by M. T. Hennings and R. G. Holmes
B. Manhour/Machine Hour		B. 05-87	05-87		
C. Steel		C. 07-87	07-87		C & D) Using information provided by J. Zicaro and Region Engineers
D. Other Materials (spacers, etc.)		D. 07-87	07-87		

CONTINUATION SHEET

ACTION PLAN

KRA # 3

STRATEGY REFERENCE A

PAGE 2 OF 2

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, etc.)
3. Convey to each location the established goals and timetables:					
A. Cement	Region Managers	A. 05-87	05-87		This must be a written instruction giving each location's established goals.
B. Manhours/Machine Hour		B. 05-87	05-87		
C. Steel		C. 07-87	07-87		
D. Other Materials (spacers, etc.)		D. 07-87	07-87		
4. Track the progress toward each goal	Plant Managers District Managers	07-87	Monthly		Using tracking systems provided in Action Step 1.
5. Act on the variances from goal performance on a monthly basis	District Managers	07-87	Monthly		
6. Train Q. C. personnel in mix design, aggregate testing, concrete testing, etc.	Region Engineers	01-87	Continuing		Regional Q. C. and Superintendent meetings should be held on an annual basis
7. Review progress of each location and adjust goals and timetables as required.	AD - HOC Committee: T. K. Breitfuss - Chairman M. W. Piche' J. P. Zicaro	07-88	09-88		

RESOURCE REQUIREMENTS AND ESTIMATED COSTS

ADDITIONAL PEOPLE

FACILITIES (plant, office, equipment, material)

OUTSIDE SUPPORT (e.g. computer service, consultants)

TRAVEL

FINANCIAL

TIMING CONSIDERATIONS (e.g. when will most important resources be needed)

ACTION PLAN NO. _____

COST/BENEFIT

		1st Year	2nd Year	3rd Year	4th Year
BENEFITS:	SALES				
	PROFIT				
	OTHER				
COSTS:	CAPITAL				
	EXPENSES				
	OTHER				
PERSONNEL REQUIREMENTS					

ASSUMPTIONS:

HOW A KEY RESULT AREA TRANSLATES INTO ACTION STEPS

Key Result Area

↓

Objectives

↓

Strategies

↓

Action Plans

SOMEONE'S PLANNING IS SOMEONE ELSE'S INFORMATION

PLAN FOR COMMUNICATING THE PLAN

When a round of strategic planning sessions has been completed there is a temptation to assume that key parts of the planning data base and the main decisions will automatically transport themselves to others in the organisation beyond the planning team members.

However, experience shows this is a poor assumption. To obtain maximum implementation success a thoughtfully prepared "plan for communicating the plan" is needed.

This step begins with the overall question: Who should receive which parts of the plan from whom, when, and in what way ?

Attached is a worksheet format for dealing with this challenge.

Once the "plan for communicating the plan" has been adopted, its implementation should be monitored in the same fashion that implementation of Action Plans in the Key Result Areas is monitored. Normally the Managing Director serves as the planning leader for this.

MANAGEMENT CENTRE EUROPE
by Bob Smith
Monaco, November 5, 1985

MANAGEMENT CENTRE EUROPE
By Bob Smith
Monaco, November 5, 1985

WORKSHEET FOR DEVELOPING PLAN TO COMMUNICATE THE PLAN

(1) Target Groups	(2) Parts of Plan Each Group Should Receive	(3) From Whom Should These Parts Be Received	(4) When Should They Be Received	(5) In What Way Should They Be Received	(6) Who Will Do The Staff Work	(7) Remarks

Robert F. Smith
President

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

GLOSSARY OF STRATEGIC PLANNING TERMS

Key Result Area (KRA) - One of the highest priorities for causing change in the organization. A part of the enterprise's life and operations in which we most have to make things happen that will be new, better and different now and in the future.

Objective - A quantified, specific, time-certain thing we set out to accomplish. This is like a destination marked on the map for a trip. It must be measurable so that we can determine what progress we are making along the way...and know when we have achieved our end.

Strategy - This is a major direction which we believe will take us to an objective. It is like the route we set out to follow in reaching a destination on a map. When we adopt a strategy, we automatically are committing the various kinds of resources required to implement it.

Action Plan - This is a step-by-step laying out of what has to be done in order to implement a strategy. It identifies who will be responsible for taking each individual step, and also establishes when it should start and finish.

Resource Requirements - This is a spelling out of the resources in people, money, materials, equipment and other kinds which will be needed in order to carry out an Action Plan that implements a strategy.

Cost/Benefit Analysis - An effort to estimate the costs that go with obtaining needed resources...and then matching those costs against the benefits that are anticipated from implementing an Action Plan.

Goal - This is a broad term that is not measurable ordinarily but does help to inspire by setting sights for great accomplishment. Goals are general. On the other hand, objectives are quantified, time-certain, measurable.

Target - A popular term that conveys the notion of a bull's eye inside a circle, It is not used as a technical term in our planning process; however, as a popular piece of language, it probably comes closer to our notion of an objective than of a goal.

Planning Data Base - All of the information gathered before determining where we want to go and how we are going to get there. A mixture of facts, estimates and best judgments. A rich data base leads to sharper selections of KRA and more realistic determination of objectives. It also helps generate more possible strategies and a wiser choice of the best ones. Task forces can be used to prepare portions of the planning data base.

KRA Task Force - A group with a designated leader(s) assigned to develop objective(s), strategies, and action plans (with resource and cost benefit analyses) within a specific KRA.

Planning Leader - This is an individual who accepts the assignment to be the initiator and coordinator of the work done by a KRA Task Force. It does not mean this individual does all the work on the task force, but rather recruits its members and sees that objectives, strategies, Action Plans (with resource requirements and cost benefit analyses) are prepared. The Planning Leader may or may not be personally responsible for seeing that certain steps of the Action Plan are carried out.

Planning Gap - In a KRA this term describes the difference between a quantified, time-certain objective and that point where current momentum will take us. It relates to some fixed period in the future, as, for example, three years from now.

Gap Analysis - This describes the intellectual process that a KRA Task Force goes through in determining how it will fill the planning gap in a particular KRA. Planning gaps are filled with strategies (and their Action Plans).

Robert F. Smith
Brussels, Belgium
January 29, 1988

Introduction

3-16
MH 1

- complex gap - need to not be seen as oversight gap
- respect diverse cultures
- probably take a cycle to complete

4 requirements for commitment to take place
1) It is made visible
2) It is voluntary
3) It is near irrevocable
4) It is specific (people know what they are supposed to do)

Planning Continuum

Operational — Strategic — Conceptual →

Short — Long

MTG 1

4 phases of plng for org.

1. Financial plng
   - annual budgets

2. Forecast-based plng
   - multi yr. budgets
   - gap analysis

   7 predictions in weather forecasts

3. Externally Oriented plng
   - Have situational analysis + competitive assessments
   - evaluation

4. Strategic Plng

---

3 ways a manager engages in plng

1. Contribute to plng of team leaders
2. Lead plng of own team
3. Coordinate + plng of other grps - peers

New segment of strategic planning is consider the culture of the organization

- may be able to determine intellectual goals + obj but culture of organization does n allow implementation

NOTE 1

* Bill Menneker going to try & contribute 5-10 to OBSG

Changing the culture
- Need to set incentives to reward new behavior

Culture -
the environment & climate created by the key values we believe in & the behavior & performance which are rewarded & punished

Participation means more than input - also needs feedback

Key Policies tend to be created during periods of stress

Key Result Areas
- need to identify them, set priority - & accept 3-5 to address
- others may be important, but can only do so many / yr.

Uses Technique called GAP analysis
does "base costing" - real data from past

✓ form called Action Plan - May be useful for Division Directors.

Do we have anyone doing "trends analysis"?
Periodical scanning - environmental scanning

Culture Committee

Special interest grp. / sub grps

K. Roberts
J. Wylie
L. Gabribaldi
G. Schneider

Send out sample / another steps
culture & instruments

Organization Co.

C. Hoessle
J. Taylor
J. Doherty

Zacconi Seal
Farrst Bresciz
Hoessle Wylie
Kurz Schneider
Taylor
Doherty Bill Denner
Read Linda
?

Key Op. Policies

Bob Read Gatherer
Dempler
Lentz
Farrst

Backcast

B. Read
Robb
Seal > International involvement

Regulatory Issue

Doug Meyer

Cultural observation - call people & related interests & who want to form les "Special Interest Groups"

Settle for something rough - & get circulated

Robert F. Smith
President

Note 1

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

MORE ON DESIGN OF THE PROCESS

AAZPA PLAN FOR PLANNING

Recommended by Bob Smith

I. Where we are and how we got here

all 1. Revisit mission -- comprehensive statement of the purpose(s) and nature of AAZPA.
-- what do we do for whom, where, how?

all 2. Our positioning (actual). That is, how is AAZPA perceived by its key internal and external publics.

task force all 3. Our key values ("driving forces").

4. Our AAZPA culture. – what believe we are, what are we really – See handout

7-9 most critical homework ~~5.~~ Our key policies. – big governance statements

~~6.~~ Our organization structure. – Maybe formal + informal

Macro culture
micro culture

~~7.~~ "Backcasting" along critical dimensions of the enterprise. This is history. Statistical and narrative. With attention to trends. It includes our successful and unsuccessful strategies in the past (big ones).

8. Critical factors for success in our mission (e.g. quality of professional staff, marketing, cost containment).

9. Main internal strengths and vulnerabilities.

II. Assumptions about the outside environment

all 1. Selecting major dimensions of the outside environment...and forecasting changes in them. Identify trends.

~~Index~~ Include CFS matrix

2. Identifying main opportunities and threats.

3. Our present situation in relationship to the main opportunities and threats.

Advisory Cte should be part of III

III. Raising major planning issues that have not been identified in Parts I and II

back to task forces

IV. Where we want to go and how we're going to get there

1. Our desired positioning. How we want AAZPA to be perceived.

2. Our principal priorities for action, for change. Where we most need to do things that are new, better and different...called Key Result Areas (KRA)...the parts of our enterprise in which we most need to make things happen.

3. Specific, quantified, time-certain objectives in each KRA.

4. Strategies and Action Plans (including resource requirements, cost/benefit analyses).

5. Likely responses to our strategies. How can we influence responses to be what we would like them to be?

6. Determine if contingency plans are needed. If so, assign task forces to prepare first drafts...and recommend "trigger" points when the contingency plans should be implemented.

7. Plan for communicating the plan.

8. Provisions for effective interaction between this strategic plan and existing AAZPA long-range plan, annual budgeting and control (including measurement and reporting).

9. Impact of this plan on AAZPA organization structure.

10. Provisions for progressive review of action planning and implementation, and for environmental monitoring.

11. Critique our planning process this time around.

Robert F. Smith
San Diego, California
November, 1989

January 25, 1990

RESPONSIBILITIES OF THE PLANNING COORDINATOR

Provide support to AAZPA President and President-Elect, leaders of the strategic planning proess.

Be inside contact and staff support person for Bob Smith, facilitator.

Provide help to members of the Nucleus Planning Group (NPG) and Advisory Committee as they carry out their assignments.

Keep minutes of key information presented and decisions made at the NPG and Advisory Committee meetings...and a record of assignments made.

Prepare planning documentation as the process progresses. This includes keeping a "master book" of all the drafts that are prepared and revised. It also includes preparation and distribution of the strategic plan document as the 1990 series of NPG meetings are concluded and presentations are made to the Board and membership.

Stay in touch with members of the NPG to assist them in the completion of their assignments.

Keep the President, President-Elect and Bob Smith up to date on her perceptions of how the process is going.

January 25, 1990
(3rd Draft)

SUGGESTED PLANNING CALENDAR, 1990

Event & Duration		
1st meeting of Advisory Committee. 4 Hours (i.e. one-half day)	Thursday, January 25	St. Louis
1st meeting of Nucleus Planning Group (NPG)... Orientation and first steps of the process. Homework assignments. 8 Hours (i.e. one full day)	Friday, March 16	Washington, D.C.
2nd meeting of NPG. 2 Days	Monday, Tuesday April 16, 17	Denver
3rd meeting of NPG. 2 Days	Monday, Tuesday June 18, 19	Tulsa

Note:

One or two additional meetings of the Advisory Committee may be scheduled according to the progress of the process.

November 27, 1989

EXPENSE ESTIMATES FOR FACILITATING AAZPA STRATEGIC PLANNING PROCESS

FEES

Fees for facilitating Advisory Committee and Nucleus Planning Group meetings, including preparations of working materials to be used.

$15,000.00

EXPENSES

Reimbursable to Strategies & Teams, Inc., on basis of actual amounts spent.

Principal categories:

Airfares, hotels, taxis, car rental, telecommunication, postage, secretarial, fotocopying, tips.

Estimated total needed:

$5,000.00

But can vary according to locations of planning meetings.

Notes:

Plan documentation (i.e. typesetting, printing and distribution) at close of process to be done by AAZPA.

Strategies & Teams, Inc., invoices for fees to be submitted in two equal amounts ($7,500 each) on March 1 and June 1, 1990.

Expenses as accumulated to be submitted on the above dates...and, as they may be incurred later, by a probable July 31, 1990 close.

Robert F. Smith
President

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

Make EX mark to check on taking off end of year

6/11/00 print & follow up! comp. & print

Mdy 1

File ~~Long Range Planning Committee~~ B

Strategic Planning B

MORE ON DESIGN OF THE PROCESS

AAZPA PLAN FOR PLANNING

Recommended by Bob Smith

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3. Our key values ("driving forces").

4. Our AAZPA culture.

5. Our key policies.

6. Our organization structure.

7. "Backcasting" along critical dimensions of the enterprise. This is history. Statistical and narrative. With attention to trends. It includes our successful and unsuccessful strategies in the past (big ones).

8. Critical factors for success in our mission (e.g. quality of professional staff, marketing, cost containment).

9. Main internal strengths and vulnerabilities.

II. Assumptions about the outside environment

1. Selecting major dimensions of the outside environment...and forecasting changes in them. Identify trends.

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10. Provisions for progressive review of action planning and implementation, and for environmental monitoring.

11. Critique our planning process this time around.

Robert F. Smith
San Diego, California
November, 1989

Robert F. Smith
President

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

November 27, 1989

Mr. David G. Zucconi, Director
Tulsa Zoo
5701 East 36th Street North
Tulsa, OK 74115

Dear Dave:

Attached are my updated recommendations for the AAZPA strategic planning process. Changes are only in dates and possible meeting locations:

1. Recommended design for "next phase" strategic planning by AAZPA.

2. Suggested planning calendar.

3. Fees and expenses.

4. Suggested role for planning process "coordinator."

5. Copy of my itinerary through December, 1989. New edition for January and February, 1990 will be distributed in late December.

Allowing some time for you and the others to look over these items, I suggest we try to have a conference call on Monday, December 11, the afternoon of Thursday, December 14 or on Friday, December 15. I will be chairing a management course in Palm Springs December 4 through 8 which makes having a successful conference call difficult during that period. I would also be able to participate in a call any day between December 20 and 29.

In the attached "Design," I have suggested that the AAZPA President function as leader of the process. However, if in the AAZPA organization of responsibilities, this is the role of the President-Elect/Chairman of the Long-Range Planning Committee, please make that alteration in both my design draft and in references process leadership in the "Responsibilities of the Planning Coordinator."

You will note I have suggested a variety of sites for our meetings. This was an effort to accommodate the home base locations of the people who are receiving this package and to provide convenient airport locations.

30 NOV. 89

I will be assisted in our efforts, Dave, if you arrange for me to be on a distribution list for AAZPA member mailings and any other relevant information that may be prepared during the period of our process.

Your letter of November 9, confirming the Board's approval of the strategic planning process as outlined in my July 31, 1989 proposal letter to Palmer Krantz, was much appreciated. I look forward to being part of what I am sure will be an exhilarating and rewarding experience for everyone involved, to the great advantage of all the AAZPA membership.

Please call or FAX me if you wish to discuss any of this.

With best wishes,

Robert F. Smith

My FAX No. is (619) 574-1664.

RFS:sa

Attachments

cc: C. Freihert
C. H. Hoessle
W. Iliff
P. Krantz
S. Robbins
B. Wagner

Robert F. Smith
President

Strategies Teams, Inc. 4468 Brindisi Street/San Diego, California 92107/USA/(619) 223-1818

November 27, 1989
(2nd Draft)

RECOMMENDED DESIGN FOR AAZPA STRATEGIC PLANNING PROCESS

Organizing the Process

Establish 10 to 15-person Nucleus Planning Group (NPG)... and 5-person Advisory Committee. The NPG functions as the strategic planning team. The Advisory Committee counsels and monitors the process.

AAZPA President is leader of the strategic planning process and chairs sessions of the NPG and the Advisory Committee.

Use an outside professional planning facilitator, start to finish.

Appoint a staff support person to assist the President, NPG, Advisory Committee and outside facilitator. This role is that of process coordinator.

Allow six months to one year for the entire effort.

Watch for opportunities to gain public relations advantage from the process.

30 NOV. 89

November 27, 1989
(2nd Draft)

SUGGESTED PLANNING CALENDAR, 1990

Event & Duration	Optional Dates	Optional Locations
1st meeting of Advisory Committee. 4 Hours (i.e. one-half day)	Thursday, January 25 or Friday, January 26	St. Louis or Tulsa
1st meeting of Nucleus Planning Group (NPG)... Orientation and first steps of the process. Homework assignments. 8 Hours (i.e. one full day)	Tuesday, February 6 or Wednesday, February 7	Washington, D.C. or Baltimore
2nd meeting of NPG. 2 Days.	Thursday and Friday March 15 and 16	Denver or Dallas
3rd meeting of NPG. 2 Days.	Thursday and Friday May 17 and 18	Washington, D.C., Baltimore, St. Louis or Tulsa

Note:

One or two additional meetings of the Advisory Committee to be scheduled according to the progress of the process.

30 NOV. 89

November 27, 1989

EXPENSE ESTIMATES FOR FACILITATING AAZPA STRATEGIC PLANNING PROCESS

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30Nov. 89

November 27, 1989

RESPONSIBILITIES OF THE PLANNING COORDINATOR

Provide support to AAZPA President, leader of the strategic planning process.

Be principal inside contact and staff support person for Bob Smith, facilitator.

Provide help to members of the Nucleus Planning Group (NPG) and Advisory Committee as they carry out their assignments.

Keep minutes of key information presented and decisions made at the NPG and Advisory Committee meetings...and a record of assignments made.

Prepare planning documentation as the process progresses. This includes keeping a "master book" of all the drafts that are prepared and revised. It also includes preparation and distribution of the strategic plan document as the 1990 series of NPG meetings are concluded and presentations are made to the Board and membership.

Stay in touch with members of the NPG to assist them in the completion of their assignments.

Keep the President and Bob Smith up to date on his perceptions of how the process is going.

30 Nov. 89

Phillips-Ramsey
ADVERTISING & PUBLIC RELATIONS

November 1, 1989

ROBERT F. SMITH'S ITINERARY

November 1 through December 31, 1989

Date	Location	Hotel
November 1, 2	Chicago, Illinois	O'Hare Marriott Hotel Phone: 312-693-4444 FAX: 312-380-8615
November 3-12	San Diego, California	
November 13	Phoenix, Arizona	The Ritz-Carlton Phoenix Phone: 602-468-0700 FAX: 602-468-0793
November 14	Saticoy, California	Phone: 805-647-1188 FAX: 805-656-5012 (Petoseed Company)
November 15	Phoenix, Arizona	The Ritz-Carlton Phoenix Phone: 602-468-0700 FAX: 602-468-0793
November 16	Chicago, Illinois	Phone: 312-739-0700 FAX: 312-739-0097 (Clipper Express Company)
November 17-20	San Diego, California	
November 21, 22	Los Angeles, California	To be determined
November 23 - December 2	San Diego, California	
December 3-8	Rancho Mirage, California	Ritz-Carlton Rancho Mirage 68-900 Frank Sinatra Drive Rancho Mirage, CA 92270 Phone: 619-321-8282
December 9-12	San Diego, California	
December 13	Saticoy, California	Phone: 805-647-1188 FAX: 805-656-5012 (Petoseed Company)
December 14, 15	San Diego, California	

6863 FRIARS ROAD, SAN DIEGO, CALIFORNIA 92108 (619) 574-0808

30 Nov-89

Date	Location	Hotel
December 16-31	Washington, D.C.	404 Rittenhouse Street Washington, D.C. 20011 Phone: 202-829-4728 FAX: 202-546-4784 c/o Barbara Smith-Minor

Linda Clemmons at Phillips-Ramsey Company in San Diego can assist in reaching Bob when he is out of San Diego. She often receives additional telephone and FAX numbers. She also will be aware of any changes which may occur in his schedule. Bob calls in frequently when traveling and messages reach him promptly. Call Linda at 619-574-0808.

FAX NOS: 619-574-1664 or 619-291-4132

U.S.A. Telephone: 619-574-0808

Mar. 1-2, 1989
Planning Workshop

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

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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.)

Animal Population Maintenance (SSP's, Heritage Species, work of WCMC, etc., and ARKS, SPARKS, MedARKS.)

Knowledge Generation (Research in genetic, reproductive, nutritional, behavioral and medical matters that are pertinent to animal population management.)

Other Direct Conservation Actions (In addition to the refuge and reservoir functions of maintaining animal populations in captivity, contributing through field studies and governmental relations to securing wild animal populations.)

Indirect Action for Conservation (Training of others for field or captive management of wild animal populations or for generation of pertinent knowledge; support of parallel efforts in field programs or collaboration with other conservation organizations.)

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.

Background Data

Conservation
Long Range Pl.

LONG-RANGE CONSERVATION PLAN FOR AAZPA

PREAMBLE

The biological diversity of the earth is being degraded at an unprecedented rate. Conservation biologists estimate that thousands, perhaps millions, of species are endangered and may become extinct during the next 50-100 years. Loss of this biological diversity will be cataclysmic for humanity in many ways. Broad-based conservation efforts must be implemented to prevent as much of this loss as possible.

Most biological diversity occurs in developing countries and is at risk. Most zoos and aquariums actively involved in conservation programs are, at present, located in the developed world. AAZPA has and will continue to contribute to the preservation of biological diversity through captive propagation and conservation education programs. Each of these activities is essential in achieving the Association's long-range conservation goals. However, of the two, captive propagation is the more immediate. Tangible results from education programs take time. Captive breeding programs must be established to prevent the loss of many species whose time is rapidly running out, especially those at high risk in greatly reduced, highly fragmented and disturbed habitats, before their populations are reduced to critically low numbers or they become extinct in the wild.

Although the emphasis of AAZPA captive propagation efforts should be directed toward those species (megavertebrates) which are particularly appropriate in zoos, a balance must be struck between these and less traditionally cared for terrestrial and aquatic species, whose maintenance in zoos and aquariums is likely to become critical to their survival in nature. The task of establishing species priorities and attaining captive propagation conservation goals will be achieved through the SSP program of the AAZPA. Further, it is necessary that AAZPA continue the development of technology that will enable effective interaction with other conservation organizations in wildlife preservation and restoration efforts.

Captive propagation programs are undertaken in hopes of maintaining or re-establishing viable populations in the wild. Additionally, captive propagation programs must also be undertaken to preserve species that would otherwise be lost; this action would provide options for the future. The development of ecological literacy and a world conservation ethic is critical to preventing the degradation of remaining natural habitats. In working toward these goals, zoos and aquariums must rely on education. AAZPA member institutions must teach about organisms and their relationship to the environment and man; alert visitors to conservation issues and their causes; offer examples of successful conservation programs; and provide specific options for involvement and action in local and global conservation efforts.

Therefore, conservation is and must continue to be the AAZPA's highest priority. The participation and cooperation of all member institutions will be required to achieve this goal.

PRIORITY 1
CAPTIVE PROPAGATION AND RELATED ACTIVITIES

OBJECTIVES

(1) To continue the development of and help to provide the scientific framework for the propagation and management of captive populations of wild animals, with the goal of maintaining such populations on a self-sustaining basis, by:

(a) Providing a detailed, prioritized action plan for conservation activities in consultation with staff, associates, members of the network of zoo conservation biologists, the AAZPA Board and other advisors.

(b) Devoting maximal energies to the development of tools, methods and the science needed to provide the capacity to manage an enlarged number of SSP programs.

2) To lead and coordinate the organization and implementation of population management plans through:

(a) Expanding the Conservation Coordinator's Office to create an AAZPA Conservation Center, adding both technical and clerical positions.

(b) Training of and communication with managers of SSP's, accelerating the training of potential managers within the zoo and aquarium community and recruiting qualified people from academia and other sources to the AAZPA conservation programs.

(c) Developing a systematic approach to choosing taxa for collective management programs, the development of more model programs, and combining this work with assessment of the carrying capacity of zoos and aquariums, including human resource potential.

(3) To communicate with the institutional network, conservation agencies, data centers, and others necessary to secure information and analyses of the data to support the development of population management plans by:

(a) Maintaining the close association of the Conservation Coordinator's Office with the ISIS Office.

(b) Assisting the further development of continued, regular interactions among conservation coordinators of the world's regional zoological associations, including a venue for workshop-type meetings.

CAPTIVE PROPAGATION AND RELATED ACTIVITIES

ACTION PLAN

(1) Add SSP programs at a rate of 15-20 per year for the next decade to respond to the current crises in conservation. The overall recommended goal would be:

200 SSP programs by the year 2000
1000 SSP programs by the year 2050

(2) Change the title of the Conservation Coordinator's Office to The AAZPA Conservation Center.

(3) Expand and more fully professionalize the Conservation Center according to the following schedule based upon the anticipated need of adding one technical staff person for every 40 SSP programs:

1988 - add 1 technical and 1/2 clerical positions;
1990 - add 1 technical and full clerical positions;
1991 - add 1 technical position;
1995 - add 1 technical position;
1997 - add 1 technical position.

(4) Assist ISIS in obtaining the finances required for software and hardware development to keep ISIS technologically current and to enable ISIS to relocate.

(5) Accord high priority to the acquisition of resources necessary to achieve the reinforcement and professionalization of the Conservation Center and to assist ISIS.

(6) Relocate Conservation Center to the Washington, D.C. area after necessary reinforcement and professionalization has occurred and when ISIS is able to relocate, recognizing that the AAZPA Conservation Center and ISIS should not be physically separated.

(7) Actively encourage member institutions to recruit and train qualified animal management staff from academia and other sources outside the zoo and aquarium profession.

(8) Continue, through the WCMC and the SSPC, to:

(a) Be involved in guidance of the selection of taxa for SSP and in the oversight, implementation and review of SSP programs.

(b) Develop relations with wildlife management agencies, both federal and state, to facilitate their assumption of additional responsibilities in captive propagation programs (black-footed ferret, red wolf, condor).

(c) Make available captive population conservation technology to managers of species of high conservation significance in reserves and parks (black rhino).

(d) Assist in the systematic development of conservation centers for captive breeding projects. This would lead to the development of additional captive habitat for SSP purposes.

(e) Develop the mechanisms necessary for the stimulation, coordination and support of research pertinent to SSP programs.

(f) Set in motion the establishment of tissue and plasm banks from zoo/aquarium and wild specimen sources as complements to whole animal population management programs.

(g) Help develop capacities in zoos and aquariums and allied institutions for ready analysis of the genetic constitution of various taxa and populations of conservation interest.

(h) Encourage the establishment of additional sister zoo/aquarium programs with institutions abroad, especially in developing countries.

PRIORITY 2
CONSERVATION EDUCATION AND RELATED ACTIVITIES

OBJECTIVES

(1) To assist in the development of a world conservation ethic by:

(a) Teaching the public about organisms and their relationship to the environment and man;

(b) Alerting the public to conservation issues and their causes;

(c) Offering examples of successful conservation programs;

(d) Providing specific options for involvement; and

(e) Inspiring the public to financially support conservation programs, to make their conservation priorities known to elected representatives and to act responsibly toward the environment in their personal lives.

(2) To foster awareness, support and appreciation of zoo and aquarium conservation programs by:

(a) Formally educating the perception of a variety of outside audiences about AAZPA conservation programs;

(b) Informally educating the visiting public in a variety of in-house formats presenting zoo and aquarium conservation as a critical endeavor.

(3) To facilitate an appreciation for and understanding of the AAZPA's conservation programs and foster a commitment to these programs throughout the Association at both the individual and institutional levels by developing and implementing an ongoing education effort among AAZPA membership.

(4) To engender the cooperation and support of various congressional and governmental agencies and individuals by developing and implementing an information program to better communicate the scope of zoo and aquarium related conservation programs and their potential impact for these agencies and individuals.

CONSERVATION EDUCATION AND RELATED ACTIVITIES

ACTION PLAN

(1) Hire a full-time AAZPA Conservation Education Coordinator in 1991.

(2) Continue, through the Public Education Committee, to:

(a) Interact with national and international conservation education organizations to develop joint programs, share resources, track programs being advanced and advise AAZPA member institutions of new conservation approaches being developed;

(b) Develop and coordinate national conservation programs such as Zoo and Aquarium Month, Seal Day, Conservation Day, etc.;

(c) Provide direction to AAZPA member institutions on how to design and implement strategies and programs to meet conservation education goals and goals for public awareness and support of AAZPA conservation activities.

3. Create an AAZPA award to recognize a member institution's conservation achievements through exhibitry, education and off-site demonstration programs.

4. Continue and expand, through the AAZPA Management School Board of Regents and AAZPA staff, program committees for National and Regional Conferences and programs for the ongoing education of the AAZPA membership including:

(a) Expansion of the conservation biology and conservation education curricula for the AAZPA Management School and Applied Zoo and Aquarium Biology School.

(b) Incorporation of paper sessions and workshops at national and regional conferences on topics aimed at developing understanding of and commitment to AAZPA conservation programs.

(c) Publication of information on AAZPA conservation in "Newsletter", brochures, press releases and other AAZPA-generated materials.

(d) Support of workshops to train species managers and studbook keepers, while considering the initiation of workshops to train conservation educators.

5. Continue, through the Legislative Committee and legislative liaison, WCMC, SSPC, and AAZPA staff, to educate and assist congressional and governmental agencies and individuals on matters of relevance and importance to local, national and international conservation efforts and to AAZPA conservation activities.

BACKGROUND INFORMATION FOR PLAN DEVELOPMENT

The following is a survey of how well the AAZPA is prepared to undertake the task of conservation, provided as background for formulation of the long-range action plan.

ISSUES

AAZPA Long Range Plans need to be further refined to enable the corresponding allocation of funds to reflect conservation activities as the primary role of the Association.

Proposed relocation of AAZPA staff functions, centralized in Washington, D.C. in response to a felt need for a national capital presence to affect legislative and regulatory concerns, may not be conducive to the effectiveness of the Conservation Center in coordinating and leading the technical and professional work for conservation in AAZPA.. Relocation at this time may result in distraction from main functions of the Conservation Center as a scientific base for AAZPA as well as in the interruption of established working relationships at all levels.

A conservation agenda that includes species rescues and the concept that zoos must act as refuges will require a exponential growth of resources. The resources needed for these proposed captive conservation programs could require immediate fund raising.

RESOURCES REQUIRED

Access to an adequate species information and processing system.

Personnel with expertise in handling zoo animal-collection data from the perspective of population biology to help set up successful population management programs.

Available pool of expertise for planning and ready means of networking with program managers in member institutions.

Location convenient for travel, access to auxiliary facilities such as libraries; preferably a zoo to provide working model conditions nearby.

Suitable offices and equipment.

Operating budget sufficient to attract and retain professional and supporting personnel and cover their expenses -- a commitment by the AAZPA proportional to the present and future dimensions of the program.

STRATEGIC FACTORS

Strengths:

Proven information database (ISIS) on animal collections and adaptable systems already at hand.

Experienced principal in respect to both the institutional network and the field of conservation biology.

Fruitful intellectual nucleus already at hand for development of concepts and methodology for programs.

Present location and accommodations conducive to function.

Limited by growing network of managers and advisors to implement programs.

Recognition by AAZPA that conservation activities are the primary concern of the organization.

Consistent support through the basic budget of AAZPA.

Establishment of the conservation endowment fund to facilitate the conservation activities of the Conservation Center and related projects.

Limitations:

Insufficient number of staff to carry out present program fully.

A perceived lack of understanding within AAZPA core membership of the need for Conservation Center to keep intellectually and technically current and to invest in continued development of skills and capacity.

Prevalence of a limited national view of population management schema and of their relation to global conservation concerns and activities.

Inadequacy of scientific knowledge that can be applied to solutions of the management problems posed by captive populations, including optimization models for management when data and analyses are necessarily incomplete.

Governance of zoo and aquarium animal populations is generally local, with little assurance of continuity, whereas dimensions of the conservation management programs needed require cooperation globally with the maximum continuity and stability.

Level of funding insufficient for present and projected programs; little experience in attracting major funding through grants.

A limited and often inadequate carrying capacity in member institutions for the population management programs devised with the Center's help.

Lack of qualified personnel to carry out management plans. Negative experiences of those assuming major responsibilities deters more volunteer effort.

Areas of Concern:

Unstable governance of host institution may suddenly disrupt ongoing conservation program activities, with substantial losses in continuity of operations.

Animal collection management programs and capacities of zoos and aquariums to support them may be seriously impaired by animal rights activism directed at specific management tactics such as euthanasia and birth control.

Well-financed conservation organizations may usurp the management authority or impair the capacity of member institutions to participate in appropriate population management programs.

The stochasticity involved in small population dynamics may impair successful management of taxa critically important in respect to public expectations of zoos and aquariums to play a conservation role by captive breeding programs.

General economic recessions may erode the capabilities of numerous institutions to actively participate in the collective population management programs and thereby substantially weaken their effectiveness.

Opportunities:

Potential exists for educating local communities to support a national strategy for zoos.

Major conservation prominence achievable on the basis of existing animal collections and management programs.

AAZPA and ISIS grant potential judged to be considerable, but largely unexplored at present.

With growth of conservation biology as a respectable academic discipline, recruitment of talent to zoos and aquariums and to activities of the Conservation Center becomes easier, including involvement of qualified students in projects and volunteer endeavors.

Leadership in identification of problem areas in the conservation of biodiversity is possible if program development can be accelerated, with resultant beneficial recognition to AAZPA by conservation organizations, governments and other agencies.

Animal rights groups and their membership potentially could be refocussed to assist and support zoos and aquariums in their efforts to conserve biodiversity. Similarly, the public at large could be recruited to volunteer their services in this special appealing vein.

Popular educational vehicles such as the television media could be utilized to a much greater degree to document and dramatize zoo and aquarium conservation programs, with benefits in recruitment of talent, attraction of support, and potential direct funding values.

American Association of Zoological Parks and Aquariums

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

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Long Range Plan Summary

Dear Member:

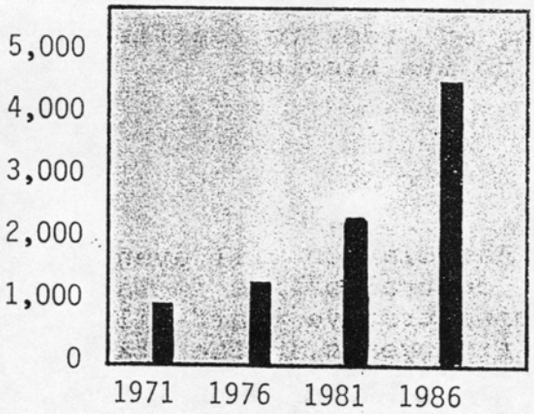
Last year the AAZPA Board voted to undertake a Long-Range Planning Study to respond to the challenges facing our organization today and to shape and plan for our growth in the future. Among the issues we addressed in the Study were how we could promote a more positive image for our zoos and aquariums, whether our offices should be located in one place, and, if so, where would be the best location.

The AAZPA has achieved a great deal during its first 15 years of existence as an independent organization. In that period we have:

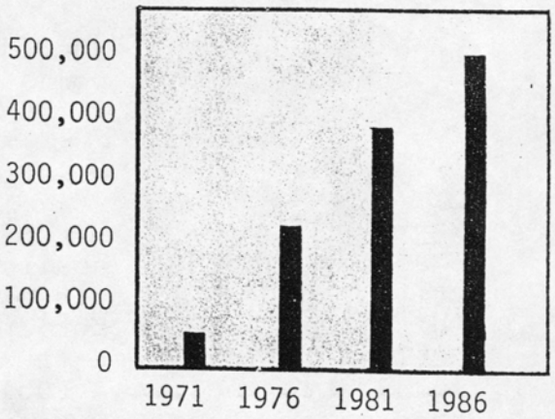
- established an independent organization,
- implemented an accreditation program,
- developed an ethics code,
- retained Washington legislative representation,
- provided financial support for an International Species Inventory System (ISIS), and
- developed and implemented the Species Survival Plan.

In addition, we have experienced significant growth in our membership (from 600 members in 1971 to over 4,500 in 1986) and in our operating budget (from $50,000 per year in 1971 to $500,000 per year in 1986).

Membership Growth



Budget Growth



These positive trends served as a foundation for the Long-Range Planning Study, which was launched last spring at each of the Regional Conferences. Over sixty members participated by serving on the five subcommittees and a special conservation subcommittee. Others passed along their ideas.

Notes:

(1) This Public Relations and Marketing Plan will survey and identify image problems, target audiences, develop marketing opportunities and programs, and recommend a structure for a permanent Public Relations/Development Office in Washington, DC.

(2) Our current registration fees are $100 and $50, respectively, for the Annual and Regional Conferences. These are considerably lower than, for example, the AAM which charges $170. By raising our fees to $175 for Annual Conferences and $75 for Regional Conferences, we would generate approximately $100,000 annually.

(3) The current professional Fellow, Affiliate, and Associate dues are $50, $30 and $20, respectively. There has been no increase in six years. By raising them to $100, $40 and $30, we would generate an additional $50,000 annually.

(4) There have been no Institution dues formula increases since 1977. By raising the $3,000 limit for larger institutions to $6,000, the $250 for smaller institutions to $500, and the 0.1% of annual budget dues to 0.125%, we would generate an additional $100,000 annually, added to $50,000 for our development efforts.

(5) This income may be in the form of dues from a national support group (made up of individuals and/or corporations) or come from some other revenue generation program developed by the Public Relations and Marketing Department.

(6) This position is seen as not only dealing with the importance of education in our institutions (particularly conservation education), but also as having the potential to work on image building of zoos and aquariums through coordination of education programming.

AN AFTERWORD

We want to emphasize that this is just a "plan" and is subject to change and improvements. Your input is welcome, and each year the Board will deliberate implementation of that year's recommendations. Only the first year's increase in annual and regional conference registration fees has been approved, along with the Public Relations and Marketing Plan that it will fund. The four succeeding years' elements of the Plan will be based on this.

We need your continued involvement and support and welcome your ideas, suggestions and criticism. The Long-Range Plan's value will be judged in the end by how well it enables us to achieve our mission of contributing to the conservation of wildlife.

	Activity	Projected Cost	Funding Source
1987:	Develop a Public Relations and Marketing Plan (1)	$100,000 (one-time expense)	Increased Conference Registration Fees (2)
1988:	Establish a Public Relations/Development Office in Washington, DC.	Approximately $150,00	Individual Membership Dues Increase (3)
1989:	Hire a Deputy Director for the Washington office; move Conservation Coordinator to that office	$150,000	Institution Membership Dues Increase (4) and Development Income (5)
1990:	Expand conservation programs in Washington office	$100,000	Development Income
1991:	Establish the position of Education Coordinator (6) in Washington office	$50,000	Development Income

(footnotes on reverse side)

The Long-Range Plan also contains the following mission statement for our organization:

> 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.

This Long-Range Plan, 1987-1991 has been adopted by the Board. Its primary goal is to set a course for our future and to ensure the continued success of our wildlife conservation efforts. It is forwarded to you for your information and discussion and so that you can share this commitment with others.

Sincerely yours,

Warren J. Iliff, Chairman
Long Range Planning Committee

HIGHLIGHTS OF THE HILL AND KNOWLTON SURVEYS

As a part of the development of the Association's five-year long-range plan, the Board of Directors retained the services of Hill and Knowlton, Inc. (H&K). James Jennings, Executive Vice President, Washington, D.C., was our account executive. The H&K endeavors included a survey of the general public, a poll of the AAZPA leadership and a suggested communications program for AAZPA.

The general public survey included telephone interviews with 1,005 residents. The specific aims were to:

- Determine the incidence of zoo and aquarium visitations.
- Document the general public's opinions regarding the roles and importance of zoological parks and aquariums within their communities.
- Assess the strengths and weaknesses of zoological parks and aquariums.
- Determine the general public's interest in wildlife conservation matters.
- Assess the general public's awareness of the conservation and educational functions of modern zoological parks and aquariums.
- Identify segments of the general public to determine their potential interest in zoological park and aquarium conservation efforts.

The questionnaire was developed by H&K research staff and reviewed and refined by the AAZPA Executive Committee. Once the interviewing was completed, the questionnaires were edited and coded by H&K research staff. The questionnaires were tabulated and the data processed according to a cross-tabulation plan designed by research analysts. H&K reported that the margin of error, based on their type of survey, would have a plus or minus 3.1 percentage points.

H&K provided an executive summary based upon its review of the survey results. The summary took the form of six major components. They are as follows:

POPULARITY OF ZOOLOGICAL PARKS AND AQUARIUMS

Zoological parks and aquariums occupy a very special place in the lives of citizens of the United States and Canada. Those persons feel our institutions are valuable parts of their communities. A full 75% of them feel that local governments should support them. The survey also underscored the popularity of our institutions by discovering that nearly everyone has been to a zoological park or aquarium at some point, and as many as one-third of those surveyed had visited a zoological facility during the past year. The survey found that zoological park and aquarium attendance centered around families taking children for an outing, but they were also popular among childless couples. Those respondents residing in communities without a zoological park or aquarium often noted that distance was a deterrent, but others stated they regularly visited zoological parks and aquariums when vacationing.

PHYSICAL FACILITIES

According to the survey, the general public perceives that zoological parks and aquariums must provide appropriate surroundings for captive wildlife. The general public is satisfied when the animals are displayed in comfortable and

PR Survey

- The survey noted that teenagers are particularly susceptible to the suggestion of volunteering at a zoological park or aquarium.

- As they have an inate love of animals, it is important that they be given an opportunity to examine animal/environmental/conservation issues.

Zoological parks and aquariums are excellent forums from which we can promote the general public's interest in species conservation work because:

- The general public looks upon our institutions benevolently.
- Our institutions attract those in the upper income and education levels.
- The general public expects zoological parks and aquariums to be involved in conservation and related endeavors and feels that our institutions are performing well in these areas.
- Many of those surveyed indicated they were anxious for opportunities to assist their local zoological institutions.

The summary concluded by noting that the AAZPA could garner a wealth of support throughout the United States and Canada in a collective endeavor with its member institutions. H&K felt that the Association has an excellent opportunity to raise the general public's consciousness about species conservation because:

- Zoological parks and aquariums attract visitors from all walks of life - including those with either high or low incomes, those with or without children and those in all parts of North America.
- Conservation is good news, and zoological parks and aquariums need to tell their story regarding conservation.
- Our institutions offer their visitors "contact" with the real thing, as no other conservation-oriented organization can.
- Only a very small number of potentially interested persons have been tapped as either members and/or donors to zoological parks and aquariums.
- The avid zoological park and aquarium boosters and participants are very likely to be the people who are potential conservation enthusiasts.
- The ease of contact is enhanced when zoological park and aquarium visitors have small children, but interest exists among all groups.

LEADERSHIP SURVEY

The Association was asked to provide a list of 80 names constituting a cross section of the Association's leadership. Included were directors, curators, educators, public relations persons and administrators from large, small and medium-sized institutions, as well as societies. H&K randomly selected thirty of them for extensive telephone interviews. The results indicated responses even more varied than those from the general public. It was clearly indicated that AAZPA means different things to different people. For some, the Association offers stimulus and urges development. For others, it is essential and helpful, but not challenging. More than half of the respondents indicated AAZPA challenges them to move into new areas of responsibility, largely because of what they learn via contact with other professionals and the standards AAZPA enforces. However, ten of the thirty polled said it does not help their institutions grow. Most leaders agreed that the Association is very effective in providing member institutions and individuals with services and a forum for the exchange of information. Further, the leaders felt that it was important to become more

initiating and continue to be reactive in legislative arenas. There was a solid consensus that the AAZPA's goal is conservation. Yet the overwhelming majority did not want attention to conservation matters to detract from the achievements and established services of the Association. The results of the specific questions were as follows:

- How effective has AAZPA been in promoting professional standards? 23 - highly effective; 7 - somewhat effective.
- How effective has AAZPA been in promoting species conservation? 9 - highly successful; 16 - somewhat successful; 5 - not very successful.
- How effective has AAZPA been in increasing public awareness of the importance of zoological parks and aquariums? 3 - highly successful; 10 somewhat successful; 16 - not very successful; 1 - undecided.
- Does the AAZPA challenge zoological parks and aquariums to move forward into new areas? 15 - AAZPA challenges their institution; 10 - AAZPA does not help their institutions grow; 5 - no response.
- How well is AAZPA known among the general public? 26 - Association not well known; 4 - known by some people. (Interestingly, the general public responded much more positively than did the leadership in this particular area.)
- Of the four following areas, which one should the Association focus its attention on in the immediate future?:

  a. Attracting funds for research and educational programs - 5.
  b. Developing and promoting conservation efforts - 10.
  c. Raising the public's awareness of conservation issues as they relate to zoological parks and aquariums - 13.
  d. Legislation - 2

- Should the Association become a service-oriented organization with a low profile or a national authority with a high profile? 16 - low profile; 6 - high profile; 8 - undecided.
- Would the Association becoming better known and recognizable be helpful to AAZPA? 24 - helpful; 2 - not helpful; 3 - both; 1 - undecided.
- Is there any reason to change the name of the Association? 4 - yes; 22 - no; 4 - undecided.
- Is it important for the Association to have a shorter or easier name? 13 - yes; 11 - no; 6 - undecided.
- Should the Association publish a magazine for the general public, both as a fund-raiser and as a means for further educating the public? 12 - yes; 13 - no; 5 - undecided.

The results of both the general public survey and the poll of our leadership are being studied by the Association. Clearly, zoological parks and aquariums are thought of fondly by the general public. Their acceptance of the education and conservation programs is at a much higher level than most zoological park and aquarium professionals thought them to be. Many of us have long held that zoological park and aquarium professionals were our most vociferous critics, and the results of the Hill and Knowlton surveys verify this.

(R. Wagner)

Correspondence