



Minnesota State Zoological Board.  
Zoo-Related Organizations Files.

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2020 COMMITTEE MINUTES

February 25, 1998

Shedd Aquarium

Present: Roberts (Chair), Taylor, Beattie, Forman, Rabb, Conway  
AZA Staff: Butler, Ramin, Vehrs  
AT Kearney: Abruzzo, Sterling

Roberts: Introduced the agenda for the day. The purpose for the meeting is to come to agreement on the goals for the 2020 Committee. Reviewed the purposes outlined by AZA President Towne and AZA Executive Director Butler. Also reviewed the discussion and results of Directors retreat.

Kearney (at this meeting) will assist the Committee in identifying tasks and timelines.

Conway: We need to look at AZA mission and vision - especially interpretation of both. The Committee must address its work within the frame of the mission and vision.

Committee needs to revisit vision for AZA: professional vs. conservation. As we look at the mission of our institutions, we need to address the AZA's role of support.

Butler: This committee will have a two-pronged effort: one looking at our institutions in 2020 and the other to look at the role and function of AZA.

Forman: San Diego retreat focused on what institutions will look like in 2020, not AZA

Rabb: We still need to look at business of AZA as service organization for zoos and aquariums in 2020

Taylor: Goal is clear - future position of AZA - but need to envision role of zoos and aquariums in 2020

Abruzzo: The goal may be clear, but the Committee is unclear about its role. The Committee needs to consider the example of the thriving vaudeville industry becoming obsolete. We need to look to the future and define what is necessary to remain a thriving industry.

Roberts/Butler: 2020 not formed to help AZA, but to help zoos and aquariums project what business will be like in 2020. Secondary result is how AZA will change and adapt to reflect this - dog wagging tail vs. visa versa

Rabb: Should we look at WZO document on what zoos "ought" to be?

Conway: We must address the changing role of zoos and aquariums as the conservation organizations of the year 2020 - into the 21<sup>st</sup> century. We need to look at trends and learn from

them to apply to our businesses. For example: how should we address California demographics re non-Caucasian visitors? How should we look at the aging population? We also need to be aware of general business trends and how are industry is different. We are currently "upsizing" vs. the trend of downsizing. We are increasing our per unit costs vs. the trend of reducing per unit costs.

Rabb: We need to look to WWF, NC, CI, etc. as we consider our role in the 21st century. We need to define the role of zoos and aquariums and our aspirations.

Taylor: The Committee must first define mission and vision for our industry and then define a business plan for taking action. The AZA role will fall out of the above process.

Forman: We need to meet again to sit around a fireplace and dream about the future of our industry.

Rabb: How will we command the necessary resources after we decide above? We cannot lose sight of the costs.

Roberts: Reminded the group we must have a process outline at end of day defining the Committee's work.

Forman: 1) process development and then, 2) dream - articulate mission and vision of zoos and aquariums in the future.

Butler: Reminded the group of the expectation from Directors retreat. They asked the 2020 Committee to review business, economic, cultural etc. trends and how they will influence our business in 2020.

Vehrs: Kinds of data needed for 20 year projection: attendance, marketing trends, demographics, regional benchmarking, natural world trends, global economic forecasts, entertainment/leisure trends, education, government health, philanthropy trends

Rabb: We need to address motivation especially early education research like that being done by Peter Kahn. We need research regarding interaction with natural world/environment - esp. cross-cultural studies.

Conway: Allow trends to inform vision

- 1) What we have
- 2) What we are looking for
- 3) Shape vision - responsive to trends
- 4) Need to inspire dialog

Roberts: Consultants need to be engaged to collect needed data. Staff can assist with this function. Committee members need to assist in data analysis and interpretation.

Conway, Otten, Forman and Schweitzer will serve as advisors to the staff in the trend study. They will not do data collection.

Conway: We need to keep members informed of the work of our committee

Rabb: This may be an experience similar to the initiation of SSPs and ISIS. We need to keep people informed and look for support.

Forman: We need to look to alternative funding sources. Is there a reason we do not look for Federal funds? We all have congressional delegates; some of us have leadership representation. Can we bring leadership into our discussions? Should Gingrich be asked to come to the fireplace with us?

Conway: This is a good idea to consider. Let's ask him to participate in our dreaming the vision for the industry. Have him tell us what he sees.

Butler: Will discuss the possibility with Maple and confer with Forman. The meeting will be in June.

Roberts: We need to complete a strategic plan to support the vision. We know some of the categories, and will certainly add more.

Rabb: We need to find the funds to do quality research on the reason people feel an affiliation with our institutions. Why do we see newborns in our facilities? There is something innate that draws people to our doors. We need to understand why and use the information.

Taylor: Ultimately we need to be able to tell the story of our industry. We need to identify our vision, our economic impact, and our influence on conservation.

Beattie: We need to draft a white paper on the state of the industry when we complete the work of this committee.

Butler: When we have completed study about our institutions we need to then define changes in the way AZA does business. We are assuming changes will be necessary at AZA.

Roberts: Do we need to meet again and to what purpose? Yes. We need to meet around the fireplace and begin to put meat on the bones of our ideas for an industry vision. We also need to prepare for the Tulsa meeting and think through how we will gain input from a wider audience. We will meet in June.

COMMITTEE WORKPLAN  
(add handwritten chart)

## 2020 COMMITTEE WORKPLAN

	Task	Timeline	Action by
1	Define the Committee work	2/25/98	Full Committee
2	Report to the Board and request up to \$75,000 for trends study	3/10/98	Beattie
3	Develop and submit Tulsa Marketplace proposal to discuss characteristics of a vision and mission for zoos and aquariums and progress on the trends analysis	3/13/98	Roberts
4	Engage consultant for trends study	5/1/98	Butler & Advisory Comm.
5	Identify necessary data sets		
6	Review consultants opinion on data quality		
7	Provide guidance to consultants during data analysis		
8	Develop draft vision statement (fireplace) and review preliminary trends study results	6/98	Full Committee
9	Report progress at August Board meeting and solicit input	8/98	Beattie
10	Present at Tyulsa Conference and solicit input	9/98	Roberts
11	Complete trends study	12/98	Roberts
12	Present trends study at Director's retreat and solicit inut on vision statement	1/99	Roberts
13	Complete vision statement	1/99	Full Committee
14	Initiate strategic planning to support vision to include: <ul style="list-style-type: none"> <li>• Affiliational studies (Rabb)</li> <li>• Action based on trends study</li> <li>• Funding source study</li> <li>• Other identified actions</li> </ul>	TBD	Full Committee
15	Present strategic plan at Minnesota Annual Conference	9/99	Roberts



**TO: AZA 2020 Committee (Listed Below)**

**FROM: Kathryn R. Roberts, Minnesota Zoo**

**DATE: February 9, 1998**

**RE: MEETING NOTICE**

**AZA 2020 Committee  
Wednesday, February 25, 1998  
9 AM – 4 PM  
Shedd Aquarium  
Chicago, IL 60605**

The purpose of the meeting is to reach agreement on the committee goals, determine the desired outcome of the committee and the process to reach the outcome. Emily Sterling and James Abruzzo from A.T. Kearney will facilitate the meeting.

For those of you who will be arriving in Chicago on the 24<sup>th</sup>, Ted Beattie has suggested you call the Claridge Hotel, 1244 N. Dearborn at (312) 787-4980...Ask for the Shedd rate.

**Committee Members:**

K. Roberts, Chair  
Ted Beattie  
Ron Forman  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

**Advisors:**

Syd Butler  
Bill Conway  
George Rabb  
Bob Ramin

cc: David Towne, AZA Membership Office, Connie Braziel



Itinerary  
Kathryn R. Roberts

AZA 2020 Task Force  
February 25, 1998

**Tuesday, Feb. 24**

Depart MSP via NW 1502, departing at 2:40 p.m.; arriving Midway 4:01 p.m.  
E-ticket ASW3YL

*Training at  
Fairmont*

Hotel: Claridge @1244 N. Dearborn (312) 787-4980 (Confirmation #896) @\$85/night

**Wednesday, Feb. 25**

9a.m. - 4 p.m. Shedd in Soundings Board Room (inside the restaurant Oceanarium). Enter through Security Entrance on south side of building down the ramp from staff parking lot.

Continental Breakfast at 8:30 a.m.  
Working lunch

Depart Midway via NW 615 at 5:15 p.m., arriving MSP 6:42 p.m.

Agenda

Facilitating role →

branding - national focus  
international - shifting forces of power  
AZA & how to deal with it



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Kathryn R. Roberts

AZA 2020 Task Force  
February 25, 1998

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branding - national focus  
international - shifting forces of power  
AZA & how to deal with it



Saved  
Emily Abruzzo  
6 pages

**TO: AZA 2020 Committee (Listed Below)**  
**FROM: Kathryn R. Roberts, Minnesota Zoo**

**AZA 2020 Committee**  
**Wednesday, February 25, 1998**  
**9 AM – 4 PM**  
**Shedd Aquarium**  
**Chicago, IL 60605**

Emily Sterling and James Abruzzo from A.T. Kearney will facilitate this meeting to help us reach agreement on committee goals, the desired outcome of the committee and the process to reach the outcome.

To recap the background of the committee, I have attached several documents:

- My initial memo to the committee (Sept. 3, 1997)
- Notes from first committee meeting (9/16/97)
- President Towne's Communique article (Oct. 97)
- Relevant notes from the Director's Retreat in San Diego
- A copy of my e-mail message to the committee.

**Committee Members:**

K. Roberts, Chair  
Ted Beattie  
Ron Forman  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

**Advisors:**

Syd Butler  
Bill Conway  
George Rabb  
Bob Ramin  
Kris Vehrs  
Bruce Carr

cc: David Towne, AZA Membership Office,





September 3, 1997

Dear AZA 20/20 Task Force Member,

Our newly formed committee has been put together with great expectations from the AZA Board. We have been asked to **DEFINE THE PROCESS** which will be necessary to meet the following goals.

1. A "picture" of zoos and aquaria in the next 10 to 20 years needs to be developed.

We have the opportunity to think about how our institutions will change over the decade. Business trends, shifting demographics, public opinion, technology and the economy will alter the way we operate.

The process our committee develops may include workshops with nationally recognized futurists to help develop the picture.

2. After completion of the first task, we will assess the services of AZA to determine whether and how the organization can best fulfill the needs of its members.

We have been given the task to take a far reaching look at AZA. The committee has the opportunity to define the culture and structure of AZA in a way that will be responsive to and supportive of all members.

I believe we can complete our task in two meetings. We will meet in Albuquerque and again at the Director's meeting in San Diego this January. The first meeting will be **MONDAY SEPTEMBER 15 AT 10:00 TO NOON IN ROOM "A" AT THE HYATT**. Again, we are not being asked to answer the questions posed above. We are being asked to outline a process for answering the questions. I look forward to working with you. This will be fun!

AZA 20/20 Task Force Members

Kathryn Roberts, Chair  
Ron Forman, Vice Chair  
Ted Beattie  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

Advisors

Bill Conway  
George Rabb  
Syd Butler  
Kris Vehrs

**ATTACHMENTS**



## officers

**President** David L. Towne  
Woodland Park Zoological Gardens  
Seattle, Washington

**President-Elect** Terry L. Maple, Ph.D.  
Zoo Atlanta  
Atlanta, Georgia

**Vice President** Richard L. Lattis  
Bronx Zoo/Wildlife Conservation Park  
Bronx, New York

**Immediate Past President**  
Thomas C. Otten  
Point Defiance Zoo & Aquarium  
Tacoma, Washington

**Executive Director** Sydney J. Butler  
AZA Executive Office  
Bethesda, Maryland

## directors

**Ted A. Beattie**  
John G. Shedd Aquarium  
Chicago, Illinois

**Hayes Caldwell**  
Caldwell Zoo  
Tyler, Texas

**L. Patricia Simmons**  
Akron Zoological Park  
Akron, Ohio

**Jim Anderson**  
Fort Wayne Children's Zoo  
Fort Wayne, Indiana

**Mary I. Healy**  
Discovery Island Zoological Park  
Lake Buena Vista, Florida

**John R. Lewis**  
John Ball Zoological Garden  
Grand Rapids, Michigan

**Bruce W. Bohmke**  
The Phoenix Zoo  
Phoenix, Arizona

**Clayton F. Freiheit**  
Denver Zoological Gardens  
Denver, Colorado

**Mark C. Reed**  
Sedgwick County Zoo  
Wichita, Kansas

## message from the

# EXECUTIVE DIRECTOR

Kevin Bell's article on the next page is most informative, and outlines the advantages and disadvantages of "privatization." As Chair of AZA's Public/Private Task Force (and a director who has been through privatization), he knows quite well the painful/productive experience of moving an institution to self governance. The Task Force Notebook is full of counsel and experience, and a fine membership service. (For information on how to obtain the notebook, contact the Office of Membership Service at 304-242-2160.)

Beyond its practical and valuable aspects, the notebook reminds us that zoos and aquariums are businesses at their core. They operate in a fiercely competitive business world, where success depends on shrewd resource management. Competition for leisure time dollars is intense, and there's no future for the complacent institution. Institution leaders must balance today's accounts, while preparing for tomorrow's competition.

To assist our members, President David Towne has created a new AZA 20/20 Task Force, charging it with identifying the challenges zoos and aquariums will face over the next 25 years. What are the significant trends, what are the questions that must be formulated and answered? Do we know the status and strength of our industry today? Are we gaining or losing ground? Do we really understand, at the psychological and practical levels, why people visit zoos and aquariums? How will a successful institution be structured 25 years from now?

And how should AZA be structured to best serve future institutions and members? What services will be needed, what membership and governance changes might be required? Through several current initiatives, AZA is already addressing these questions. We are evaluating current membership categories and services, establishing a data clearinghouse component, and greatly strengthening our conservation education programs to support our members increasing focus on education. We are evaluating and improving our conservation and science efforts, recognizing the growth pains of these highly successful, volunteer supported programs.

Using a sports analogy, we are in the first mile of a long marathon to improve our services. I have no doubt that we have the strength, skill and commitment to run the distance.



## **Summary of Meeting Notes from AZA 2020 Meeting in Albuquerque, 9/16/97**

President Towne explained the charter of the committee: to “lay a highway” for the future and “reinventing” AZA’s role with members.

### Long List of Issues that Need to be Considered

- Future of Business
- Future of public funding
- Changes in education
- Uses of animals
- Demographics
- Psychographics
- Gender distinctions in affiliation
- Race distinctions in affiliation
- Individual safety
- Changes in technology
- How affinity for animals is created
- Conservation
- Transfer of wealth

### Task Assignments

- Collect existing data using ERA, McKenzie, Kearney, etc.
- Determine what additional information needs to be collected
- Identify experts in future trends and demographics
- Recommend a forum for their presentation and discussion
- Collection information regarding the affiliation issue to be shared with committee

- Ask Accreditation Commission to strengthen review standards/guidelines on animal welfare, animal surplus and enrichment (beyond nonhuman primates)
- Ask AZA Board of Directors to continue to address animal surplus issue.

### ACTION ITEMS/ASSIGNMENTS

Diane Sena the facilitator then began the process of determining what action items the entire group wanted to commit to for the next year, based on the group discussions. Two areas everyone focused on included industry trends (who are we, what do visitors experience and how do we sustain our long-term relevancy) and accreditation (how do we strengthen it and then once it is improved market its value).

WHAT IS THE EFFORT?	LEADER	DEADLINE
<u>Benefits of zoos and aquariums</u> - market research and communication plans. Approximately 25 institutions have recent plans (within 5 years). Most directors did not believe they were proprietary and agreed to send them to Ted Beattie to determine the 10 to 15 common elements of the plans. Ted, Diane Sena and Pete Hoskins will analyze them by 1 June.	Ted Beattie, Diane Sena, Pete Hoskins	1 June 1998
<u>Industry trends</u> - new AZA information manager will be able to provide some of the information. They will also look to studies by other associations such as IAAPA and AAM, chambers of commerce, visitors bureaus, university recreation divisions, etc. This will be a national effort. The 2020 Task Force will gather all the available information and then a professional should be hired to evaluate the validity of the findings and prepare a report before the next director's retreat. There was discussion of an assessment of institutions to pay for hiring the consultant. The goal is to produce a report on how to prepare for long-term relevancy.	2020 Task Force	January 1999
<u>PR Campaign</u> - Would require the data from both trends study and the marketing research. By next year's director's retreat, this data should be available to enable discussion about a possible national PR campaign.	2020 Task Force	January 1999

## Kathryn Roberts

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**From:** Kathryn Roberts  
**To:** Bill Conway; Emily Sterling; Jan Schweitzer; Ron Forman; Satch Krantz; Steve Taylor; Sydney Butler; 'Ted Beattie'; Terry Maple  
**Subject:** Proposed meeting schedule  
**Date:** Wednesday, January 28, 1998 3:32PM

I would like to schedule a meeting of the 2020 Committee. The purpose of this gathering will be to reach agreement on the committee goals, determine the desired outcome of the committee and the process to reach the outcome.

There was much discussion about the 2020 Committee and its role at the recent Director's retreat. I understand there was a desire on the part of the participants to collect relevant data on social, cultural and economic trends, analyze the information and produce a report. The resulting analysis could be used for a variety of purposes including a national campaign to increase awareness and appreciation of our industry.

This is a different vision for our committee than was discussed in September. In order for us to move forward in an effective way we need to come to an agreement on the work of the committee. Looking into the future is a complex task; we need to be certain we are all on the same path and moving toward an agreed upon outcome.

Ted Beattie has graciously agreed to host a day long meeting at the Shedd Aquarium. Please let me know: (1) if you are interested in this planning session and (2) which of the 3 dates would work for you February 25, February 26, March 4.

Emily Sterling and James Abruzzo from A.T. Kearney will be facilitating the day.

I hope to hear from you soon.



AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

February 19, 1998

Office of the President  
David L. Towne  
Woodland Park  
Zoological Gardens  
5500 Phinney Avenue North  
Seattle, WA 98103-5897  
Tel: 206-684-4880  
Fax: 206-684-4854

George Rabb  
Brookfield Zoo  
3300 South Golf Road  
Brookfield, Illinois 60513

Dear George:

Thanks for your very thoughtful letter of February 6th, 1998. Your comments on the retreat were helpful and echoed those of other directors who have contacted me. Almost all found the retreat to be focused and stimulating. As with you, there were concerns about not being able to bring closure to major issues.

My feeling is that it afforded the directors their first opportunity to collectively address key issues, and I structured it accordingly. I also felt that the best we could expect was an identification, general discussion and overall assessment of those issues that must be further addressed by the organization as a whole or through its committees. Hopefully this is the way that institutional directors can have a more significant say in setting AZA priorities and concerns.

I do hope, George, that you can focus your valuable insight and philosophy on the efforts of the Zoo 2020 Task Force. I have high expectations of this group's vision in addressing the future of our profession and institutional direction. While we all acknowledge the dynamic nature of our mission and its relationship to society, I do think we need to carefully and creatively set a future course for this profession that goes well beyond what we've known in the past. I am confident that the Zoo 2020 Task Force has the vision necessary to point our collective direction.

I am committed to developing a much stronger foundation of respect for the AZA, through a variety of tools, e.g., accreditation, ethics, SSP, etc. We cannot expect legislative respect or increased funding for our programs if we don't have our own house in order. Again, I hope that Zoo 2020 can help address this important need along with support from the Board and its Committees.



George Rabb  
February 19, 1998  
Page Two

As far as our marketing and development needs are concerned, George, I'm well aware of your concern. While I share some of your views, I also think that AZA does have to grow in stature and financial backing, not for itself, but to support a higher image and higher level of funding for our AZA members' purposes. I've enclosed a reprint from a recent Smithsonian magazine for your review. Do you think a similar task force or a special committee would be of assistance in setting an ethical policy that could enable us to take advantage of opportunities without compromising our standards? I'd like to hear your ideas on a constructive direction and have asked Syd and Ted to meet with you next week to discuss it further.

We need to find a common ground that helps us nationally, globally and locally. The key is consensus and direction! I ask you not to just connect but to provide vision to the Task Force, and AZA, as I know you can do so well.

I'm sorry I won't be able to attend the Zoo 2020 meeting in Chicago, but am certain it will be a step forward in addressing the many issues facing our profession, especially with your guidance.

Are you attending the Monterey meeting? If so, I'll look forward to having dinner with you--I'll even buy!!

Thanks,



David L. Towne  
President

DLT:pak

cc: Ted Beattie  
Syd Butler  
Kathryn Roberts



P.S. Thanks for helping the Ethics Committee address a thorny issue. Nancy is doing a great job under very difficult circumstances.



# Museums and Marketing

AS PHILANTHROPY EBBS, THE SMITHSONIAN COUNCIL ADVISES PRUDENCE IN OUR SEARCH FOR CORPORATE SPONSORSHIP

**T**HE SMITHSONIAN INSTITUTION HAS A NUMBER OF advisory groups. These museum boards and commissions, which include scholars and other interested private citizens, offer advice on programs, and budget and planning, and play a role in the ongoing evaluation of directors.

One of the key advisory boards to the Regents and the Secretary is the Smithsonian Institution Council. It is made up principally of people from the academic world, including Nobelists, artists, critics, museum directors, distinguished professors, media experts, philosophers and writers. The Council was created to review and debate topics embracing the entire Institution, including all of its units and interrelationships. Since I became Secretary, I have asked for Council review of three issues affecting the whole Institution. This column concerns Council advice on corporate partnerships.

As many of you will recall, I indicated at the beginning of my term that resources are a central problem for the Smithsonian Institution in this era. I predicted limitations on the growth of federal funding for new programs and the consequent need to increase revenues from other sources, one important one being corporate support.

In the past three years, corporate funding has been an important source of additional revenues for our educational efforts in research, exhibitions and national outreach. We're grateful for that help. Unlike in the past, however, corporations now ask more from us than simple acknowledgment of support. For instance, in return for a sponsor's giving to the Smithsonian a percentage of its product sales, or funding an activity or exhibition, the sponsor may ask to use the Institution logo in corporate advertising, identifying the company as "a proud supporter of the Smithsonian." There are many other examples, not the least of which have been the corporate presentations that accompany the "America's Smithsonian" exhibition.

Two of our sponsors made it clear at the Council meeting that the value of the Smithsonian to corporations lies in pairing our identity (or "brand") with that of a corporation ("co-branding"). In corporate eyes, our well-known identity bespeaks "American," "integrity," "familiarity," "family," "history," "technology," "art" and similar concepts.

Given the new emphasis on marketing in corporate support, I sought the Smithsonian Council's perspective on the consequences to the Institution that might result from sponsorship rather than philanthropy. The Council discussion emphasized prudence in choosing corporate partners. Cor-

porate identity can negatively affect the Smithsonian, especially in connection with questionable products (tobacco and alcohol, for instance), practices (such as providing substandard wages and working conditions) and occurrences (such as deleterious environmental events). And we must be able to sever relations if catastrophe occurs.

It also became clear that corporations that sponsor particular programs or exhibits are interested in the subject matter, but do not seek to affect specific content both as a matter of principle and to avoid debasing the independent reputation of the Smithsonian Institution, which is also important to them. This means that the corporate sector can be approached broadly for general Institution-wide support and more narrowly for targeted programs and exhibits. A number of corporations are more interested in our musical presentations, for instance, than in exhibits of objects and texts because they believe that their prospective customers will relate more closely to music.

Adamant critics of corporate sponsorships on the Council fear that the specificity of corporate interest will narrow the range of planned exhibitions and lead to self-censorship because of concerns that the Smithsonian "brand" might be less valuable to our sponsors. Most on the Council, and the Smithsonian Institution leadership, recognize these as potential problems but believe that treating corporate sponsorship as only one of a number of sources of support lessens the perceived threats.

On the broader issue, the Smithsonian already copes with strenuous critics in Congress, or people who enlist congressional support, whenever controversial programs are presented. Any corporate opposition is minor in this context. Corporations should be willing to accept the Institution's policy of not avoiding controversy but seeking a balanced presentation of subjects and ideas.

In general, we welcome corporate sponsorship opportunities, but we must review them carefully and maintain sensible oversight once we enter into contracts. We are grateful that a highly talented group of people dedicated to the welfare of the Institution devoted a two-day meeting to this topic, which is important not only to the Smithsonian but to museums throughout the United States.

*Michael Heyman*

I. MICHAEL HEYMAN, SECRETARY



Brookfield Zoo



Chicago Zoological Society

February 6, 1998

David Towne  
Director  
Woodland Park Zoological Gardens  
5500 Phinney Avenue North  
Seattle, WA 98103-5897

Dear Dave,

You will see from the enclosed copy of a letter to Syd Butler that I am more perturbed than ever with the marketing side of AZA, which seems to be driving the organization.

I am writing you about the Directors' Retreat. I thought it was appropriately more focussed than what I had heard of the previous two, and I am sure that this was due in large measure to your efforts. However, perhaps because of the time constraints, the outcomes fell short of the seriousness of the issues. For example, the lukewarm response on the ZEST proposal and the lack of discussion of the need for preparedness for emergencies in this context. The accreditation weaknesses were spoken to, but the hard proposition of hiring people to help us conduct a stronger program was not really acted on. The animal welfare issue as raised by Ron Kagan was not appreciated, yet here we are in the imbroglio with the San Jose Pulitzer aspirant.

Paradoxically, one particularly troubling outcome for me was the endorsement of pursuing understanding of people's motivational basis for visiting/affiliating with our institutions. Somehow this got confused with evaluation of the effectiveness of our conservation communications. I tried to indicate that we need to do the latter, but the former is more fundamental to how we go about communicating. I further indicated that we are ignorant! Besides the likes of Kellert and E. O. Wilson, even the generalities have not been explored, much less the profundities.

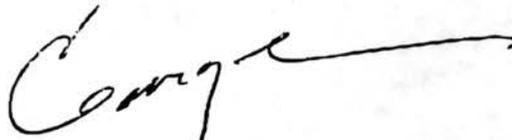
I note that the 2020 group has now been summoned to get on with the demographic-socioeconomic trends review, using agents in the business to facilitate. The data are there and available, as David Jones pointed out, but the real questions are what to do with the data, whether local, regional, or national. This comes back then to the fundamental basis of our business. If we think we're competing simply for leisure time we do not have the resources to compete effectively. If we know that we have a comparative advantage in appealing to deeper interests then it is a different competition. Unfortunately, I could see that when I mentioned investing in acquiring the knowledge, people clutched their wallets.

Brookfield, Illinois 60513  
708.485.0263 312.242.2630

Dave, I believe you and others appreciate that the affectional link of people and animals is a crucial concern in various connections, e.g., our repute as people striving to provide animal welfare, our accreditation and ethics code weaknesses in respect to transfer of animals to less than responsible parties, our trading upon the cuddly and curious qualities of our animals. We need broader and more extensive discussions on the topic, but preferably from a much more informed base than we have. We need to progress from this knowledge-to-be-acquired to its utilization in order to promote our conservation agenda. We have a better chance of inducing commitment to a more beneficial relationship of people to species survival and environmental integrity if we have their hearts as well as minds engaged.

We need to take our strongest case for the continuing existence of these institutions to the public, but especially to the public's representatives. This means we need to have our house in order, and I see that we are still distant from that ideal. We need to be operating in a more noble fashion.

Sincerely,

A handwritten signature in black ink, appearing to read 'George Rabb', with a long horizontal flourish extending to the right.

George Rabb



2/17/98

**TO:** AZA Board of Directors  
**CC:** David Towne, AZA President  
2020 Committee Members (listed below)  
**FROM:** Kathryn R. Roberts, Committee Chair  
Chief Executive Officer, Minnesota Zoo  
**DATE:** February 13, 1998  
**RE:** AZA 2020 Committee Mid-Year Report

The AZA 2020 Committee held its organizational meeting in Albuquerque on September 15, 1997. The committee began to identify tasks to be completed in order to understand the challenges for the industry over the next 25 years.

At the Director's retreat, participants indicated they wanted to collect relevant data on social, cultural and economic trends, analyze the information and produce a report, perhaps to be used in a national campaign to increase awareness and appreciation of our industry.

The Committee's next meeting, scheduled for February 25th in Chicago, will be facilitated by Emily Sterling and James Abruzzo from A.T. Kearney. The purpose of the meeting is to reach agreement on the committee goals, determine the desired outcome of the committee and the process to reach the outcome.

At this time, we have no requests for funding or action from the board.

**Committee Members:**

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Ron Forman, Vice-Chair (Audubon Institute)  
Ted Beattie, AZA Board Liaison (Shedd Aquarium)  
Satch Krantz (Riverbanks Zoo)  
Terry Maple (Zoo Atlanta)  
Tom Otten (Point Defiance Zoo)  
Jan Schweitzer (Glen Oak Zoo)  
Steve Taylor (Cleveland Metroparks Zoo)

**Advisors:**

Syd Butler  
Bill Conway  
George Rabb  
Bob Ramin  
Kris Vehrs  
Bruce Carr



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Bob Ramin

Identify categories of information needed to manage the institutions; identify a qualified individual to provide information to the committee about trends that may affect our future success as an industry. How should AZA be structured to best serve future institutions – over the next 25 years?



*With this  
work,  
Wonderful!*

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**THE AUDUBON INSTITUTE**

P.O. Box 4327 • New Orleans, LA 70178 • 504-861-2537

*for 2020  
file*

*~~CIB~~  
pls return*

February 5, 1998

2020 Committee

Kathryn Roberts, Chair  
Ted Beattie  
Bill Conway  
Satch Krantz  
Terry Maple  
Thomas Otten  
Jan Schweitzer  
Steve Taylor  
Dave Towne  
*George Rabb*

Attached is an article which I thought might be of interest to our Committee.

Look forward to seeing you in June.

Sincerely,

*Ran*

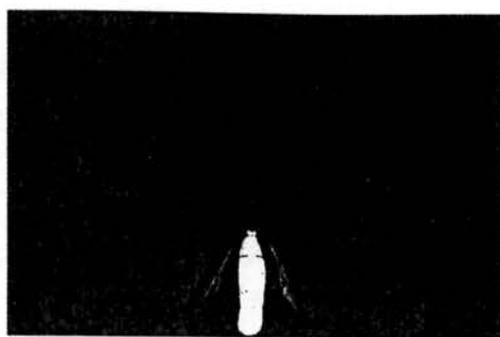
L. Ronald Forman  
President and  
Chief Executive Officer

/csl

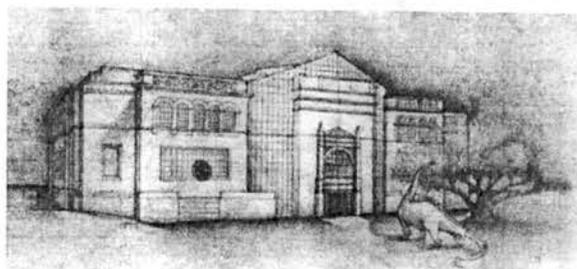
Attach.

cc: Syd Butler  
Bob Ramin  
Kris Vehrs

**"CELEBRATING LIFE THROUGH NATURE"**



## TOWARD A NATURAL HISTORY MUSEUM FOR THE 21ST CENTUR



Past, present, and future at natural history museums around the country:

*Clockwise from top:* The Frederick Phineas and Sandra Priest Rose Center for Earth and Space at the American Museum of Natural History, scheduled to open in 2000; butterfly on view at the Carnegie Museum of Natural History; the Moon, Meteorites, and Solar System Gallery at the National Museum of Natural History's new Janet Annenberg Hooker Hall; young visitors to the Field Museum learning about African family life; the San Diego Museum of Natural History's new building, scheduled to open in 2001; dueling dinosaurs at the Natural History Museum of Los Angeles County; "Sue," the most complete *Tyrannosaurus rex* ever discovered, will be on display at the Field Museum starting in 2000; the facade of the Natural History Museum of Los Angeles County, established in 1913.

HOW WILL THE UNIQUE INSTITUTION OF THE NATURAL HISTORY MUSEUM USE ITS RESOURCES TO RENEW ITSELF AND MEET THE CHALLENGES AND EXPECTATIONS OF THE NEXT CENTURY? RESPONDING TO A REQUEST BY *MUSEUM NEWS*, DIRECTORS OF SOME OF AMERICA'S LEADING NATURAL HISTORY MUSEUMS IDENTIFY THE CHALLENGES AND SUGGEST STRATEGIES FOR THE 21ST CENTURY.

## TOWARD A NATURAL HISTORY MUSEUM FOR THE 21ST CENTURY

### OF CHANGECATALOGUE OF CHANGECATALOGUE

This is a time of transition for the natural history museum in America. After all, the Field Museum has a new director, and so do the National Museum of Natural History and the Carnegie Museum of Natural History. They represent a trend, and follow the example of the American Museum of Natural History: to seek directors who have not worked in natural history museums before. There must be a reason why.

The articles that follow comprise a picture of a field confronting the profound disparity between the demands of a natural world under severe stress, and the resources available to address them. How natural history museums will deal with this is the principal issue facing us. Some of the articles, such as Ellen Futter's, confront the problem head-on. Others address necessary strategies or tactics.

Within these articles is a catalogue of change and some examples of how it is being accommodated. *Change*: a subject Peter Crane nicely permits Henry James to introduce. *Change*, in the phrases "collaboration," "societal responsibilities," "the environment," "building," "measured performance," "audiences," and "greater good of the community."

By mending it all together, we find a picture of what the new natural history museum world should look like:

*It will be collaborative.* This theme is most common among writers. It may also be the least developed and most difficult to achieve. Homage to the concept is widespread. However, current natural history museum culture still respects the university model, which itself (abetted by funding practices) works against shared vision and complementary work.

The university model tends toward chaos and random productivity. It is not easily synchronized with a rational consideration of the world's scientific needs, and it remains more closely allied with funding opportunities than with a widely

**ELLSWORTH H. BROWN**  
PRESIDENT,  
THE CARNEGIE MUSEUMS  
OF PITTSBURGH

shared mission. Would not collaboration on a wide scale—engagement of funders in this question, and a hard look at issues of current interest to humankind—argue for a more systemic approach?

*It will be accountable.* Robert Fri speaks of managerial accountability, which has a broader context, too. Accountability to colleagues, accountability to society for the lack of progress in the preservation of the natural world, and accountability for the current shortage of collaboration are

important. Accountability to management can further other references, however, and speak to measures of performance, addressed by Jay Apt.

*It will be connected to issues of current and critical interest to humankind.* Another common theme, this, too, requires a kind of accountability. And it will be the source of the clear vision required by donors and supporters of all kinds. It also will be the driver for connections to audiences and to the outward-looking perspective suggested by several writers.

*It will be activist.* It follows that to be connected to current issues museums are required to act on behalf of the state of the world, as they have identified it. This will be difficult for museums for, as nonprofit entities, they are petitioners that depend upon donors who may prefer stability, predictability, and an "educational" posture to an activist demeanor.

And, finally, *it will aggressively embrace new technology* as a tool of collaboration and education. Information must be available at once, shared quickly and widely without the "seven-year wait." Communication among museums must be regular and frequent. Most important, sharing and communication must become systemic, automatic, required. It argues for a highly organized effort and calls for newly assigned or reallocated resources.

As broad and revealing as these articles are, at least one question remains to be explored, perhaps in the interchange that occurs best face-to-face.

Karen Goldstein observed that these are "*established* natural history museums" (italics mine). It is well known that universities have virtually abandoned the collecting of specimens in favor of more modern genetic inquiry, leaving the gathering to museums. It can be argued that universities' diminishing commitment to collections is a natural outcome of focusing on their true mission, which is education. It also can be argued that university scientists see the same world that museum scientists see, understand it as well, and care about it equally. Is

the universities' shift a nimble response to scientific need, possible because they were not encumbered by massive physical plants dedicated to the storage of collections? The one subject not tackled was whether the collecting paradigm under which natural history museums began is still valid or has much meaning when set against the massive and practical needs of Earth.

That said, the articles collectively frame the principal issues that are alive today and represent the beginning of a discussion that should still take place. We should thank the authors, who on a daily basis must balance these questions with the daunting task of managing and funding complex institutions in a time of institutional need and ecological crisis.

## BIODIVERSITYBIODIVERSITYBIODIVERSITY

**M**any of the great natural history museums were established over a century ago with the purpose of encapsulating the momentum and excitement of scientific discovery in a world incredibly rich with biological life and human culture. Although the stewardship of the natural world was certainly part of the original museum mission, the natural world simply did not seem so vulnerable as to warrant crisis management. Now, of course, it is a different world, and the obvious questions confronting museum leadership are: What is the appropriate role for natural history museums? How can we most effectively contribute to the stewardship and understanding of these precious natural resources?

### DEFINING THE CHALLENGE

To be sure, this is a significant challenge, and a delicate one. Exhaustive documentation demonstrates that nearly every ecosystem—every network of biological species in a natural setting—is under threat. Many of these habitats are virtually lost. One need only consider the sobering statistics for the loss of 21 percent of all forests and woodlands over the last century or the decimation of over 2,000 species of resident birds in the Pacific islands over the last millennium to realize that we have already moved to the compromised strategy of saving what is left for future generations. Equally disturbing is the fact that these ecosystems and their component species play roles in recycling nutrients, balancing energy, and maintaining a global environment in ways that are far from completely understood.

Indeed, our enlightenment on these matters sadly is not keeping pace with the global scale of destruction of natural

**ELLEN V. FUTTER**  
PRESIDENT  
AMERICAN MUSEUM OF  
NATURAL HISTORY  
NEW YORK

habitats. For example, we are far from mustering a comprehensive catalogue of biodiversity, the multitude of species that make up these ecosystems. Although over 1.7 million species have been named, there could be as many as 10 to 20 million species on earth (in truth, no one really has a handle on a precise extrapolation). Many of the unnamed species belong to groups vital to maintaining ecosystems and to controlling the conditions bearing on the co-existence of human popula-

tions—groups like bacteria, fungi, and the incredibly diverse insects. At the same time, researchers have warned that as many as 50 percent of these critical species will be driven to extinction by the mid-21st century. In short, the biological world is evaporating before we get a chance to thoroughly account for or understand it.

There is evidence and justified argument aplenty that the continued degradation of biodiversity on its present trajectory will result in a seriously skewed and disrupted global resource. Separate from the scientific, cultural, aesthetic, and ethical justification of saving nature for its own sake, it is clear that this disruption does not bode well for the conditions for human life on the planet. Biodiversity contributes importantly to the agricultural, medical, and economic well-being of all of human society in ways we are still discovering, and its role in the life of numerous indigenous peoples is not yet fully appreciated. At the same time, despite the growing appreciation of this crisis among policy makers and professionals in the field, the general public remains largely unaware of the spiraling degradation of our planet and its fragile life systems, curiously uncomprehending its significance on our lives and the lives of our children and grandchildren.

## WHY MUSEUMS OF NATURAL HISTORY?

The biodiversity crisis is indeed so formidable that no single institution or cohort of scientists, economists, policy makers, or educators can claim to provide the crucial strategy in mitigating global environmental degradation. Collaboration of a diverse community has perhaps never been so necessary. In this context, where do we, natural history museums, fit?

First, biodiversity goes to the heart of our mission. It is foursquare what natural history museums are all about: the natural world and humanity's place within it.

Second, biodiversity is our area of expertise. It is the essence of what our collections represent and the cornerstone of our curators' scientific research. Who can more effectively describe the nature of the problem and the means to mitigate it than the scientists intimately, and even passionately, familiar with the properties and dynamics of living systems? Natural history museums (and our sister institutions, botanical gardens and zoos) support enormous collections and large scientific staffs that are not typically fostered elsewhere. The formidable scientific research produced by the scientists from those collections and their allied field work provide both a standard for assessing the scale of historical changes affecting habitats and insights into the use of species as indicators of the health of the environment. This research has immediate relevance to many conservation measures and policies.

Third, museums (and gardens and zoos) have a unique opportunity to bring the issue of biodiversity to the public. Our institutions have dedicated audiences and the explicit responsibility to inform these audiences about the natural world through exhibitions and educational programs. An institution like the American Museum of Natural History seeks to bring to its 3 million annual visitors—including more than 1 million children—the inspiration, excitement, and pure fun of science. Effective educational programs cultivate scientific understanding that has a resonance beyond a day at the museum. With the right kind of educational program it is even possible to share with a large audience the experience of a scientist caught up in the excitement of his or her own work. Museums cultivate scientific understanding while breaking through barriers of socio-economic class and level of scientific learning. We embrace the broadest possible audience for the purpose of fostering life-long learning and understanding of the natural world.

Given these attributes of mission, research, and education, one may wonder if natural history museums aren't already doing quite enough on the environmental front. But if such were the case, the public's awareness and appreciation of the current crisis would be dramatically higher, and we would be able to claim a more coordinated and comprehensive international effort in understanding and preserving biological diversity. Instead, public ignorance of the problem persists, and

international collaboration on the research front is nascent.

Clearly, museums can and should do more. A few strategies, building on the above-noted attributes of museums, are recommended.

## A CALL FOR ACTION IN RESEARCH, EXHIBITION, AND EDUCATION

Museum research and scientific resources must be more effectively responsive to environmental issues and conservation needs. Much of the research produced at natural history museums is relevant to the crisis and need only be targeted to the environmental arena. At the American Museum of Natural History, with the establishment of the Center for Biodiversity and Conservation, scientists have been encouraged to include within their research programs habitat surveys, taxonomic studies, and related projects that have strong implications for conservation. Rather than diluting the enterprise of basic science, the center's programs have invigorated many aspects of the work of the museum. Indeed, curatorial response to the new program has been overwhelmingly enthusiastic, and on-the-ground research/training projects in Madagascar, Viet Nam, Bolivia, Brazil, and New York City are already producing important results useful to both policy and conservation.

While such programs are immensely significant, they face a serious challenge. Put simply, the need for such scientific effort far exceeds the capacity of the current work force. There are, for example, only about 1,500 professional systematists—scientists who identify and name species and study the organization of diversity—who are experts on organisms in tropical rain forests, the ecosystems that harbor the greatest concentration of species. This number of experts can hardly account for the millions of species that live in such habitats. The shortfall is amplified by the fact that the countries that border on the rain forests are particularly lacking in systematic expertise.

Given that impediment, what mechanisms of assessment, review, and triage offer opportunity for progress? First, we need greater collaboration among scientists within an institution, at different institutions, and across different nations. But collaboration is not a straightforward matter; effective collaboration requires greater institutional support, mediation, and planning. Fortunately, the significant breakthroughs in computerization and communication have opened a gateway for immediate interchange and data sharing among scientists, providing a mechanism that enhances collaborative research. Second, we need to develop model systems for collaborative research and education. Many methods in surveying, collecting, data analysis, report writing, and training can be applied to multiple habitats and situations. The American Museum of Natural History's Center for Biodiversity and Conservation supports both of these calls for collaboration by providing

support for joint research, the development of model research protocols, and the sharing of expertise among and between institutions and countries.

On the education and exhibition front, issues should be given increased attention. Issues such as species loss, habitat destruction, global climate change, infectious diseases, and threats to freshwater systems and other natural resources are not only pressing but, unfortunately, enduring. Accordingly, major exhibitions—in the form of both “permanent” halls and temporary exhibitions—and programs that educate the public about such vital topics have a place in natural history museums. In 1992, the American Museum of Natural History in collaboration with the Environmental Defense Fund (EDF) launched a temporary exhibition, “Global Warming: Understanding the Forecast,” that is still receiving widespread attention and interest as it continues its travel itinerary. In 1997, the museum opened the temporary exhibition, “Endangered!

**WE MAY COLLECT DIFFERENTLY, EXHIBIT  
DIFFERENTLY, AND EDUCATE DIFFERENTLY, BUT  
OUR GOALS AND MISSIONS ARE THE SAME:  
TO EXPLORE, REVEAL, AND INTERPRET  
THE NATURAL WORLD.**

Exploring a World at Risk,” which illustrates the factors causing endangerment and extinction and describes some of the strategies for protecting species. And now, in our largest commitment to environmental topics, the museum will open, in the spring of 1998, a new, permanent Hall of Biodiversity meant to showcase and dramatize the wonder, beauty, and diversity of life; the severe threats to this living world; and the steps necessary to mitigate the biodiversity crisis. The Hall of Biodiversity will provide a dazzling array of animals, plants, and other organisms in a massive spectrum of life and will vividly illustrate the workings of vital ecosystems in a magnificent 2,300-square-foot recreation of a central African rain forest. This 21st-century diorama will allow the visitor to step behind the glass and experience a constantly changing habitat alive with the sights, sounds, and smells of the rain forest. Educational materials allied to the issue will be woven through—not tacked onto—the exhibition.

Museum education programs should, of course, also reach beyond the immediate on-site connection to the audience provided by exhibitions. Technology now offers ways of

extending the experience of a visit to diverse audiences in the classroom, the home, and the community center. With our Hall of Biodiversity, the American Museum of Natural History will use electronic bulletin boards to broadcast late-breaking news on scientific results and environmental crises. The information on these bulletin boards, other computer-generated data, and the videos integrated into the hall will be available to audiences visiting our museum electronically. Educational programs, too often maintained strictly as a complementary enhancement of exhibitions, should show strong and continual integration with scholarly activities. For example, our museum’s national student biodiversity inventory, “Biodiversity Counts!,” which involves the participation of schools, the development of curricular materials, and the communication potential of the World Wide Web, will link one of the institution’s educational outreach activities in this field directly to its research and exhibition priorities. The enthusiasm for anneal-

ing education and research, the potential for cultivating a cohort of talented scientists and educators, as well as an informed public and the application of new technologies, bring such opportunities within reach.

Natural history museums today maintain superb and inspirational public halls with collections and exhibits that were fashioned decades ago. That is a proud legacy and one that we should build upon. The 21st century offers new issues, challenges, and opportunities for science and education that the founders of our great institutions might never have imagined but surely would embrace. We may collect differently, exhibit differently, and educate differently, but our goals and missions are the same: to explore, reveal, and interpret the natural world. It is difficult to imagine a problem that more powerfully connects natural history museums to societal needs and binds our collections, research, and instruction more effectively than the drastic environmental changes now transforming the planet. It is critical that we not sidestep this scientific and educational challenge, but confront it, using the resources, expertise, and techniques long at our command, together with those newly available to us. How natural history museums respond to the need for scientific discovery and education in this area will determine their future importance to society and the changing world.

# VENESS MEASURING EFFECTIVENESS MEASURIN

**M**any natural history museums have traditionally been inner-directed. We create halls that are admired by our curators and accurately portray the hard work of research that has gone into the identification and systematic analysis of the artifacts in the hall. But the skills of the model maker's art are often lost on our visitors, who no longer come through our doors to admire the accuracy with which a model depicts the natural world. To be visitor-directed, we must recognize that our visitors have a knowledge base that is at a much higher level than what they had 100 or 50 years ago. Today, their knowledge comes from the Discovery Channel, National Geographic Explorer, the Internet, and the many popular magazines that are devoted to the Earth.

**JAY APT**  
**DIRECTOR**  
**CARNEGIE MUSEUM OF**  
**NATURAL HISTORY**  
**PITTSBURGH**

They can provide more detailed analysis than the single datum provided by attendance figures, and can pinpoint shifts in visitor demographics that may be of great interest to donors.

Natural history museums are also great centers of scientific research. Directors or deans must make resource allocation decisions among the many fields represented in the museum. If it were ever possible to support all requests for funding, staffing, or space allocations in the past, that time has long since disappeared! There are tools available for assessing the effectiveness of scientific research performed at the museums, just as there are at universities. One such tool is the visiting committee, a group of nationally or internationally known scientists who come to evaluate a particular field every few years, and make a report to the director on areas of strengths, and areas that can be strengthened. Another tool, widely used in universities, is the *Science Citation Index* (SCI), which records the number of times that other scientists have cited a paper. Although SCI does not index some important journals (such as many museum annals), it is still a very useful tool for evaluating the impact of scientific work. Of course, success in obtaining grants and professional honors is also a useful quantitative measure of scientific staff effectiveness.

Several of the directors of natural history and natural science museums now come from fields outside the curatorial ranks. We often see clearly the distinction between inner- and visitor-oriented museums. But to succeed in redirecting our museums, we must also ensure that the curators, exhibit staff, and education staff realize that (1) visitors matter, and (2) visitors are not satisfied with the experiences they often get from museums. To address the first point, the governing bodies of the museum (for example, the board of trustees) can make a strong statement directly to the staff. But quantitative measures are also available: one is to make a strong connection between support and visitor excitement, so that the staff realizes the dollar value in gifts and grants generated by the new vision. Audience surveys address the second point most effectively. Surveys of attitudes and perceptions of the museum among visitors, and particularly among non-visitors, are extremely effective means of dispelling "common wisdom" and of convincing staff that changes are required.

The Carnegie Museum of Natural History is fortunate to be part of an organization, the Carnegie Museums of Pittsburgh, that recognizes the fundamental importance of quantitative measures for improving our visitors' experience and our scientific productivity. We, together with several other like-minded institutions, are inventing a new type of natural history museum: a hands-on, interactive museum of the Earth. As we proceed down this new path, we want to make as few expensive errors as possible. Quantitative surveys can define the potential for unintended miscommunication inherent in new ideas, logos, advertisements, or exhibit concepts. The director's job is to lead the museum into uncharted waters, but the rocks and occasional favorable winds on that voyage can now be spotted by the keen eyes of quantitative tools.

Specific surveys of new exhibits are also effective measures of whether new directions are on target. Exit interviews can rank the importance of the various attributes of an exhibit. Decisions can then be made for future exhibits to allocate resources to attributes rated important by the visitors. (Are real specimens such as fossils more important than realistic models such as fleshed-out dinosaurs?) The educational impact of exhibits, docents, and classroom activities can also be quantitatively measured by specific exit surveys. At the Carnegie Museum of Natural History, we had a small, summer dinosaur exhibit that tested concepts that may be used when we undertake a major renovation of our dinosaur and evolution exhibits. By asking adults and children in an exit

In 1904, Henry James predicted that "the greatest challenge to 20th-century Americans will be change—volcanic, tumultuous change, accelerating with each decade, increasingly by a sort of geometric progression." Now, at the end of the 20th century, we can appreciate the full wisdom of these words: Business as usual is no longer usual. For all museums in the next century, the key to success will be to embrace change as an opportunity and resist the natural tendency to see it as a threat. In the future, as now, strong attendance will be vital to the economic viability of most natural history museums. But, as our institutions evolve, it must be recognized that building attendance and developing strong programs in collections and research are not mutually exclusive. The great natural history museums of the world will not survive if collections and their associated research become peripheral to their vision of the future.

The use of collections for both research and education is central to the mission of the major natural history museums. The Smithsonian charter expresses this as "the increase and diffusion of knowledge." At major, free-standing natural history museums, just as at major universities, there is, or there must be, a synergism of education and research. Science must be understood not just as a series of facts, but as a process through which we build our understanding of the natural world. To fulfill their societal responsibilities, museums should be educating about how science is done, not simply what science has taught us.

More strategically, it is clear that genuine expertise in anthropology and the biological sciences, together with massive collections of real specimens and cultural objects, are two of the most distinctive attributes of major natural history museums. They separate our institutions fundamentally from theme parks, shopping malls, and even local nature centers. It would be a mistake to compete with such enterprises on their own terms. There is also the old adage that research builds reputation, which in turn brings resources. There are many resources that will simply be inaccessible without the intellectual substance that a strong research staff can contribute. In addition, supporters and friends are frequently energized when they identify with particular collections or subject areas through their interactions with the academic staff.

Perhaps most important to the long-term future of research and collections at the major natural history museums is that they provide a substantive curriculum around two of the most compelling issues of our time: how different cultures live together harmoniously in an increasingly small, urbanized world, and how we live on this planet in a way that sustains the environment on which we all depend. Those two issues should

**PETER R. CRANE**  
**A. WATSON ARMOUR III**  
**CURATOR,**  
**VICE PRESIDENT,**  
**ACADEMIC AFFAIRS,**  
**AND DIRECTOR,**  
**THE FIELD MUSEUM, CHICAGO**

be uppermost in everyone's mind as we approach the millennium. Through collections and research natural history museums can perform an important role in contemporary society as we seek to build knowledge and understanding about two issues of critical concern to the future of humankind.

Given this context, how should the major, free-standing natural history museum approach the 21st century? Every institution is different in its culture and the milieu in which it operates. What works in one situation may make little sense in another context. At the Field Museum our overall strategy can be summarized in one word: *connections*. Connections within the museum to ensure a unified approach to our mission. Connections among the academic departments to facilitate interdisciplinary research and increase the impact of our work. Connections to subject matter that builds public understanding of our relevance and motivates support. Connections to issues that have significant local resonance. And finally, connections to other institutions and organizations in strategic partnerships that help us carry out our mission. A few examples will illustrate our approach.

**How do you build a more effective institution with a clear, coherent and unified mission? Our approach was to seek new, more creative ways to integrate the museum's public and academic programs, and also to build public awareness of what is going on behind the scenes.** Our aim has been to leverage the museum's behind-the-scenes resources into truly unique—qualitatively different—public programs that could not be duplicated by institutions that lacked in-house researchers and major collections. As a first step, we developed a new mission statement that highlights public service and public education, and emphasizes that our research, public learning programs, and collections are "inseparably linked to serve a diverse public of varied age, backgrounds, and knowledge." We also established two centers—the Center for Evolutionary and Environmental Biology and the Center for Cultural Understanding and Change—to unite all our collections, research, exhibits, education, and outreach around the two central strands of our curriculum.

On the biological side, we established an Office of Environmental and Conservation Programs to coordinate and focus the Field Museum's environmental collections and research programs across departmental lines, and to help strengthen the linkages among the academic departments and between our academic and educational programs. On the cultural side, we appointed a director of the Center for Cultural Understanding and Change who was charged with infusing all aspects of the museum's cultural programming with concepts and principles

from contemporary anthropology. We have also used traveling exhibits to build awareness of our behind-the-scenes collections and research. For the past three years, we have added a component to each of these summer exhibits that highlights Field Museum scientists and the importance of their research. We want people to understand that the Field Museum is not only a place where they can come to learn, but also a place where new knowledge is being created.

We have also reoriented our thinking about permanent exhibits. This fall we will open "Living Together," a new permanent exhibit based on a simple idea that is central to contemporary anthropology: that all cultures have common concerns but respond to them differently in the context of their differing histories and environments. This exhibit is a radical departure from traditional anthropological exhibits that focus on a specific culture or geographic area. The aim is to catalyze a comparative approach that builds cultural understanding by asking people to look across cultures to recognize their similarities and reflect on the basis for differences. Because we have collections and research strengths that focus on soil organisms, we are developing a major exhibit entitled "Life Underground." Again, the subject matter is integrative; it is an exhibit on the soil ecosystem rather than a single group of organisms.

With respect to increasing the impact of our curatorial research, we decided that it was neither desirable, nor practical, to switch entirely to programs of focused or directed research. We determined instead that we must stay close to a university model that encourages entrepreneurial faculty and individual achievement because of "market forces" involved in competition for the most talented scientists. Nevertheless, we also recognized that collection and research strengths in four major disciplines—anthropology, botany, geology, zoology—gave us the opportunity to pursue an interdisciplinary approach. This approach is especially important because many of the more pressing issues in modern biology cut across several sub-disciplines and require an interconnected and interdisciplinary research strategy. There are inherent strengths in a collaborative approach, even in the context of an individualistic academic model. Furthermore, it is clearly in everyone's interest to have four strong academic departments, rather than just one or two.

We have also grouped scientists from different departments around shared, multi-user facilities (e.g., molecular biology laboratories) to enhance interdepartmental interactions. This approach is cost-effective and also brings together scientists who deploy similar techniques and analytic procedures to ask similar research questions. We have also sought to identify subjects or geographic areas in which two or more departments can align themselves; for example, conservation biology, soil organisms and soil ecosystems, ecosystems of the Neotropics, and the living and extinct faunas of Madagascar. Overall,

we have sought to develop a balance in our research portfolio that maintains our traditional disciplinary strengths, while at the same time sustains innovative and substantive interdisciplinary programs.

Balance is also important when attempting to communicate and increase the relevance of collections and cultural research. We must continue to serve those who have an inherent fascination with natural history, but we must also reach a broader audience by working harder to communicate the importance of our research. Our biological collections and expertise in the history and diversity of life clearly predispose us toward environmental issues and much of what we have accomplished has been catalyzed by our Office of Environmental and Conservation Programs.

Our research and the information in our collections have much to contribute to sound decision-making in the environmental arena. Internationally, through a partnership with Conservation International, we have become increasingly involved with the Rapid Assessment Program (RAP), which uses our biological expertise to provide multidisciplinary assessments of the biological status of tropical regions. These assessments are immediately useful for conservation and land management decisions. We have also expanded our programs, both in Chicago and abroad, that help train biologists from the tropics to quickly gather biological data for conservation-related purposes.

We are also working to make our collection resources more useful, both through the computerization of collections data and some physical reorganization. Databases derived from our bird collections and other sources are providing guidance on priorities for conservation in tropical South America. A reorganization of parts of our herbarium will create synoptic collections of plants from specific areas of conservation or research concerns, which will substantially expand the utility of our collections to ecologists and conservation biologists.

In connecting with local issues, expertise in anthropology links us to ongoing concerns in our culturally heterogeneous community. On the biological side, we have focused on the fact that the Chicago area is a region of extraordinary ecological and biological interest, where there is much practical conservation work to be done and much scope for public education. With our extensive local collections and our scientific expertise, we can contribute significantly to these efforts. Like politics, all museums are local. While we are not reducing our commitment to research overseas, we are trying to balance those activities with local research programs that provide the opportunity to connect our collections and research to local environmental education efforts.

We have worked hard to bring together more than 40 state and local agencies, conservation organizations, and cultural institutions in a cooperative network to help conserve, restore,



staff and help to make curators more visible to the general public as well as to specific supporters through public relations, speakers bureaus, and the formation of specific support groups. We must encourage and support curators' search for research support from all possible sources. We must also look for ways to earn revenue with our collections; for example, by making reproductions from collections available for sale to the general public. We must find ways to make collections more accessible to the public by providing open collections in the museum, traveling our collections to local school districts, and making electronic catalogues of our collections available on the World Wide Web.

The Natural History Museum of Los Angeles County is a good example of the situation in which many museums are finding themselves at the beginning of the new millennium. It is the third-largest natural history and American history museum in the nation and the largest in the western United States, with 35 million specimens and artifacts that cover 4.5 billion years of Earth's history. Founded in 1913, with additions built in 1925, 1930, 1964, and 1974, the main museum facility is 411,000 square feet. The Natural History Museum family includes four separate museums as well as three warehouses and research facilities. Though the museum is a department of the County of Los Angeles, county operational funding was cut so drastically in the early 1990s that over half of our revenue is now provided through the museum's foundation. County funding has not been available for capital projects for more than 25 years. While the museum has sufficient funds for its annual operations, it needs major renova-

tions to improve its facilities.

Institutions the size and age of the Natural History Museum require between \$50 million and \$100 million for physical plant renewal. Raising that kind of money requires well-organized and vigorous strategic planning, master planning, and the highest level of commitment on the part of senior staff and trustees. That commitment must then be translated to the public and private entities of the museum's community, however large or small.

While a successful capital campaign includes funds from individual and corporate sources, the funding required is so high that no effort will succeed without major governmental support. And there are indications that public funding for museums will continue. In the United Kingdom, museums that are hundreds of years old are finding significant support for renewal of their physical plants through government lottery funds. The California Museum of Science and Industry is building a large new facility, The California ScienCenter, with major support from the state government.

The challenge facing our institutions is clear and often seems overwhelming, but our mission is so important that we must meet it. We can succeed in doing so with a clear vision and a well-organized effort. We must determine what is needed to maintain our collections in the future. We must educate the public about our mission and the significance of our collections. We must develop a master plan for renewal and turn that into our vision for the future, a vision that will generate understanding and commitment from our friends and supporters in all sectors.

## C PLANNING STRATEGIC PLANNING STRATEGIC PL

**S**ometimes when you're at the bottom of a hole, you just can't see a way out. Street wisdom says, "If you keep on doin' what you're doin', you'll get what you've got." And if you're only doing the things necessary to stay alive and not thinking about future possibilities, chances of getting out of that hole are slim. Without a vision, there is no future.

This was the situation at the San Diego Natural History Museum in 1991. The museum was essentially irrelevant to the community, dysfunctional at all levels, failing financially, and without a vision for the future. But while we seemed to be in the midst of a losing battle, we hadn't yet lost the war. Difficult as it was to start planning a strategy then, we began to think about the 21st century and about seeking real change and a new vision for the museum.

**MICHAEL W. HAGER**  
EXECUTIVE DIRECTOR  
SAN DIEGO MUSEUM OF  
NATURAL HISTORY

### THE PROCESS

A consultant was hired based not only on his track record but also on the process that he recommended. For the core planning team, we carefully selected a cross-section of the community on the basis of people's positive, problem-solving attitudes, with the greater good of the community (not necessarily the museum) in mind. Less than one-third of the core team consisted of museum staff, board members, or volunteers; and 75 other task force committee members added expertise, diversity, and insight to the process. In addition to convening many meetings, we commissioned three professional research reports and sent questionnaires to every museum member. All in all, more than 2,800 hours of intense effort went into crafting our strategic plan.

## BACK TO THE FUTURE

By soliciting input from a diverse audience, we learned what our community wanted and needed. Emerging from this process was a loud and clear message to revisit our past and re-focus on our region in all aspects, including research, education, and permanent exhibits. To do that had profound implications, and the decision was not entered into lightly.

Critics of a regional focus—mostly curators—believed that such a “parochial” mission would diminish the stature of the institution, impair our ability to obtain research grants, and severely limit our opportunities for systematic research. Proponents of the plan argued that a regional focus would increase

## HOW WOULD WE DEAL WITH THE POLITICAL RAMIFICATIONS OF AN ENVIRONMENTAL PROGRAM?

our relevance to the community by enhancing our ability to collaborate with Mexican and American institutions throughout southern California and Baja California; increase the value of our collections by establishing regional strength and expertise; and lead to increased funding through private gifts, grants, and contracts. It became evident that, with local university and biotech expertise moving in the direction of cellular biology, the museum had an opportunity to serve a regional need for expertise in biology, ecology, and conservation. Based upon opportunities cited in “An In-depth Attitudinal Analysis of Key Audiences,” a research report that we commissioned, science museum directors, community leaders, education professionals, museum staff, government leaders, and the core planning team recommended that we incorporate our research efforts into a Biodiversity Research Center of the Californias.

## THE “E” WORD

Nearly everyone we interviewed was also concerned with the environment, which was seen as both a threat to and an opportunity for the San Diego Natural History Museum. How would the museum of the future face the drastic decline of “nature” feared by many? How would we deal with the political ramifications of an environmental program?

On the other hand, if the museum were significantly involved in environmental education and quality of life issues and had regional scientific and educational expertise, it could become a highly visible and valued community resource. The core planning team and the board of trustees were a bit wary of the “e” word in 1991. But they cautiously accepted the recommendation to establish an Environmental Science Education Center in the museum of the future. The word “science” was added after considerable discussion and debate about remaining as apolitical as possible and avoiding an advocacy point of view.

## MORE STRATEGIES

In 1996, we received a two-year grant from the Monsanto Fund to plan for and implement a comprehensive Environmental Science Education Center. Once again, a diverse cross-section of the community was selected for the core strategic planning team. This time, however, members of the team were selected for their knowledge of and experience in environmental and educational matters. Task force team members were recruited broadly from throughout the community, and focus group sessions were conducted with corporate environmental managers, conservation groups, regulators, and public officials.

Many expressed initial surprise that the museum was interested in issues such as the environment, sustainability, quality of life, a regional vision, eco-tourism, and scientific literacy. We pointed out that we were not abandoning our traditional natural history mission and program, but expanding our vision to include the environment. After considerable discussion, we concluded that:

1. Many organizations within our region deal with the environment, business, and conservation, but have no credible avenue for public outreach.

2. The museum’s bi-national and regional perspective would add considerable value to local issues.

3. As a truly independent scientific and educational organization, the museum has the credibility to work with and include disparate points of view.

We are still in the planning process of the environmental science education program, and will begin implementation in 1998. It will be fully operational by the next century (only two years away!) and will be funded entirely by endowments, program fees, and grants and contracts.

## 2020 VISION

One of the participants from the 1991 strategic planning committee was a young public relations executive who said, “I don’t know what ‘natural history’ means, and ‘museum’ means dead, stuffed, and in the past to me.” I knew, in an instant, that we had an image problem! Our public image was that of a “dead zoo,” or worse yet, as one of the surveys indicated, we had no image at all. The solution for us has been to create relevance by focusing upon the region. The Monterey Bay Aquarium has achieved an international reputation by doing an outstanding interpretation of a single bay. The American Museum of Natural History, in contrast, has a global perspective in a city of global importance. Knowing who and where you are and where you’ve been, and planning where you want to go, can be achieved through thoughtful and well-executed strategic planning. The result is a vision of relevance, direction, and purpose.

# MANAGEMENT MANAGEMENT MANAGEMENT

A useful definition of management is the prudent use of resources to achieve organizational purposes. Even cursory reflection on the future of natural history museums offers convincing evidence of the need for both prudence and purposefulness. New technology is opening exciting but untested paths to reach the natural history audience, which is itself experiencing a profound demographic evolution. Other institutions are competing with increasing vigor for the time and attention of this audience. The science of natural history is undergoing accelerating change, even as concerns about biological diversity stress its importance. And because traditional sources of revenue are insufficient to deal with these changes, new forms of financial support need to be recruited into the natural history sector.

Management in this sense of purposeful activity in a rapidly changing environment is thus likely to be important to natural history museums over the next decade or so. That is not to say, of course, that the natural history community has failed to engage in such activity in the past. It has, and in doing so has built extraordinary institutions that conduct the research, care for the collections, and educate the public with exemplary professionalism. What may now be required is an additional skill, here called management, that can help connect the strengths of natural history museums to the realities of a new environment.

With this perspective as the starting point, let me suggest five important management challenges facing natural history museums in the 21st century.

*Vision.* Management starts with a sense of purpose, and so having one is the first challenge of management. Obvious as the need may be, crafting a vision that makes sense in an increasingly competitive and unfamiliar world is not easy. Yet it is precisely those new conditions that will lure staff, donors, volunteers, and visitors off course. The compelling reason to craft the vision is that those essential constituencies desire a roadmap, not merely to satisfy some abstract fascination with strategic planning.

*Choice.* The vision may be expansive, but resources are not. In consequence, managers must focus on doing a few things well if anything is to get done at all. Some of those things will be fascinating new initiatives, but choice unfortunately also means not doing some things that may long have been dear to the heart of a museum. These latter choices can be painful, should be managed sensitively, and need to be made.

*Balance.* Overreacting to a changing environment is as risky as ignoring it. Natural history museums are great because of

**ROBERT W. FRI**  
**DIRECTOR**  
**NATIONAL MUSEUM OF**  
**NATURAL HISTORY**  
**SMITHSONIAN INSTITUTION**  
**WASHINGTON, D.C.**

the collections they have assembled and the scholarship they have nurtured, as well as the ability they have developed to engage the public in the excitement of natural science through exhibits and other education programs. Natural history museums should not try to become theme parks, not because theme parks are bad but because a museum is not likely to be very good at being one. Nor, on the other hand, can museums be visitorless palaces of pure science. The challenge is to adapt

historic strengths to new demands.

*Collaboration.* Focused research, collections, and education programs mean that no one museum can cover the full range of natural history subjects. Collaboration among museums is therefore both possible and essential. That is a well-accepted principle in collections-based research, even if it is yet to be applied as successfully as it needs to be. Collaboration is also important in public programs. Natural history museums do not compete for markets among themselves in any serious way, and so all natural history museums will gain from promoting broad public interest in the field. In today's environment, however, any collaboration must be strategic, for randomness leads to overlap and imprudent use of resources.

*Accountability.* Museum management should encourage governance systems that demand accountability for meeting these challenges, for two reasons. First, a changing and more competitive environment makes museum boards more attentive to their fiduciary responsibilities. To avoid unease becoming inaction—almost surely the wrong thing to do in these circumstances—management needs to provide a vision and be willing to be accountable for it. Second, donors expect their philanthropy to produce results on time and within budget, and should be able to hold management accountable for doing so. In fact, demonstrating that kind of stewardship can be an important argument in attracting new donors.

These challenges for management are not narrowly conceived. The response to them is not just to build better project management systems, or to do more perceptive market research, or even to organize a well-disciplined capital campaign. The functional skills needed to do all of these things, and more, are of course essential parts of the mix. Meeting these challenges also requires management in the sense of providing clear and focused purpose in the midst of change and with limited resources. And that is a skill that can be found within the natural history community as well as outside of it. ■



**TO: AZA 2020 Committee Meeting Attendees:**

Ted Beattie  
Ron Forman  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor  
Syd Butler  
Bill Conway  
George Rabb  
Bob Ramin  
Kris Vehrs

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

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

**FROM:** Kathryn R. Roberts, Minnesota Zoo

**AZA 2020 Committee**  
**Wednesday, February 25, 1998**  
**9 AM – 4 PM**  
**Shedd Aquarium**  
**Chicago, IL 60605**

**Since the Aquarium does not open its doors until 9 a.m., please enter through the Security Entrance (south side of the building down the ramp from staff parking). Security staff will direct you to the Grouper Room in the Aquatic Science Center (the original Aquarium building.)**



**Kathryn Roberts**

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*2020  
file*

**From:** Bob Ramin  
**To:** Kathryn Roberts (E-mail)  
**Subject:** FW: Definition of a World Class Zoo/Aquarium  
**Date:** Thursday, December 11, 1997 3:23PM

K - FYI re 2020 - Stay tuned for more from Mike...B

> -----Original Message-----

> From: Michael Hutchins

> Sent: Thursday, December 11, 1997 2:55 PM

> To: Everyone

> Subject: Definition of a World Class Zoo/Aquarium

>

> As mentioned at the recent staff meeting, I would appreciate any input  
> you could give me on the following draft definition of a "world class  
> zoo or aquarium in the twenty-first century." I am developing this at  
> the request of the AZA FIG chairs, but think it has wider  
> applicability. It may also be the theme of my opening talk at the AZA  
> Schools for Zoo and Aquarium Personnel in February. Let me know what  
> you think. Have I left anything out? Can I simply and make more  
> succinct? Thanks for your input.

>

> Michael

>

> DRAFT

>

> CHARACTERISTICS OF A

> WORLD CLASS ZOO OR AQUARIUM OF THE TWENTY-FIRST CENTURY

>

> The term "world class" denotes something of exceptional quality and  
> achievement. A world class zoo or aquarium of the twenty-first  
> century will:

>

- > \* have a professional and well-trained staff who understands the  
> vision and goals of a modern zoological institution and has the skills  
> and motivation to implement them.
- > \* be accredited by their regional zoo association and conform to  
> all relevant local, state, and federal regulations.
- > \* maintain animals in aesthetically-pleasing naturalistic  
> exhibits that replicate many aspects of the species' natural  
> environments.
- > \* maintain animals in naturalistic social groupings, whenever  
> possible.
- > \* provide expert veterinary care and nutrition to maintain the  
> health of the animals in their collection.
- > \* develop and implement formal environmental enrichment plans for  
> each exhibit designed to maintain the animals' psychological, as well  
> as their physical health.
- > \* participate in regional cooperative breeding programs (e.g.,  
> SSPs and PMPs) designed to sustain healthy (genetically diverse and  
> demographically stable) populations over the long-term and reduce the  
> likelihood that populations will overshoot their available space  
> (i.e., create a surplus).

- > \* loan, rather than sell animals to other accredited institutions,
- > thus not only saving money, but also eliminating support for the
- > commercial animal trade.
- > \* develop and implement an institutional collection plan which
- > takes into account cooperatively-developed regional collection plans
- > and outlines a specific educational, conservation, or scientific
- > purpose for each species and individual animal selected for holding or
- > display, and a plan for implementation.
- > \* develop and adhere to a detailed animal acquisition and
- > disposition policy that both minimizes impacts on wild populations and
- > assures that animals leaving the facility are provided with
- > appropriate care.
- > \* devote a significant proportion of their resources, both human
- > and financial, to education, conservation, and science.
- > \* employ professional educators to develop an effective
- > conservation education program that not only entertains and informs
- > visitors, but also compels them to take conservation action.
- > \* evaluate the effectiveness of their conservation education
- > programs by measuring their impact on visitor behavior, attitudes, and
- > knowledge.
- > \* develop cooperative relationships with local elementary and
- > secondary school systems and integrate conservation education into
- > course curriculums.
- > \* employ professional scientists and conservationists who
- > contribute to our knowledge about wildlife and make demonstrable
- > contributions to wildlife and habitat conservation, locally,
- > regionally, and/or internationally.
- > \* develop a formal research program, including an institutional
- > mission statement for research, a method for evaluating research
- > proposals, and protocols for visiting scientists.
- > \* develop strong cooperative relationships with local colleges and
- > universities and make the animal collection and biological materials
- > available for appropriate and approved research and educational
- > activities.
- > \* employ curatorial staff who have both advanced academic training
- > and practical experience, thus allowing them to continually integrate
- > scientific advancements and new technologies into animal management
- > protocols.
- > \* make staff development a priority, including the implementation
- > of formal keeper training programs.
- > \* employ progressive personnel management practices designed to
- > empower employees and increase their output and contributions to the
- > organization, while at the same time, ensuring accountability and
- > performance.
- > \* establish a strong link between their living collection and the
- > conservation of wildlife and their habitats through public education,
- > scientific research, development of relevant technologies,
- > professional training and technology transfer, ecotourism, captive
- > breeding for reintroduction, the direct support of field conservation,
- > and fund-raising to support these activities.
- > \* collaborate with local, state, and federal government wildlife
- > agencies to assist in native species recovery and habitat
- > conservation.
- > \* develop strong and innovative marketing and development
- > strategies, both to provide a solid financial base for the institution
- > and to help support educational, scientific, and conservation goals.
- > Develop strong working relationships with local businesses and

- > corporations.
- > \* provide excellent public amenities and experiences that result
- > in repeated and increased visitation.
- > \* enter into a dialog with its critics and attempt to find
- > solutions to perceived conflicts.
- > \* develop a strong public relations program designed to
- > communicate the institution's and profession's mission, goals and
- > accomplishments to the public and relevant decision makers.
- > \* stay informed about and employ modern communication technologies
- > (e.g. distance learning, Internet) to improve networking and outreach
- > capabilities.
- > \* develop strong working relationships with local, state, and
- > federal elected government officials. Lobby collectively through
- > their regional zoo and aquarium association to influence legislation
- > addressing conservation initiatives and other issues important to the
- > profession.
- > \* cooperate and share information and resources with other
- > zoological institutions through their regional zoo and aquarium
- > association (with the goal of advancing the profession and greatly
- > magnifying their impact on education, conservation, and science).
- >
- > AZA Conservation and Science Office (M. Hutchins) 12/11/97
- >



AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

Chairman/Advisor

## AZA 2020 Committee (Listed Below)

Kathryn R. Roberts, Minnesota Zoo

DATE: January 29, 1998

RE: Email Message

Attached is a copy of an e-mail message sent to those committee members for whom I have e-mail addresses.

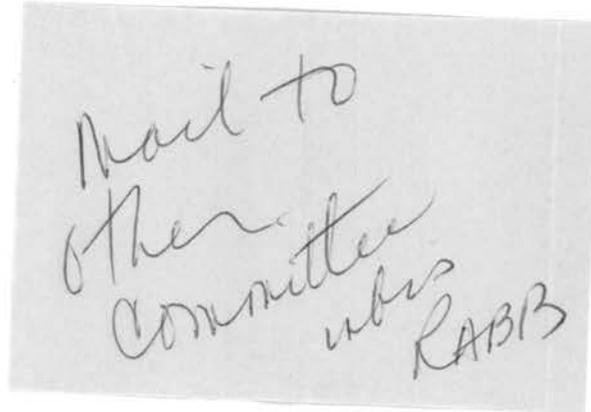
Committee Members:

- K. Roberts, Chair
- Ted Beattie
- Ron Forman
- Satch Krantz
- Terry Maple
- Tom Otten
- Jan Schweitzer
- Steve Taylor

Advisors:

- Syd Butler
- Bill Conway
- George Rabb *mail*
- Ramin* *mail*
- mail*

cc: David Towne, Bruce Carr, Bob Ramin, AZA Membership Office, Connie Brazier



**Kathryn Roberts**

---

**From:** Kathryn Roberts  
**To:** Bill Conway; Emily Sterling; Jan Schweitzer; Ron Forman; Satch Krantz; Steve Taylor; Sydney Butler; 'Ted Beattie'; Terry Maple  
**Subject:** Proposed meeting schedule  
**Date:** Wednesday, January 28, 1998 3:32PM

I would like to schedule a meeting of the 2020 Committee. The purpose of this gathering will be to reach agreement on the committee goals, determine the desired outcome of the committee and the process to reach the outcome.

There was much discussion about the 2020 Committee and its role at the recent Director's retreat. I understand there was a desire on the part of the participants to collect relevant data on social, cultural and economic trends, analyze the information and produce a report. The resulting analysis could be used for a variety of puposes including a national campaign to increase awareness and appreciation of our industry.

This is a different vision for our committee than was discussed in September. In order for us to move forward in an effective way we need to come to an agreement on the work of the committee. Looking into the future is a complex task; we need to be certain we are all on the same path and moving toward an agreed upon outcome.

Ted Beattie has graciously agreed to host a day long meeting at the Shedd Aquarium. Please let me know: (1) if you are interested in this planning session and (2) which of the 3 dates would work for you February 25, February 26, March 4.

Emily Sterling and James Abruzzo from A.T. Kearney will be facilitating the day.

I hope to hear from you soon.

## **AZA 2020 Committee (Listed Below)**

Kathryn R. Roberts, Minnesota Zoo

**DATE:** January 29, 1998

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**Committee Members:**

K. Roberts, Chair  
Ted Beattie  
Ron Forman  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

**Advisors:**

Syd Butler  
Bill Conway  
George Rabb

**cc:** David Towne, Bruce Carr, Bob Ramin, AZA Membership Office, Connie Braziel

## **Kathryn Roberts**

---

**From:** Kathryn Roberts  
**To:** Bill Conway; Emily Sterling; Jan Schweitzer; Ron Forman; Satch Krantz; Steve Taylor; Sydney Butler; 'Ted Beattie'; Terry Maple  
**Subject:** Next meeting  
**Date:** Thursday, January 29, 1998 3:41PM

Thanks to all of you for your prompt response. Please mark Wednesday, February 25th on your calendar for the 2020 committee meeting. I will send out a subsequent notice with information about times and hotels. I look forward to seeing all of you.



MINNESOTA ZOO

13000 Zoo Boulevard Apple Valley, MN 55124

**Fax Cover Sheet**

\_\_ of \_\_ pages

DATE: February 2, 1998

TIME: 9:38 AM

→ TO: George Rabb

FROM: Kathryn Roberts  
Minnesota Zoo

PHONE: 612-431-9299

FAX: 612-431-9336

RE: **AZA 2020 Meeting**

The AZA 2020 Committee will meet at Shedd Aquarium in Chicago on February 25, 1998. Other committee members have been notified by e-mail.

*Details to follow.*

Cc: Bob Ramin

David Towne

AZA Membership Office

## **Kathryn Roberts**

---

**From:** Kathryn Roberts  
**To:** Bill Conway; Emily Sterling; Jan Schweitzer; Ron Forman; Satch Krantz; Steve Taylor; Sydney Butler; 'Ted Beattie'; Terry Maple  
**Subject:** Proposed meeting schedule  
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AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

## **AZA 2020 Committee (Listed Below)**

Chairman/Advisor

Kathryn R. Roberts, Minnesota Zoo

DATE: November 26, 1997

RE: San Diego Director's Retreat

The 2020 Committee of AZA will *NOT* meet in San Diego.

Committee Members:

K. Roberts, Chair  
Ted Beattie  
Ron Forman  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

Advisors:

Syd Butler  
Bill Conway  
George Rabb  
Kris Vehrs

cc: David Towne, Bruce Carr, Bob Ramin, AZA Membership Office, Connie Braziel





**FAX TRANSMITTAL**

1 pages

~~10/24/97~~

<b>To:</b>	<b>Ron Forman</b>	<b>Fax:</b>	
<b>From:</b>	Kathryn R. Roberts, Executive Director	<b>Fax:</b>	(612) 431-9336
		<b>Phone:</b>	(612) 431- <del>9299</del> 9333
<b>Re:</b>	<b>2020 Committee</b>		

Thanks for filling in for me at the Director's meeting. I have had SEVERAL conversations with Syd and Dave Towne about the progress of this committee. If you have time to call me, I will be happy to fill you in on the details.



AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

**AZA 2020 Committee (Listed Below)**

Chairman/Advisor

Kathryn R. Roberts, Minnesota Zoo

**DATE:** November 4, 1997

**RE:** Next Committee Meeting

Ron Forman and Ted Beattie are working hard to identify an individual to assist our committee in identifying trends that will influence our businesses. Their deadline is November 17.

Our committee will meet sometime on Thursday, January 15th prior to the Director's Meeting which starts on Friday, January 16th.

As we firm up a speaker, I will let you know whether you need to plan on spending a full day for the 20/20 committee or only a half day.

Committee Members:

K. Roberts, Chair  
Ted Beattie  
Ron Forman  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

Advisors:

Syd Butler  
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cc: David Towne, Bruce Carr, Bob Ramin, AZA Membership Office, Connie Braziel





**FAX TRANSMITTAL**      \_\_\_ pages

**10/24/97**

<b>To:</b>	<b>Dave Towne</b> <b>Cc Ted Beattie, Syd Butler</b>	<b>Fax:</b>	
<b>From:</b>	Kathryn R. Roberts, Executive Director	<b>Fax:</b>	(612) 431-9336
		<b>Phone:</b>	(612) 431-9299
<b>Re:</b>	2020 Committee meeting		

The 2020 Committee meeting was very productive. We had good attendance and good participation. Detailed notes of the meeting are now being written and will be distributed soon. Basically, the Committee defined its work to fall into 3 categories. Of highest importance is the need to produce a mission, or vision, for zoos and aquariums in North America. This will be different than the mission for AZA. It will be a statement crystallizing the mission of AZA's member institutions. We have laid out a process for the development of this task, which will be outlined in the minutes of the meeting.

At the same time, the Committee will be responsive to the clearly identified need for an analysis of trends affecting all of us as we move into the future. The directors brought this need forward in San Diego. A sub-committee of members has been named to help the AZA staff starts the process to engage a consultant and to assist in the analysis of the collected information. The Committee would like the Board of Directors to approve UP TO \$75,000 to complete this task. The final product will be presented, in detail, at the next Directors meeting. Details of this effort will be in the minutes.

After completion of the mission statement, the Committee will begin looking at strategies necessary for zoos and aquariums to be successful in the next century. For example, we need to know about how and why people develop affiliations with our institutions. We need to look at alternative funding mechanisms like the availability of federal funds. More study of emerging trends will also be important.

At this time, the trend piece is the only item bearing a cost.

Ted Beattie attended the meeting and will be available to talk in more detail with the Board. Thanks again for taking on this very important effort.



Emily Sterling 7 pages

AMERICAN ZOO AND  
AQUARIUM ASSOCIATION

Committee

Chairman/Advisor

## Memorandum

DATE: September 19, 1997  
TO: 20/20 Committee  
FROM: Kathryn R. Roberts, Chair  
RE: Minutes

Please find attached a copy of minutes for our Committee meeting on September 16, 1997. If you see any needed changes, please let me know and I will amend the minutes to show your changes. Also attached is a memo George Rabb sent to me. I think it will be of interest to all of you.

I will phone you in the next month or so to see your progress. Thanks to each of you for your participation. I'll look forward to seeing you in California.

cc Towne, Seattle; Otten, Point Defiance; Braziel, Minnesota; Butler, Vehrs, Ramin, Carr, AZA.



**MINUTES**  
**20/20 COMMITTEE**  
**September 16, 1997**

Towne: Introduced the charter of the Committee. He sees this as a major undertaking. We are to "lay a highway" for the future. We need to identify the process for describing what zoos and aquariums will look like in the next 10 to 20 years. We will also play a significant role in "reinventing AZA" the role it plays with the members.

A progress report should be made to the Directors at the meeting in San Diego this January. Similarly, a report should be made at the Tulsa conference on the committee's progress.

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Forman: We do very little forward looking. For example, we have been in a period of declining public support. Do we believe this will continue? How will we compete successfully with the private sector (Disney)? We need to ask for outside expertise to help us understand the future.

Krantz: We need a data base that sets a base line to describe ourselves. Changes need to be regularly described against the base line.

Conway: Being market driven may not be right. We need to look for new paradigms. We need to get issued out in the front. We need to look at existing data bases (ieERA) and to "gurus" who can help us understand things like the impact of the Euro dollar and help us ask the right "what ifs".

Taylor: Perhaps we should format the Director's meeting to address the issues. We need to remember how a live animal collection affects our business.

Beattie: Shedd recently held a symposium on issues that will be part of the future of our business. We need to make certain our colleagues agree we need to be forward looking and open to business changes. People need to start thinking bigger.

Rabb: We need to understand why people are attracted to our facilities. Is it our investment of time and money in marketing? Our hype of exhibits and special events is not enough. Why are people invested in our facilities? We need to understand the complex issue of organizational affiliation.

We also need to continue to improve our conservation programs.

Two recommended readings: *Excellence in Ecology-A World of Wounds: Ecology and the Human Dilemma* by Paul Ehrlich and *Conservation and the Future: Trends and Options Toward the Year 2025* by Jeffrey A. McNeely.

Maple: Recruiting expertise from outsiders will help us stretch to "do it right."

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Conway: Remember that countries of poverty are unable to participate in conservation.

#### Long list of Issues that Need to be Considered

- Future of Business
- Future of public funding
- Changes in education
- Uses of animals
- Demographics
- Psychographics
- Gender distinctions in affiliation
- Race distinctions in affiliation
- individual safety
- Changes in technology
- How affinity for animals is created
- Conservation
- Transfer of wealth

#### Assignments

1. Collection of existing data using ERA, McKenzie, Karney etc.
2. Determine what additional information needs to be collected

**RESPONSIBLE: Krantz, Maple, Beattie, Ramin, Carr**

**DUE: January 1, 1998**

3. Identify experts in future trends and demographics
4. Recommend a forum for their presentation and discussion

**RESPONSIBLE:** Forman, Beattie, Roberts

**DUE:** January 1, 1998

5. Collect information regarding the affiliation issue to be shared with the full committee.

**RESPONSIBLE:** Rabb, Conway

**DUE:** Prior to next meeting

Please anticipate a meeting prior to the San Diego Director's meeting. The date, time and duration will depend on the outcome of some of the tasks.



September 17, 1997

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

Dear Kathryn,

Thanks for taking on the futures coordinating job for AZA. As I understand the immediate agenda, several of the 20/20 group will be sorting through available data sources on the zoo business to establish a baseline for future projections relating to demographic and socioeconomic trends. I asked that if any surveys were done in this phase that we ascertain the commitment of our institutions to the conservation ideal of the AZA. As I understand the rest of the current agenda it includes (1) understanding motivations for zoo visits and membership, (2) trends in support (not just financial), and (3) trends in competition. Since Brookfield is exploring (1) already, I will put something together on the subject for consideration before the next meeting.

However, the main reason for communicating is to indicate that the second point of my initial intervention at the meeting is still a cardinal concern: the conservation status of the world's biota and our inadequacies in the zoo business in responding to the extinction crisis that is upon the world. If we are dedicated to changing the public regard for the rest of the living world in a positive way, then we must commit even more than we have to conservation activities throughout our institutional operations. In Berlin I made a presentation on the grim news from the latest Red List of Threatened Animals. One-quarter of all species of mammals are threatened with extinction, at least 11 percent of all birds, and the reptiles, amphibians, and fishes are probably at the 20 to 30 percent levels. The charismatic megavertebrates, core to the public attraction in many zoos and aquariums, are apt to be in the critically endangered or endangered categories of threat. This is a very practical reason for greater involvement, but more fundamentally, zoos need to be crusaders for conservation to be true to their purpose as societally relevant institutions in this time and certainly in the near future. I feel that this concern needs to be front and center in the 20/20 agenda.

Brookfield, Illinois 60513  
708.485.0263 312.242.2630

In regard to doing more as conservation organizations, we need to think more flexibly than we have. Certainly becoming more involved in local conservation concerns is appropriate and within the capacity of most of our organizations. Operating our institutions in environmentally friendly ways is another obvious means of illustrating our conservation commitment. And, of course, the adopt-a-park, adopt-a-developing country zoo, in-situ SSP actions can be expanded. Yet we can perhaps have even more effect by adopting other relations with threatened environments and their biota. Bill Conway suggested to the Avian Interest Group the notion of zoo consortia contracting for use of tracts of land (or water) with developing countries. These "zoo reserves" could provide for sources of animals for zoos, relieve zoos of the potential burden of providing more and more ex-situ breeding facilities, and protect the living resources of the reserves. Seemingly a win-win proposition, but one that would take very careful communications.

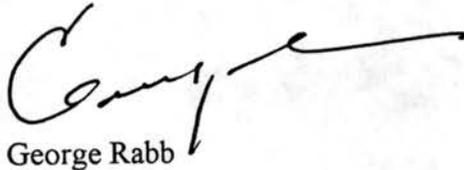
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Various FIGs have some potential in this vein, and perhaps it is time to shift some of these programs more explicitly to the model suggested. We also need to think more creatively about other ways to make connections - buying fishery rights, "owning" resort islands or mountains or lakes, contracting with governments as managers of lands that would not be zoo reserves. We could even consider using the CEF in this connection, as collateral on loans or in outright investments in rights for zoo reserves.

To close, I feel (1) that we need to understand what is the nature of our institutions' attraction to the public in order to communicate more effectively than ever in keeping with our conservation mission, and (2) that we need to affirm substantively our conservation commitment by exploring avenues for conservation action in the field locally and internationally. Clearly individual institutions are doing the latter, but AZA should endeavor to shepherd collective action to garner and maintain the public regard for us as

worthy and relevant institutions forever. Unless we are true to our mission in conservation I assert we will not be survivors much less champions in the competition for time, support, and affection.

Sincerely,

A handwritten signature in black ink, appearing to read "George Rabb", with a long horizontal flourish extending to the right.

George Rabb

P.S. Feel free to circulate

cc: W. Conway  
D. Towne

# Memo

**To:** Satch Krantz, Terry Maple, Ted Beattie, Bob Ramin, Bruce Carr  
**From:** Kathryn R. Roberts  
**CC:** Steve Wylie  
**Date:** 10/23/97  
**Re:** 20/20 Committee Assignment

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Your group took responsibility to complete two tasks prior to our next meeting. The first is to collect existing data from sources like ERA, McKenzie and Karney. Satch has contacted ERA with little result.

Secondly, the group took on the task of identifying the categories of information we need in order to manage our institutions. In Albuquerque, we talked about examples like the need for reliable data about attendance trends, capital improvements, changes in length of stay and per caps. We also talked about needing data to allow us to answer questions like whether the industry is "down sizing" and at what rate.

Coincidentally, I received a memo from Steve Wylie asking for a response identifying what services we would like AZA to provide to us as members. It is possible that directors will identify specific data needs in their responses. I will ask Steve for a copy of his results and forward them to each of you.

The deadline we set for your tasks to be completed is January 1, 1998. Thanks in advance for your hard work.



**FAX TRANSMITTAL**

*3 total*  
**pages**

**10/24/97**

<b>To:</b>	<b>Bob Ramin</b>	<b>Fax:</b>	
<b>From:</b>	Kathryn R. Roberts, Executive Director	<b>Fax:</b>	(612) 431-9336
		<b>Phone:</b>	(612) 431-9299
<b>Re:</b>	2020 committee		

This is my first attempt at an outline. Will you please review it and make suggestions? I want to send something out with the real committee meeting announcement. I am going to try and get that in the mail next week before the holiday. Thanks again for your help!!

## **20/20 COMMITTEE TASK OUTLINE**

- A. Develop a set of questions that need to be answered and analyzed on a regular basis by all institutions. The analysis will begin to allow us to recognize the emergence of trends that may affect our future success.
1. Collect existing questionnaires and review. December 1
  2. Complete first draft of candidate questions. December 15
  3. Solicit feedback from all committee members and complete next draft. January 10
  4. Present draft at Director's retreat and solicit feedback  
January 16
  5. Complete final draft March 1
  6. Design collection mechanism April 1
  7. Collect information for the first time
- B. Identify a dynamic, well-qualified individual who can provide information to the committee about trends that may affect our future success as an industry.
1. Secure speaker for the 20/20 committee meeting November 24
  2. Secure agreement with Butler and Towne to allow speaker adequate time to address the directors in San Diego. November 30
- C. Determine why people feel an affiliation with our institutions and develop ways to enhance the affiliation.
1. Review the current relevant literature January 1

2. Determine whether original research needs to be designed and implemented. January 1

3. Present findings to the committee January 15

D. Assess the state of the industry in the conservation arena.

*This is the section that will meet George Rabb's needs. I have to go back and read the stuff he handed out and try to develop some tasks.*

E. Assess the state of the industry in the education arena.

The committee needs to determine whether we are able to provide the best informal education possible. Are we competitive? What do we need to do differently to continue to be the best? Are we as responsive to our customers as the private sector? How can we maintain our competitive edge and "keep our soul?"  
How can AZA best help us in this arena?

*This section also needs to be thought through and have specific tasks identified.*

F. Assess the state of the industry in the attraction arena.

The committee needs to regularly review the results of the data analysis described in our first task to identify whether we are competitive as an industry. What changes are occurring that may affect our ability to maintain our unique identity? What changes can we make to increase the public's affiliation with our institutions?  
How can AZA best help us in this arena?

*Same as above. I will send out this outline with the announcement for our next committee meeting. Hopefully I can do that next Tuesday after the speaker selection is completed. I wonder whether it is better to leave these sections loose and let members have their say, or fill them in with tasks and modify them as necessary.*

G. Conduct an annual review of the data analysis and report on emerging trends across the industry.

# RIVERBANKS ZOO & GARDEN FAX MESSAGE

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DATE: 20 October 97

No. Of Pages: 1

---

FROM THE DESK  
OF  
SATCH KRANTZ  
Executive Director

TO: Ted Beattie, Bruce Carr, Terry Maple, Bob Ramin

email address:  
skrantz@riverbanks.org

---

PHONE: ( )  
FAX: ( )

---

CC: Kathryn Roberts

---

P.O. Box 1060  
Columbia, SC 29202

**REMARKS:** Just a brief note to let you know that I contacted Economics Research Associates regarding their zoo and aquarium data base. They informed me that they have not had any zoo clients for a number of years, but have just picked up the Toronto Zoo. They doubt that they have anything that would be useful to us, but promised to send what they have. I am not holding my breath!

I believe that you all were to contact other consulting firms. Let me know if I can help.

803-779-8717  
ext. 1101

fax: 803-253-6881



# Urgent

**To: Ted Beattie  
Ron Forman**

**From: Kathryn Roberts**

**Your assignments from AZA 20/20 committee meeting of September 16 were to (1) identify experts in future trends and demographics, and (2) recommend a forum for their presentation and discussion.**

**Have you found a speaker for the January director's gathering? What candidates have you considered and do you want them to present to the 20/20 committee or to incorporate it into the director's meeting?**

**I need to hear from both of you. Please phone me at (612) 431-9333 or email me at [kathryn.roberts@state.mn.us](mailto:kathryn.roberts@state.mn.us). (My fax is 431-9336.)**

**Thanks.**



4.1

Syd -

I have 2 call into Kate &  
I'll get back to you as soon  
as I hear -

Also, only waiting for Ted's  
response on dates for Zooping.  
Wtg. It will be 2 days & some  
combo of Tues, Wed or Thurs, (May 20, 21, 22)

Kataype

## Memorandum

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Emily Sterling 2 pages

AMERICAN ZOO AND  
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**DUE: January 1, 1998**

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**RESPONSIBLE:** Forman, Beattie, Roberts

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**RESPONSIBLE:** Rabb, Conway

**DUE:** Prior to next meeting

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Brookfield Zoo



Chicago Zoological Society

September 17, 1997

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

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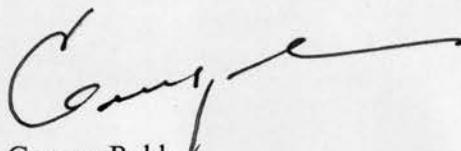
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Sincerely,



George Rabb

P.S. Feel free to circulate

cc: W. Conway  
D. Towne



13000 Zoo Boulevard Apple Valley, MN 55124

## **Fax Cover Sheet**

**DATE:** April 10, 1997                      **TIME:** 1:04 PM

**TO:** Ted Beattie  
Syd Butler  
Ron Forman  
Satch Krantz  
Tom Otten  
Steve Taylor

**FROM:** Kathryn Roberts                      **PHONE:** 612-431-9299  
Minnesota Zoo                                      **FAX:** 612-431-9336

**RE:** **Zoo Futures Planning Process**

**Number of pages including cover sheet: 1**

Thanks to all of you for sending me your dates of availability for our process planning meeting on the future of zoos and aquariums.

I am having a very difficult time trying to find dates to bring us all together. I would like to propose that we pick a time to meet for several hours when we are all in Albuquerque for the annual conference. Several of us will be in Orlando for the aquatic meeting and perhaps we can have some preliminary discussions there. In the meantime, I am collecting literature that may be of interest to our topic. As I receive copies I will distribute them.

Thanks again for your interest. I know we will get this done.



September 3, 1997

Dear AZA 20/20 Task Force Member,

Our newly formed committee has been put together with great expectations from the AZA Board. We have been asked to DEFINE THE PROCESS which will be necessary to meet the following goals.

1. A "picture" of zoos and aquaria in the next 10 to 20 years needs to be developed.

We have the opportunity to think about how our institutions will change over the decade. Business trends, shifting demographics, public opinion, technology and the economy will alter the way we operate.

The process our committee develops may include workshops with nationally recognized futurists to help develop the picture.

2. After completion of the first task, we will assess the services of AZA to determine whether and how the organization can best fulfill the needs of its members.

We have been given the task to take a far reaching look at AZA. The committee has the opportunity to define the culture and structure of AZA in a way that will be responsive to and supportive of all members.

I believe we can complete our task in two meetings. We will meet in Albuquerque and again at the Director's meeting in San Diego this January. The first meeting will be **MONDAY SEPTEMBER 15 AT 10:00 TO NOON IN ROOM "A" AT THE HYATT**. Again, we are not being asked to answer the questions posed above. We are being asked to outline a process for answering the questions. I look forward to working with you. This will be fun!

AZA 20/20 Task Force Members

Kathryn Roberts, Chair  
Ron Forman, Vice Chair  
Ted Beattie  
Satch Krantz  
Terry Maple  
Tom Otten  
Jan Schweitzer  
Steve Taylor

Advisors

Bill Conway  
George Rabb  
Syd Butler  
Kris Vehrs

**ATTACHMENTS**