



Zoological Registrars Association 2007-2011 Strategic Plan

Building the Future

October 2007

Developed by
The ZRA Strategic Planning Committee (SPC), Officers and Board
Members, Committees and Focus Groups

Congratulations to all of the ZRA members, leaders, advisors and non-members committed to the mission and future of the Association that made the 2007-2011 Strategic Plan a reality. Special thanks, and much deserved appreciation, to the previous leaders of ZRA that developed the 2002-2007 Strategic Plan, the first of its kind; it provided the foundation from which this plan emerged. A complete list of the above-noted participants is attached as Appendix I. A complete list of resources and references are attached as Appendix II. ZRA would like to acknowledge the following individuals and supporters:

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History of the Association

ZRA is a not-for-profit organization comprised of both U.S and international members holding expertise in animal transaction management; records management; wildlife transport, legislation and permit requirements; and policies and procedures as they relate to the management of animal collections. The Association began in 1984 and has grown to a current membership of 138.

Market Analysis

Beginning in the year 2000, the Association of Zoos and Aquariums (AZA) and the International Species Information System (ISIS) began the initial journey towards the single, largest software development process possibly ever undertaken in the world. The software project, now known as Zoological Information Management System (ZIMS), has been in development for a period of three years and will be deployed in over 700 zoos by the year 2011 (www.isis.org). ZIMS will change the way the zoo and aquarium industry documents core business processes for animal collections and will require ISIS-member zoos to re-engineer related policies and practices. The impact of ZIMS to the zoological registrar position has already been felt in terms of how they manage animal records, prepare animal information for conversion to the future system and has highlighted the need for data quality standards both within the software and at the institutional support level.

Records management events, external to the zoo and aquarium industry but which have great relevance to current business practices, highlight the need for organizations to ensure legal compliance with federal, state and local record keeping requirements and to develop policies and procedures regarding records retention, destruction and preservation of certain business records. As the transition to electronic records management continues to increase, ZIMS, the use of email and the need to streamline business processes being the main catalysts; the need for standards, policies and procedures for records retention, protection and preservation will prevail in order that institutions can meet legal requirements and provide for the future access, retrieval and use of animal, research, medical and core business data.

Wildlife legislation continues to evolve and change in response to an increased need to afford protection to a growing number of species; enhanced collaborations between zoos and aquariums and academics and researchers in the field has increased the need to import and export biological samples; the need to manage captive animal collections from a global perspective; enhanced security requirements due to the threats of terrorism; and heightened sensitivity toward animal welfare and conservation issues is raising ethical and policy-related concerns. ZRA is prepared to assist members in meeting the demands of changing business practices and external events that impact the registrar function.

Growth Strategies

During the first fifteen years of its existence, ZRA developed its membership base primarily through word-of-mouth, and fulfilled its mission by providing practical information and support to zoo and aquarium registrars regarding animal transactions, related legislation and regulation, and records and information management. Membership growth is a core objective of the 2007-2011 Strategic Plan, and is intended to provide the necessary resources in terms of revenue, talent and collaborative relationships, to facilitate the long-term sustainability of the organization.

ZRA is now a firmly established, professional association with a solid North American membership base but one that can still be expanded both in the United States and internationally due to untapped resources and emerging prospects. The zoo and aquarium industry is emphasizing greater accountability in all functions, providing an opportunity for expansion of the registrar's role. Registrars' expertise in these key areas will be an essential part of zoo and aquarium management in the next decade. ZRA is well positioned to help its members meet new requirements, to fulfill their professional potential and to offer the organization's collective expertise to related associations and their members.

Competitive Advantage

ZRA has the advantage of being a well-organized, established association with experienced members and a respected reputation among related organizations in the zoo and aquarium field. The organization's first fifteen years were focused on developing a support structure and training opportunities for its members. As an organization transitioning to its next professional level, ZRA is now positioned to double its membership in the next five years. It will achieve competitive advantage through building collaborative relationships, increasing member services and forging strong programs for professional development, certification and training with advanced technological support.

There is more competition at the institutional level to secure professional development resources as more specialized associations emerge and the need for broad-based business information, that larger organizations currently provide, increases. Associations such as ZRA, that cater to a specialized position, will need to expand their offerings to include the broader business information in order to increase the professional profile and perceived value of membership to registrars and their superiors. By developing quality programs for certification, professional development, training and standardization, and adding the convenience of e-learning, ZRA will be a more effective competitor in its industry.

Strategic Planning Process and SWOT Analysis

The 2007-2011 ZRA Strategic Planning Committee (SPC) is comprised of a chair, seven members and four advisors that represent small, large and medium zoos; aquariums both in the United States and abroad; three former, the current and the immediate past chair of the association; an AZA Board of Regent and two staff members of ISIS. The ZRA Board was apprised of all assignments and events involving the strategic planning process and received periodic updates of the committee's progress.

A SWOT analysis (strengths, weaknesses, opportunities and threats) was completed in January of 2007. The SWOT analysis is a strategic planning tool that is designed to help the leadership of a business, organization or association identify its internal strengths and weakness and evaluate the condition of the external environment (business, economics, political) to identify and anticipate opportunities and threats. The SWOT summary represents the core strategic issues identified by the ZRA SPC and provides for the development of the six strategic goals, the 2007-2011 Strategic Plan Membership Survey and the resulting action plans.

Based on the input of the members and advisors of the SPC, ZRA currently represents a strong, dedicated and diverse membership that, collectively, comprises a significant amount of industry specific experience in animal data and records management, animal shipping, animal collection and permit management and various other areas depending on the specific definition

of the position at each institution. ZRA, as an association, enjoys a solid relationship with the respective staff at AZA and ISIS as well as its members as professional constituents and colleagues. As associations, both AZA and ISIS supported ZRA as a fledgling organization and have provided opportunities and support for the overall advancement of the registrar position in the United States.

AZA and ISIS continue to provide training and educational resources to registrars and have embraced their knowledge and expertise by utilizing the talents of ZRA members during the ZIMS development process. AZA provides ZRA with a registrar-specific listserv that allows for a continual stream of communication among its members.

ZRA currently identifies itself as an international organization but its membership remains largely representative of the North American region. Its strong connection to AZA and ISIS, despite the fact that ISIS is an international organization, enhances the regional perception. The determination of a regional or international focus will be critical in terms of how the association will target membership growth and ultimately how it will direct its long and short-term strategic objectives. This determination will help ZRA to identify professional constituents and associations that can provide additional opportunities for advancing its strategic objectives.

There was overwhelming consensus that the ZRA website is outdated and should be upgraded and enhanced to provide member services that reflect current standards for association management. The ZRA website should be an interactive, informational, web-based tool for members to connect, communicate and learn.

The demographics of the ZRA membership are changing as founding and/or veteran members approach retirement, accept promotions, go back to school or leave the zoo industry for other jobs. It is paramount that ZRA document its collective knowledge, experience and history and that it develop and implement a state-of-the art mentorship program that will address the needs of its diverse membership. ZRA members should be nurtured and supported by the association whether they are a veteran in their position who wants an opportunity for the highest level of professional growth in our industry, a new registrar who needs guidance in learning the basics of the job function or someone who is preparing for a certification process.

The current governance structure has a limited number of Board positions and a lot of committees. Increased Board oversight for committee effectiveness may be necessary to ensure that the association's objectives are driven top down and link back to the Strategic Plan. As the strategic plan is finalized, committee realignment may be necessary to ensure that volunteer talent, time and association resources are used to their maximum efficiency and effectiveness.

Events internal and external to the zoo and aquarium industry that will impact the strategic direction of ZRA include the ZIMS initiative; greater emphasis on managing records electronically; the need for global standards; increased security requirements in the airline industry; scrutiny from governmental and animal rights groups regarding the exhibition and transport of wildlife; and an increasing need for both managerial oversight and administrative support for the registrar function.

Following is a summary of the strategic issues that were identified from the information provided through the SWOT analysis and that guided the process of determining the six strategic goals and action plans for the 2007-2011 Strategic Plan:

Strategic Issues

Strategic Issue 1

- Member services need to be increased and improved, specifically regarding the ZRA website, as well as the determination of a regional or international direction for the association in order to develop strategies for membership growth, related marketing and advertising and training programs.

Strategic Issue 2

- Demonstrated need and want for increased opportunities for professional development, recognition, certification, training and education.

Strategic Issue 3

- Work with ISIS and regional associations to support the implementation of ZIMS by providing resources for evaluation, benchmarking and training.

Strategic Issue 4

- Need for increased autonomy from affiliated associations within the zoo industry without alienating them as important constituents along with a desire to forge additional cooperative relationships with other professional and related associations.

Strategic Issue 5

- Demonstrated need to incorporate and seek information that will assist ZRA in developing industry standards for records and data management as well as other areas of the registrar job function that may currently be underdeveloped.

Strategic Issue 6

- Demonstrated need to develop a comprehensive mentor system that will ensure industry knowledge and experience is effectively captured from founding and veteran members, to nurture and support those new to the registrar position and to provide a strong foundation for professional development, leadership and management training.

Strategic Issue 7

- Demonstrated need to fully implement a record keeping awareness program that can be expanded globally.

Vision

- ZRA will inspire registrars to develop their careers to full potential by providing opportunities for professional enrichment, growth and development
- ZRA will provide training and continuing education opportunities to ensure registrars have the skills to meet changing business needs
- ZRA will provide leadership in the development and use of the highest standards achievable in managing animal transactions and the records and information that support them
- ZRA will take a leadership role in animal transport, legislation and legal compliance
- ZRA will continue to expand its network of professional partnerships within the zoo and aquarium industry and with associations that provide related services

Mission

To enhance the value of zoos and aquariums through leadership, professional development, standardization and service to its members

VALUES

Integrity – our members emulate the highest standards of honesty and integrity in our interactions, management of animal transactions and records and information.

Accuracy – our members strive for the highest standards of quality achievable

Respect – our members treat both people and animals with the utmost respect

Strategic Goals

Strategic Goal 1

- Membership – ZRA will focus on maintaining and increasing its membership base by enhancing member services and improving communications

Strategic Goal 2

- Training and Continuing Education – ZRA will continue to be a leader in providing its membership with training and continuing education opportunities through ZIMS training, additional partnerships with related organizations, assessing and using the expertise of its members and expanding conference programs

Strategic Goal 3

- Professional Development – ZRA will respond to the professional development needs of its membership through leadership, opportunities for advanced education and by leveraging technology and collaborative relationships

Strategic Goal 4

- Educational Resources and Standards Development – ZRA will provide leadership in the development of resources, standards and best practices that support current and changing business requirements

Strategic Goal 5

- Mentorship Program – ZRA will provide a comprehensive and organized mentorship program that expands on existing collaborations and facilitates the transfer of knowledge

Strategic Goal 6

- Financial – ZRA will generate sufficient financial resources and relationships to support a sustainable future as a leader in its industry

2007-2011 Strategic Plan Membership Survey Results

In May of 2007, the ZRA Strategic Planning Committee (SPC) with the assistance of Amy Niedbalski, Audience Research Coordinator for the Saint Louis Zoo, developed the 2007-2011 Strategic Plan Membership Survey around the six strategic goals and the information that was provided to her from the ZRA SPC.

The questions were reviewed extensively by the ZRA SPC and approved by the Board prior to distribution to the general membership. The Survey was distributed on May 24th, 2007 with an end date of June 10th, 2007. 139 email invitations were distributed to ZRA members via surveymonkey.com.

There were 6 ‘undeliverable’ addresses; 2 members opted out; 87 completed or partially-completed the survey; and the average response rate was 65% with a 95% confidence level with +/- 6% confidence intervals.

The survey results are attached as Appendix II. All action plans contained in this document are supported by the Membership Survey results.

Action Plans

Membership Services

Strategic Goal 1

- Membership – ZRA will focus on maintaining and increasing its membership base by enhancing member services and improving communications

Enhanced membership services will be achieved through improved website design and functionality that will streamline processes for association management and reallocate ZRA resources to the strategic priorities established as part of the Plan.

ZRA will increase its membership through effective campaigning focusing on current and emerging prospects in North America. Membership categories will be realigned to maximize the effectiveness of campaigns and to facilitate the goals for recruitment and long-term retention of members.

ZRA will increase its outward recognition for members that demonstrate their commitment to the goals and objectives of the Association and to those that contribute their time and talent in leadership positions. A mentorship program that supports a diversity of member needs, in a format that extends beyond geographic boundaries, will be developed and implemented. A map will be developed to use as a marketing/membership tool during campaigns. The ZRA brochure and membership packet will be automated and included in the new website.

A. Website Design and Management Services

How and When

1. Solicit vendor presentations, review proposals and prepare a requirements document that specifies scope for functionality, design, management services, timeframe for completion and cost information. (2007)
2. The ZRA Board shall negotiate and select the final vendor. (2007-2008)
3. The ZRA website development shall begin in 2007 and website launched by April 1, 2008.
4. The cost range, approved by the membership on 10/27/2007, for the redesign of the website is \$1500-\$2000.
5. The cost range, approved by the membership on 10/27/2007, for annual website management services is \$1500-\$2000.
6. All Committees/Board – develop content for website (2007-2008)

B. Membership Campaigns

How and When

1. Marketing – creation of electronic membership map (2008).
2. Marketing – update brochure and new member packets and convert to electronic format. (2008)
3. Membership/Marketing/Communications/Board – develop campaign strategy (2008).
4. Membership/Marketing/Board – launch multi-year campaign by 2009.

C. Membership Recognition

How and When

1. Nominations and Elections Committee/Board– develop criteria for selection of leadership candidates (2008)
2. Board - Develop and implement additional programs for recognition and awards (2007-2008)

D. Leadership Development

How and When

1. Board – Conduct Bylaws revision in conjunction with parliamentary consultant to implement changes to the current governance structure in order to effectively implement the Strategic Plan (2007)
2. Board - Develop and/or formalize all existing governance policies and procedures and prepare content for hosting on the new website (2007 - 2008)
3. Board – Develop a plan for incorporating speakers into the annual conference for management and leadership development (2008)
4. Training/Board - Develop leadership training class to be held at 2008 annual conference and thereafter (2008)

E. External Relations

Action Plans

1. Identify related organizations whose members would have synergy with ZRA. Increase opportunities for networking by inviting representatives to speak or setup as vendors at ZRA conferences, join ZRA or host regional workshops. (2007-2011)
2. Create Vendor Membership Category to initiate partnerships that will allow for additional opportunities for information sharing, funding and collaborations. (2007)
3. Develop a vendor participation process that would include a membership application and conference exhibitor guidelines.(2008)
4. Implement vendor participation process by the 2008 ZRA Annual Conference to be held in St. Louis, Missouri October 22-24, 2008.

Action Plans

Strategic Goal 2

- Training and Continuing Education – ZRA will continue to be a leader in providing its membership with training and continuing education opportunities through ZIMS training, additional partnerships with related organizations, assessing and using the expertise of its members and expanding conference programs

A. Training Programs

How and When

1. Develop ZRA leadership training program for members elected to the Board or serving as committee chairmen, vice-chairmen or subcommittee chairman.(2008)
2. Develop record keeping awareness program (formerly called Long-Term Outreach Program) focused on the needs of the North American region but that can serve as a model for international partnerships in the future. Implement by 2009.
3. Develop survey and database to assess and document the variable level of skills and expertise among the ZRA membership to be used as a tool to help address the need for a tiered conference program, provide for the training desired by the members and to identify potential candidates for leadership. (2008-2009)
4. Develop ZIMS training workshops as needed for presentation at ZRA annual conferences. (2007-2011)
5. Research, develop and present online training proposal to Board and/or membership for approval. The proposal should apply to all approved programs already offered at the annual conference. (2010-2011)

Action Plans

Professional Development

Strategic Goal 3

- ZRA will respond to the professional development needs of its membership through leadership, opportunities for advanced education and by leveraging technology and collaborative relationships

A. Programs for Professional Development

How and When

Action Plans

1. Implement Professional Development Committee (Approved in Bylaws 10/27/2007)
2. Develop guidelines for how proposals are requested, approved, developed and implemented. (2008)
3. Review, research and develop proposals for professional development opportunities. (2007-2011)
4. Develop criteria, policies and application process for how professional development funds will be requested, approved and allocated. (2008)

B. Professional Development Through Certification

ZRA will assemble a mentorship program that will support and assist registrars in applying to sit for the Certified Records Manager (CRM) exams and the actual preparation for Parts 1-6. A template was developed by the Strategic Planning Committee to help registrars identify examples of job duties that would meet the ICRM requirements for job experience and the relevant category that they would fall under. Workshops will be developed using the existing resources available from the ICRM, that can be incorporated into the ZRA annual conferences and held each year to assist registrars in preparing for the CRM exams.

A ZRA scholarship program will be developed, building on examples available through the Association of Records Managers and Administrators (ARMA) city chapters, to provide financial assistance to registrars pursuing their CRM certification.

How and When

1. Develop a ZRA CRM Exam Template that will assist registrars in getting their initial applications approved to sit for 6 exams established by the Institute of Certified Records Managers (ICRM). (Completed 2007)
2. Develop ZRA-sponsored CRM workshops that can be presented at the annual conference, and eventually in a Webinar format, that provide comprehensive information on the ICRM testing process and that includes PowerPoint presentations developed by the ARMA Education Foundation for use in assisting CRM candidates prepare for each exam. (2008-2009)
3. Develop ZRA/ICRM/ARMA-sponsored mentorship program that matches a registrar CRM-candidate to other CRMs that may work for other zoos or companies located in their city to identify additional opportunities for education, study groups or networking in order to prepare for exams. (2008)

4. Develop a ZRA-sponsored scholarship program to support and assist ZRA members in financing their professional certification. (2007-2008)

Action Plans

Strategic Goal 4

- Educational Resources and Standards Development – ZRA will provide leadership in the development of resources, standards and best practices that support current and changing business requirements

A. Educational Resources

1. Analyze current resources produced, updated and distributed by ZRA. Prioritize resources and determine those that should be updated and maintained on a long-term basis. Identify emerging needs for additional publications. (2008)
2. Develop formal guidelines for how educational resources are requested, developed and distributed. (2008)
3. Provide a comprehensive list of links to related or affiliated organizations for the new website in order to increase membership awareness of educational or professional resources that reside within or outside the zoological industry. (2008)
4. Research and develop a proposal for what resources will be provided as a courtesy to members and those that should be offered at an additional charge. (2008)
5. Complete a bibliography of professional resources to assist members in their job functions. (2009)
6. Update current job description for Registrar position. Research the need for additional job descriptions for emerging positions related to the Registrar function. (2009)

A. Standards Development Committee

1. Create ZRA Standards Development Committee. (2007)
2. Develop Standards Development Committee Project Proposal Form. (2007)
3. In conjunction with the Board, develop formal guidelines for how the Standards Committee will accomplish its work and how standards will be proposed, approved and distributed. (2008)
4. Identify specific areas of need for best practices and standards development. (2008)
5. Prioritize standards that are identified and propose a schedule for development that includes the years 2009-2011 of the Strategic Plan. (2008)
6. Collaborate with related organizations and industry-specific groups to develop and revise ZIMS standards. (2007-2011)

Action Plans

Strategic Goal 5

- Mentorship Program – ZRA will provide a comprehensive and organized mentorship program that expands on existing collaborations and facilitates the transfer of knowledge

A. Mentorship Program

1. Develop a mentorship program for new members (2008)
2. Develop a mentorship component for existing CRMS exams (2008-2009)

Strategic Goal 6

- Financial – ZRA will generate sufficient financial resources and relationships to support a sustainable future as a leader in its industry

Action Plans

A. Website Design and Management Services

1. The cost range, approved by the membership on 10/27/2007, for the redesign of the website is \$1500-\$2000. (2007)
2. The cost range, approved by the membership on 10/27/2007, for annual website management services is \$1500-\$2000 (2007)

Proposal 1

A one-time contribution of a minimum of \$30.00 per individual member will be requested to fund the website redesign and the first year of management services (2007)

Proposal 2

\$2000 for the website redesign and \$2000 for the first year of management services would be paid out of funds not previously allocated to other line items (approved by membership on 10/27/2007 to cover cost range for website redesign and annual website management services if the full contribution requested is not received)

Proposal 3

Consider raising membership dues to offset ongoing management services after the first year of implementation. This may not be necessary but should be an option given the increased member services that will be provided through the new website.

B. Membership Campaigns and Advertising

1. Create mail campaign to support membership growth objectives with \$500.00 allocated each year for 2008-2011.

C. Professional Development Fund

1. Establish an account dedicated to professional development activities including scholarships, training and other programs approved by ZRA. (2008)

All dues received under the Institutional Membership category will be allocated 100% to the Professional Development Fund. Additional funding obtained through other resources may also be allocated to professional development activities.

D. Vendor Membership

3. Create Vendor Membership Category at \$150.00. (2007)
4. Implement vendor participation process to include exhibitor setup fee of \$250.00. (2008)
5. Implement process for advertising on the website to include a fee of \$65.00 annual fee per vendor. (2008)

Strategic Implementation

A. Bylaws Revision

As part of the process required to effectively implement a new strategic plan, the current ZRA Bylaws and other governance documents were reviewed. There was a unanimous vote of the Board to hire a registered parliamentarian to assist with a complete Bylaws revision since the process would require looking at all major business areas of the Association. In order to position the Strategic Plan, and to carryout and effectively implement its goals and objectives, specific governance changes will need to be made.

The Bylaws revision was presented at the ZRA Annual Conference, hosted October 25-27, 2007 at Disney's Animal Kingdom and was approved with amendments and provisos. The Bylaws revision will be sent to the Internal Revenue Service for their review. (2007-2008)

B. Expand Leadership and Governance Resources

There was a unanimous vote of the Board to purchase a copy of the current version of Robert's Rules of Order: 10th Edition for each officer and Board position and two copies of Robert's Rules of Order: Simplified and Applied for the Chair and Chair-Elect. These resources will support improved training and leadership development for the Board and officers. These resources will be maintained by the Association and will be transferred as new officers come on Board and can be used in the future leadership training class to be developed for presentation at future conferences.

C. **Board Liaison and Committee Vice-Chair Positions**

There was a unanimous vote of the Board to implement a Board liaison structure to improve committee oversight. This system will ensure that the future work of the committees is aligned with the goals, objectives and action items of the Strategic Plan. (2007-2008)

There was a unanimous vote of the Board to implement committee vice-chair positions in order to promote better delegation of work and authority across the various committees and to provide for leadership succession.

D. **Committee Realignment**

Committee realignment needs will be assessed by the ZRA Board and Ad Hoc Governance Committee in order to determine any changes or additions that need to be made to the Association's existing standing committees. This review is an important component and should allow for the effective implementation of the Strategic Plan and provide for maximum utilization of ZRA resources and volunteer leadership. Changes in committee governance are reflected in the bylaws approved by the membership on 10/27/2007.

E. **Standing Rules, Administrative Rules, Rules of Order**

The ZRA Board shall convert all of its current policies and procedures that link to the bylaws or that provide for detailed instructions beyond this document to standing rules, administrative rules or rules of order. Standing rules or rules of order shall be developed for new committees or board positions and shall be posted on the new website for access by all ZRA leadership. (2008)