



Zoological Registrars Association 2020-2025 Strategic Plan DRAFT

Building Our Future

October 2019

Developed by: ZRA's Strategic Planning Committee and Board of Directors

History of the Association

In 1984, twelve zoo registrars and animal records keepers met for a workshop at the Brookfield Zoo. Leading up to and during that meeting, the foundation for the Zoological Registrars Association (ZRA) was established. The annual workshops originally began very informally as a platform to assure that once a year the registrars and records keepers would come together and share both their unique and common problems and in some cases, their solutions. One of the original long-term goals was to establish the function of Registrar, which was very uncommon in zoos and aquariums, as a supported professional position.

Although never official, very early in its existence the participants were referred to as the Registrars' Group. As the membership of the Group grew, it elected its first Chairman in 1990. By 1992, members of the Registrar's Group had produced the publication *Animal Records-Keepering*. This manual provided guidance in animal record keeping and the collection and maintenance of data pertaining to live animal collections. The manual was also an early attempt at standardization of animal records and related processes. The manual was offered to all American Association of Zoological Parks and Aquariums (AAZPA, now known as AZA) institutions. It also found its way into a number of European and Australian zoos and aquariums.

In 1993, the Group established the Marvin Jones Award of Excellence to recognize meritorious achievements, specifically in the area of animal record keeping. Eight Marvin Jones Awards of Excellence have been awarded to eligible members since its inception.

During the 1994 annual conference, the Group adopted its first bylaws, and in 1998 received its status as a 501 c (3) not-for-profit organization. This was the official founding of the current association known as the Zoo Registrars Association (ZRA). Later, members voted to change

the name of the organization to the Zoological Registrars Association in response to the increased involvement of aquariums.

During the 1990s, there was a major push by zoos and aquariums worldwide to improve animal records for the purpose of supporting the captive management of animals and conservation programs. ZRA was ideally suited to take advantage of this movement and has been in the forefront of creating and supporting standards for animal records since then. In 1998, *Standards for Data Entry and Maintenance of North American Zoo and Aquarium Animal Records Databases* was published by the Lincoln Park Zoo. ZRA members both edited and heavily contributed to this publication. "The Standards for Data Entry" provided a systematic approach to animal record keeping through the use of the Animal Records Keeping System (ARKS) software produced by the International Species Information System (ISIS), now Species360.

In early 1996, ZRA proposed a new course for the AZA Management School. Following approval, the first Institutional Record Keeping (IRK) course began in 1998, and continues today as part of the AZA Professional Training School curriculum. The IRK course has always been taught by ZRA members, and one member has served on the AZA Board of Regents.

The first ZRA five-year Strategic Plan was adopted in 2002. During the 2007 Annual Conference, the membership approved its successor, the 2007-2011 Strategic Plan, and an accompanying revision of the Association's bylaws. The bylaws revision represented a significant realignment of the organization's governance structure that more closely represented current standards in association management and provided for the implementation of the strategic direction set forth by the membership.

The 2007-2011 Strategic Plan provided for important initiatives, including the adoption of the Association's first Code of Professional Ethics; a new web site; a program for leadership succession, training and development; enhanced professional development opportunities; and a comprehensive membership growth campaign.

Enhanced leadership and member recognition was achieved through the implementation of a more formal recognition ceremony at the Annual Conference, providing additional service awards for board members and committee leaders, and the development of a second outstanding achievement award. The Judith Block Professional Excellence Award was established to recognize those members with long-standing tenure who have consistently demonstrated the willingness to provide for the professional development and mentorship of other members.

ZRA's diverse membership includes representatives from five continents. Many members are also active in AZA, serving as SSP Program Leaders, Studbook Keepers and lending their expertise to Taxon Advisory Groups (TAGs) and Scientific Advisory Groups (SAGs).

ZRA members have also been instrumental in partnering with animal record software companies to help develop and enhance these data systems. Over the past 35 years, many of

its members have collaborated with Species360, first in the development of ARKS (Animal Records Keeping System), and then of its web-based successor, ZIMS (Zoological Information Management System). Species360 has also been an important partner in the IRK Course. Additionally, in 2019, four ZRA members were appointed to the first Tracks Software Client Advisory Committee. With half of the new committee made up of ZRA members, registrars will play a key role in guiding and evaluating development of the software.

In 2016, ZRA's Professional Development Committee received a formal proposal for the creation of a comprehensive online training program for the zoo registrar position. The ZRA Training Certificate Program (TCP) began development after this proposal was approved by the membership on March 8, 2017. The first of its six modules was presented at the 2017 Annual Conference to an audience of 49 ZRA members and non-members. At that same conference, the membership approved a contract with San Diego Zoo Global Academy and CypherWorx to provide the online delivery and administration of the program. The entire process, from approval to deployment, took nearly 14 months and involved many ZRA members as well as partner agencies, associations, and special advisors. The TCP was deployed in October 2018 with 66 member and non-member registrants in first year.

As ZRA celebrates its 35th anniversary (2019) and implements its newest Strategic Plan, it is positioned to become an increasingly valuable asset to the zoological industry, and to provide cutting-edge services, leadership development, and educational opportunities to its growing membership.

Creating the Future through an Enhanced Mission and Vision

Before starting development of this Strategic Plan, the Association's leaders felt it was time to revisit and refine the Mission and Vision of ZRA. The updated Mission Statement was written and approved by the membership in 2018; the updated Vision Statement was crafted by the Strategic Planning Committee in June of 2019 and approved by the membership shortly thereafter. These two statements helped to guide the conversation as the membership considered the direction in which the Association should move.

Mission

ZRA connects, trains and empowers the community of zoo and aquarium registrars.

Vision

ZRA envisions a future where registrar expertise is valued and acknowledged by institutions worldwide to promote the care and conservation of animals.

Core Commitments: *(unofficial until voted on by membership)*

- ZRA empowers its members to establish industry-wide standards and creates platforms for members to share their knowledge with each other.
- ZRA provides easy access to resources and training/professional development opportunities.
- ZRA fosters global communication amongst registrars and animal records professionals of all kinds and from all countries.
- The ZRA organization is run in a transparent, deliberate, forward-thinking manner that encourages all members to participate.

2019 Analysis

In March of 2019, the ZRA Strategic Planning Committee (SPC) reviewed the previous Strategic Plans approved by the membership. The SPC also refined the 2012 Member Value Survey for relevancy.

The 2019 Member Value Survey was sent to the membership in April 2019. 107 members completed the survey with a 95% completion rate. The survey results are included as Appendix I of this document. All action plans contained in this document are supported by the survey results.

Members expressed their overall satisfaction with ZRA was 8.59 out of a possible 10 and 9.46 of 10 would recommend ZRA membership to their colleagues in the profession.

Top 5 services that the members want:

1. Access to a professional “listserv” or network with online discussion
2. Education, professional development, and networking at conference
3. Communication of standards and best practices for the profession
4. Setting standards and best practices for the profession
5. General permit information

Top 5 services ZRA provides well:

1. Access to a professional “listserv” or network with online discussion
2. Education, professional development, and networking at conference
3. Setting standards and best practices for the profession
4. Government representatives at conference
5. Industry-specific record-keeping software training

Top 5 services with the biggest gap between importance and performance:

1. Permit application assistance (US specific)
2. General permit information
3. Mentorship programs to develop aspiring professionals
4. Communication of standards and best practices for the profession
5. Reimbursement opportunities to attend annual conference

Areas where performance is rated higher than importance:

1. Recognition and awards for professional excellence
2. ICRM certification scholarship opportunities
3. Leadership development and volunteer opportunities
4. AZA IRK scholarship opportunities

Strategic Objectives and Action Plans

After analyzing the results of the survey and determining where the gaps in performance were, the SPC developed the following objectives:

- Develop resources to assist members with permits
- Strengthen the mentorship program
- Improve communication regarding standards and best practices
- Provide additional assistance for educational opportunities and professional development
- Increase international engagement
- Improve the functionality and usability of the website

The SPC further expanded each objective in order to clarify and explain what, exactly, ZRA hopes to achieve in the next three to five years. Each objective has a number of specific action items that will guide the Association's efforts and activities in support of the overarching goal.

Objective: Develop resources to assist members with permits

Support the membership with information and resources about wildlife permits and permit application processes.

Managing wildlife permits is one of the most important and complicated aspects of a zoo registrar's duties. Even the most seasoned of registrars must work to keep up with constantly changing regulations, rules, and processes, not to mention conflicting interpretations from different government contacts. In an effort to assist its members in this area, ZRA will develop new resources to help decipher the various aspects of permitting, including a resource page on the Association's website as well as a 'panel of experts' who will serve as part of the mentorship program and as contacts for specific questions from the membership.

Action Items:

- Develop a wildlife permits resource page on the ZRA website
- Form a small team or work group to manage the permits resources page and keep it up to date
- Establish an expert panel of members with extensive permitting experience to serve as mentors and contacts for permit-related questions from the membership

Objective: Strengthen the mentorship program

Redefine and restructure the mentorship program to engage new members early in their membership and strengthen the skills of established members.

The mentorship program should be a means of welcoming new members to ZRA, encouraging networking, and assisting members in forming mentor/mentee relationships. These goals can be accomplished with a two-pronged approach: Orientation and Topic Specific. Orientation mentorship would be short term and would introduce the person to ZRA and the resources

available. Topic specific mentorship would most likely be for a longer term and would cover a specific topic(s). Topic specific mentorships would not necessarily be restricted to new members only, but could include someone who may be asked to work on a task that they have never had assigned to them before and are looking for guidance.

The mentorship program has struggled with membership awareness and a new communication plan will be developed, which should increase participation. Programs cannot be successful without regular evaluation to identify program strengths and weaknesses.

Action Items:

- Create a two-pronged approach to the mentorship program
 - New member orientation mentorships
 - Topic specific mentorships
- Create a conference event to welcome new members and their mentors
- Streamline the topic specific mentorship process to include a searchable database of mentors on the ZRA website
- Add a mentorship check box to the new member application
- Evaluate the mentorship program annually

Objective: Improve communication regarding standards and best practices

Support the membership by providing up-to-date and easily accessible standards and best practices.

While there are resources available to the membership for data entry standards and best practices, these items are not easy to locate and are not current. ZRA should take the lead in establishing these standards and best practices for the industry. Current data standards should be compiled, reviewed, and if needed, updated or augmented with new standards. These resources should have a dedicated section of the Association's website with the ability to search, sort, view and download. Regular presentations or round tables at annual conferences should also be included in order to discuss best practices in a collaborative environment.

Action Items:

- Review current standards/best practices
- Creation of new standards/best practices
- Distribution of standards/best practices through a new website feature

Objective: Provide additional assistance for educational opportunities and professional development

Expand opportunities for the membership with regards to educational opportunities and professional development through increased funding and awareness.

ZRA has a long-standing foundation of education and professional development for the membership. While the current scholarship/reimbursement programs are popular, they benefit only a small section of the membership. The ZRA Board of Directors has increased funding for professional development and educational opportunities through new conference attendance

stipends/scholarships and quarterly reimbursement offerings. These changes need to be advertised to the membership, along with opportunities available from outside organizations.

The newly launched Training Certificate Program (TCP) will be an ongoing project for years to come. Each module should be evaluated regularly for content updates and also user feedback.

ZRA's relationship with the Institute of Certified Records Managers (ICRM) continues to strengthen with their interest in partnering with the Association to create a "Zoological Specialist" Specialty Certification.

Action Items:

- Expand conference attendance opportunities for members lacking institutional funding through stipends and scholarships for first-time presenters
- Increase awareness of available funding programs for education and professional development
- Monitor website content to ensure it is current and comprehensive
- Share opportunities offered by outside organizations that may be available to ZRA members
- Review and update TCP content based on user feedback
- Apply to the ICRM for a "Zoological Specialist" Specialty Certification
- Complete new Salary Survey

Objective: Increase international engagement and support

Increase involvement with other records keeping professionals internationally and establish reciprocal partnerships for support.

While ZRA prides itself on being an international organization, the Association recognizes the limitations to accommodate the needs of other international groups within its platform. However, connecting and establishing partnerships with other international organizations can benefit both parties, even if only to advocate for the importance of animal records. ZRA has struggled with growing into a fully international association, as many small associations do. The resources provided to ZRA's members are often dedicated solely to the United States. While international members may find some of the information useful, it is often not applicable. ZRA would like to develop useful resources for those members situated outside the USA with a dedicated space available on the website.

Action Items:

- Reach out to other regions to try to establish reciprocal relationships with animal records groups around the globe
- Reach out to other regional accrediting bodies to advocate for registrars and the professionalism of / importance of animal records
- Recruiting ZRA's international colleagues to write articles for the newsletter or present at conferences
- Dedicated resources/assistance for international members

Objective: Improve the functionality and usability of the website

Reorganize the ZRA website and implement needed improvements in order to make the space more user-friendly and to provide an increased level of resources and support to members.

In order to reach the other Strategic Plan objectives, the Association's website needs to be renovated and reorganized so it is more functional and user-friendly for members. Migrating the site to a new platform in 2018 solved a number of issues, but continued updates are needed. Specific areas needing improvements include, but are not limited to: navigation, search functions, reporting capabilities, and general organization.

Action items

- Reconvene the Website Task Force to drive the website renovations.
- Determine the specific improvements that are needed
- Define which improvements need to be done by ZRA and which will require the website developer
- Work with the website developer to determine cost, prioritize the improvements, and create a detailed plan for moving forward with the improvements
- Develop a plan for continual monitoring of the website's functionality

Next Steps

The 2020-2025 Strategic Plan will be presented to the ZRA membership in August of 2019 with the intention of formal approval at the 2019 Annual Business Meeting. Once this structure is approved, particular objectives will be assigned to a specific Committee or Task Force. Committees will further refine the action items, performing additional research or investigation if needed, and establish time-lines and specific, achievable goals.

This Strategic Plan will be reviewed annually by the Strategic Planning Committee to monitor and evaluate implementation and progress of the Plan's goals and objectives.