

The Zoo and Aquarium Partnership for The Great Lakes

**Strategic Plan Annual Meeting
January 9-10, 2007**

 Chicago Zoological Society

Capstone Consulting Group

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Preamble

On January 9 and 10, 2007 a group of representatives of zoos, aquaria, and conservation organizations from around the region met to agree upon an ambitious Strategic Plan for the Zoo and Aquarium Partnership for the Great Lakes. This document represents the results of the Partnership's first Annual meeting.

Zoos and aquariums reach a broad audience and can become a trusted resource for information, as well as an inspiration for taking conservation action in general and specifically on Great Lakes Restoration. The Zoo and Aquarium Partnership for the Great Lakes presents an opportunity to bring a highly credible new voice into Great Lakes restoration issues and a challenge to institutions with varying degrees of expertise in legislative action, public awareness, education and research. During 2005 and 2006, a number of AZA Zoo and Aquarium Directors discussed the possibility of developing this regional partnership for the Great Lakes. As of January 2007, a total of 38 institutions and two non-governmental organizations had formally joined the Partnership.

The purpose of this meeting was to identify specific work plans in four previously identified key areas of engagement: Awareness, Education, Science, and Public Policy. The meeting reinforced the willingness of this group of committed institutions to work collaboratively to promote restoration of the Great Lakes. We were also thrilled with the support and active participation from pre-eminent environmental groups working on Great Lakes issues, including The Nature Conservancy, Biodiversity Project, Alliance for the Great Lakes, and Healing Our Waters.

The resulting document is a collection of workplans that identify actions, working teams, leaders and sometimes specific targets or deliverables. The document is divided in five areas: Public Policy, Science, Communications, Funding and Outreach. Each of these areas includes a table with actions, and whenever possible a working team, a team leader, and a timeline.

As expected for a first meeting, this document accurately reflects the level of commitment of all Partnership members. The reader may also find an intrinsic unevenness in the level of detail between areas and work plans. Some are very specific and thorough; others are general statements of aim. Some have well-conformed working teams that are already delivering significant results; others are waiting for a working team or a team leader to pick up the action. Although not every Zoo and Aquarium partner was able to attend, we warmly invite all partner institutions to join and actively participate in these ambitious work plans.

This success of this meeting would not have been possible without the warm hospitality of Discovery World, our host in Milwaukee. This new and spectacular cultural institution, located right on the waterfront of Lake Michigan, regaled us with panoramic

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views of the lake, and provided us with inspiration, logistics and warmth that made the meeting particularly successful. Thus the Zoo and Aquarium Partnership for the Great Lakes would like to thank Paul Krajniak, Executive Director of Discovery World, and to all their wonderful staff – especially Kate Morgan and Elizabeth Meyer, for their efforts to make this meeting a total success.

We also want to thank the Joyce Foundation for providing financial support and for inspiring us at the meeting. Lori Pedelty of Capstone Consulting did a superb job at facilitating this meeting.

We are planning our next meeting toward early 2008 to assess the success of this workplan, and we will also meet in Philadelphia later this year at the 2007 Association of Zoo and Aquarium annual meeting to review progress.

Again, thanks to all for your enthusiastic support and commitment.

Stuart

Stuart D. Strahl, Ph.D.
President and CEO Chicago Zoological Society

Introduction

At its first Annual Meeting on January 9-10, 2007, members of the Zoo & Aquarium Partnership for the Great Lakes and distinguished guest advisors, collaborated to formulate the Partnership's Mission and determine ways to begin living the mission immediately.

This report outlines the results of their collaborations, with detailed Plans of Action surrounding each Strategic Objective and Goal that includes people responsible and target completion dates.

A rigorous review process began before the Annual Meeting when individual members were interviewed by Lori Pedelty of Capstone Consulting Group, who guided the planning process and facilitated the meeting. Based on the results of the pre-meeting interviews, an agenda was designed to foster an environment for rich dialogue focused at identifying the unique purpose the Zoo & Aquarium Partnership for the Great Lakes could serve in its quest to help in the restoration and conservation of one of America's greatest natural resources – the Great Lakes ecosystem.

Upon successfully formulating its mission (see page 4), participants shifted their efforts to activities they could take **now** to help make the Great Lakes healthier. It was determined that the Partnership could positively impact efforts of restoration and conservation from five different strategic vantages: public policy, science, communications, funding, and outreach. Working in teams, the members crafted detailed Action Plans for each strategic area and made the commitment to begin immediately with implementation. All target due dates hit in 2007 or 2008.

The first steps of the plan's execution were taken before the close of the Annual Meeting, with the formation of the Steering Committee, and selection of Dr. Stuart Strahl, CEO & President of Chicago Zoological Society/Brookfield Zoo, as its Leader. The Chicago Zoological Society is hiring a full-time Manager who will assume responsibility for facilitating the successful implementation of the Plan outlined in this report. And, although not every Zoo and Aquarium partner was able to attend the annual meeting, all are warmly invited to join and actively participate in these ambitious work plans.

With a bias towards action and an intent focused on results, the members of The Zoo & Aquarium Partnership for the Great Lakes identified specific ways in which they could uniquely meet the needs of efforts to restore and conserve the Great Lakes. Understanding the urgency of their call to action, the participants attending the Annual Meeting crafted aggressive plans for action, and challenged themselves and all members of the Partnership to step up and take action **NOW**.

*Knowing is not enough;
we must apply.
Willing is not enough;
we must do.
[Goethe]*

Mission

It is the purpose of the Zoo and Aquarium Partnership for the Great Lakes to leverage the strengths of our members, inspiring audiences to care and act for the restoration and conservation of the health of the Great Lakes ecosystem.

Member Strengths

- Sound science
- Diverse audience
- Education
- Media relations
- Public policy connections
- Local collaborations
- Living collections
- Audience engagement strategies
- Institutional venues

Top Strategic Areas

- Public policy
- Science
- Communications
- Funding
- Outreach

PUBLIC POLICY

Strategic Area: Public Policy

Team Leader: Tom Adams (CZS)

Team: Chad Lord (HOW), Paul Harpley (Toronto), TBD (Discovery World), Deb Fassnacht (Shedd), TBD (The Nature Conservancy), TBD (Alliance for Great Lakes)

Ask to join team: Reps from Minnesota, Cleveland, Indianapolis, WCS/Buffalo, Pennsylvania, Granby- Michigan (Detroit, Grand Rapids, Binder Pk)

Strategic Objective:

Keep members informed about public policy initiatives relative to the Great Lakes and ways that they and their constituents (board members, donors, other people of influence) can help:

- Guided by science
- Tap available public funding sources
- Give "Casual Access"

Goal:

Develop and implement Institutional Advocacy among ZAP-GL member institutions, making Great Lakes a higher priority.

<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
Institutions with existing commitments to Great Lakes being helping help other ZAP-GL member institutions identify ways to make Great Lakes a higher priority	Public Policy Team	April 30
Build program for developing institutional advocacy (local HUBs): <ul style="list-style-type: none">· Capacity/Training· Board Education· Membership· Visitors· Web· Staff	Public Policy Team	June 1
Identify which zoos have and have not, but could, get more involved with public policy activities	Public Policy Team	April 30
Identify key lawmakers	Public Policy Team	April 30
Develop a basic policy document that is consistent and	Public Policy Team	April 30

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<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
compatible with other advocates in our voice		
Give “casual access” to decision-makers and staff <ul style="list-style-type: none"> · Private tours of Institutions · Venue for meetings (advocacy capacity) 	Public Policy Team	Memorial Day Weekend - ongoing
Determine how ZAP-GL members can utilize DC lobbyist: <ul style="list-style-type: none"> · Conservation priority · Source of federal funding 	Public Policy Team	June 15
Communicate about legislation (“the good, bad, and ugly”) <ul style="list-style-type: none"> · Key with decision-makers 	Public Policy Team	April 30
Make Great Lakes a higher priority with AZA – start by sending a letter from ZAP-GL, signed by the Partnership Director	Public Policy Team	April 30
Participate in upcoming events: <ul style="list-style-type: none"> · Great Lakes Day · Earth Day · AZA Lobby Day · Other local and regional events to be determined 	Public Policy Team	April 22 April 18
Join HOW: <ul style="list-style-type: none"> · HOW Conference – Chicago 	Public Policy Team	April 30 Sept 7-9
Participate in Great Lakes Regional Collaborative (GLRC) <ul style="list-style-type: none"> · Educate ZAP-GL members about GLRC · International Joint Commission – Chicago 	Public Policy Team	July
Get aligned with the Great Lakes/St. Lawrence Cities Initiative <ul style="list-style-type: none"> · Develop list matching Initiative-mayors with ZAP-GL members 	Public Policy Team	Dec. 31 April 30
Need a state component <ul style="list-style-type: none"> · See list of states to recruit members to join the Public Policy project team 	Public Policy Team	Dec 31 and ongoing
Formulate a budget	Public Policy Team	June 1

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Background – Project and Activity Ideas

The following items were proposed during the Plenary Brainstorming Session at the ZAP-GL Annual Meeting on January 10, 2007. They are documented here for reference purposes.

- Get Board members, major donors, and other people of influence to endorse our mission and inspire them to action, e.g., call legislators about Great Lakes issues
- Piggyback with Great Lakes Day and AZA Lobby Day; meet with legislators
- Join Healing Our Waters; good source of information; September 7-9, 2007 Conference

SCIENCE

Strategic Area: Science

Strategic Objective:

Gather, evaluate, and disseminate scientific information, including what is and is not being done, as well as what ZAP members are doing; dissemination of the information is for outreach, both internally and externally.

Goal:

Develop a list of projects related to the Great Lakes, for the AZA, Annual Reports on Conservation & Science (ARCS).

Team Leader: Larry Sorel

Team: Dave Ireland, Kate Morgan, Tony Remsen, Alejandro Grajal

Budget: \$20,000-\$100,000

<u>What (Action)</u>	<u>Who</u>	<u>When (2007)</u>
"Access excel fields" <ul style="list-style-type: none">· List (inventory) of federally and state funded research projects (Canada and USA)	ARCS Team	Dec. 31
Compile information into one database for Annual Reports on Conservation & Science (ARCS) <ul style="list-style-type: none">· Recommend AZA use key words for ARCS· Use The Nature Conservancy's list to study	ARCS Team	Dec. 31
Disseminate to ZAP-GL partners	ARCS Team	Dec. 31
Provide the information to the larger Great Lakes' Community	ARCS Team	Dec. 31

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Goal:

Focus on select keystone species to expand ZAP involvement and provide information to the Outreach and Public Policy Teams.

Team Leader: TBD

Team Coordinator/Facilitator: Staff to be hired or assigned (need funding).

Team: TBD

<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
Hire or assign staff person to coordinate this program	Alejandro Grajal	April 15
Identify a lead ZAP institution for each species: <ul style="list-style-type: none"> · Sturgeon · Amphibians · Blanding's Turtle · Otters · Piping Plovers · Zooplankton · Frog watch (Canada & USA) 	TBD	TBD
Identify & communicate actions ZAP members can take	TBD	TBD
Share technologies	TBD	TBD

Goal:

Identify ZAP members and contacts with current Great Lakes' related projects, promote participation by other ZAP members, and develop messaging about the projects (relevant Great Lakes ecosystem health related projects and issues include: water quality, invasive species, keystone species, habitat restoration and management).

Team Leader: Yvonne Strobe

Team: Bruce Beehler, Sue, Dave Ireland (excel), Alejandro Grajal

Budget: \$100,000 to \$1MM/annually + one staff person to coordinate the program

<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
Gather brief description about current Great Lakes-related projects from/by each ZAP member	Yvonne	April 30
Hire or assign staff coordinator	TBD	TBD

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The following items were proposed during the Plenary Brainstorming Session at the ZAP-GL Annual Meeting on January 10, 2007. They are documented here for reference purposes.

- Establish or provide information on biodiversity monitoring – data and programs; get the word out...pass along information
- What is going on with science and field work?
- Select specific species to monitor
- Select a key species from the amphibian crisis and get the word out; a global problem with a local impact
- Identify top threats to Great Lakes Ecosystem and focus our efforts accordingly (linked with the strategic area of communications-messaging)

COMMUNICATIONS

Strategic Area: Communications

Team Leader: Stacey Bennett

Team Facilitator: Chicago Zoological Society/Brookfield Zoo To Hire by 3/15/07

Team: Scott Carter, Tom Adams, HOW, Shana (TZ)

Strategic Objective:

Formulate and communicate the ZAP-GL's message about the Great Lakes.

Goal:

Design, develop, and implement the Partnership's structure.

<u>What (Action)</u>	<u>Who</u>	<u>When</u> 2007
Hire staff	Alejandro Grajal	April 15
Develop Position document <ul style="list-style-type: none">· Who we are· What is our structure· What we are committed to· How we fit in· What outcomes (actions)	Ad hoc Steering Committee	Draft by March 1
Form the Steering Committee <ul style="list-style-type: none">· Each state/country represented· Project Leaders	Stuart Strahl	WIP; start at Annual Mtg; April 1 Complete

Goal:

Build communications capacity.

<u>What (Action)</u>	<u>Who</u>	<u>When</u> 2007
Form Communications Team	TBD	ASAP
Create Communications Template and Review Process for proactive and reactive letters to the editor, news releases, etc.	Communications Team	July 1
Formulate budget	Communications Team	March 1

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Goal:

Develop "The Message."

<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
Draft messages <ul style="list-style-type: none">· Leverage the research· Identify new· Align with Training· Align with research on public opinion	Communications Team	March 1
Attend HOW training programs <ul style="list-style-type: none">· Use research to inform messaging on other initiatives	ZAP-GL members	January & February

Components of the Position Document

- Physical Location
- Ambassadors (animals)
- Audience
- Credibility
- Media (Magnets) Expertise
- Educational Expertise
- Connections and Access
- Natural Collaborations, e.g., AZA

Background – Project and Activity Ideas

The following items were proposed during the Plenary Brainstorming Session at the ZAP-GL Annual Meeting on January 10, 2007. They are documented here for reference purposes.

- Inventory, track, and update strengths of our members
- Gather and reference audience research results from existing studies, in order to create greater understanding about our Institutions' guests (locally), MIRP Survey, website tracking, audience survey results, etc.
- Identify top threats to Great Lakes Ecosystem and focus our efforts accordingly (linked with the strategic area of science)

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- Healing Our Waters (HOW) and Biodiversity messages (February 2007); core group “on message” about the most effective way to get the word out
- Develop a resolution of ZAP-GL (bullet points about key issues of the Great Lakes), to help all our members, for instance, municipalities, demonstrate support for the Great Lakes’ principles
- When issues arise in the media, serve as spring board for actions, e.g., letters to the editor, etc.
- Develop news bulletins for media re: conclusions, actions, etc. related to the Great Lakes ecosystem
- Develop “founding” positions

FUNDING

Strategic Area: Funding

Team Leader: Stuart Strahl

Team Facilitator: Chicago Zoological Society/Brookfield Zoo To Hire by 3/15/07

Strategic Objective:

Get funding to meet the defined deliverables of ZAP-GL.

Goal:

Raise \$_____ in funds by December 31, 2008 to meet defined deliverables; and
\$_____ by December 31, 2011.

<u>What (Action)</u>	<u>Who</u>	<u>When</u> 2007
Establish a multi-institution team to raise funds	Stuart Strahl	TBD
Define specific deliverables for each strategic area (major projects and Plans of Action): <ul style="list-style-type: none">· Communications – Messaging· Evaluation· Science· Outreach – Education· Public Policy	Project Team for each Strategic Area	TBD
Identify the major donor and foundation prospects <ul style="list-style-type: none">· National· Regional	Funding Project Team to identify who is responsible	TBD
Cultivate Donors	Funding Project Team to identify who is responsible	TBD
Write Grants	Funding Project Team to identify who is responsible	TBD

OUTREACH

Strategic Area: Outreach

Strategic Objective:

Create public awareness of the issues associated with the Great Lakes, through shared messaging, programs, activities, and events.

Goal:

Develop joint public programs for 2007 – 2008.

Team Leader: Linda Troutman

Team: TBD

<u>What (Action)</u>	<u>Who</u>	<u>When</u> 2007
Identify key messages	TBD	TBD
Identify and share existing resources	TBD	TBD
Develop budget	TBD	TBD
Specify shared events and dates <ul style="list-style-type: none">· Story Contest – 2007· Earth Day - 2008· Great Lakes Awareness Day (GLAD) – 2008· World Water Day· International Coastal Cleanup	TBD	May 31 April 21. '07 TBD March 22 Sept
Great Lakes Awareness (GLAD) Tool Kits	TBD	TBD

Goal:

Develop a long-term Action Plan

Team Leader: JoElle Mogerman

Team: TBD

<u>What (Action)</u>	<u>Who</u>	<u>When</u> 2007
Develop and share common programs and activities, e.g., beach clean-up	TBD	TBD
Develop a timeline for implementation	TBD	TBD

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Goal:

Identify shared audiences and tailor key message to audiences.

Team Leader: TBD

Team: TBD

<u>What (Action)</u>	<u>Who</u>	<u>When 2007</u>
Identify ZAP-GL member audiences – who they are; their ages, examples follow: <ul style="list-style-type: none">· Shedd and Brookfield Zoo: families, schools, teachers, community organizations· Discovery World: adult programs, business partners, web based· Identify and document for each ZAP-GL member	TBD	TBD
Fine tune three messages per audience	TBD	TBD
Identify existing audience research	TBD	TBD

Background – Project and Activity Ideas

The following items were proposed during the Plenary Brainstorming Session at the ZAP-GL Annual Meeting on January 10, 2007. They are documented here for reference purposes.

- Summer 2007 Story Contest
- Develop and implement a traveling exhibit
 - The less infrastructure required, the better
 - Share graphic files
- Conduct same-day events, e.g., joint Earth Day, World of Water Day, create a Great Lakes Day, Bio Blitz, etc. (perhaps hold jointly)
- Produce attractive posters and other graphic designs
- A common Great Lakes Education Program (Alliance has one)
- Incorporate First Nations' traditional knowledge
- Celebrity promotion of Great Lakes issues, e.g., a musician or band
- Use existing aquatic exhibits to get the message out

ADDENDA

ADDENDUM A

STEERING COMMITTEE

Steering Committee

SC Leader: Stuart Strahl

SC Facilitator: CZS to hire by April 30, 2007

Committee Members:

- Ted Beattie (nominated at Annual Meeting; need to confirm interest)
- Scott Carter (Communications Team)
- Bill Rapley
- Larry Sorel (Science Team)
- Tom Adams (Policy Team)
- Alejandro Grajal (Science Team)
- Stacy Bennett (Communications Team)
- Deb Fassnacht (nominated at Annual Meeting; need to confirm interest)
- Bert Davis
- Jo-Elle Mogerman (Outreach Team)
- Linda Troutman (Outreach Team)
- Bert Vescolani (nominated at Annual Meeting; need to confirm interest)
- Greg Geise (nominated at Annual Meeting; need to confirm interest)

Note: Form the Steering Committee so that every state is represented.

ADDENDUM B

LIST OF ATTENDEES ANNUAL MEETING JANUARY 9-10, 2007

List of Attendees: Annual Meeting, January 9-10, 2007

Members

<u>Institution</u>	<u>Names</u>
Akron Zoo	Linda Troutman
Chicago Zoological Society/ Brookfield Zoo	Tom Adams Kathryn Abelson Alejandro Grajal JoElle Mogerman Stuart Strahl
Cosley Zoo	Susan Wahlgren
Detroit Zoological Society	Scott Carter
Discovery World	Steve Atwell Kate Morgan Candy Barone Todd Brennan
Lincoln Park Zoo	Steve Thompson
Milwaukee County Zoo	Bruce Beehler
Peoria Zoo	Yvonne Strode
Seneca Park Zoo	Larry Sorel
Shedd Aquarium	Stacy Bennett Deb Fassnacht
Toledo Zoo	Jay Hemdal
Toronto Zoo	Paul Harpley Dave Ireland Steve Jones Bill Rapley
Zoological Society of Milwaukee	Bert Davis

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Advisors

<u>Institution</u>	<u>Names</u>
Alliance for the Great Lakes	Stephanie Smith
Biodiversity Project	Peter Alexander
Healing our Waters	Chad Lord
National Wildlife Federation	Chris Grubb
The Nature Conservancy	Lois Morrison
University of Milwaukee – Wisconsin	Val Klump
UWM Great Lakes Water Institute	Charles (Tony) Remsen

Strategic Consultant & Facilitator

Capstone Consulting Group – Lori Pedelty

ADDENDUM C

OTHER PROJECT & ACTIVITY IDEAS

Other Project and Activity Ideas

The following items were proposed during the Plenary Brainstorming Session at the ZAP-GL Annual Meeting on January 10, 2007, and were not categorized with any of the five strategic areas in the Strategic Plan. They are documented here for reference purposes:

- Design and develop website or webpage with links to Great lakes information
 - Source for ideas
 - Source to inform about current projects and issues
- Partner with Seafood Watch
- Partner with River Associations
- Develop and launch ZAP-GL logo/identity
- Develop a database of stories, e.g., Great Lakes Town Hall has link at no cost that provides information
- Explore programs through videoconferencing
- Exploration kits for schools
- Develop ZAP-GL calendar of all the various important dates
- Use existing aquatic exhibits to get the message out
- Great Lakes newsletter articles provided to members (Toronto Zoo)
- Formally bring back and share results of ZAP-GL activities and meetings with our staff
- ZAP-GL members actively seek Great Lakes conferences