



program leader &  
education advisor handbook

# Integrating Education in Animal Programs: A Guide to Success for Program Leaders and Education Advisors

## **INTRODUCTION**

This guide has been created for program leaders of AZA Scientific Advisory Groups (SAGs), Species Survival Plans (SSPs), Red Studbook Programs, Taxon Advisory Groups (TAGs) and Conservation Action Partnerships (CAPs) who are interested in using education as one of their strategies for conservation, and for educators who are interested in applying their skills and experience to working with these Animal Programs.

Whether you are just starting or are already planning and working on projects, this guide will provide suggestions and tips for both program leaders and educators to work more effectively together. This guide will help program leaders to recruit an education professional to serve as an advisor to the program. Educators can use this guide to understand what is generally expected of an education advisor, and what to consider before becoming involved in this work.

We hope that this guide and other resources available on the AZA web site will help to facilitate Animal Program education initiatives that result in conservation outcomes.

## **Background**

In the early 1990s, a handful of educators were working in an advisory capacity with a few AZA Conservation & Science committees. In September of 1994 at the AZA Annual Conference in Atlanta, the first formal meeting took place between interested educators and members of SSP, TAG and FIG (now CAP) committees. A survey of all SSP, TAG and FIG chairs and all education Advisors was completed in 1997. Ultimately, this produced a database of education liaisons, which is still maintained, and a publication, *The Educator's Role on an SSP, TAG or FIG*.

In collaboration with educators, Animal Programs have produced many excellent education initiatives. Yet some partnerships have encountered challenges along the way due to an unclear role for the education advisor, or a lack of time, funding, planning or follow through. Others experienced a lack of continuity when an education liaison left the zoo/aquarium field. In 2008, surveys were again conducted of SSP, TAG and CAP program leaders as well as education liaisons (following up on the 1997 surveys) to learn how well these partnerships were working, and to assess needs for tools and assistance that could make them function better and be even more productive. Results of those surveys have informed the contents of this new guide for both program leaders and education liaisons, and have helped to plan online tools as well as training opportunities.

## **THE ROLE OF AN EDUCATION ADVISOR ON AN ANIMAL PROGRAM TEAM**

### **What could an Education Advisor do for an Animal Program?**

An education advisor will bring professional expertise to enable program leaders of Animal Programs to plan, implement and assess education initiatives. The primary objective of the education advisor is to assist with developing, distributing, and/or enhancing the environmental awareness programs that provide the foundation for the changes in attitude needed for conservation and stewardship practices. Many conservation education programs specifically target audiences to foster changes in behavior that promote sustainable resource use and habitat improvement, which ultimately benefit those communities.

An advisor can help program leaders determine the best direction for education efforts by proposing the appropriate audiences, program format, and media. The education advisor will then take the lead on creating and managing the education initiative. Examples of such collaborations include creation of web site content, education programs for zoo and aquarium audiences, and field-based programs. Education advisors have also helped Animal Programs obtain grant funding for education projects, assisted with public relations, and cultivated partnerships with other organizations.

### **What kinds of projects do education advisors do?**

Education advisors identify meaningful, doable education components of conservation initiatives. They develop programs at the regional, national, and international levels for a range of target audiences. Projects include:

- Curriculum and teaching kits for schools and children's programs
- Training of teachers or colleagues
- Creating interpretive messages
- Community outreach
- Content for exhibit graphics and interpretation
- Web site contents
- Multimedia programs
- Newsletters, activity guides, books and other publications
- Special events
- A clearinghouse for images and educational materials related to the SSP/TAG/CAP to make available to zoos and aquariums

### **A Successful Partnership**

The partnership between educator and program leaders requires commitment from both parties. An education advisor will assume the lead and be able to work independently on education projects; however, he or she will need the support of the Animal Program to be successful. While educators are aware of each program member's need to focus their attention on species management issues, program leaders and other members of the Animal Program can contribute ideas and information, establish connections with colleagues, and include the education advisor in the overall work of the group. These efforts will greatly enhance your education advisor's ability to meet the group's objectives. Like program members, the education advisor is a volunteer, so both parties need to be realistic about what can be accomplished in a given time.

### **Educators: What are the expectations for an Animal Program Education Advisor?**

An Animal Program education advisor serves as the champion for education within that group. While group members are committed to and supportive of education, this is not their field of expertise, and they must focus their attention on the management tasks they are charged with by the AZA Wildlife Conservation and Management Committee (WCMC).

Important tasks for the education advisor are to:

- Promote education as a priority on the group's agenda
- Ensure that the group is on task as needed with respect to education initiatives
- Work independently
- Follow through
- Keep the group informed
- Participate regularly in the group's listserv discussions

In addition, an education advisor may:

- Assist the group with strategic planning to determine its education priorities
- Keep members apprised of education trends
- Propose strategies to accomplish education objectives
- Establish and maintain partnerships to plan and implement education initiatives
- Manage the logistics of the program; and assess its effectiveness

Educators may also be asked to assist with obtaining funding for education projects or educational components of a project, and respond to media inquiries. Depending on the priorities of the Animal Program, this work may be done for AZA zoos and aquariums, be field-based, web-based, or a combination of all of these.

## **FOR EDUCATORS: BECOMING AN EDUCATION ADVISOR**

### **How to Apply**

1. Download and carefully read through this handbook. The handbook was created for this program by the AZA **Conservation Education Committee**.
2. Research available education advisor positions by visiting the **Animal Programs Search** page.
  - If the education advisor position for a specific program is filled, the position listing will be visible.
  - If the position is vacant, or is not available within that program, you will not see a listing for an education advisor. AZA members can access program leader contact information by logging in to the AZA website before performing a search.
3. Download the Education Advisor Application from <http://www.aza.org/education-advisors/>.
4. Send the completed Education Advisor Application to the Program Leader for the Animal Program of interest.

Individuals who are not members of AZA should contact **Brian Kutsch** ([bkutsch@birminghamzoo.com](mailto:bkutsch@birminghamzoo.com)) (205-397-3862) for Program Leader contact information. Program Leaders will determine how vacancies are filled.

### **Benefits to Educators**

- Contribute to wildlife conservation
- Collaborate with colleagues at other institutions
- Learn more about conservation practices in general and of species, taxa, or areas in specific
- Have the opportunity to work on a conservation project
- Professional development
- Develop education materials that can be used at any AZA institution
- Have an opportunity to travel
- Make new friends in surprising places

### **Things to Consider in Becoming an Education Advisor**

Requirements for an education advisor's participation vary among Animal Programs. However, most *prefer* (not necessarily require) that the education advisor attends either the annual meeting at the AZA Annual Conference, a mid-year working meeting, or both. This expectation should be discussed when you consider taking on the job of an education advisor. You will need to be a strong self-starter, be able to generate ideas, initiate education projects and see them through to completion. As you consider becoming an education advisor, you will want to:

- Assess if you have the time to take on the work of this committee. Your institution may or may not be able to allocate time for this in your job. If not, you will then be volunteering your time, which may be a considerable commitment.

- Determine whether your institution can provide the financial support to enable you to attend the Animal Program meetings. The likelihood of receiving support may be greater if the group is relevant to your institution's collection. The support you receive from your institution may increase over time as your involvement grows.
- Ensure that you have the approval of your Director and immediate supervisor (see a sample letter of support in Appendix A).
- Learn more about the issues and priorities of the Animal Program in which you are interested by attending a meeting at the AZA Annual Conference, speaking to a program leader, and/or checking the AZA's web site at [www.aza.org/animal-programs](http://www.aza.org/animal-programs).
- Decide whether you have the interest and enthusiasm for this species (SSP, Red Program), group (TAG, SAG) or geographic region (CAP) to keep you involved, motivated and rewarded.

### **Getting Started: Connecting with the Conservation Program**

Members of the AZA Conservation Education Committee (CEC) subcommittee on Education Advisors will monitor Animal Program teams. You may also be contacted by one of these subcommittee members to guide you in beginning communication with the program leader. This person will also be available to advise you as needed throughout your education advisory experience. Once you are in contact with the program leader of the Animal Program, you can ask for clarification about the group's education priorities, requirements, and any expectations for the educator.

If the Animal Program in which you are interested already has an education advisor and you have a strong interest in that group, you can contact the education advisor and the program leader to determine if you can join the team.

### **Forming a Relationship**

A good first step in your role as education advisor is to learn everything you can about the work of your group. Introduce yourself to group members by informing them of your skills and experience, and how you may be able to help the group advance its conservation work. When the group knows what you can do, they will have a better understanding of the possibilities and how to utilize your talents. They will then be better prepared to provide direction as needed.

### **Setting Conservation Education Goals**

If the group already has education priorities, you can propose options for accomplishing this work. If the group is just starting to think about education, they will be looking for your leadership. The experiences of both program leaders and education advisors show that the preferred option for decision making is to have the group and the education advisor work together to determine these priorities. Once you have this clear direction, you can then begin to work on education projects. The Objective Planning Form, Appendix D, can help you outline the program's goals and objectives, and determine target dates of completion.

### **FOR PROGRAM LEADERS: COLLABORATING WITH AN EDUCATION ADVISOR**

#### **How to Recruit an Education Advisor for your Animal Program**

To recruit an education advisor for your Animal Program, please download the Education Advisor Recruitment Request Form from <http://www.aza.org/education-advisors/>. Your responses to the questions will help the Conservation Education Subcommittee for Education Advisors to recruit an educator with the skills and experience that best meet the needs of your group. Please return the completed form to **Brian Kutsch**, Education Manager at Birmingham Zoo, who maintains the database, at [bkutsch@birminghamzoo.com](mailto:bkutsch@birminghamzoo.com). Brian will advertise the position via the AZA educators' listserv and refer applications from interested educators to you along with their contact information.

## Getting Started

Once you have invited an educator to join your Animal Program as the Education Advisor, you can begin with a meeting to discuss your group's specific needs and how you envision the education advisor's specific role. The more you can integrate your new advisor into the working of your group, the sooner he or she can begin the education work you need to have done. You can facilitate this progress by establishing the educator's role with the rest of the group and including the education advisor in listserv discussions and annual and midyear meetings. It will also be helpful to connect your education advisor with other colleagues who can provide information and support.

### **SETTING CONSERVATION EDUCATION GOALS: WHAT DO YOU WANT TO ACCOMPLISH?**

While the education advisor will be responsible for carrying out the education projects of your group, it is recommended that determining project priorities should be a collective decision.

**Strategic planning** will involve a decision-making process to choose among multiple urgent needs, and select priority species, habitats, or geographic areas. It is important for the program leaders and the educators to discuss the purpose of education initiatives, since different outcomes require different kinds of programs. The group may want to create community support by providing environmental education; increase knowledge and awareness of species or habitat conservation; influence attitudes; build capacity; or change behavior. Among the possible strategies, the program leader and educator will select the strategy that is right for the group and choose the appropriate audience(s). Establishing goals and objectives will enable both partners to have a clear understanding of what the Animal Program wants to accomplish. Use the Education Advisor Goals & Objectives Form found under the Resources section of the Education Advisor webpage (<http://www.aza.org/education-advisors/>).

### **Next, you need an implementation plan:**

- Identify the resources needed. Determine how you will find funding (whose role is it?).
- Think creatively about potential partnerships!
- Establish the project team. In addition to the role of the education advisor, what is needed from other Animal Program members, and what could program partners contribute?
- Set a *realistic* time line

## Education Advisors

Once you have the clear direction generated by strategic planning and have a plan of action for implementation, you will need to create a preliminary budget. Depending on your group's determination of how to find funding, you may need to take the lead on creating a funding proposal. A few additional things to consider are: the potential need to identify the needs of your audience; establishing criteria for evaluating your program's effectiveness; and having a plan to monitor if your project is on track.

As the group's education advisor, you will need to be proactive and take a leadership role in managing the project. It will be helpful to set mutually agreeable deadlines with other members of the project team and keep everyone on task while allowing for flexibility.

## Field Conservation Education

If you are planning a field conservation education initiative, refer to the document *Template for Beginning an In Situ Conservation Program* found under the Resources section of the Education Advisor webpage.

(<http://www.aza.org/education-advisors/>)

## **STAYING INVOLVED: TIPS FOR SUCCESS**

The 2008 survey asked program leaders and education advisors how they would improve what they do, and what they would do to improve what each other does. Every list advocated better communication!

**Communicate:** Program leaders and education advisors can establish a mechanism for checking in regularly with each other. For example, set up a periodic phone meeting to keep in touch, exchange information, and report on progress. Having that meeting on your calendar can help keep you on track. See Appendix E for a sample communication and reporting tool. Even if there are project delays or down time due to lack of funding, stay in touch. It is important to build a relationship. Communication is everyone's responsibility.

**Time:** Everyone wishes they had more time to spend on Animal Program work. Consider what can be accomplished and establish realistic timelines. Take time to celebrate small successes; you're making a difference!

The following are additional success tips for program leaders and education advisors, suggested by survey respondents:

### **Program Leaders**

- Provide direction and clear expectations
- Pave the way by integrating the education advisor into your group, connecting that person to others who can be helpful, and encouraging other group members to be responsive in providing requested data, images or other material as needed
- Provide support as needed by being open to new ideas, seeking funding, providing feedback, and acknowledging good work

### **Education Advisors**

- Actively participate in the Animal Program list serve discussions
- Be open to the ideas of group members regarding education
- Be proactive and take the initiative to move education projects forward
- Be organized about education projects and set clear timelines with the group
- Follow through with commitments
- Consider recruiting an education team to share the work and ensure continuity for the Animal Program if you or one of the other educators leaves the group
- Connect with other education advisors to exchange ideas and learn from each other's setbacks and successes. Participate in the AZA education advisors list serve.
- Integrate Animal Program education initiatives with participating institutions that hold species relevant to your group

## **LEARNING FROM OTHERS: EXAMPLES AND BEST PRACTICES**

For examples of successful education initiatives, see the Resources section of the Education Advisor webpage. Here, you can find:

- Profiles of highlighted Education Advisors
- Key conservation messages
- Sample activities

## **In Closing**

Every Animal Program is different. Personalities, personal experiences, and visions often drive each committee at different speeds and in slightly different directions. Every species, taxon, and conservation action group has different issues and different needs. No one handbook can explain the intricacies necessary to be an effective education advisor. The qualifications may vary from group to group but there seem to be some higher priority credentials. The candidate must have an enthusiastic interest in the Animal Program's species of concern and be knowledgeable in regards to its natural history and issues of concern. The candidate must be able to attend at least some of the Animal Program meetings, and preferably all of them. These would include the AZA Annual Conference and the mid-year meeting. The candidate should have the full support of their institution in this endeavor and must be willing to dedicate a minimum of one hour per week to the Committee's projects, and often times many hours per week when a particular project dictates that need. And finally, the candidate must be a strong self-starter, able to generate ideas, initiate education projects and see them through to completion.

We are all deeply committed to the same overall goal, the preservation of wildlife and wild places. Together we can help each other discover the best way to reach that goal. Keep connected to your fellow education advisors and you'll always be in good company.