

Situational Assessment

“Redesigning an Avian Education Program”

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Overview:

- This tool is designed to assist you in objectively reviewing the main aspects of your organization’s operation
- This tool assists in determining priorities to achieve high impact to effort

How to use the Situational Assessment:

1. Read the **Item** description and select the **Criterion** that most closely matches your situation on a **1-5** scale, using intermediate numbers where needed for more accurate definition
2. Record the **Score** in the right hand column and **Total** each **Category**
3. Determine the **% Score** by dividing the **Category Score** by the **Category Maximum Score**
4. Use the **% Scores** to determine priority areas
5. Refer to the **Needs Assessment** for specific areas of action

Disclaimer:

- This is a tool, meant to streamline the decision-making process for identifying priorities. It does not assess all possible variables or situations

Administration

Item	Rank	Criteria	Score
Mission & Leadership	5	<ul style="list-style-type: none"> • Everyone understands their role within a big picture or strategic vision • Clear mission with realistic expectations provided by administrators • Staff input is valued and solicited in decision-making 	
	3	<ul style="list-style-type: none"> • Mixed messages, expectations, or priorities; “mission creep” • Staff are resourceful in meeting their goals, without or without support from administration 	
	1	<ul style="list-style-type: none"> • Unrealistic or unclear vision, mission, and/or expectations • Staff input is not included in decision-making process • Different perspectives or critical feedback are not encouraged 	
Governing Body	5	<ul style="list-style-type: none"> • Governing body is active in oversight, planning, budgeting, and fundraising • Interacts with non-administration staff to understand their roles and impact • Engages in professional development to better serve the organization 	
	3	<ul style="list-style-type: none"> • Governing body is active, but may be ineffective • Limited engagement with non-administrative staff or impact 	
	1	<ul style="list-style-type: none"> • Governing body is nonexistent or functionally inactive • “De facto” governing body of certain staff • No outside structure for supporting organization in strategy, development, or evaluation 	
Funding Sources	5	<ul style="list-style-type: none"> • Diverse mix of income and funding streams; long-term financial stability • Endowments established • Major donor cultivation, annual giving, bequests, grants, and memberships • Minimum 3 months “Rainy day” fund/operation reserve 	
	3	<ul style="list-style-type: none"> • Some funding diversity, including long-term and short-term sources • Generally financially solvent, but needs to improve resource development • 3 month “Rainy day” fund 	

	1	<ul style="list-style-type: none"> • Limited income or funding diversity; too dependent on ephemeral sources • “Day-to-day” cash flow problems • No “rainy day” fund 	
Payroll & Benefits	5	<ul style="list-style-type: none"> • Competitive wages and salary • Competitive benefits • Ample vacation, flexible scheduling, and leave • In-house promotional opportunities - staff are trained for 	
	3	<ul style="list-style-type: none"> • Non-competitive, but liveable wages and salary • Benefits provided, but high cost to benefit • Vacation provided and some scheduling flexibility • Some in-house promotional opportunities 	
	1	<ul style="list-style-type: none"> • Undermarket wages and salary • No or high-priced benefits • No in-house promotional opportunities • No or limited vacation, schedule, or leave options 	
Finances, Permits & Recordkeeping	5	<ul style="list-style-type: none"> • Records are complete, up to date, and transparent • Budget is managed by a team using General Accepted Accounting Procedures (GAAP), with governing body oversight • Safeguards in place to avoid loss • All permits up-to-date • Filing deadlines are met 	
	3	<ul style="list-style-type: none"> • Records exist, but could use better detail and transparency • Budget is in order • Permits in place, information may be outdated • Deadlines are met 	
	1	<ul style="list-style-type: none"> • Records are incomplete, outdated, or missing • No GAAP; lack of transparency • No governing body oversight for budget • No safeguards for avoiding loss • Permits maybe missing or expired • Filing deadlines missed 	
Marketing	5	<ul style="list-style-type: none"> • Marketing plan, tailored to different audiences and platforms 	

	3	<ul style="list-style-type: none"> • Some marketing, but no defined plan 	
	1	<ul style="list-style-type: none"> • No marketing plan; primarily word-of-mouth 	
Administration Total Score			
% Score (Administration Total Score/30)			

References & Resources:

Accounting.com “What is GAAP?”. <https://www.accounting.com/resources/gaap/>. Web

Association of Nature Center Administrators. “Publications”. <https://www.natctr.org/services/publications>. Web

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National Council of Nonprofits. “Strategic Planning for Nonprofits.” <https://www.councilofnonprofits.org/tools-resources/strategic-planning-nonprofits>. Web

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Staffing

Item	Rank	Criteria	Score
Hiring Process	5	<ul style="list-style-type: none"> • Job postings are wide promoted • Search teams have practical understanding of the position needs and skills required • All staff have the opportunity to provide input or feedback some involvement in the hiring process • Active steps are taken to prevent unconscious bias 	
	3	<ul style="list-style-type: none"> • Job postings are casually shared • Multiple staff are involved in the hiring decision, but may possess limited understanding of actual position and skill needs • Cultural fit highly valued 	
	1	<ul style="list-style-type: none"> • No active recruitment effort • Cultural fit overshadows professional competency; unconscious bias is common • Limited staff involvement in the process 	
Staff Training	5	<ul style="list-style-type: none"> • Staff have solid mix of evidence-based theory and hands-on application, based on current best practice • Formal staff training process that ensures consistency and equitable staff opportunities • Experienced a variety of situations and are able to make quick, informed decisions • Staff are in regular communication with mentors and colleagues in the field to increase knowledge • External professional development opportunities are valued and encouraged 	
	3	<ul style="list-style-type: none"> • Some training protocols, but may be outdated or loosely followed • Staff cross-train either other • Limited opportunities for professional development • Some contact with professional colleagues and mentors 	
	1	<ul style="list-style-type: none"> • Staff have limited to no experience in animal care or training • No formal training process, inconsistencies may be common • May be learning as they go without direct or any supervision • No external support system (mentors, etc.) • Professional development opportunities not encouraged or valued 	

		<ul style="list-style-type: none"> • Tradition valued over current best practice (folklore husbandry) 	
Support personnel (Volunteers, seasonal staff, interns)	5	<ul style="list-style-type: none"> • Expectations and roles are clearly defined and consistent • Support personnel are trained and evaluated in the same manner as staff and follow the same protocols • Professional development and training opportunities are valued and encouraged 	
	3	<ul style="list-style-type: none"> • Most seasonal staff follow the same procedures. May be variance based on certain individuals 	
	1	<ul style="list-style-type: none"> • Seasonal staff operate under different rules or standards than staff, may be due to limited time, or long-term relationships with facility 	
Staff Communication & Interactions	5	<ul style="list-style-type: none"> • Leadership cultivates and role models a work environment where staff are expected to provide feedback and engage in open, honest conversation • Difficult situations are discussed directly and addressed in a timely manner 	
	3	<ul style="list-style-type: none"> • Some staff communication, but may be limited to informal groups • Lack of clarity in instructions or processes for challenging discussions and situations 	
	1	<ul style="list-style-type: none"> • Leadership models a lack of transparency • Information is inconsistently shared • Limited or no opportunities to engage in challenging conversations 	
Staffing Total Score			
% Score (Staffing Total Score/20)			

Staffing References & Resources:

Facilities & Housing

Item	Rank	Criteria	Score
Accessibility	5	<ul style="list-style-type: none"> • Facilities are accessible and convenient for all users • Animal care and hospital areas allow clean and efficient operations for staff and animals 	
	3	<ul style="list-style-type: none"> • Access varies, including both desirable and undesirable elements. 	
	1	<ul style="list-style-type: none"> • Access is inadequate for staff and/or visitors, impacting job execution or educational effectiveness 	
Condition	5	<ul style="list-style-type: none"> • Functional and safe • Minor repairs may be required, but overall condition is good. 	
	3	<ul style="list-style-type: none"> • Facilities are serviceable, but multiple or some major improvements needed in the near future • Minor safety concerns 	
	1	<ul style="list-style-type: none"> • Major improvements needed immediately • Major or multiple safety concerns 	
Animal Access to elements and/or species-specific environmental needs	5	<ul style="list-style-type: none"> • Appropriately-sized, species-specific enclosure • Full access to experience or avoid elements throughout the day - 100% of the time • Many environmental enrichment opportunities • Retreat areas are provided • Variety, including novel or rotating items 	
	3	<ul style="list-style-type: none"> • Some access to experience or avoid elements throughout the day - 50% of the time • Some environmental enrichment, but more needed 	
	1	<ul style="list-style-type: none"> • No species-specific design or undersized enclosure • No access to experience or avoid elements throughout the day - 0% of the time • Environmental enrichment is lacking • No escape areas/refugia for animals 	

Facility & Housing Total Score	
% Score (Facilities & Housing Total Score/15)	

References & Resources:

International Association of Avian Trainers & Educators. "Position Statement: Housing".

https://iaate.org/pdfs/Position%20Statement_Housing%202019.pdf. Web

Raptor Center Resources. "Facilities". <https://raptorcenterresources.wordpress.com/facilities/>. Web

Animal Care & Training			
Item	Rank	Criteria	Score
Collection Planning	5	<ul style="list-style-type: none"> • Collection plan is regularly reviewed and updated • Scenarios are discussed beforehand, and discipline is shown in the decision-making process 	
	3	<ul style="list-style-type: none"> • Some general guidelines or goals are noted, but informally 	
	1	<ul style="list-style-type: none"> • No collection plan 	
Care & Training Model	5	<ul style="list-style-type: none"> • Evidence-based training • Training procedures are continually updated as new information is learned • Application is consistent amongst staff 	
	3	<ul style="list-style-type: none"> • A mix of folklore and evidence-based approaches • May includes multiple, sometimes counter-productive philosophies and applications • Overall inconsistent 	
	1	<ul style="list-style-type: none"> • "Folklore husbandry" - "We've always done it this way," "It's tradition" • Not evidence-based • Inconsistent approaches 	

Health & Wellness	5	<ul style="list-style-type: none"> Wellness is proactive, including regular visual and behavior assessments Baseline radiographs or bloodwork for all animals Staff and veterinarians are accessible, well-trained and informed on general and emerging wellness issues Complete medical records for all animals 	
	3	<ul style="list-style-type: none"> A mix of approaches, often based on chronic needs Some staff and veterinary competency Most animals have accurate medical records 	
	1	<ul style="list-style-type: none"> Reactive approach to health care Individual health records may be incomplete or missing No formal wellness exam process Staff or veterinarians may lack necessary knowledge or be unavailable 	
Level of Empowerment	5	<ul style="list-style-type: none"> Uses Least Intrusive, Minimally Aversive techniques (LIMA) Antecedent arrangement is a major component of training Positive Reinforcement Training (PRT) is primary operant technique 	
	3	<ul style="list-style-type: none"> Limited choice and control options On occasion, may use some force to get animal to comply 	
	1	<ul style="list-style-type: none"> Animal is forced into participation Animal may exhibit escape or avoidance behavior, be lethargic, or respond aggressively 	
Nutrition & Supplements	5	<ul style="list-style-type: none"> Species-specific diets, including whole prey in carnivorous species (may be tidbitted) Stock is rotated from oldest to newest Supplements are provided 	
	3	<ul style="list-style-type: none"> Diet varies based on available resources, including budget or sourcing issues 	
	1	<ul style="list-style-type: none"> Diet is not species-specific and may include processed or human food (boneless chicken, burger, cooked vegetables and fruit) May be old or expired food No supplements 	
Enrichment	5	<ul style="list-style-type: none"> Enrichment is planned, is varied, and is species-specific All animals receive regular enrichment Enrichment is evaluated for effectiveness 	

	3	<ul style="list-style-type: none"> • Enrichment is offered but no formal plan, goals, and limited variety • Some animals receive enrichment, but not all • Enrichment is not usually evaluated for effectiveness 	
	1	<ul style="list-style-type: none"> • No enrichment is provided or may be unsafe or not species-appropriate • No evaluation if enrichment is provided 	
Food Management & Training Mechanics	5	<ul style="list-style-type: none"> • Food is prepared specifically for each animal • Amounts are recorded • Free-feeding, if used, is part of an overall training program • When used for PRT, food is delivered quickly and inconspicuously, unless to show specific feeding behaviors 	
	3	<ul style="list-style-type: none"> • Feeding amounts generic and/or not recorded • Food is delivered as reinforcement for desirable behaviors 	
	1	<ul style="list-style-type: none"> • Strictly free-feeding; food is not used as reinforcement • Amounts not weighed or recorded 	
Weight Monitoring	5	<ul style="list-style-type: none"> • Animals voluntarily provide regular weights and are in good health • Diets prepared based on behavior 	
	3	<ul style="list-style-type: none"> • A mix of approaches or conditions 	
	1	<ul style="list-style-type: none"> • Animals are rarely or infrequently weighed and may be forced into it • Animals are managed to a weight rather than behavior or condition • May be under or overweight or have poor conditioning 	
Husbandry	5	<ul style="list-style-type: none"> • Regular, effective cleaning and disinfecting • Leftovers and soiled areas are quickly removed or cleaned • Very limited conditions for bacteria or parasites to thrive. 	
	3	<ul style="list-style-type: none"> • Some cleaning, but more needed 	
	1	<ul style="list-style-type: none"> • Cleaning is infrequent or ineffective • Perches and bedding areas are dirty and may harbor parasites • Food and other items left to rot or attract pests 	

Animal Care & Training Total Score	
% Score (Animal Care & Training Total Score/45)	

Animal Care & Training Resources & References:

Association of Zoos & Aquariums. "Animal Care Manuals". <https://www.aza.org/animal-care-manuals>. Web

Chance, Paul. 2009. Learning and Behavior. Wadsworth, Cengage Learning, Belmont, CA, USA. ISBN10: 0-495-09564-8, ISBN13: 978-0-495-09564-4

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Ramirez, Ken, Editor. 1999. Animal Training: Successful Animal Management through Positive Reinforcement. John G. Shedd Aquarium, Chigo, IL, USA. ISBN: 0-9611074-9-9.

Education

Item	Rank	Criteria	Score
Educational Animal Engagement	5	<ul style="list-style-type: none"> • Animal voluntarily demonstrates species-specific behaviors in direct or indirect contact with staff (chooses to interact with staff, when doing so) 	
	3	<ul style="list-style-type: none"> • A mix of stress and comfort behaviors 	
	1	<ul style="list-style-type: none"> • Animal is used as a static prop (restrained in place) • Stress (avoidance behaviors, darting looks, drooped wings, bating, etc.) instead of comfortably performed species-specific behaviors, 	
Educational Messaging	5	<ul style="list-style-type: none"> • Programs provide clear, concise, and reinforced conservation messaging • Achievable, take-home conservation behaviors are provided to the audience (ex. composting, community/citizen science, volunteering) • Word choices are deliberate, accurate, and consistent with messaging 	
	3	<ul style="list-style-type: none"> • Program includes general conservation information, but limited or impractical conservation actions • Some word choices are deliberate or inconsistently applied 	
	1	<ul style="list-style-type: none"> • Focus is on information sharing, with very limited conservation connections • Word choices are inaccurate or confusing (ex. Injury vs. disability) 	
Educational Evaluation	5	<ul style="list-style-type: none"> • Regular program evaluations conducted, with audiences and by peers • Effective feedback shapes future programming 	
	3	<ul style="list-style-type: none"> • Some evaluation, but may have limited effectiveness or not incorporated 	
	1	<ul style="list-style-type: none"> • No program evaluations or ineffective if conducted 	
Exhibits & Signage	5	<ul style="list-style-type: none"> • Clear wayfinding signs, providing important visitor services information • Identification signs are concise and accurate • Conservation & other animal-related signs are clear and concise 	

	3	<ul style="list-style-type: none"> • Signage exists, but may be outdated or in disrepair • Signage may be too wordy or messaging is unclear 	
	1	<ul style="list-style-type: none"> • Wayfinding signage or exhibits are missing 	
Education Total Score			
% Score (Education Total Score/20)			

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