

AZA Guide to Developing and Implementing Animal Training Records

What is a “training session”?

Although every interaction can impact behavior, for the purposes of this document, a training session is a purposeful interaction where a keeper, care specialist or trainer approaches an animal/enclosure with an intent to practice or develop specific behaviors with the animal(s) present. Every team is encouraged to discuss and define what they consider a training session or how to classify sessions within their records system.

Why Keep Animal Training Records?

Training records capture key information and should show what happened during a single training session as well as provide cumulative records of sessions to look at trends or historical patterns. They are also a useful tool in planning future sessions. Best practice is to review the previous training session records prior to beginning a new training session. Records should be regularly reviewed by managers and trainers and discussed in order to receive the following benefits.

Training records have numerous benefits, which include:

- Capturing the outcomes of training sessions
- Improving consistency between trainers
- Highlighting patterns in training
- Summarizing developmental behaviors planned in a training program
- Maximizing training efficiency

Training records can be used to:

- Monitor behaviors during the introduction of new training or scenarios
- Identify time taken to train a new behavior to completion
- Facilitate early identification of behavioral changes
- Encourage trainers to share best practices to overcome training challenges and actively seek advice from colleagues

- Identify common training trends
- Assist continual monitoring of an individual animal's overall well-being and training program

What to Include:

The table below describes some of the recommended training details that a facility or team may want to capture in their training records and why. Each facility needs to determine what kind of information they specifically want to record and track.

Detail	Explanation	Notes and Examples
Date	Creates a timeline. Allows monitoring of when behaviors were last trained and how long training projects have taken. Helps identify seasonal trends or pinpoint patterns of successful or unwanted behaviors.	Highlight key dates such as when a new behavior was started, changes to enclosure or social group, changes to training team, etc. can be helpful for quick reference or clarity.
Time	Helps recognize patterns or monitor trends.	Motivation may differ at certain times of day or keepers might unknowingly create patterns that influence anticipation.
Duration of session	Helps monitor trends. Start and end time of the session are based on the facility or team definition of 'training session'.	Motivation may differ with various session duration. This can also help you identify if session length is impacting learning or look for trends to work through, particularly for duration behaviors.
Name of trainer	Identifies the trainer who worked the session. This is especially important when several trainers work the same animal. Allows	It might be useful to record all trainers present in case a specific trainer's presence is impactful.

	accountability for the session. Helps track trends with different trainers.	
Animal(s) involved	Identify individual(s) that are a part of the training session. Depending on the situation, a training record can be filled in for each individual or per group; this will depend on the behavior and the way the group is managed.	Might record species, individual name, individual number, etc.
Species	Ensures records are recorded in the correct animals' record if/when multiple animals in a facility have the same name.	This might be already included in your digital records system.
Location	Tracks where each session took place to track trends or problem solve if issues arise in specific locations.	Could be the exhibit name or detailed locations; ensure the entire team agrees on the name of the location referenced and that future teams will be able to identify them.
Type of session	Helps track the frequency of sessions and adjust/prioritize the types of sessions an animal is receiving.	Husbandry/cooperative behaviors, show or presentation behaviors, tours or guest interaction, new behaviors, relationship building, free feeds.
Specific aim/goal of session	This can be in addition to session type and can add more specific information.	Depending on how the data is used, it may be useful to record when introducing a new trainer or having a new trainer work a specific behavior. It may also be a useful note if the session goal was exercise, husbandry, public demonstration, etc.
Reinforcers used	Can be important in monitoring trends such as what some animals train best for or if they are motivated for certain reinforcers. Motivation may differ with various reinforcers.	Primary or secondary reinforcers used (i.e., carrots, apples, red ball, paper towel play, access to conspecifics, etc.)
Equipment/props used	Helps to give a full picture of the techniques and devices utilized.	Target pole, station markers, environmental set-up or furniture, secondary trainers or guests,

		veterinarians or medical equipment.
Behaviors achieved/shaped	Helps to track when behaviors were last trained or frequency of asking for behaviors.	Specific behaviors worked during a session such as station, up, sit, etc., or could be categories of behaviors such as husbandry, maintenance/completed behaviors.
Approximation worked on or notes for next session	Allows training to progress quickly by preventing the same approximation from being repeated by multiple trainers or to remind the trainer where they left off in the training plan. This is especially important if multiple trainers are working on the same behavior. It is recommended that only one trainer train each new behavior, but there are sometimes situations where this is not possible.	If a written plan is submitted, the trainer can reference the step number or could describe the behavior in progress and any challenges that should be focused on for the next session. Prior to beginning a training session, a trainer should have a clear idea of what behaviors they will be working on during the session including the approximations.
Behavioral rating	Tracks behavior by developing an objective rating system. Assigning a ranking for a session will help to monitor trends in the animals' attentiveness and interest in sessions. It is ideal to try to set criteria that allow the rating system to be standard among all trainers working together (Ramirez, 1999).	See appendix for examples.
Motivational rating	This can be combined with behavioral rating or applied separately.	See appendix for examples.
Food related rating	This can be combined with behavioral rating or applied separately.	See appendix for examples.
External factors	Tracks factors that might have influenced behavior or session progress.	Environmental conditions (e.g., temperature, humidity, wind speed) Any unusual disturbances present (e.g., new people, machinery, other animals)
Additional information	Note anything that the team thinks might be relevant or useful for additional communication.	Other trainers present Observers present

		Breeding season Other animals present Guest(s) present (ex: training new behaviors on exhibit or for a behind-the-scenes tour) Any aggressive or unusual behaviors seen (could also be in Comments section) Cite if videos or recordings of session were made.
Comments	Important to include a place to note the progress or setbacks encountered during a session, especially if records are checkboxes or ratings.	Capture categories in this chart that are not specifically noted in your records system.

Methods of Record Keeping

The table below summarizes some of the various ways that animal training records may be kept. The use of a standardized training session record template within a facility will help to maintain consistency in what information is recorded. However, different teams might need different types of records based on skill, accessibility of information, infrastructure, etc., particularly in early stages of record keeping. It is possible to change records style and information collected by a team or facility as they work through the process.

Format	Benefits	Limitations
Handwritten paper records - diary per animal/species/habitat	<ul style="list-style-type: none"> • Easy to set up and low cost • Requires no computer skills • Easy to capture complex information (e.g., long written descriptions) • Permanent hard copy 	<ul style="list-style-type: none"> • Not always accessible at time or location of session • Time consuming to record all of the training session and outcomes • Difficult to standardize information recorded between sessions and across people • Difficult to analyze and identify trends

		<ul style="list-style-type: none"> Physical storage space required
Typed records - Word, Google Docs, etc.	<ul style="list-style-type: none"> Easy to set up and low cost Permanent hard copy with data stored in cloud Easy to access and maintain on a computer Little/no licensing or storage fees Searchable using keywords Can contain prompts or guidance on information input (i.e., fillable form) Easy to add photos and some video files 	<ul style="list-style-type: none"> Requires computer skills Requires access to a digital device (e.g., tablet or computer) Potential for devices to fail or for information to be lost during training sessions if not stored on cloud Needs to be stored for multiple people to access Limited ability to view graphs Limited ability to analyze entries
Spreadsheets - Excel, Google Sheets, etc.	<ul style="list-style-type: none"> Easy to set up, low cost and can be visually informative Permanent hard copy with data stored in cloud Easy to access and maintain on a computer Little/no licensing or storage fees Searchable using keywords Efficient in inputting information (e.g., select options) Tailored with specific details required Can contain prompts or guidance on information input Easy to standardize the information recorded between sessions, across people 	<ul style="list-style-type: none"> Requires computer skills Requires access to a digital device (e.g., tablet or computer) Potential for devices to fail or for information to be lost during training sessions if not stored on cloud Needs to be stored for multiple people to access Can be hard to record on a personal device Hard to add additional information (e.g., photos or videos) Need to manually set up the analysis before assessing trends Need knowledge of writing formulas and formatting to increase value of records
Survey format - Google Forms, Survey Monkey, Microsoft Forms, etc.	<ul style="list-style-type: none"> Easy to record on a digital device regardless of location (e.g., mobile phone or computer) Efficient in inputting information Stored in cloud 	<ul style="list-style-type: none"> Need an account to utilize Requires computer/internet access or data plan for your device Requires suitably secure digital storage space Often requires Wifi

	<ul style="list-style-type: none"> • All types of data can be viewed and compared in one place • Basic data can be analyzed quickly to assess progress or trends in training 	
Records keeping software - ZIMS, Tracks, Animal Care Software	<ul style="list-style-type: none"> • Can input a wider range of data types (e.g., videos of training) • All types of data can be viewed and compared in one place • Template Notes can be made to ensure specific questions are always answered/used • Records can be transferred to other facilities with the same product 	<ul style="list-style-type: none"> • Needs institutional account, computer skills/access • Needs to be built out specifically for each animal/team • ZIMS - Does not yet have a mobile version for handheld devices • Requires data to be entered into appropriate categories, can be difficult to enter feeding, medical notes and training records collectively • Can be difficult to change records systems in the future

Appendix: Training Records Template Examples

Example 1:

Animal Training Record

Date	Time	Location	Reinforcement	Behavior(s)	Initials	Rating	Time taken	Comments

Ratings:

5 = perfect session

4 = above average session

3 = normal average session (should be the most common rating)

2 = below average session

1 = extremely poor session

0 = chose not to participate

Example 2:

Name: _____ Date: _____ Species: _____

Date	Daily Food Intake	Food Rating**	Behavior Rating**	Reinforcers used	Comments***	Initials

** Rating: A - Excellent; B - Above Average; C - Average; D - Poor; E - Very Poor

*** Comments to include: Molting (Start & Finish): Breeding Behavior: Aggression (Towards keepers/other seals)

Food Motivation:

A – Excellent: Very hungry, appears to want more food at the end of the day, eating very quickly, no hesitation with any food

B – Above Average: Hungry, eating slightly faster than normal, could have taken more food at the end of the day, no hesitation with any food

C – Average: Ate all food given, no chomping, no dropping, no playing with any food throughout the day

D – Poor: Doing any of the following things: Dropping food, playing with food, being fussy with certain food types

E – Very Poor: Eating little or no food all day.

Behavioral Motivation:

A – Excellent: All behaviors cued met all criteria and responded very quickly. Very alert and focused. New behaviors were progressing very quickly. No aggression to trainers or other animals.

B – Above Average: majority of behaviors met criteria and responses were faster than normal. Alert and focused. Certain behaviors may be better than normal e.g., higher back flip. No aggression to trainers or other animals.

C – Average: Majority of behaviors met criteria. Responses to cues were within an acceptable time frame. No unwarranted breaking from stations. No aggression towards trainers or other animals.

D – Poor: Any of the following: Several behaviors not meeting criteria throughout the day. Slow responses to cues. Unwarranted breaking from stations. Not alert or occasionally losing focus. Any aggression towards animals (during sessions) or trainers. If only one session is poor or only one specific behavior is being difficult, it would be permissible to give a C/D.

E – Very Poor: Significant deliberate act of aggression e.g., a bite. Or, not responding to trainers at all, or only responding aggressively.

Example 3:

Progress Chart

Animal _____ Start Date _____
Behavior _____ Completion Date _____
Trainer _____ Month _____

Day	No. Sessions	Motivation (1-4)	Approx no.	Criteria %	Comments

Session Rating Scale

0 - Did not acknowledge your presence, possibly did not know you were there.

1 - Acknowledged that you were there, then completely ignored you. Any session which included aggression of any kind. Any escape/fly off.

2 - Completed some of the behaviors asked for or needed multiple cues for most behaviors and/or completed on first cue with serious issues with latency and/or intensity.

3 - Completed many behaviors on first cue or second cue, some issues with latency and/or intensity.

4 - Completed most behaviors on first cue with great intensity and without any latency.

5 - Completed all behaviors on first cue with great intensity and no latency. Did not do any random sampling.

Example 4:

If using Excel or Google Sheets, you can create drop down menus or add color coding, etc. to make it more user friendly.

Date	Time	Keeper	Animal(s)	Behavior(s)	Score	Notes

Example 4.1:

This version has a different tab for each animal and lists all the known or in-progress behaviors across the columns. Each row is a day, so you just put a rating in the column for each behavior on the day it was worked (rating scale explanation below).

Date	Behavior 1	Behavior 2	Behavior 3	Behavior 4	Behavior 5

Example of a rating scale & explanations:

0 – Animal doesn't participate in session

1 – Minimal engagement - Low motivation or very unfocused; Takes a long time to engage; Leaves session and doesn't return; Minimal focus; Offering unasked behaviors; Performing asked behaviors at low criteria; Refuses to engage in asked behaviors; Aggression towards conspecifics or keepers

2 – Low performance - Low motivation or unfocused; Takes a long time to engage initially, but once engaged participates; Leaves session but returns; Occasional breaks in focus; Discriminates which behaviors they'll engage in; Discriminates reinforcement (i.e., only participates for 'good' food)

3 – Average performance - Ready to participate in session when asked; Good focus & criteria; Completes behaviors on 1st or 2nd cue, maybe not great intensity or with a delay; Minimally offering/anticipating behaviors

4 – Very good performance - Ready to participate in session when asked; Strong performance & focus but occasionally anticipation or distraction; Completes most behaviors on first cue with great intensity, no delay

5 – Excellent performance - Amazing in every way