

## Regional Species Planning & Management

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### 1. Purpose

This Policy establishes an effective, accountable and transparent framework for ZAA regional species planning and management amongst Association members, non-members and other Recognised Regional Associations. It ensures a collaborative, consultative, best practice approach to support demographically viable and where possible, genetically sustainable populations in the Australasian region. In the case of threatened species that are the focus of recovery efforts, it ensures that their regional populations support the delivery of tangible conservation outcomes as required, as well as the delivery of consistent educational and advocacy messaging.

### 2. Scope and exemptions

This Policy applies to all identified TAG Priority Species and TAG Interest Species. Exemptions apply to certain parts of the Policy.

### 3. Policy Statement

The Association supports the objectives and intent of all relevant prevailing National, state, and territory environment, biosecurity and welfare legislation and the authorities responsible for regulation of these matters.

The Association supports the objectives and intent of international multilateral environmental agreements including the Convention on International Trade of Endangered Species of Wild Fauna and Flora (CITES), the Convention on Biological Diversity (CBD) and its supplementary protocols, the Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilization; and the Cartagena Protocol on Biosafety.

The Association provides Association Members access to species planning and opportunities to participate in ZAA administered SMPs. Association Members are encouraged to actively participate in TAGs. TAGs will assess and analyse species populations, reach agreement on preferred priority and non-priority species. TAGs will recommend the Species Role, including opportunities to support conservation outcomes, and the required level of management, including the need for a formal ZAA SMP. Consideration of conservation priorities (e.g. the needs of formal Recovery Programs) and global zoo population requirements (including consultation and coordination with other recognised regional associations) will occur to inform recommendations. Association Members will provide information about species populations housed at their organisation, and planned species numbers to support the regional species planning processes.

The AMC will consider TAG recommendations for ZAA SMPs. The relevant TAG will reach consensus on the recommended Role and level of Management Strategy for the species. Management Strategy is guided by the agreed Species Role and current population status. Based on the TAGs recommendations, the AMC will determine whether there is a need to establish/discontinue a ZAA SMP or change the management strategy. (See: Position Description and FAQ Sheet for ZAA SMP Position Holders).

The Association supports a consultative, collaborative approach to species planning and management, informed by analysis and advice from the relevant SMP Position Holders, and with support from the relevant TAG Co-conveners and ZAA Executive Team as required. This approach is used to generate Endorsed Plans and Recommendations designed to ensure the longevity of species populations in the region that contribute to biodiversity conservation through associated conservation recovery, advocacy and science activities. Position Holders will give due consideration to genetic and demographic targets for each species as well as individual and group welfare, and resource capacity and commitment of both source and recipient Association Members. Association Members agree to support requests of a Species Coordinator supporting the plan and to implement all endorsed recommendations.

The Association supports Association Member participation in ZAA SMPs only where current best practice can be met for a species, with consideration given to facilities (including capacity to progress transfers and introductions), expertise, population genetics and demographics and where the provision of ongoing positive welfare experiences will be provided.

Association Members commit to aligning their institutional species plans (including planned species/specimen acquisitions, dispositions, transfers and breeding) with TAG-endorsed regional approaches that are representative of membership as advised by the AMC, the TAGs and ZAA SMP Position Holders.

Association Members commit to incorporating their existing animals into ZAA SMPs on the advice of the AMC or their elected delegate.

Association Members commit to implementing endorsed recommendations and plans only. If endorsed recommendations or plans cannot be implemented for any reason, the Association Member will inform the relevant Species Coordinator as quickly as possible.

The Association strongly encourages Members to work closely with the relevant species coordinator and TAG, and to make every attempt to transfer managed species to/from other ZAA Members. The Association does not usually support the transfer of RSP species to non-members unless it supports the program's goals. This includes transfers to other WAZA-affiliated regional zoo association programs and recovery programs.

Association members that seek to temporarily or permanently remove an animal from the breeding population of a ZAA SMP must obtain approval from the AMC prior to actioning (with the exception of events such as euthanasia or permanent contraception to address an immediate welfare concern, such as trauma or birthing difficulties). The AMC will consider the requests to permanently remove an animal(s) from a ZAA SMP when the removal will support positive welfare outcomes and program goals. The AMC does not support practices such as permanent contraception to enable participation in Animal Visitor Interactions, or for housing in atypical group structure.

Association Members that want to temporarily or permanently contracept a SMP Animal must seek approval from the Species Coordinator (in cases of temporary contraception) or AMC (in cases of permanent contraception) prior to actioning, with the exception of medical emergencies (in these cases, the Species Coordinator must be advised as soon as practical after the event).

The Association considers that exhibited animals and animals housed for the purpose of exhibition and conservation breeding are not used primarily for commercial purposes and are transferred in keeping with the ZAA Animal Transfer Policy on a gratis loan basis. The Association and its members acknowledge the costs involved in animal transfers and imports to support program goals. For some species consideration may be given to a cost share/cost recovery model to support participants with ongoing logistics costs.

Prior to any scenarios in which Association membership is withdrawn, lapsed or terminated, the Association Member Director commits to planning and implementation of agreed plans with the AMC and ZAA Executive Team on disposition of any animal(s) that form part of ZAA SMPs.

If an Association Member becomes insolvent or enters administration, the Association Member Director or their delegate commit to planning and implementation of agreed plans with the AMC and the ZAA Executive Team to ensure that any animals received through ZAA SMP participation are appropriately homed.

The Association requires that members acquiring regional species program animals commit these animals to the stewardship of the program. In the above circumstances, all ZAA SMP Animals received or descended from animals received as a benefit of membership with the Association, or those received through participation in another regional program will be repatriated back to the Association for distribution within the relevant program on advice from the relevant Position Holder/s. In these circumstances, stewardship of animals is transferred from the holder to the ZAA SMP on a gratis loan/donation basis.

For scenarios in which membership is withdrawn, lapsed or terminated, or the Member is otherwise insolvent or enters administration, at the request of the Director/CEO/Owner, their delegate or the Administrator, the Association will provide guidance on the placement of non-Program animals.

For scenarios in which membership is withdrawn, lapsed or terminated, or the Member is otherwise insolvent or enters administration, all ZAA SMP Animals received or descended from animals received as a benefit of membership with the Association will be repatriated back to the Association for distribution within the relevant program on advice from the relevant Position Holder/s. In these circumstances, stewardship of animals is transferred from the holder to the ZAA SMP on a gratis loan/donation basis.

For scenarios in which membership is withdrawn, lapsed or terminated, or the Member is otherwise insolvent or enters administration, and where animals have been received or are descended from animals received through participation in a program managed by another regional association, the Association will seek guidance from the relevant regional association.

Any issue/concern which arises that is not covered by this Policy, but falls within the purpose of the Policy, will be included and addressed by the Board of the Association, or their delegate, in the best interest of the Association and its membership.

## 4. Responsibilities

### 4.1 Compliance

The Director or their delegate of an Association Member will ensure that all species planning and species management processes involving their institution shall satisfy the requirements of this Policy; the requirements of all relevant prevailing international, national and state legislation; and all related ZAA Policies and Procedures, and the ZAA Code of Conduct, are met.

Where an Association Member becomes insolvent or enters into administration, the Association Member will ensure that the Administrator is aware of this Policy and commitments outlined herein.

### 4.2 Reporting

Reporting to the ZAA Executive Team is required where Association Member activity conflicts with any aspect of this Policy, or ZAA Procedure, or AMC/ZAA Recommendation. The Director/CEO/Owner of an Association Member or their delegate is responsible for reporting such variances to the ZAA Executive Team.

The AMC reports to the Association Board on ZAA Species Management Program developments and any breaches to this Policy and/or its associated ZAA Procedures.

### 4.3 Records Management

The ZAA Executive Team is responsible for maintaining records on any breaches to this Policy and/or its associated ZAA Procedures.

The Director or their delegate of an Association Member is responsible for systems/procedures that provide for accurate and current record keeping relating to species housed at the institutions (e.g. CPOS, ZIMS).

The Policy acknowledges that individual Members own animal records and associated information relating to their organisation, and that the Association provides a custodian role for data that is used to support species planning and management.

#### 4.4 Issue resolution

Should any conflicts arise, every attempt should be made to resolve these in the first instance through consultation with the relevant Species Coordinator and TAG Co-Conveners. Where the Association Member(s) is/are unable to resolve such conflicts, assistance should be sought from the ZAA Executive Team, and may be elevated to the AMC, or through the Association's Complaints Policy framework.

## 5. Related Documents

This policy is to be read in conjunction with the following policies, procedures and guidelines of the Association:

- Policy – Animal Transfers
- Terms of Reference – Animal Management Committee
- Position Description and FAQ Sheet for ZAA SMP Position Holders

## 6. Terms and Definitions

**AMC:** Animal Management Committee, a committee of the Zoo and Aquarium Association Australasia (ZAA).

**Association / ZAA:** Zoo and Aquarium Association Australasia.

**Association Member:** A regional member of the Zoo and Aquarium Association Australasia (ZAA).

**CPOS (Census and Planning Online System):** ZAAs central database that is used for institutional and regional species planning.

**Endorsed Plan/s:** Endorsed plans are developed by the Species Coordinator and TAG, approved by Institutional Representatives, and published by ZAA. These include TAG Regional Species Plans and Captive Management Plans.

**Endorsed recommendation/s:** Breeding and/or transfer recommendations (Annual Report & Recommendations) for a particular ZAA SMP. Endorsed recommendations are supported by TAG Representatives and published by ZAA.

**Host Institution:** ZAA Member that hosts a ZAA SMP.

**Institutional Representative:** A person who represents an Association Member and is accountable for actions of that Member, usually the Chief Executive, Director or Owner. This person approves Endorsed Plans.

**Insolvent:** Unable to pay debts owed.

**Lapsed:** In the context of ZAA Membership, refers to the membership status of a member having become invalid due to expiry and non-renewal as per *Member Policy* and *Association Constitution*

**Management Strategy:** Practices and approaches utilised to manage a species.

**Non-SMP Species:** A species for which there is no formal ZAA SMP facilitated by the Association.

**Permanently annexed individual:** An animal that has been approved by the AMC to be permanently removed from a ZAA SMP. Removal may occur via physical removal, including euthanasia, or through permanent contraception. *See also, Temporarily annexed individual.*

**Point-of-difference species:** A species that is not prioritised by the TAG. Generally, these are housed in low numbers and have no impact on delivery of the TAG Regional Species Plan.

**Program Species:** A species for which there is a formal ZAA Species Management Program (ZAA SMP) facilitated by the Association.

**Recognised Regional Association:** A zoo/aquarium association that is a member of the World Association of Zoos and Aquariums (WAZA).

**Regional Species Plan (RSP, formerly intensity Plan):** A component of the ZAA Census and Planning Online System (CPOS) which publicises the role, management intensity and plans for each TAG Priority Species in the Australasia region.

**Role:** The primary reason for which a species is included in a ZAA TAG Regional Species Plan.

**Specialist Advisory Group (SAG):** A ZAA group providing specialist advice to ZAA Members on a particular area of expertise.

**Species Coordinator:** The primary manager of a specific ZAA SMP.

**Species Management Program (SMP):** An animal program administered by ZAA.

**Species Role:** The function of the species in the Regional Species Plan.

**SMP Animal/s (i.e. Program Animal/s):** An animal/s participating in a ZAA SMP. Generally, these animals are housed by ZAA Member institutions, however there may be rare exceptions where non-ZAA members hold ZAA SMP Animal/s.

**SMP Position Holders:** A person who holds a formal position associated with the delivery of the Association's species planning and species management activities. Positions include Studbook Keeper, Species Coordinator, Taxon Advisory Group Co-Convener, Director Conservation & Population Management, Conservation & Population Management Officer.

**Studbook Keeper:** A person who maintains a studbook to support a ZAA SMP.

**Taxon Champion:** A person nominated informally by the TAG as the primary contact for a species or group of species for which there is no formal ZAA SMP.

**Taxon Advisory Group (TAG):** A group comprising TAG Representatives from all Regional Association members having interest in a particular taxon. The group also includes the ZAA Director, Conservation & Population Management and Conservation & Population Management Officer.

**Taxon Advisor Group Co-convenor:** Taxon-specific technical expert charged with facilitating advisory group operations.

**TAG Interest Species:** A species in which the TAG has expressed interest but does not formally manage as a SMP. These species fall within Type 3 of SMP management intensity levels.

**TAG Priority Species (Priority Species):** A species that the TAG has identified as a priority. These species form a part of the TAG Regional Species Plan.

**TAG Representative:** A person who represents an Association Member on a particular Taxon Advisory Group and is the key contact for that Member in terms of maintaining contact and negotiating breeding and transfer recommendations with a species coordinator. This role also endorses Annual Reports and Recommendations on behalf of their institution.

**Temporarily annexed individual:** An animal that has been approved by the AMC to be temporarily removed from a Program. Removal may occur via loan to a non-ZAA member for breeding or research. *See also, Permanently annexed individual.*

**Terminated:** In the context of ZAA Membership, refers to scenarios in which membership status is ended on decision by the ZAA Board.

**TUATARA:** ZAAs regional population planning, assessment, and reporting tool.

**Withdrawn:** In the context of ZAA Membership, refers to the removal of the Member from the ZAA Membership, by choice of the Member.

**ZAA Executive Team:** The Executive Team of the Association, providing support to Association Members and operations.

**ZAA Procedure:** A ZAA Procedure developed in conjunction with the relevant ZAA Committee, to which adherence is mandatory.

## 7. Approval and Review Details

Approval History	Details
Approval Authority	Association Board
Relevant Committee and/or Stakeholders	Animal Management Committee (previously the ASMP Committee)
Original Approval Date	09/06/2020
Last Review Date	08/08/2022
Next review date	08/08/2027

This document should be reviewed within five (5) years of the date of approval or last review.

Amendment History Approved / Amended / Rescinded / Reviewed	Authority	Date [DD/MM/YY]	Description / Notes
Approved	ZAA Board	08/08/2022	Provide clarity on a number of terms and additions to further clarify intent of the Policy
Approved	ZAA Board	01/02/2021	Three clauses were adjusted to better support the program's vision "viable species, now and in the future"
Approved	ZAA Board	15/03/2021	Updated terminology (eg, ASMP to SMP) and references.
Approved	ZAA Board	09/06/2020	Approved changes made by AMC
Approved	AMC Committee	28/05/2020	Replacing ASMP Policy.