



SAFE Species Program Handbook

Created by the
AZA Wildlife Conservation Committee
in Association with the
AZA Conservation, Management, and Welfare Sciences
Department and
SAFE Implementation Task Force

SAFE Species Program Handbook

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Table of Contents

Chapter 1. Introduction	5
Mission Statement for AZA SAFE: Saving Animals From Extinction	5
SAFE Species Program	5
Chapter 2. Program Functions	6
Partnerships	6
Program Partner Training	6
Meetings and Workshops.....	6
Outputs	7
SAFE Program Plans	7
Program Annual Report (Due August 10)	7
Program Mid-Year Progress Report (Due February 15)	7
Conservation Grants Fund Reviews	7
Communications	8
SAFE Species Focus Days	8
Annual Report (Due August 10)	9
Program Mid-Year Progress Report (Due February 15)	9
AZA Network	9
Social Media and <i>Connect</i> Articles.....	9
Chapter 3. Proposing a Program	11
Create a New SAFE Species Program	11
Eligibility Criteria for SAFE Species	11
Dividing or Combining Existing Program(s)	12
Chapter 4. The Cornerstone: Program Plans	13
Overview	13
Required Elements of a Program Plan	13
SAFE Species Program Goal.....	13
Program Operational Structure	13
Conservation Target.....	13
Status of Taxon within the AZA Community.....	13
AZA Conservation Activities	14
AZA Public Engagement Activities	14
Conservation Status of Taxa	14
Recovery Plan	14
Threats	14
Objectives.....	14
Actions.....	16
Program Plan Review Checklist.....	17
Guidance for Developing Program Plans	17
Program Plan Submission and Review	17
Review of Program Plans.....	17
Approved Program Plans	18
Program Plans Approved Pending Required Revisions.....	18
Program Plan Extension Requests	18
Program Plan Revisions.....	19
Successive Program Plans	19
Chapter 5. Organizational Considerations	20

Program Structure	20
Positions	20
Program Leader.....	20
Vice Program Leader	21
Steering Committee.....	21
Additional Suggested Positions	21
Secretary	21
Treasurer	21
Program Partner Representatives.....	21
External Experts	22
Advisors.....	22
WCC Coordinator for SAFE Species Programs.....	22
WCC Liaison.....	22
Chapter 6. Program Administration	23
Elections	23
Change in Employment or Institutional Status	23
Change of Institution.....	23
Loss of Employment.....	23
Member Institution Loss of Accreditation or Certification	23
Program Assessment and Accountability	24
Accountability Emails	24
Program Partner Representative Assessment.....	24
Program Partner Assessment	24
WCC Liaison Assessment.....	25
Contacts	26
AZA Web Resources	26
AZA Board Approved Policies	26
AZA SAFE Homepage	26
Animal Programs Database	26
Conservation and Science Database	27
Appendix A. SAFE Species Program Proposal	28
Appendix B. Program Position Descriptions and Essential Functions	32
Appendix C. Program Leader Statements of Individual Commitment and Institutional Support	37
Appendix D. Program Officer Statements of Individual Commitment and Institutional Support	38
Appendix E. AZA Program Partner Statement of Institutional Support	39
Appendix F. Annual Report Template	40
Appendix G. Mid-Year Progress Report Template	42
Appendix H. Checklist for Program Plan Review	43
Appendix I. SAFE Visual Brand and Identity Guidelines	45

Chapter 1. Introduction

Mission Statement for AZA SAFE: Saving Animals From Extinction

The mission of AZA's *SAFE: Saving Animals From Extinction* is to combine the power of zoo and aquarium visitors with the resources and collective expertise of AZA members and partners to save animals from extinction, with the vision that together we are saving the most vulnerable wildlife species from extinction and protecting them for future generations.

SAFE Species Program

The SAFE species program is part of SAFE. The purpose is to bring groups of AZA members together with field-based partners to enhance the probability of conservation success for threatened species or a group of related taxa in the wild. SAFE species programs help AZA-accredited zoos and aquariums do more and better conservation. Stories from these programs help the public recognize and support the meaningful conservation done by AZA-accredited zoos and aquariums.

Specifically, SAFE species programs:

- Protect threatened animals in the wild
- Build on established recovery plans and track records of commitment
- Prioritize collaboration among AZA member institutions and field-based partners
- Implement both strategic conservation and public engagement activities
- Measure and report real conservation

One of the strategies of SAFE species programs is to follow the principles of a One Plan Approach (CBSG, 2011) and consider all populations of a species, across the spectrum from intensively managed to least managed (usually wild-living) in an integrated, stakeholder-inclusive, science-based process. SAFE species programs bring together multiple AZA members and field-based partners (Program Partners) to address the conservation needs of a threatened species or group of related taxa in the wild. Each program builds upon the historic commitment of AZA members and others to implement aspects of existing recovery or action plan(s). AZA members working on a SAFE species assess the existing plan(s), and develop a three-year program plan that identifies an array of conservation actions to be addressed by AZA members. The intention of the program plan is to prioritize actions by AZA members that complement and unify conservation efforts in the context of an existing recovery or conservation action plan. The group identifies a Program Leader who champions the efforts and will help coordinate, facilitate, and review progress toward program plan goals. Program Leaders and Partners serve the AZA community as experts on the conservation needs, challenges, and opportunities of the target species or taxa.

The programs work in partnership with AZA's Wildlife Conservation Committee (WCC), which oversees the overall SAFE species initiative. Program Partners include two or more AZA-accredited institutions or certified related facilities that have conducted or supported conservation work on the target species or group of related taxa for a minimum of two years and are committed to advancing an existing recovery or conservation plan. While the Program Leader must be an individual AZA member and work for an AZA-accredited facility, Program Partners do not need to be AZA members and may be comprised of a diverse membership of private entities, government agency representatives, other NGOs, universities, etc., as appropriate, for the program. In addition, each program may be complemented by Advisors, who serve as experts in various fields, and may be members of an associated AZA Committee or Scientific Advisory Group (SAG), or an external expert, such as a representative from an IUCN SSC Specialist Group. The program should strive to engage additional AZA members; ideally five or more within the cycle of the program.

SAFE species programs must adhere to AZA Board approved policies in all aspects of program management, and all AZA member institutions and programs must adhere to the [AZA Code of Professional Ethics](#).

Chapter 2. Program Functions

SAFE species programs have great independence to create a program structure and identify those unique activities that best advance the conservation of their targeted species or group of related taxa. Because AZA SAFE seeks both to increase conservation activity, as well as raise awareness about these efforts, Program Leaders are expected to develop the professional relationships necessary for program success and to work with their WCC Liaison and AZA staff to maximize communication about progress and obstacles. In order to reach these goals, several functions that are expected of all SAFE species programs are detailed below.

Partnerships

Partnerships are critical to species recovery and Program Leaders and Partners should form appropriate, professional partnerships with the purpose of conserving these species in the wild. The program team should include the primary stakeholders that will ultimately be responsible for long-term conservation success – both AZA members and beyond. Program Leaders are encouraged to communicate consistently with regional and international colleagues, and keep Program Partners, their WCC Liaison, and AZA staff informed about such discussions. AZA staff and the program's WCC Liaison are available to assist Program Leaders in developing these relationships, if necessary.

- Programs should emphasize the importance of building trusting and cooperative relationships with local, community-based organizations or other non-profit organizations or agencies actively involved in the species' conservation. Special emphasis should be placed on building or expanding relationships with the entity responsible for authorizing implementation of the recovery plan.
- Programs should cooperate with existing AZA Animal Programs, especially Taxon Advisory Groups (TAGs) and Species Survival Plan® (SSP) programs, and take a One Plan Approach to conservation planning that incorporates both *in-situ* and *ex-situ* populations.
- Programs should collaborate with IUCN/SSC staff and Specialist Groups as they strive toward conserving endangered animals.
- Programs should collaborate with WAZA and other regional zoo and aquarium associations as they strive toward species conservation.

Program Partner Training

- Program Leaders should help new and existing Program Partner representatives become familiar and comfortable with their responsibilities with respect to advancing the program plan.
- AZA Professional Development programs are being identified and created to enhance the skills needed to lead and to participate in field conservation programs. SAFE partners will receive priority access to these programs.

Meetings and Workshops

WCC Meetings

The WCC will host an open meeting for SAFE species Program Leaders, Program Partner representatives, and other interested parties at each AZA Annual Conference and Mid-Year Meeting. These meetings may include reporting and updates from the WCC and/or the AZA Conservation, Management, and Welfare Sciences Department, updates from SAFE species Program Leaders, an open question and answer session, and time for networking across SAFE species programs. Minutes from these meetings, and/or copies of presentations given, will be disseminated via the AZA Network after the meeting.

SAFE Species Program Meetings and Workshops

- Program Leaders should hold, electronically or in person, regular, preferably at least annual, working meetings and/or workshops. Program Leaders are encouraged to hold in-person meetings and workshops in conjunction with the AZA Annual Conference and/or Mid-Year Meeting.
- Program-related meetings and workshops should be communicated to all Program Partners and their WCC Liaison, as well as the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org).
- Program Leaders are encouraged to schedule and moderate open reporting sessions at the AZA Annual Conference and/or Mid-Year Meeting.
- All Program Partner representatives are encouraged to attend all official program meetings.
- Minutes should be recorded, AZA branded, archived, and included in the program's annual report.

Outputs

Each SAFE species program is responsible for publishing and maintaining specific outputs including a program plan, an annual report, and a mid-year progress report. All outputs should be SAFE branded, reviewed by members of AZA's Wildlife Conservation Committee, and will be published on various AZA communications platforms including the AZA website, *Connect* magazine, and social media as appropriate.

SAFE Program Plans

A cornerstone of the SAFE species program is the development of a three-year program plan within six months of approval as a SAFE Species program. The program plan will include measurable field conservation, public engagement, and funding objectives that will advance an established conservation or recovery plan (See [Chapter 3](#) for complete information on developing a program plan). Data related to these objectives should be included in a program summary table within the program plan, which should be updated annually and included in the program's annual report.

Program Annual Report (Due August 10)

(Also see Communications Section below)

Program Leaders are expected to submit an annual report ([Appendix F](#)) for the previous year to their program's WCC Liaison and copying the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org), by **August 10** of each year. Generally, the annual reports allow the program an opportunity to update the WCC and AZA on the work of the program as it relates to the objectives described in the program plan.

Program Mid-Year Progress Report (Due February 15)

(Also see Communications Section below)

Program Leaders are expected to submit a mid-year progress report ([Appendix G](#)) focused on recent highlights to the program's WCC Liaison, and copying the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org), by **February 15** of each year. Generally, mid-year progress reports allow the program an opportunity to share continued progress on their program plan and communicate challenges that have arisen.

Conservation Grants Fund Reviews

Participation in the AZA [Conservation Grants Fund](#) (CGF) annual review process provides all SAFE species programs with an opportunity for steering the conservation and science directives of the AZA community. Programs are encouraged to provide input to parties interested in submitting CGF proposals in order to strengthen links between the project and the SAFE species program's priorities. The Program Leader may be asked to provide first-tier reviews when relevant proposals are submitted.

Annual timing: CGF application materials become available in January, with funds available the following October. Requests for reviews will be sent to Program Leaders in April, with reviews due in late May.

Communications

Each program should facilitate communication among its partners, as well as develop a communication strategy to increase awareness of SAFE species program activities among appropriate audiences, such as the general public, zoo and aquarium visitors, media, program stakeholders, research colleagues, etc. The SAFE Style Guide ([Appendix I](#)) includes boilerplate language about SAFE and guidelines for using the SAFE logo across various media platforms. Each facility is encouraged to work with their own Public Relations departments to maximize the effectiveness of their communications strategies. Other AZA members that hold the SAFE species or a closely related surrogate species may be a particularly important audience. If there is a relevant SSP, AZA members may download contact information for SSP Institutional Representatives from AZA's website. Program Leaders may contact AZA's Conservation, Management, and Welfare Sciences Department to request contact information for the directors of those Institutional Representatives. Outreach to these members should encourage engagement with the SAFE program and may include a project-specific financial ask.

The program may distribute information among the AZA community via reporting sessions at AZA conferences and meetings, through annual and mid-year progress reports, AZA's online monthly Animal Programs Update, through program e-mail and newsletters, and/or the AZA Network. While directors may share invitations to join a SAFE species program or program updates in the directors' community on the AZA Network, *they should not post project-specific fundraising appeals to that community*, unless it is an AZA-endorsed, community-wide campaign.

In addition to promoting the AZA member's role in the program, or highlighting their staff or collaborations with other Program Partners, all public communications about the program should reference AZA and SAFE in order to enhance consistency and brand recognition. The SAFE Style Guide and the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org) are available for branding and SAFE-related language assistance.

SAFE Species Focus Days

Species teams should decide if and how a species "focus day" is part of their public awareness/communications strategy and include it in their approved program plan, as appropriate. If a focus day is part of the program plan, species teams are responsible for leading the creation and dissemination of materials, and engaging AZA members and partners to participate. AZA staff will provide support, if requested, per the following timeline, such as species-related conservation contribution data, materials review, and/or message amplification on social channels.

- Six months ahead of the scheduled day:
 - Confirm that the species team will be organizing Focus Day efforts by emailing Rob Vernon (RVernon@aza.org) and Amy Rutherford (ARutherford@aza.org) with the day and date that will be celebrated and outlining the team's specific goals. This timeframe will allow AZA to include the Focus Day in its communications calendar and connect the team with additional expertise or resources to meet its goals.
- No less than two months in advance of the scheduled day:
 - Request any species data (field conservation contributions, SSP status and holding facilities, etc.) from AZA's Conservation & Science team (Conservation@aza.org)
 - Request any assistance with message or resource crafting/review or media support from Rob and Amy.
- No less than one month in advance of the scheduled day:
 - Submit any requests for social media posts to be shared on the AZA accounts or tracking of social statistics to Rob.

Note that AZA may develop messaging or resources for some focus days based on other strategic priorities. This may happen even if a SAFE species team has chosen not to engage on the designated day. If AZA is planning to promote a focus day related to a SAFE species, AZA will notify the SAFE species program leader at least six months in advance and will coordinate efforts if the SAFE species team is also engaging on the day.

Annual Report (Due August 10)

Program Leaders are expected to submit an annual report ([Appendix F](#)) for the previous year to the program's WCC Liaison, while copying the AZA Conservation and Science Department (safe@aza.org), by **August 10** each year. Reports should generally cover the time period between August 1 and July 31 of the previous year; however, the timeline covered may be adjusted to reflect their program and meeting schedules. These reports update the WCC and AZA on the program's conservation, public engagement, communications, and funding progress in relation to the program plan, and facilitate the tracking of tracking of program meeting schedules. The reports also:

- Provide the Program Leader an opportunity to share program highlights and successes, and document and/or communicate any issues that may have arisen within the program, including confidentially, as appropriate.
- Identify any additions or resignations of Program Partners.
- Allow an opportunity for the Program Leader to submit Statements of Institutional Support for new Program Partners and other materials to AZA on an annual basis.

Program Mid-Year Progress Report (Due February 15)

Program Leaders are expected to submit a mid-year progress report ([Appendix G](#)) for the previous six months to the program's WCC Liaison, and copying the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org), by **February 15** each year. Reports should generally cover the time period between August 1 and January 31. These reports:

- Provide the WCC and the AZA Conservation and Science Department with recent program highlights to be shared with external audiences.
- Assist the WCC and the AZA Conservation and Science Department in monitoring program progress.
- Provide the Program Leader an opportunity to communicate confidentially if necessary any issues that may have arisen within the program.

AZA Network

The AZA Network is an online, professional networking platform for people within the AZA zoo and aquarium community to share their ideas, best practices, and lessons learned. The platform allows for open professional interest groups or closed, private working groups. The profile section in the Network allows users to manage notifications of activity, so each member may decide whether to receive emails as activity occurs, or in a daily or weekly digest email. Program Leaders are automatically added to the AZA Network community called "SAFE: All Program Leaders" and "SAFE: Saving Animals From Extinction" The SAFE: All Program Leaders Network is private, includes SAFE Program Leaders, WCC Liaisons, and AZA staff and should be used to communicate important updates and share resources for and among SAFE species programs. The SAFE: Saving Animals From Extinction community is an open workspace that allows Program Leaders to post announcements, have discussions, and share resources with the wider AZA community.

Programs are encouraged to establish and maintain an open or closed community for their SAFE species program to facilitate communication and discussion, along with document and resource sharing. To create a community within the AZA Network, Program Leaders should contact the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org).

Social Media and *Connect* Articles

AZA's national public engagement and awareness campaign utilizes SAFE species stories as its conservation content. AZA manages a Facebook page, Instagram, and Twitter accounts that have thousands of followers. To maximize exposure of the program's work, snippets of publicly appropriate information (including photos) should be provided for inclusion on AZA's social media assets. Program Leaders should contact Kristen Corl, AZA's Digital Media Coordinator (kcorl@aza.org), to determine the best ways to share content. In addition, programs may wish to distribute information about their work in an article in *Connect*. To publish an article in *Connect* Program Leader should contact Tim Lewthwaite, AZA's Publications and Brand Director (tlewthwaite@aza.org), and Kayla Ripple, AZA's

SAFE Coordinator (kripple@aza.org). Content from annual and mid-year reports may be published, with permission, to these assets.

Chapter 3. Proposing a Program

Create a New SAFE Species Program

AZA members wishing to create a SAFE species program should confirm that the species or group of related taxa meet the eligibility requirements, complete the proposal, and submit it to the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org). Proposal materials are included in the Appendices and are also available in Microsoft Word format from AZA's website. The proposal should include a list of Program Partners, along with the contact information for the individual serving as the Program Partner Representative and a Statement of Institutional Support ([Appendix E](#)) for AZA member organizations. The proposal should specify what existing conservation plan (e.g., recovery plan, biodiversity management plan, PHVA action plan.) the program plan will complement and provide an overview of how AZA Animal Programs and/or individual AZA institutions have been supporting the target species' conservation. Proposals should be accompanied by Statements of Institutional Support from each listed AZA-accredited Program Partner.

Eligibility Criteria for SAFE Species

Each of the following criteria must be met in order to be eligible to become a SAFE species.

1. The species is threatened with extinction
 - Threatened (VU, or EN, or CR or, EW) according to IUCN's Red List; or
 - Equivalent threat level according to relevant government agencies (e.g., US or non-US federal/state/provincial); or
 - Listed as protected under CITES I or II; or
 - Demonstrates science-based evidence that the species population is under extreme distress and has not yet been listed under recognized threat levels.
2. The species has established conservation plan(s) (e.g., recovery plan, biodiversity management plan, PHVA action plan) in place. The SAFE species program can be either holistic or can be more targeted (e.g., regional, focused on one sub-species) as long as the program is clearly tied to a larger conservation plan.
3. Appropriate stakeholders (e.g., IUCN SSC Specialist Groups, USFWS recovery teams, range state wildlife offices, other NGOs, researchers focused on relevant taxa or issues) are identified and/or engaged.
4. Two or more AZA-accredited zoos or aquariums/certified related facilities have an established commitment for conducting/supporting active conservation work on this species (as exemplified in AZA Accreditation Standard 3.2.1) for a minimum of two years.
5. If accepted as a SAFE species, the Program Team agrees to:
 - Develop a three-year plan within six months for SAFE activities that includes measurable conservation objectives that will advance the established conservation plan(s), including conservation/science and public/stakeholder strategies as they address existing conservation threats.
 - Develop communication objectives to increase awareness of SAFE program activities; target audiences should include not only program stakeholders but also the general public, media and other audiences as appropriate.
 - Increase member involvement in the conservation of the species to at least five AZA facilities.
 - Follow the SAFE species Processes and Protocols.

All AZA Program Leaders and Program Partners must adhere to AZA's Code of Professional Ethics.

Proposals are accepted on a rolling basis throughout the year. The Wildlife Conservation Committee (WCC) will approve or provide questions to the submitters within two months of receiving the proposal.

If questions arise during the review of the proposal, the WCC Coordinator for SAFE will contact the submitter for resolution, identifying where additional information is needed and providing advice, as appropriate. Once the program is accepted, AZA's Conservation, Management, and Welfare Sciences Department will send an official notification via email to the Program Leader and Program Partners. Public notification will be done via AZA's member magazine, *Connect*, at conference general sessions, on AZA's website, and over other AZA communication channels, as appropriate.

Proposal submission and approval dates are tracked by AZA's Conservation, Management, and Welfare Sciences Department. The AZA Conservation, Management, and Welfare Sciences Department will also maintain records of approval notifications and reviewer comments for proposals denied.

Dividing or Combining Existing Program(s)

If an existing program would like to request that it be divided into two or more distinct programs, that two or more SAFE species programs be combined, or that an existing SAFE species program be expanded to encompass the larger taxonomic group, the Program Leader(s) should provide a written explanation and justification for the change, and identify the Program Leader(s) for the combined, expanded, or separated programs. This document should be submitted to the WCC Liaison(s), who will notify the WCC Coordinator for SAFE. The team(s) that reviewed the programs' program plan will consider the request and the WCC Coordinator for SAFE will make a recommendation to the WCC chair, which will approve or reject the recommendation. The WCC Coordinator for SAFE will inform the Program Leader and AZA's Conservation, Management, and Welfare Sciences Department of the decision.

Chapter 4. The Cornerstone: Program Plans

Overview

Working with Program Partners, Program Leaders are responsible for drafting, submitting, and explaining three-year program plans within six months of acceptance of the SAFE species program. Program plans should clearly articulate conservation targets and threats contributing to the species' decline. The connection between proposed actions and threats or targets should be clearly described. The primary goal of a program plan is to identify those activities that will include specific, measurable, attainable, realistic, and timely (SMART) field conservation, public engagement, and funding objectives that advance an established conservation plan (e.g., recovery plan, biodiversity management plan, PHVA action plan). The plan will also identify SMART communications objectives intended to increase awareness of SAFE species program activities, not only among program stakeholders, but also visitors, the general public, media, and other audiences. The plan will identify long-term goals, set measurable objectives needed to meet these goals, and provide AZA member institutions with information for how to become involved, with the goal of engaging at least five AZA members involved in the implementation of the program plan. All information and details included in the program plan should be sufficiently clear for colleagues not familiar with the species' or taxon group's conservation status and their needs to understand how and why these objectives and actions are being recommended.

Secondarily, the program plan should also incorporate background information, some of which will have been included in the proposal for becoming a SAFE species, regarding: 1) the *ex-situ* population within the AZA community, 2) existing conservation and research activities by AZA members and of other regional zoological associations, as appropriate, and 3) the current *in-situ* population status from the global IUCN Red List assessment to facilitate conservation planning across *in-situ* and *ex-situ* populations (i.e., the One Plan Approach). If an IUCN global assessment is out of date, the species has not been assessed, or the SAFE species program is focused on a population at a local or national, rather than global, scale, then relevant information with data from national assessments, CPSG Species Conservation Plans, or relevant IUCN/SSC Species Specialist Group documents should be provided.

Required Elements of a Program Plan

The following elements are required in the program plan and will be evaluated by WCC and other committee reviewers ([see checklist](#)). Program Leaders may be creative in their presentation of the information within this basic format, but the program plan must address each element completely. Please be sure to include all elements in a **Table of Contents** and number each page of the document. Many of the components to be included in the program plans have been identified by the *Open Standards for the Practice of Conservation*, developed by the Conservation Measures Partnership. For more information about the definition of terms or examples, refer to the [Open Standards](#).

SAFE Species Program Goal

- Identify the program's overarching, long-term goal.

Program Operational Structure

- Identify the Program Leader, Steering Committee, Program Partners, Advisors, Field Partners, etc., and list their current contact information including their employer, email address, and phone number.

Conservation Target

- Specify the program's species or taxonomic group. The program may specify their taxon at a higher taxonomic level (e.g., Order, Family, Genus), but should still summarize these taxonomic groupings and clearly identify the portion of the taxa being targeted. References may be cited.

Status of Taxon within the AZA Community

- Briefly relate the significance of this species to AZA institutions.

- Summarize the status of the *ex-situ* population within the AZA community, including whether the species is under the management purview of a Taxonomic Advisory Group (TAG) or Species Survival Plan® (SSP). If it is part of an SSP, please indicate the population sustainability ranking (i.e., green, yellow, red, or Candidate) based on the most recent [Animal Program sustainability designations](#).

AZA Conservation Activities

- If the species is under the purview of an AZA Animal Program (i.e., a TAG or SSP), describe the Animal Program’s engagement in the species’ conservation and how/whether those activities relate to the program plan.
- Summarize the history of conservation support and engagement provided by individual members of the AZA community prior to the establishment of the SAFE species program (available in AZA’s [Conservation and Research database](#), or Program Leaders may also contact AZA’s Conservation, Management, and Welfare Sciences Department for specific data requests (conservation@aza.org).
- If this program plan is subsequent to the publication of the first three-year program plan, summarize the actions and progress that occurred under the earlier program plan(s).

AZA Public Engagement Activities

- Summarize the history of public /stakeholder engagement activities related to this species by individual members of the AZA community prior to the establishment of the SAFE species program.
- If this is not the first published program plan for the SAFE species, summarize the actions and progress that occurred under the earlier program plan(s).

Conservation Status of Taxa

- Identify both the [United States conservation status](#) and the [International Union for Conservation of Nature \(IUCN\) status](#) for each species. If an ESA or IUCN assessment is out of date, the species has not been assessed, or the SAFE species program is focused on a population at a local or national, rather than global, scale, then relevant information with data from national assessments, CPSP Species Conservation Plans, or relevant IUCN/SSC Species Specialist Group documents should be provided.
- Include a short paragraph summarizing the conservation status of the taxon in the wild, as appropriate.

Recovery Plan

- Cite the established recovery plan that the program plan will feed into and identify key partners.
- Describe the relationship of the Program Leader or Program Partners to key partners (e.g., membership on IUCN/SSC Species Specialist Group); specifically describe the relationship with the entity responsible for authorizing implementation of the recovery plan.
- Specify the sections of the recovery plan that align with the proposed conservation- and public/stakeholder engagement-related actions.

Threats

- Describe the primary threats impacting the species’ population(s). Include both the direct and indirect threats to provide the conservation context and the forces impacting the species or taxonomic group. Identify those that will be addressed by the AZA SAFE plan.

Objectives

Objectives are formal statements of the outcomes (or intermediate results) and desired changes that you believe are necessary to attain your goals, such as reducing a threat. Objectives specify the desired changes in the factors (direct and indirect threats and opportunities) that you would like to achieve in the short and medium-term (Conservation Measures Partnership, 2013). A SMART objective meets the criteria of being results oriented, measurable, time limited, specific, and practical (see table below).

Specific	A SMART objective identifies a specific action or event that will take place.
Measurable	The description of a SMART objective will allow you to determine your progress towards

	completion, and let you know when you are finished.
Achievable	A SMART objective should be achievable given available resources.
Realistic	A SMART objective should require you to stretch some beyond your normal routine and regular abilities, but allow for likely success based on your skills and the time available.
Time	A SMART objective should state the specific time period in which it will be accomplished.

The actions and metrics used for achieving and measuring progress toward these objectives should be included in a program summary table. This table should be updated annually with the appropriate data to track progress and should be included in the program's [annual report](#).

Conservation Objectives

Conservation objectives describe outcomes and changes necessary to achieve the SAFE species' program goal (e.g., expanded conservation breeding program, research questions addressed). Conservation objectives should:

- Describe the specific SMART conservation objectives that the three-year program plan seeks to achieve, and how they address the different threats outlined in the established recovery or action plan. Objectives should generally be short-term steps necessary for achieving a specific long-term outcome.
- Describe the metrics that will be used to monitor progress and the approximate timeframe for meeting each objective.
- Connect the objectives to specific sections of the established recovery plan.

Public/Stakeholder Engagement Objectives

Public/stakeholder engagement objectives describe change that the public, stakeholders, and/or zoo and aquarium visitors can make that support the target species. Examples might include engaging people in the target species' range through conservation-focused behavior changes to decrease the threat or support the species (e.g., community-based conservation projects, support for the development of policy or legislation for species protections and conservation, and/or education programs).

- Describe the specific SMART public/stakeholder engagement objectives that the three-year program plan seeks to achieve and how they address the different threats. Objectives should generally be short-term steps necessary for achieving a specific long-term outcome.
- Describe the target audience for each objective.
- Describe the metrics that will be used to monitor progress and the approximate timeframe for meeting each objective.
- Connect the objectives to specific sections of the established recovery plan.

Communications/Public Awareness Objectives

Communications/public awareness objectives increase awareness, appreciation, or understanding for the identified SAFE species actions that have been taken within the program plan, and/or SAFE and the role of AZA-accredited zoos and aquariums in conservation more generally. These objectives have an indirect impact on species conservation, supporting the awareness needed for successful conservation, public/stakeholder engagement, or fundraising objectives. Objectives should aim to elevate the AZA community as a whole to increase awareness of AZA zoos and aquariums in the role of conservation by telling stories of demonstrated conservation impacts.

- Objectives should identify a target audience for each activity.
- Describe the specific SMART communications/public awareness objectives that the three-year program plan seeks to achieve. Objectives should generally be short-term steps necessary for achieving a specific long-term outcome. Describe the metrics that will be used to monitor progress and the approximate timeframe for meeting each objective.

Funding Objectives

Funding objectives should describe the resources collected that will support implementation of the program plan. Objectives may relate to grant(s) secured, fundraising events held, financial expectations of program partners, etc.

- Describe the specific SMART funding objectives necessary in order to implement the activities included in the three-year program plan. Objectives should generally be short-term steps necessary for achieving a specific long-term outcome.
- Describe the metrics that will be used to monitor progress and the approximate timeframe for meeting each objective.

Actions

Actions necessary to achieve each objective should be identified. Actions should be listed under their corresponding objective in the program summary table. The Program or Field Partner responsible for advancing that objective should be identified.

Conservation Actions

- Describe the specific activities and tasks that will be undertaken and who will be responsible for the implementation of each.
- Include an ordering or timeline for sequential activities.
- Include or describe the budget or other resources necessary for activities to be undertaken and if those resources have already been obtained.

Public/Stakeholder Engagement Actions

- Describe the specific activities and tasks that will be undertaken to engage local communities and/or specific stakeholder groups that will directly benefit the conservation goals, and who will be responsible for the implementation of each.
- Describe the specific audience for each activity and task.
- Include an ordering or timeline for sequential activities.
- Include or describe the budget or other resources necessary for activities to be undertaken and if those resources have already been obtained.

Communications/Public Awareness Actions

- Describe the specific activities and tasks that will be undertaken to increase general awareness of the species' status, threats, and program activities, and who will be responsible for the implementation of each.
- Describe the target audience(s), to include the general public, media, and program stakeholders including conservation organizations and AZA members/colleagues
- Include an ordering or timeline for sequential activities.
- Include or describe the budget or other resources necessary for activities to be undertaken and if those resources have already been obtained.

Funding Actions

- Describe the specific activities and tasks that will be undertaken and who will be responsible for the implementation of each.
- Include an ordering or timeline for sequential activities.
- Describe the resources necessary for activities to be undertaken and potential sources for those resources.
- Include an array of opportunities (including both financial and in-kind) that allow Program Partners of various means to participate meaningfully. Clearly articulate any funding expectations of Program Partners. AZA suggests that participation as a Program Partner be valued at a minimum of \$1500 in direct financial and/or in-kind support per year, but specific expectations for meaningful participation should be defined by each program, as appropriate for their program plan and species' needs.

Program Plan Review Checklist

The Program Leader and WCC Liaison should use the Program Plan Review Checklist ([Appendix H](#)) to confirm inclusion of all required program plan elements. Committee reviewers will confirm that each element of this checklist has been satisfied appropriately as they assess the program plan for acceptance.

Guidance for Developing Program Plans

The program plan will place a particular emphasis on identifying action opportunities appropriate for involvement of an array of AZA members, with the purpose of increasing member involvement in the conservation of the target species or related taxon group to include at least five AZA members. One of the intentions of the SAFE program is to be multi-disciplinary and incorporate a variety of areas of expertise among AZA members, thus programs are encouraged to consider including not only science, conservation, and animal programs, but also education, public communications, professional development, fundraising, government affairs, etc. as appropriate.

Various resources are available to assist Program Leaders and Teams. The program's WCC Liaison should work closely with the Program Leader to provide guidance during the program plan process and is intended to help ensure that the Program Leader and Team are addressing each element of the checklist, while also providing general advice as the Team develops the program plan. AZA's Conservation and Research database, available on the AZA website, is a valuable resource when compiling information about existing conservation activities being taken by AZA members. Program Leaders are encouraged to contact AZA's Conservation, Management, and Welfare Sciences Department with specific data requests (conservation@aza.org). Program Leaders are also encouraged to reach out to other AZA Board-level committees (e.g., Conservation Education, Public Relations, Advancement, Government Affairs) for help in developing SMART public engagement and communications objectives that advance the conservation plan and increase awareness of and support for program activities. Program Leaders should also consider reaching out to other AZA membership groups, such as Conservation Partners and Commercial members, and engage with them in meaningful ways that extend beyond donations and fundraising (i.e. advising on development of objectives as appropriate).

Program Partners that use the program plans to guide their conservation actions on behalf of a target species/taxon benefit from the plan's clear connection to an established recovery plan, maximizing the likelihood that the actions taken will be valued by stakeholders and be considered essential in the recovery of the species.

Program Plan Submission and Review

The Program Plan will be AZA SAFE branded. Staff in the AZA Conservation, Management, and Welfare Sciences Department is available to assist with document branding, if needed.

Program Plans should be submitted by the Program Leader to the AZA SAFE Coordinator and copied to their WCC Liaison within 6 months of the SAFE species program approval. If this program plan is subsequent to the original plan, it should be submitted to the AZA SAFE Coordinator and copied to their WCC Liaison within 6 months of the conclusion of the term of the previous program plan. The AZA SAFE Coordinator will confirm receipt of the plan and notify the AZA's Conservation, Management, and Welfare Sciences Department, as well as inform the WCC Liaison of next steps.

Review of Program Plans

The WCC Liaison will coordinate the review process among board-level committees. The core group of review committees consists of the Wildlife Conservation, Conservation Education, Marketing, and Public Relations committees. Representatives from other committees may be asked to review the program plan when/if key components are relevant to their work (e.g., Government Affairs, Research and Technology). It is the responsibility of the WCC Liaison to suggest other board-level committees that should be involved in the review process. The WCC Liaison will inform AZA staff if and which additional committees should

review the program plan, as appropriate. A contact list for each committee will be provided by the AZA SAFE Coordinator to the WCC Liaison for their coordination. This list should be used to send each committee a copy of the SAFE Program Plan and Review Checklist found in [Appendix H](#) of this Handbook.

Each committee point of contact should send the Program Plan to selected reviewers and compile and submit all feedback, including each reviewer's approval recommendation, to the WCC Liaison no later than within 4-6 weeks after receiving the plan. The WCC Liaison is responsible for compiling all reviewers' feedback, conversing with committee representatives, and making a final recommendation for the approval status of the Program Plan to the WCC Coordinator for SAFE and the SAFE species program. Based on reviewers' input, the WCC Liaison will recommend to the WCC Coordinator for SAFE and the SAFE species program, copying the AZA SAFE Coordinator, that the Program Plan be "Approved", "Approved Pending Required Revisions", or "Not Approved".

Approved Program Plans

Upon approval, the WCC Liaison will send an official notification to the SAFE species Program Leader, copying the WCC Coordinator of SAFE and the AZA Conservation, Management, and Welfare Sciences Department (SAFE@aza.org). The SAFE species program will have up to two weeks to incorporate any additional edits or comments from the committee. Upon completion, the Program Leader will send the final PDF of the Program Plan to the AZA SAFE Coordinator for publication on AZA's SAFE webpages. Public notification will be done via AZA's member magazine, *Connect*, and through appropriate AZA communication channels (e.g., the AZA Network).

Program Plans Approved Pending Required Revisions

When the program plan meets all required criteria outline in the Checklist for Program Plan Review, but more information or edits are needed prior to Program Plan acceptance, the program's WCC Liaison will notify the Program Leader, WCC Coordinator for SAFE, and AZA's Conservation, Management, and Welfare Sciences Department and provide the Program Leader with a summary of comments from reviewers. The WCC Liaison will identify additional information needed, provide advice, and work with the Program Leader towards ultimate acceptance and publication. Revised program plans will be reviewed by the WCC Liaison and the WCC Coordinator for SAFE. The Program Plan does not need to undergo a second full review. Once approved, the process for finalization, publication, and announcements will be the same as described above in the "Approved Program Plans" section.

Program Plans Not Approved

In cases where several criteria of the program plan checklist have not been met, a program plan may not be approved. In this case, the program's WCC Liaison will provide the Program Leader, the WCC Coordinator for SAFE, and AZA's Conservation, Management, and Welfare Sciences Department with a summary of comments from reviewers. The WCC Liaison will identify additional information needed, provide advice, and work with the Program Leader towards ultimate acceptance and publication. Revised program plans should be submitted within two months of receiving requested revisions, and resubmitted for another full review process.

Program plan submission, approval, and publication dates are tracked by AZA's Conservation, Management, and Welfare Sciences Department, who will also maintain records of approval notifications and of reviewer comments for program plans.

Program Plan Extension Requests

In order to keep SAFE species program information current and progressing, Program Leaders are accountable for submitting a program plan to the WCC for review and approval every three years. Requests for extensions in completing the program plan should be included in the program's annual or mid-year report, when possible. Failure to meet deadlines will give the WCC cause to consider removal and replacement of the Program Leader or removal of status as a SAFE species.

If there are challenges with meeting the program plan submission deadline:

- The Program Leader may request an extension prior to the deadline by contacting the WCC Liaison to discuss the reason for the extension request and to request a new due date.
- The WCC Liaison will consider the request, and if they determine that the extension is warranted, a new program plan deadline will be set. Examples of circumstances that may precipitate an extension include an unanticipated delay in USFWS species recovery plan development, the need to involve a new stakeholder in the planning process, or the need to further revise a draft Program Plan in order to incorporate emerging environmental or human dimensions elements.
- The WCC Liaison will notify the AZA SAFE Coordinator and the WCC Coordinator for SAFE Programs of the outcome of the extension request.

Program Plan Revisions

The program plan is a living document, and projects may be added or amended over the course of plan implementation. One goal of the SAFE program is to keep the program information current on AZA's website so that members may learn about programs and become involved. Therefore, if significant revisions have been made, the updated program plan should be submitted to the program's WCC Liaison and copied to the AZA Conservation, Management, and Welfare Sciences Department (safe@aza.org).

Successive Program Plans

- Programs with accepted plans will be up for review three years from when acceptance notification of previous program plan was sent.
- The program is expected to submit a new program plan for review and acceptance every three years.

Chapter 5. Organizational Considerations

Program Structure

All AZA SAFE Species programs should be composed of the WCC Liaison, a Program Leader and Vice Program Leader, a Steering Committee, and Advisors in order to incorporate an extensive and diverse amount of experience and expertise. The program may design its operating and organizational structure as best it sees fit and may differ for programs comprised primarily of AZA members compared to those primarily comprised of non-AZA participants.

For example, programs that are largely constituted of AZA members may consider including additional officer positions beyond the Program Leader and Vice Program Leader, such as Secretary and Treasurer. Steering Committees generally include 5-15 participants and would be composed of representatives from Program Partners; for groups with a large number of partners, the steering committee should be elected from among the Program Partners. Officers, with the exception of the Program Leader, should be elected from the Steering Committee and the Steering Committee should form the electorate for that vote.

Some programs may be based upon existing groups that are composed of many non-AZA participants, such as a government-led Recovery Team. In this case, the AZA members of the team may apply for designation as a SAFE Species program. The responsibilities of the Program Leader would still be the same, including communication and engagement with AZA and other AZA members. In developing an appropriate SAFE program structure that is sensitive to an existing structure, the Program Leader should consult with their WCC Liaison or the WCC Coordinator for SAFE species programs.

Positions

Each SAFE species program should develop an organizational structure that works for it, and each may ultimately have a slightly different organization and composition. That said, over the course of AZA history, some items have emerged that may be best practices for developing Program Teams. The following provides an overview of positions and their functions; for specific eligibility guidelines and details of essential functions see [Appendix B](#).

Program Leader Position Overview

The Program Leader serves as the primary point of contact for the Program Partners and AZA staff. The Program Leader position holds responsibilities critical to the success of AZA's SAFE species programs. The primary responsibility of the Program Leader is to lead the Program Partners to build on existing conservation plans to create a three-year program plan which includes measurable field conservation and public engagement actions and engages additional collaborators within AZA community and beyond. Additional responsibilities include: 1) working closely and in a timely manner with the Program Partners, AZA Wildlife Conservation Committee Liaison, and AZA staff to maintain forward movement on the program plan; (2) monitoring and evaluating action item implementation and progress toward measurable outcomes; (3) working with Program Partners to adapt the program plan, budget, and timelines as necessary; (4) managing funds raised for the program (in association with the Treasurer, as available), and (5) providing project updates and reports to the Project Partners and AZA twice a year. It is important for the Program Leader to work closely with the WCC Liaison on all matters related to the program's ongoing operations. It is expected that the Program Leader will continue in that position beyond the duration of the three-year timeline and would be responsible for adapting and developing subsequent three-year program plans. If that is not to be the case, the Program Leader should work with the WCC Liaison and Program Partners to identify a new Program Leader.

Vice Program Leader

Position Overview

It is strongly recommended that a Vice Program Leader is elected from the Steering Committee members. It is presumed that if, for any reason, the Program Leader must vacate the position, the Vice Program Leader will assume all Program Leader-related duties until a new one is selected by the Steering Committee.

Steering Committee

Overview

The Steering Committee serves as the voting body for program business, and members should be integrally involved in the program's decision making, appointments, reports, and meetings. The Steering Committee should be composed of five to 15 members, as appropriate for the program, including Officers. Steering Committee members should represent a Program Partner and no Partner should have more than one representative on the Steering Committee. If there is a large number of Partners, elections should be held to select Steering Committee members from among the Partners.

Additional Suggested Positions

Secretary

Position Overview

The Secretary keeps a written record of the program's elections, votes, and official meetings, and communicates these records, and any programmatic changes to the Program Partners, the WCC Liaison, and AZA staff.

Treasurer

Position Overview

If the program's work involves any funds raised by the group, then AZA's guidelines for creating and managing externally held [dedicated funds](#) must be met. Dedicated Fund accounts are held by AZA member institutions, and used to support projects initiated and/or coordinated under SAFE auspices. A Treasurer should be designated and an AZA SAFE Dedicated Fund account should be used to manage those funds. Treasurers collect, disburse, and archive written records of all program financial transactions. Treasurers are responsible for managing money in AZA SAFE Dedicated Fund accounts to assure that all funds are used for their intended purpose.

Program Partner Representatives

Position Overview

The Program Partner Representative is the primary contact between his/her institution and the Program Leader of the SAFE species program to which s/he has been designated. The Program Partner Representative is responsible for maintaining open communication between the program and the institution, communicating to the Program Leader on behalf of the institution, and participating in program communications and activities. The role of each Program Partner Representative will vary across the program team and over the course of the program plan's implementation, reflecting each representative's expertise and the activities (and timing of those activities) that they are helping to implement.

One individual may serve as the Program Partner Representative for more than one SAFE species program at an institution; however the duties for each program are independent of each other.

An institution may identify one or more Program Partner Representative(s) to participate in multiple SAFE species programs, and should expect to participate meaningfully in each program, helping each achieve its 3-year goals and objectives.

External Experts

Advisors

Overview

Advisors, often members of corresponding AZA Committees, Animal Programs, Advisory Groups, IUCN SSCs, or species experts, may play a useful role in advising, designing, and executing conservation and stakeholder engagement decisions within SAFE species programs. Programs are encouraged to work with as many Advisors as appropriate for their program in order to implement superlative species conservation initiatives. Advisors do not need to be employed by an AZA member institution. Advisors do not vote on program issues unless they also serve as a Program Partner.

Suggested Advisors, as appropriate

Animal Health/ Veterinary
Conservation Education
Government Affairs
Green Practices
Marketing
Public Relations
Research
Reproduction/Endocrinology
IUCN/SSC Director of Specialist Group Partnerships
Taxonomic or Disciplinary IUCN/SSC Specialist Groups

WCC Coordinator for SAFE Species Programs

Position Overview

The WCC Coordinator for SAFE Species programs is a member of the WCC who oversees implementation of the SAFE species program, acting as a resource for WCC Liaisons and Program Leaders, and working closely with the WCC chair and AZA Conservation, Management, and Welfare Sciences Department to assure reputability and overall coordination of this effort. The Coordinator will engage WCC members as Liaisons to individual SAFE species programs and maintain consistent and open communication with them about their programs.

WCC Liaison

Position Overview

The WCC Liaison is a member of the WCC who serves as the primary contact between the WCC and the Program Leader of a SAFE species program. The WCC Liaison is accountable for timely communications for program deadlines, reviewing draft program plans, and communicating with the WCC Coordinator for SAFE on extension requests and new information relevant for the WCC. The program should maintain consistent and open communication with their WCC Liaison. This will facilitate the WCC Liaison in assisting the program during all program plan and accountability processes, and acting as a resource for Program Leaders regarding WCC and AZA SAFE guidelines.

Chapter 6. Program Administration

Just as each program will be organized in a unique fashion, programs may be administered in the manner that maximizes efficiency and transparency for their group. However, some recommended best practices and considerations for administration are detailed below.

Elections

Steering Committees are encouraged to use open, transparent, democratic processes for filling open positions and for other business of the group. Some typical practices may include:

- The Program Leader manages open positions by advising the Steering Committee of open Officer positions and Steering Committee vacancies. Nominations are sought from existing Steering Committee members and Program Partners.
- Nominees for Officer positions submit a Program Officer Statement of Individual Commitment and Institutional Support ([Appendix D](#)) to a program Secretary who will distribute to the Steering Committee and the program's WCC Liaison. Having documentation of Institutional Support prior to elections is helpful.
- Program Leaders are encouraged to record the purpose and outcomes of all votes, and may include that information in annual or mid-year reports to the WCC.

There are no WCC-mandated term limits for program Officers and Steering Committee members. The WCC encourages programs to create a system of term rotations of Steering Committee members to provide opportunities to involve new members. Program Officers and Steering Committee members are elected from the Program Partner Representatives. All institutions are able to participate in the program through their Representatives.

Program Leaders should discuss Steering Committee concerns with their WCC Liaison who will provide guidance and assistance in resolving issues.

Change in Employment or Institutional Status

Change of Institution

Program Leader and Vice Program Leader

- Program Leaders who move to a new AZA member institution will, within 90 days of departure from their original institution, submit new Statements of Individual Commitment and Institutional Support ([Appendix C](#)) to their WCC Liaison and the AZA Conservation, Management, and Welfare Sciences Department.

Program Leaders are expected to update their new contact information, including institution, phone, and email via the AZA website by logging into their account on "My AZA."

Loss of Employment

Program Leader and Vice Program Leader

- If a Program Leader loses his/her position from an AZA member institution, they have six months to re-gain employment with an AZA member institution before a new Program Leader is selected.
- If a Program Leader is no longer employed at an AZA member institution and fails to communicate with the WCC Liaison or the AZA Conservation and Science Department within one month, it will be assumed that the Program Leader has abandoned the role in the program and the Program Partners may proceed with filling the vacancy before the six month grace period is over.

Member Institution Loss of Accreditation or Certification

Program Leader and Vice Program Leader

- If a Program Leader's institution loses accreditation, the Program Leader has six months to resign from the program or find employment with an AZA member institution.

Program Partner Resignation or Changes

AZA Program Partners should provide a written notice of resignation to the Program Leader, who will notify the WCC Liaison, WCC Coordinator for SAFE species programs, and copy the AZA SAFE Coordinator.

A Program Partner may replace or reassign the individual representing their organization. Such departing Program Partner representatives should uphold program business confidentiality and, when possible, orient and provide all relevant program documents to their replacement.

WCC Liaison Changes in Status

WCC Liaisons are encouraged to continue their support of the SAFE species program should a change in status occur (change of institution, or loss of employment). Changes in status of the WCC Liaison should be communicated to the Program Leader, WCC Coordinator for SAFE, and the AZA SAFE Coordinator in a timely manner. If the WCC Liaison is no longer able to serve as the WCC Liaison, they should inform the Program Leader and WCC Coordinator for SAFE so that a new WCC Liaison can be assigned.

Program Assessment and Accountability

In order to ensure that all SAFE programs continue to move toward effective conservation, the Program Leader should regularly review the accountability status and performance of the program plan and of Program Partners.

Accountability Emails

Because the SAFE species program seeks to include more AZA-accredited members over time, as well as achieve measurable conservation impact, it is important that AZA is sharing the most current information about each program in its communications (e.g., website). As a result, AZA's Conservation, Management, and Welfare Sciences Department provides courtesy reminders to the Program Leader of upcoming deadlines, such as for submission of the program plan and reports. Each email includes the appropriate instructions, relevant contact information, and links to the deadline information pages on the AZA website. These emails are sent to Program Leaders and routinely copied to the associated WCC Liaison; they may be copied to the WCC Coordinator for SAFE Species programs and the WCC Chair. These courtesy emails are sent one month prior to the deadline, when the deadline is reached and two weeks past the deadline.

Program Partner Representative Assessment

- The AZA staff, the WCC Coordinator for SAFE, and the WCC Liaison are available to provide guidance and assistance with Program Partner Representatives' performance issues.
- The Program Leader should regularly communicate with Program Partner Representatives within the program's purview regarding accountability deadlines and program plan changes, guidelines, publications, etc. and to remain informed about progress toward or challenges in achieving goals defined in the program plan.
- The Program Leader should document Program Partner Representatives that appear not to be adequately and/or appropriately performing their commitments. These concerns should be discussed with the WCC Liaison, WCC Coordinator for SAFE, and/or the AZA Conservation, Management, and Welfare Sciences Department.

Program Partner Assessment

- The Program Leader should informally assess or track the accountability status and performance of the Program Partners participating in its program.
- The Program Leader should discuss any potential issues with their WCC Liaison, the WCC Coordinator for SAFE, and/or a representative from the AZA Conservation, Management, and Welfare Sciences Department.

WCC Liaison Assessment

- The Program Leader should informally assess or track the accountability status and performance of their WCC Liaison's participation in its program.
- The Program Leader should discuss any potential issues with the WCC Coordinator for SAFE, and/or a representative from the AZA Conservation, Management, and Welfare Sciences Department.

Chapter 7. Contacts and Resources

Contacts

AZA Conservation, Management, and Welfare Sciences Department

Candice Dorsey, Ph.D.
Senior Vice President, Conservation
Management, and Welfare Sciences
301-244-3339
cdorsey@aza.org

Shelly Grow, M.S.
Vice President, Conservation and Science
301-244-3363
sgrow@aza.org

Kayla Ripple, M.S.
Coordinator, SAFE
301-244-3331
kripple@aza.org / safe@aza.org

Rebecca Greenberg
Coordinator, Animal Programs
301-244-3328
rgreenberg@aza.org / conservation@aza.org

Jordyn Chace
Program Assistant, Conservation
301-562-0777
jchace@aza.org

Miranda Brauns
Program Assistant, Animal Programs
301-244-3367
mbrauns@aza.org / conservation@aza.org

AZA Web Resources

AZA Board Approved Policies

<https://www.aza.org/board-approved-policies-and-position-statements>

AZA SAFE Homepage

<https://www.aza.org/aza-safe>

The “AZA SAFE” homepage provides public-facing information for the SAFE program, including a high-level SAFE program overview, links to SAFE stories and blog posts, links to all SAFE species programs, and SAFE Annual Reports. SAFE species pages provide general information for all SAFE species programs, as well as published program plans. There are also links to SAFE program resources such as materials/paperwork needed to propose a SAFE species program, and guidelines for developing three-year program plans. Links to SAFE program contributors and corporate sponsorships can also be found on this page.

Animal Programs Database

The Animal Programs Database contains all Animal Program Data, and is separated into Animal Program pages. There are separate pages for TAGs, SSP programs, Studbooks and SAGs. Each Animal Program page can be accessed by going through the Animal Program Page Search Portal:

<https://ams.aza.org/eweb/DynamicPage.aspx?Site=AZAandWebKey=8f652949-31be-4387-876f-f49a2d7263b2>

Each Animal Program page contains the following (*information only available if logged in):

- Program Leader, Officers, Advisors names and contact information*
- Animal Program details (start dates, websites, etc.)
- Animal Program Species
- Related Animal Programs
- Animal Program Documents*
- Animal Program IR list*

Conservation and Science Database

The Conservation and Science Database contains all field conservation and mission-related science projects submitted by AZA-accredited zoos and aquariums and certified related facilities. AZA members are asked to submit these activities each year. The database can be accessed through the Conservation pages on AZA's website (<https://www.aza.org/conservation>), or directly at: <https://ams.aza.org/eweb/DynamicPage.aspx?Site=AZA&WebKey=bf0eb751-0a30-49b5-a127-63e380894186>) or by logging into "My AZA." Users do not need to be members in order to search the database.

Appendix A. SAFE Species Program Proposal



SAFE Species Program Proposal

1. Program name (should be descriptive and include species, scope, and region):

2. Submitter (if different than Program Leader):

3. Scientific name of the species or taxa being applied for:

4. Common name(s) of the species or taxa being applied for:

5. Level of conservation threat and designating group/organization (indicate all that apply):

IUCN:	EW, CR, EN, VU, or NT
CITES:	I or II
USFWS:	Endangered, Threatened, or Candidate
State:	Species of Concern

- If none of the above categories is applicable, provide science-based evidence that the species/population is under extreme distress and has not yet been listed under recognized threat levels. (LIMIT: 1500 characters with spaces)

6. Provide the full citation for current, established conservation plan(s) (e.g., recovery plan, biodiversity management plan, PHVA action plan) in place for this species/taxa:

- Please attach a copy of the publication(s)
- If the plan is available online, please include a weblink/URL:

7. Name of the person who will serve as the SAFE species Program Leader (selected by the Program Partners submitting this proposal and serving as the point person for this proposal):

Name
Name of Institution
Address
Email
Telephone

Please attach a CV or resume for the Program Leader, along with his/her completed "Statements of Individual Commitment and Institutional Support" (<https://www.aza.org/safe-species>).

8. Names of AZA-accredited Zoos and/or Aquariums and Certified Related Facilities (Program Partners) applying for the species/taxa to become a SAFE species. Please attach a statement of institutional commitment (<https://www.aza.org/safe-species>) from each institution:

Name of Institution (1)
 Address of Institution
 Contact name, email, telephone

Name of Institution (4)
 Address of Institution
 Contact name, email, telephone

Name of Institution (2)
 Address of Institution
 Contact name, email, telephone

Name of Institution (5)
 Address of Institution
 Contact name, email, telephone

Name of Institution (3)
 Address of Institution
 Contact name, email, telephone

Name of Institution (6)
 Address of Institution
 Contact name, email, telephone

9. Has each of the Program Partners listed above been involved in an established and active conservation program for the species/taxa for more than two years?

Yes No

- If a Program Partner has not been involved for more than two years, explain their interest in being a Program Partner (LIMIT 1500 characters with spaces for all appropriate Program Partners):

- If a Program Partner has been involved in this species/taxa's conservation for more than two years, please summarize their involvement. (LIMIT 1500 characters with spaces for *each* Program Partner)

10. Have field-based program partnerships been established?

Yes, please list the organization(s)

No

11. Name of the related AZA TAG and SSP (if applicable):

Name of TAG
 Name of TAG Chair
 TAG Chair email
 TAG Chair telephone

Name of SSP
 Name of SSP Coordinator
 SSP Coordinator email
 SSP Coordinator telephone

- Do the related AZA Program Leaders support this proposal?

Yes No Not Applicable

Please explain (LIMIT: 750 characters with spaces).

- Will the SAFE species program relate to existing, written AZA Animal Program conservation plans or priorities (e.g., within Animal Care Manuals, Regional Collection Plans).

Yes, please describe (LIMIT: 750 characters with spaces)

No, the SAFE species program will be new / different than current Animal Program conservation efforts. Please describe (LIMIT: 750 characters with spaces)

No, the Animal Program has not identified current field conservation priorities

12. Briefly relate the importance of this species to AZA institutions. Please include history, field work, threats, and how the project will benefit the conservation status of this species, etc. (LIMIT: 3000 characters with spaces)

13. Briefly describe your plan to increase involvement of AZA members and partners, as appropriate. (LIMIT: 750 characters with spaces)

Agreement to Terms.

Checking the boxes below indicates that all Program Partners identified above agree to the terms identified:

All Program Partners agree to adhere to AZA's Code of Professional Ethics and all relevant Animal Care and Welfare Standards.

All Program Partners agree to develop a 3-year plan within six months of approval as a SAFE species for AZA SAFE activities that will include measureable field conservation and public engagement objectives to advance the established conservation plan.

Submitter's Signature

Date

For Internal Use Only:

Checklist for WCC reviewer:

- Questions 1-13 are answered fully.
- The species/taxa being applied for meets the eligibility criteria for a SAFE species.
- The established conservation plan for the species/taxa was attached and includes field conservation objectives.
- Each of the Program Partners listed has been involved in an established and active conservation program for the species/taxa for more than two years, or describes their commitment to the SAFE species program.
- Each of the Program Partners listed is a current AZA-accredited zoo or aquarium or Certified Related Facility and has submitted a Statement of Institutional Commitment.
- The CV or resume of the Program Leader of a SAFE species program, along with their completed Statements of Individual Commitment and Institutional Support, were attached.
- The support of the proposal by the related TAG and/or SSP Program Leader(s) is clear.
- The species' importance to AZA institutions was fully explained.
- All 'Agreement to Terms' checkboxes are checked.

Appendix B. Program Position Descriptions and Essential Functions

Required Positions

SAFE Program Leader

Eligibility Requirements

The Program Leader will:

- Be a paid employee of an AZA-accredited zoo or aquarium or certified related facility (AZA Member Institutions)
 - The intent of this requirement is to ensure that each Program Leader has the institution's full support to serve as a Program Leader.
- Be an individual member of AZA.
- Be confirmed to serve as the Program Leader by the WCC.
- Provide the Program Leader Statements of Individual Commitment and Institutional Support with the program proposal ([Appendix C](#)), committing the full support of his/her institution to serve as the Program Leader, which will include making necessary time available, supporting necessary travel costs to attend meetings, monitoring progress, and holding the Program Leader accountable for achieving the objectives and goals set for the program plan.
- Expect to be able to commit to the three-year position duration.
- Have proven capability in coordinating complex projects or programs.
- Be skilled in working with a multitude of individuals with diverse viewpoints.
- Preferred: skilled with implementing an adaptive management strategy.
- Preferred: species-specific knowledge/experience.

Essential Position Functions

Program Plans

- Oversee development, completion, and submission of a three-year program plan to the WCC within six months of a program proposal being approved, following all procedures outlined in this Handbook. At the end of the three-year program plan timeline, the Program Leader will oversee review of the program plan and will recommend adaptation as needed for a subsequent three-year program plan.

Program Administration

- Solicit and engage additional AZA members as appropriate.
- Solicit and engage additional external collaborators (e.g., government agencies, community-based or international non-profit organizations), as needed. Liaise with other zoo regions as relevant.
- Work closely and consistently with, and serve as the primary point of contact for the Project Partners, collaborators, AZA Wildlife Conservation Committee, and AZA staff to maintain forward movement on the program plan.
- Convene regular meetings of the parties, ideally in conjunction with the AZA Annual Conference and/or Mid-Year Meeting.
- Monitor and evaluate action item implementation and progress toward measurable outcomes.
- Work with Project Partners to adapt the program plan, budget, and timelines as necessary.
- Work with Project Partners to resolve obstacles or complications as they arise, or proactively if they can be anticipated.
- Manage (in conjunction with Treasurer if there is one) funds raised collaboratively to support the program plan in a restricted pass-through account (e.g., an AZA SAFE Dedicated Fund), and provide an annual financial report to Project Partners, WCC Coordinator for SAFE Species programs, WCC Liaison, and AZA staff.
- Work with AZA staff to keep SAFE species program webpages current regarding opportunities for AZA member involvement in the program.
- Utilize the SAFE Style Guide to brand materials appropriately. Provide a written report twice a year that includes updates on the specific action items in the program plan, as well as a short summary of

recent experiences appropriate for publication in *Connect*, other AZA publications, and/or to be shared with relevant AZA Animal Programs (i.e., TAGs and/or SSPs). Reports will be shared with the Project Partners, AZA staff, and the AZA Wildlife Conservation Committee. Reports will be submitted by the WCC to AZA's Board of Directors as addendums to their regular Committee report.

- Communicate any Program Partner performance issues to the WCC Liaison, WCC Coordinator of SAFE species programs, or AZA staff, work with the Program Partner to resolve the issues, and communicate the outcome to the WCC contacts.
- Fully understand and abide by the [AZA Code of Professional Ethics](#).

Vice Program Leader

Eligibility Requirements

The SAFE species program Vice Program Leader is expected to:

- Be a paid employee at an AZA member institution.
- Have an individual AZA membership.
- Uphold program business confidentiality.
- Have proficiency in utilizing AZA web resources and the internet, and have email access.
- Have strong skills in organization, communication, facilitation, conflict resolution, and in establishing and maintaining effective working relationships with diverse groups of individuals.
- Provide Program Officer Statements of Individual Commitment and Institutional Support ([Appendix D](#)).
- Preferred: Be well versed in the biology and behavior of the taxon/taxa covered by the program.

Essential Position Functions

- Assume all Program Leader-related duties if the Program Leader is unavailable, or that position is vacant.
- Attend program meetings whenever possible.
- Assist the Program Leader in the supporting and monitoring of Program Partners.
- Immediately notify the AZA Conservation, Management, and Welfare Sciences Department of a Program Leader vacancy.
- Assist the Program Leader with filling the Secretary and Treasurer (if applicable) positions if vacant.

Steering Committee

Eligibility Requirements

Members of the Steering Committee are expected to:

- Be paid employees of their institution or organization.
- Represent a current Program Partner and have subject matter expertise.
- Uphold program business confidentiality.
- Have proficiency in utilizing AZA web resources and the internet, and have email access.
- Have strong skills in organization, communication, facilitation, conflict resolution, and in establishing and maintaining effective working relationships with diverse groups of individuals.

Essential Position Functions

- Participate and communicate actively in program discussions and respond by set deadlines.
- Contribute to the development of the program plan for the SAFE species program.
- Vote in all elections and issues brought to a vote.
- Attend program meetings whenever possible.
- Communicate any problems or issues within the Steering Committee to the Program Leader.
- Monitor the progress on program plan activities.
- Contribute to and review the final draft of the program plan. This includes garnering information regarding conservation status and threats, identifying critical field conservation and public engagement actions to be implemented by AZA members and linking them to existing recovery or conservation plans, and working with partner organizations.
- Provide expert review of Conservation Grants Fund (CGF) proposals directed to the program.

- Provide and update general program information for the public pages of the AZA website upon request.

Members of the Steering Committee are encouraged to:

- Help existing and new incoming Program Partners become familiar and comfortable with their responsibilities, especially with respect to building sustainable populations.
- Identify, refine, support, and participate in actions identified in the program plan.
- Help to recruit applicants for vacant Program Leader positions.
- Solicit additional Steering Committee members as appropriate to reach the Steering Committee's ideal capacity (5-15 individuals).
- Solicit new Steering Committee members to replace Steering Committee members when their terms are completed.

Additional Suggested Positions (as needed)

Secretary

Eligibility Requirements

The Secretary is expected to:

- Be a paid employee of their institution or organization, which is an active Program Partner.
- Be a subject matter expert.
- Uphold program business confidentiality.
- Have proficiency in word processing and spreadsheet programs, utilizing AZA web resources, the internet, and have email access.
- Have strong skills in organization, communication, and in establishing and maintaining effective working relationships with diverse groups of individuals.

Essential Position Functions

- Record, document, and use the AZA SAFE brand on all program business documentation and submit materials to the Program Leader for distribution to the Program Partners and in the program's annual report ([Appendix F](#)).
- Communicate all programmatic changes for the program to the WCC Liaison and AZA staff.
- Participate in program's official meetings (in person if possible) and record minutes.
- Participate in program's working meetings (in person if possible).
- Respond to inquiries and requests for information regarding the program's expertise from the WCC, staff, AZA staff, and Program Partners in a timely manner.
- Post all program issues held to a vote on the program's AZA Network workspace (if applicable).
- Tally, record, and archive all vote results and submit to the Program Leader to communicate to the Program Partners, and to include in the program's annual report ([Appendix F](#)).
- Keep all program plan materials, Statements of Institutional Support, etc. updated and on file.

Treasurer

Eligibility Requirements

The Treasurer is expected to:

- Be a paid employee at an AZA member institution.
- Have an individual AZA membership.
- Uphold program business confidentiality.
- Have proficiency in word processing and spreadsheet programs, utilizing AZA web resources, the internet, and have email access.
- Have strong skills in organization, communication, and in establishing and maintaining effective working relationships with diverse groups of individuals.

Essential Position Functions

- Apply for and manage a [Dedicated Fund](#) in compliance with “AZA’s Management Guidelines for AZA Conservation Program Dedicated Funds”.
- Participate in program official meetings (in person if possible).
- Participate in program working meetings (in person if possible).
- Respond to inquiries and requests for information regarding the program’s expertise from the WCC, AZA staff, and Program Partners in a timely manner.

Program Partner Representatives

Eligibility Requirements

Each Program Partner Representative is expected to:

- Be an employee of the institution or organization s/he represents.
- Uphold program business confidentiality.
- Be familiar with the species/taxa s/he represents. It is understood that there will not always be a staff member that specializes in a particular taxon or species. In these situations, the position should fall to the person on staff that is the most logical point of contact for the program.
- Have the ability to make decisions about the institution’s engagement in the program plan, or be able to communicate with those who have the ability to make decisions about commitments.
- Have the capability to disperse documents to the appropriate institution personnel.
- Submit a Statement of Institutional Support if representing an AZA member organization.

Essential Position Functions

- Communicate with and disseminate information to staff at his/her institution, including the institutional director.
- Respond to and fulfill inquiries by Program Leaders in a timely manner.
- Vote in program elections.
- Review and respond to program plans within the requested time frame. Ensure that any program plan recommendation disagreements are addressed with the Program Leader and other relevant parties in a timely manner.
- Consider participation in or support for activities included in the program plan.
- Complete and return surveys regarding progress on actions within the requested time frame.
- Communicate any contact information changes to the Program Leader.

External Expert Positions

Collaborators

Essential Position Functions

- Work with SAFE Program on an ad hoc basis to assist with implementation of program plan objectives and actions.
- Provide input on the program plan as requested.
- Provide expert advice regarding any topics, research proposals, and education materials related to the collaborator’s area of expertise.

Advisors

Essential Position Functions

- Advise the program in their efforts to develop, implement, and evaluate program goals, as applicable.
- Uphold the program’s business confidentiality.
- Provide input on the program plan as requested.
- Provide expert advice regarding any topics, research proposals, and inquiries related to the Advisor’s area of expertise.
- Assist in the development of education materials related to the Advisor’s area of expertise.
- Assist with the development of research projects related to the Advisor’s area of expertise.

- Assist the program in reviewing CGF grant proposals related to the Advisor's area of expertise as requested.

WCC Coordinator for SAFE Species Programs

Essential Position Functions

- Uphold SAFE species program confidentiality.
- Receive program proposals and assign WCC Liaisons; send WCC Liaisons draft program plans.
- Review program proposals as outlined in this Handbook, and submit recommendation to WCC chair for final decision.
- Review program plans and provide feedback to WCC Liaison.
- In the case of filling a Program Leader vacancy, communicate confirmation of the new Program Leader to program Steering Committee, all applicants for the PL vacancy, and the AZA Conservation, Management, and Welfare Sciences Department.
- Provide general assistance to WCC Liaisons and Program Leaders regarding changes to program plans and accountability of Program Partners and Program Partner Representatives.
- Track eligibility and vacancies as Program Leaders change employers or the AZA member status changes at their institution.
- Coordinate consideration of program plan extensions and other special requests by SAFE species programs.
- Work with WCC Liaisons and Program Leaders interested in dividing existing SAFE species programs into multiple programs, or combining multiple programs into a single one.

WCC Liaison

Essential Position Functions

- Act as the primary contact between the SAFE species program and the WCC.
- Attend (or participate via conference call) as many of the program meetings as possible.
- Maintain consistent communication with the Program Leader to provide mentoring on best practices in conservation, to connect them with other resources within the AZA community such as AZA Committees, etc.
- Uphold program business confidentiality.
- Respond to inquiries from Program Leaders during the development of the program plan, review the draft program plan as outlined in this Handbook, and provide feedback to the Program Leaders.
- Compile comments from all reviewers and provide a recommendation for accepting/rejecting program plans to WCC Coordinator for SAFE species programs to send to the WCC chair.
- Monitor the program's progress and accountability for prioritizing, managing, and publishing the program plan.
- Provide general assistance to the program's oversight and operation. Monitor and provide feedback as necessary regarding consistent communication with their Program Partners and collaborators, especially with respect to implementing actions identified in the program plan and assessing accountability of Program Partners and Program Partner Representatives.
- Using annual and mid-year reports provide a verbal summary of the program, including accomplishments and/or concerns, at both AZA's Annual and Mid-Year WCC meetings. Communicate any challenges or issues identified to the WCC during the Annual meeting.

Appendix C. Program Leader Statements of Individual Commitment and Institutional Support

Program Leaders for SAFE species programs and their supporting institutions must be willing and able to devote the necessary resources (financial and/or in-kind) to oversee and manage a SAFE species program.

The *[Name of Institution]* is committed to providing the resources (may include financial and/or in-kind) and support needed for *[Name of Program Leader]* to serve as the *[Name of the species/taxa]* SAFE species Program Leader. This institutional support to the Program Leader includes making time available to work on the program, supporting travel costs to attend meetings, and monitoring progress in their job performance.

As defined in the SAFE Program Handbook, responsibilities include:

- Serving as the primary point of contact for the Program Partners and AZA Conservation, Management, and Welfare Sciences Department staff.
- Working with the Program Partners to create a program plan which includes measurable field conservation and public engagement actions and engages additional collaborators.
- Working closely and in a timely manner with the Program Partners, collaborators, AZA Wildlife Conservation Committee, and AZA Conservation, Management, and Welfare Sciences Department staff to maintain forward movement on the program plan.
- Monitoring and evaluating action item implementation and progress toward measurable outcomes.
- Working with Program Partners to adapt the Program Plan, budget, and timelines as necessary.
- Managing funds raised for the Program.
- Submitting reports to the Project Partners, AZA Wildlife Conservation Committee, and AZA Conservation, Management, and Welfare Sciences staff twice per year.

The *[Name of Institution]* further acknowledges that the timeline of this commitment spans a three-year period, *[20XX - 20XX]*. As this period comes to a close, the *[Name of SAFE Species Program]* will be adapted as needed for a subsequent three-year period. If this program is continued, *[Name of Program Leader]* and/or *[Name of Institution]* may indicate their interest in continuing to serve in this role by reapplying.

The above-named institution further grants AZA the nonexclusive right to publish on the AZA website and in AZA publications that information gathered for SAFE species programs supported by the institution. The institution retains all rights not otherwise in the public domain.

Name of Program Leader:

Date:

Signature of Program Leader: _____

Name of Direct Supervisor:

Date:

Signature of Direct Supervisor: _____

Name of Director/CEO:

Date:

Signature of Director/CEO: _____

Appendix D. Program Officer Statements of Individual Commitment and Institutional Support

Statement of Individual Commitment

As an officer for the *[Name of the species/taxa]* SAFE species program, I am willing and able to devote the necessary time to meet all deadlines, commitments, and responsibilities as outlined in the SAFE species Program Handbook related to my position. I will work with the Program Partner Representatives, the WCC, and the AZA Conservation, Management, and Welfare Sciences Department to ensure that the SAFE species program runs effectively and efficiently as defined in the position functions outlined in the Handbook. I understand that failure to meet these obligations may result in my removal from the program.

Name of officer position (i.e., Vice Program Leader, Secretary, or Treasurer):

Name of Applicant:

Signature of Applicant: _____

Date:

Statement of Institutional Support

The *[Name of Institution]* is committed to providing adequate resources and support for the management of the *[Name of SAFE Species Program]* as outlined in the SAFE Program Handbook. Responsibilities of the officer position include working with Program Partner Representatives, the WCC, and the AZA Conservation, Management, and Welfare Sciences Department to ensure that the SAFE species program runs effectively and efficiently as defined in the position functions outlined in the Handbook. The institution also understands that part of each officer's responsibility is to advance the conservation of the target species/taxa through implementation of a three-year program plan. The institution understands that failure to meet these obligations may result in his/her removal from the SAFE species program.

The above-named institution further grants AZA the nonexclusive right to publish on the AZA website and in AZA publications that information gathered for SAFE species programs supported by the institution. The institution retains all rights not otherwise in the public domain.

Name of the Director/Governing Official:

Signature of Director/Governing Official: _____

Date:

Appendix E. AZA Program Partner Statement of Institutional Support

The *[Name of AZA Institution]* is committed to providing resources (may include financial and/or in-kind) and support for the management of the *[Name of SAFE Species Program]* as outlined in the SAFE species Program Handbook. Responsibilities of the Program Partner include identifying a Program Partner Representative who will serve as the primary point of contact between the institution and the SAFE species program, and with working with the Program Leader, the WCC, and the AZA Conservation, Management, and Welfare Sciences Department to ensure that the SAFE species program runs effectively and efficiently.

The institution also agrees to:

- Help develop a three-year program plan within six months of approval of a new SAFE species program that will include measureable field conservation and public engagement objectives to advance an established conservation plan.
- Help implement the program plan to advance the conservation of the target species/taxa.

The institution understands that failure to meet these obligations may result in the AZA-accredited institution being removed as a Program Partner.

The above-named institution further grants AZA the nonexclusive right to publish on the AZA website and in AZA publications that information gathered for SAFE species programs supported by the institution. The institution retains all rights not otherwise in the public domain.

Name of the Program Partner Representative:

Signature of Program Partner Representative: _____

Date:

Name of the Director/Governing Official:

Signature of Director/Governing Official: _____

Date:

Appendix F. Annual Report Template

SAFE Species Program Annual Report

Notes:

Annual reports must be digitally submitted to AZA's Conservation, Management, and Welfare Sciences Department (safe@aza.org) and the program's WCC Liaison no later than **August 10th**.

Adjust the tables as necessary to accommodate complete answers.

This template is available in Word format at <https://www.aza.org/safe-species>.

Program Leader(s):

Vice Program Leader:

WCC Liaison:

Date:

Year when three-year program plan was approved:

1. Attach an updated, current program summary table with actions since your last annual report as they relate to the specific conservation and public engagement objectives detailed in the program plan.
2. List any significant revisions to the approved program plan or the timeline of actions, as well as why the revisions were made. If significant revisions were made, please send most recent version to the AZA SAFE Coordinator to be updated on the AZA SAFE website.
3. List all substantive working meetings the program held over the past year, along with the dates and location of the meeting(s) Program Leaders are asked to arrange, electronically or in person, at least one working meeting each year, and are encouraged to hold this meeting in conjunction with the AZA Annual Conference and/or Mid-Year Meeting.

Meeting Date	Meeting Place

4. Provide a list of all of the current Program Partners, specifically identifying those that joined the program this year. Attach copies of completed Statements of Institutional Support for any new AZA partners.
5. Provide a list of any other collaborators with which you worked over the course of the year, specifically identifying those that are new collaborators this year.
6. Briefly note any significant media/dissemination activities (e.g., news coverage, publications, conference presentations). You are encouraged to attach electronic copies of key publications, videos, or other materials developed over the course of the year.
7. If any, share comments and/or concerns regarding Program Partner Representatives or AZA member institution accountability with respect to the program plan. Please know that you may discuss any issues as they arise throughout the year with the program's WCC Liaison.
8. If any, share additional program-related comments/concerns so that WCC may be able to assist you.
9. Please write a short summary (~500 words) of the program's highlights over the past year and overall assessment on progress with respect to the program plan and its relation to the species' recovery or conservation plan. Highlights can include major milestones that have been reached, major press that was received on behalf of the efforts for your program, programs that have engaged visitors or local communities in the region of focus, etc. The summary should be written with a public audience in mind and may be used in part or in full in AZA communications, such as in *Connect*, social media,

press releases, etc. Please attach high-resolution project-related photos (resolution of 300 dpi at 5x7 inches), photo credit information⁷, and authorship credit.

10. Please attach a spreadsheet listing institutional, organizational, or corporate donors; funds raised (income), as well as how funds were expended (expenses).

⁷ In your agreement to submit photos with your reports or associated communications, you grant to AZA the non-exclusive, worldwide, perpetual right and license to use, display, reproduce, publish, transmit, and distribute your photograph on AZA's Web site, in our magazine, and/or in other promotional materials. Your grant and license shall also apply to any reprints, revised editions, or derivative works in any media or format, whether now or hereafter known, including without limitation other kinds of print media and electronic media. By submitting the photos you also represent, acknowledge and warrant that (i) the submitted photograph is an original work created solely by you, and you are the sole owner of all rights, title, and interest in and to your photograph, including the copyright or have received equivalent permissions from the original photographer; (ii) AZA's publication of your photograph as authorized herein will not violate or infringe any rights, title, or interest of any person or entity; (iii) AZA's publication of your photograph will not violate any rights of privacy or publicity nor create any other liability in tort and that you have obtained a valid model release from any identifiable, individual person who is the subject of the photograph; (iv) you are not a party to and your photograph is not subject to any contract or arrangement that would conflict with your permission herein; and (v) you agree to indemnify and hold harmless AZA against any damages, losses, or expenses occurring as a result of any claimed breach of warranty, to the extent of the law.

Appendix G. Mid-Year Progress Report Template

SAFE Species Program Mid-Year Progress Report

Notes:

Progress reports must be digitally submitted to AZA's Conservation, Management, and Welfare Sciences Department (safe@aza.org) and the program's WCC Liaison no later than **February 15th**.

This template is available in Word format at <https://www.aza.org/safe-species>

Program Leader:

Vice Program Leader:

WCC Liaison:

Date:

Year when three-year program plan was approved:

1. Please write a short summary (~500 words) of recent program highlights from the past six months (approximately). This summary should be written with a public audience in mind and may be used in part or in full in AZA communications, such as in *Connect*, social media, press releases, etc. Please include authorship credit, as well as attach high-resolution project-related photos (resolution of 300 dpi at 5x7 inches) and photo credit information .
2. If any, please share any comments and/or concerns regarding the program plan, Program Partner Representatives, or AZA member institution accountability so that the WCC may be able to assist you.

^{*} In your agreement to submit photos with your reports or associated communications, you grant to AZA the non-exclusive, worldwide, perpetual right and license to use, display, reproduce, publish, transmit, and distribute your photograph on AZA's Web site, in our magazine, and/or in other promotional materials. Your grant and license shall also apply to any reprints, revised editions, or derivative works in any media or format, whether now or hereafter known, including without limitation other kinds of print media and electronic media. By submitting the photos you also represent, acknowledge and warrant that (i) the submitted photograph is an original work created solely by you, and you are the sole owner of all rights, title, and interest in and to your photograph, including the copyright or have received equivalent permissions from the original photographer; (ii) AZA's publication of your photograph as authorized herein will not violate or infringe any rights, title, or interest of any person or entity; (iii) AZA's publication of your photograph will not violate any rights of privacy or publicity nor create any other liability in tort and that you have obtained a valid model release from any identifiable, individual person who is the subject of the photograph; (iv) you are not a party to and your photograph is not subject to any contract or arrangement that would conflict with your permission herein; and (v) you agree to indemnify and hold harmless AZA against any damages, losses, or expenses occurring as a result of any claimed breach of warranty, to the extent of the law.

Appendix H. Checklist for Program Plan Review

The role of AZA Reviewers is to ensure that each SAFE species program plan addresses the expected criteria, and that the programs provide quality information and measurable conservation outcomes. Periodic review of the program plan is one way to ensure this. Reviewers are encouraged to identify specific strengths or concerns in the comments column. After reviewing the program plan, reviewers should provide a recommendation for approval status of the plan.

SAFE Species Program:

Reviewer:

Recommendation for Approval: (*Approved, Pending Approval with Required Revisions, Not Approved*)

Required Section of the Program Plan	Section included?		Comments
	Yes	No	
I. Background			
A. Table of contents and page numbers			
B. Program Goal			
C. Program Operational Structure, including Program Leader, Vice Program Leader, Steering Committee, Program Partners, and advisors with contact information (phone numbers and emails)			
D. Conservation Target			
E. Status of Taxa within AZA Community			
1. Relation to an AZA Animal Program			
2. SSP Sustainability designation (if applicable)			
F. AZA Conservation Activities			
1. AZA Animal Program Activities (if applicable)			
2. Individual AZA Member Activities			
G. AZA Public Engagement Activities			
II. Species Status			
A. Conservation Status			
B. Recovery Plan or other Conservation Plan in effect			
1. Citation and date of recovery plan or other conservation plan and implementing authority			
2. Relationship of Program Leader and/or Program Partners to recovery authority			
C. Threats			
III. Outlined Objectives			
A. Conservation Objectives			
1. Metrics for evaluation			
2. Specific section of recovery plan to which each objective links			
B. Public/Stakeholder Engagement Objectives			
1. Target audience(s)			
2. Metrics for evaluation			
3. Links to advancing the existing conservation/action plan			

C. Communications/Public Awareness Objectives			
1. Target audience(s)			
2. Metrics for evaluation			
D. Funding Objectives			
1. Projects or action items from to which funds will be applied			
2. Metrics for evaluation			
IV. Program Summary Table			
1. Objectives			
2. Actions			
3. Timeline			
4. Responsible Party/Partner			

Additional Reviewer Comments: *(please provide additional comments here if applicable)*

Appendix I. SAFE Visual Brand and Identity Guidelines