



AZA Institutional Data Management Advisory Group (IDMAG)  
Government Ownership Committee (IDMAGGOC)

March 8th, 2006

**Note: The information contained in this document is not current and is in the process of being revised by the AZA IDMAG.**

Currently, there are approximately 60 government-owned species held in AZA zoos that are part of some type of collaborative program (excluding confiscations). A survey of program managers indicated that many of the initial animal imports or transfers of government-owned species to and among AZA zoos, which have occurred as a result of these programs, are not supported by official loan agreements and/or the paperwork does not include record keeping requirements. Therefore, record keeping details for government ownership transactions have been promulgated primarily through word-of-mouth, contributing to data discrepancies in the ISIS database. In order to ensure legal compliance, and to meet the current and existing expectations for data quality, it is critical that we move toward written policies and procedures that exemplify best business practices.

WCMC reviewed the attached proposal during its March, 2006 Board meeting and has deemed it acceptable for distribution to the TAG Chair, Conservation & Science, Studbook Keeper and Registrar listserves. Therefore, IDMAGGOC recommends that the following guidelines be implemented in order to streamline and improve business practices for government-owned species. The process would ensure that legal documentation is developed and distributed, in a timely manner, and that current and future holding institutions are provided with the information necessary to maintain records of the highest quality.

Sincerely,

Rae Lynn Haliday, CRM  
Chair/IDMAGGOC  
Registrar/Saint Louis Zoo

Aletha Kinser  
Chair/IDMAG  
Registrar/Sedgwick County Zoo

AZA Institutional Data Management Advisory Group (IDMAG)  
Government Ownership Committee (IDMAGGOC)

March 8th, 2006

Page 2

**IDMAGGOC Advisors/Members**

Beth Bahner/Animal Collections Manager/Philadelphia Zoo  
Lynn McDuffie/Registrar/Disney's Animal Kingdom  
Steve Olson/Director of Government Affairs/AZA  
Melanie Brose/Biologist/USFWS  
Laurie Bingaman Lackey/Application Support Analyst/ISIS

Rachél Watkins Rogers/Registrar/Miami Metrozoo  
Adrienne Miller/Registrar/Audubon Park Zoo  
Liza Watson/Animal Records Keeper/Lincoln Park Zoo  
Susan Reno/Registrar/Riverbanks Zoo  
Marla Waddell/Registrar/Point Defiance Zoo & Aquarium  
Gretchen Bickert/Registrar/Phoenix Zoo  
Nancy Butler/Registrar/Detroit Zoo



**AZA Institutional Data Management Advisory Group (IDMAG)  
Government Ownership Committee (IDMAGGOC) Guidelines  
for Developing Loan Agreements  
for Government Owned Species**

March 8<sup>th</sup>, 2006

Page 1

All programs and subsequent transactions that involve local, state, federal or foreign government entities, wherein ownership of the animal (s) resides with the stated agencies, need to be supported by loan agreements or similar documentation, that adequately reflects record keeping requirements as they relate to the management of AZA-member institutional animal data. In order to meet legal requirements and expectations for animal data quality, agreements should be finalized and distributed to all holding institutions prior to the import or transfer of any relevant specimens. IDMAGGOC recommends the following minimum record keeping requirements be included in loan agreements relevant to government-owned species held in AZA zoos:

1. Ownership of animals acquired under the agreement and all subsequent offspring should be clearly defined.
2. All terms as they apply to the ownership, management and holding of the relevant species and specimens need to be clearly defined including, but not limited to, stewardship (for example, Toronto Zoo serves as steward for Puerto Rican crested toads which are owned by the Government of Puerto Rico), institutional contacts, permit requirements, breeding recommendations, division of offspring, carcass disposition, and reporting requirements.
3. Complete contact information for the government entities including legal name of the relevant agency, address, phone number and the appropriate representative and their title should be documented.
4. Draft agreements should be provided to IDMAGGOC for verification and/or issuance of the ISIS institutional mnemonic that will represent the government entity.

AZA Institutional Data Management Advisory Group (IDMAG)  
Government Ownership Committee (IDMAGGOC)

Guidelines for Developing Loan Agreements  
for Government-Owned Species

March 8th, 2006

Page 2

5. A copy of final agreements is encouraged to be provided to the committee for inclusion into the IDMAGGOC Government Owned Species Database.
6. Any questions with regard to existing government-owned species, record keeping protocols or general data management issues may be directed to the IDMAGGOC or IDMAG Chairs.
7. In the event that there is a legitimate business reason that an official loan document cannot be obtained, a record keeping protocol can be developed by IDMAGGOC. Protocols are developed for the sole purpose of communicating information to record keepers and are not a substitute for official, legal documentation.

If you would like your loan agreement to be included in the IDMAGGOC Government Owned Species Database, please send a copy to Rae Lynn Haliday, Chair of IDMAGGOC, Saint Louis Zoo, 1 Government Drive, St. Louis, MO 63110. Ms. Haliday may be reached at (314) 781-0900, ext. 372, [haliday@stlzoo.org](mailto:haliday@stlzoo.org) or by fax at (314) 647-7969. A backup copy of the database will also be provided to AZA.