

# ASSOCIATION OF ZOOS & AQUARIUMS

## **TAXON ADVISORY GROUP (TAG) CHAIR HANDBOOK**

Updated 14 February 2007

General information on TAGs is available on the AZA Web site at:  
<http://www.aza.org/ConScience/ConScienceTAGFact/>

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**ASSOCIATION OF ZOOS AND AQUARIUMS  
TAXON ADVISORY GROUP (TAG) CHAIR  
POSITION DESCRIPTION**

**Position Overview**

The TAG Chair works directly with AZA institutional representatives, WCMC, and AZA Conservation and Science Department to lead, develop, oversee, promote, evaluate and support the cooperative animal management, conservation, and scientific initiatives of the TAG. The primary responsibility of the TAG Chair is to ensure completion and distribution of a Regional Collection Plan with recommendations for which species/taxa should be maintained in AZA collections and what, if any, level of management is appropriate for each recommended taxon. Additional responsibilities include leadership and organization of the TAG, communication of recommendations and policies, and political expediency. The TAG Chair works in conjunction with a TAG Steering Committee and is responsible for taking this diverse set of representatives from individual zoos and aquariums across North America and making them a cohesive and productive group. The TAG Chair serves as the primary contact and Association expert for her/his taxa and abides by the duties and responsibilities set forth by the WCMC.

**Essential Position Functions**

- Must oversee completion and distribution of an initial Regional Collection Plan (RCP) within 18 months of being named/elected TAG Chair. Must oversee completion and distribution of an updated RCP every three years thereafter
- Must oversee management (once the TAG RCP is approved) and monitoring of SSP Coordinators, PMP Managers, and Studbook Keepers under the TAG's umbrella
- Must regularly assess status of TAG's SSPs, PMPs and Studbooks and provide assistance as necessary
- Must communicate all programmatic changes for the TAG and TAG's programs to the AZA Conservation and Science Department
- Must send copies of all significant program documents and correspondence to AZA Conservation and Science Department and WCMC Vice Chair for TAGs and SSPs
- Must develop and oversee appropriate TAG Steering Committee structure and responsibilities and solicit appropriate advisors
- Must maintain an up-to-date list of all Steering Committee members, officers and advisors.
- Should assist the AZA Animal Welfare Committee with the development of the Standardized Guidelines for Animal Care by identifying taxonomic experts to assist in their production
- Should maintain contact with counterparts in other regional associations to facilitate inter-regional cooperation.
- Should engage in the work of the appropriate World Conservation Union (IUCN) Species Survival Commission (SSC) Specialist Group and other relevant conservation organizations.

**Requirements for Eligibility**

- Employment at an AZA Accredited Institution, Certified Related Facility, or Society Conservation Partner.
- Individual AZA Membership.
- Statement of individual commitment.

- Statement of institutional support from an AZA Accredited Institution/Certified Related Facility
- Internet and email access.
- Should have strong skills in organization, communication, facilitation, conflict resolution, and in establishing and maintaining effective working relationships with diverse groups of individuals.

The Institutional Director, Institutional Liaison, and AZA Conservation and Science Department will be kept informed as to whether the TAG Chair is meeting required position functions and eligibility requirements. **Failure to meet the obligations outlined in this handbook could result in the TAG Chair's removal from the program.**

## **TAG General Information/Administration**

### **TAG Description**

AZA Taxon Advisory Groups are expert advisors who help to identify, manage and support the Association's cooperative animal management programs. TAGs develop regional collection plans that recommend taxa for AZA collections and determine appropriate levels of management. TAGs also serve as AZA experts on husbandry, veterinary, conservation, research, ethical, and other issues that apply to their taxa.

TAGs were purposely organized along the same lines as the specialist groups of the IUCN SSC's and Bird Life International's Taxonomic Specialist Groups, and as such are ideal groups to promote cooperation and sharing of information between AZA and other regional and international conservation programs.

### **Becoming a TAG Chair**

Individuals interested in becoming a TAG Chair may consult the AZA Conservation and Science Department or the WCMC Vice Chair for TAGs and SSPs. A list of TAGs is available on the AZA Web site at [http://members.aza.org/Departments/ConScienceMO/tag\\_mo/](http://members.aza.org/Departments/ConScienceMO/tag_mo/). A list of available TAG Chair positions is published in the monthly Conservation and Science report, distributed via the consci listserv. To join this or any AZA listserv, see: <http://members.aza.org/Departments/ConScienceMO/>. All TAG Chair Applications (page 8) should be submitted directly to the WCMC Vice Chair for TAGs and SSPs. All TAG Chairs must be individual AZA members and must be employed by an AZA Accredited Institution, Certified Related Facility, or Society Conservation Partner.

### **Creating a New TAG**

The existing AZA TAGs cover nearly all animal taxa commonly held in AZA collections. Individuals interested in creating a new TAG for taxa not yet brought under a TAG umbrella or a subgroup of taxa currently covered by an existing TAG should complete a Petition to Create a New TAG (page 10). All New TAG Petitions should be submitted directly to the WCMC Vice Chair for TAGs and SSPs. All TAG Chairs must be individual AZA members and must be employed by an AZA Accredited Institution, Certified Related Facility or Society Conservation Partner.

### **TAG Chair Accountability**

All TAG Chairs must (1) submit a Regional Collection Plan for WCMC approval within 18 months of approval as TAG Chair and (2) submit an updated RCP for WCMC approval at least every three years thereafter. Failure to meet these obligations could result in the TAG Chair's removal from the program.

If the TAG Chair misses an RCP deadline but wants to maintain her/his role as program leader, the institutional director or IL must contact the WCMC Vice Chair for TAGs and SSPs within two weeks of the missed deadline to discuss the reason for the missed deadline. If the Director/IL does not contact the WCMC Vice Chair within two weeks of the missed deadline, the TAG Chair will be removed and the position vacancy will be advertised. If the WCMC Vice Chair determines that the reason for the missed deadline is valid, a new deadline will be set.

TAG Chairs are also responsible for working with Institutional Representatives, SSP Coordinators, PMP Managers, Studbook Keepers, the TAG Steering Committee, the WCMC, and the AZA Conservation and Science Department to ensure that their program runs effectively and efficiently. They must also be aware of the functioning and status of the managed programs they oversee. The TAG Steering Committee (or WCMC) can remove the TAG Chair if s/he does not meet these obligations (e.g., is consistently not responsive to requests for information, is consistently not responsive to/considerate of institutional needs). Each TAG has a WCMC Liaison, established to facilitate the work of the TAG and to assist the Chair and Steering Committee with any issues that may arise.

### **TAG Structure**

Each TAG is led by a Steering Committee and three officers: Chair, Vice Chair, and Secretary. TAG Chairs are elected by WCMC. The Steering Committee, Vice Chair, and Secretary are elected from the TAG's Institutional Representatives (IRs). All institutions are able to participate in the TAG through their IRs.

### **TAG Steering Committee and Officers**

- The TAG Steering Committee is made up of up to 15 members (this includes the officers).
- The Steering Committee serves as the voting body for approval of TAG business.
- Each TAG determines the size of its Steering Committees, as long as it has at least five and no more than 15 members. These numbers include the officers. If 15 or fewer IRs are interested in serving on the Steering Committee, all can simply be appointed. If more than 15 IRs are interested in serving on the Steering Committee, or if the Chair desires, the TAG Secretary must conduct a Steering Committee election. If the TAG does not have a Secretary or if the Secretary is up for election, the TAG Chair or the AZA Conservation & Science Department will administer the election.
- The Secretary and Vice Chair are elected from the Steering Committee members. Steering Committee members form the electorate for this vote. In the event that a Secretary cannot be identified from within the Steering Committee membership, an IR may be appointed Secretary but will not be allowed to vote as a Steering Committee member.
- The Steering Committee may determine its own operating structure, provided that provisions are made for the democratic election of Steering Committee members on a regular basis. As examples: Steering Committee members might serve staggered terms of three years duration.

Committees with fewer than 15 members might find it more efficient to solicit new or additional Steering Committee members annually to ensure that interested individuals have an opportunity to come forward on a regular basis.

- Each institution may be represented in the TAG by one IR. If the Chair moves to an institution that already has an IR or if a new Chair is appointed from an institution that already has an IR, the Chair automatically becomes the IR. However, if the IR was a member of the Steering Committee, both the Chair and IR will be voting members of the Steering Committee until the next election.
- TAGs may appoint any number of Sub-Committees and Sub-Committee Chairs to carry out the work of the TAG. TAGs may also appoint any number of non-voting advisory members to the Steering Committee to support the work of the TAG.
- SSP Coordinators, PMP Managers, and Studbook Keepers are not automatically approved as IRs or voting members of the TAG Steering Committee. They must be designated as their institution's IR and be elected to the Steering Committee. Program leaders who are not Steering Committee members may still participate in the TAG as non-voting advisory members.
- If the TAG Chair position becomes vacant, the position is advertised to the general membership and the most qualified applicant is selected by the WCMC.
- The primary role of the Vice Chair is to assume leadership of the TAG should the Chair position become vacant. During this time, the Vice Chair will assume all responsibilities of the Chair.
- The primary responsibility of the TAG Secretary is to oversee TAG elections.
- Non-productive Steering Committee members (including officers) may be removed by a majority decision of the Steering Committee.
- If a Steering Committee member transfers to a different participating institution with an existing IR, and that institution does not wish to change IRs, the Steering Committee member will be allowed to remain a voting member of the Steering Committee until the next election.
- If a Steering Committee member resigns or leaves employment within AZA, s/he must resign her/his position on the Steering Committee. The TAG may fill the vacated position with the IR who received the next highest number of votes in the most recent Steering Committee election or by holding a new election. The Steering Committee may choose not to fill a vacant position(s), as long as the Committee maintains a membership of at least five IRs.

### **TAG Institutional Representatives (IRs)**

- All AZA institutions/facilities may designate one IR to a TAG. The IR is designated by the Institutional Liaison (IL). If an institution does not want to specify an IR, the IL will still receive TAG information and be responsible for responding to the TAG space survey. All AZA institutions must respond to TAG space surveys.
- An institution may change its IR at any time by entering the change online in the AZA C&S Programs Database. Institutions are responsible for keeping the TAG Chair informed of changes in IRs and contact information by notifying the Chair directly.
- The Chair of the TAG is automatically her/his institution's IR for that TAG.
- The IR is the primary point of contact with the TAG, will receive all TAG correspondence (Regional Collection Plans, meeting minutes, requests for information, etc.), and is responsible for disseminating TAG information within her/his institution.
- IRs are responsible for representing their institutional needs within the TAG.

- IRs are responsible for actively participating in the TAG, most importantly in the regional collection planning process, and are required to respond to all TAG information requests (space surveys, policy questions, husbandry information, etc.).
- IRs must be able to conduct regular business via e-mail and have access to the Internet and the Members Only section of the AZA Web site.
- IRs are responsible for voting on relevant TAG business (e.g., to elect Steering Committee members). The only voting members of the TAG are the IRs.

### **Program Oversight**

Once the RCP is approved by WCMC, the TAG Steering Committee is responsible for approving, monitoring, and overseeing the TAG's programs (SSPs, PMPs and Studbooks) and program leaders. All vacant program leader positions must be advertised in the monthly Conservation and Science report (distributed via the consci listserv), whereupon the TAG Steering Committee may select the most qualified applicant. All program and program leader changes must be reported immediately to the AZA Conservation and Science Department.

The TAG should regularly assess program status and program leaders' performance and provide assistance as necessary. The TAG Steering Committee may remove program leaders for not adequately and/or appropriately performing their duties. The AZA Conservation and Science Department and the WCMC Vice Chair for TAGs and SSPs are available to provide assistance with performance issues. The AZA Conservation and Science Department should be copied in on all correspondence and decisions relevant to program leader performance.

### **TAG Chair Institutional Change**

TAG Chairs who are changing institutions must, within 60 days of departure from their original institution, submit:

- A new Statement of Individual Commitment and Statement of Institutional Support (part of the TAG Chair Application, page 8) to the WCMC Vice Chair for TAGs and SSPs and the AZA Conservation and Science Department.
- New contact information, including institution, address, phone, fax, and email.

The names and contact information of all new program leaders are published in the monthly AZA Conservation and Science report and updated on the AZA Web site and in the AZA Directory.

If the institution holding the TAG does not wish to relinquish the program, a representative must contact the WCMC Vice Chair for TAGs and SSPs within 30 days of the departure of the TAG Chair and submit an applicant (using the TAG Chair Application, page 8). The WCMC Vice Chair will request an updated application from the current TAG Chair and the full committee will review and vote on the candidates to select the one most qualified. Upon selection of a TAG Chair, the WCMC Vice Chair will inform the applicants, the supporting institutions, and the AZA Conservation and Science Department of the final decision.

### **Loss of Accreditation/Certification of a TAG Chair's Institution**

The AZA Board has stipulated that all TAG Chairs must be employed at an AZA accredited institution, certified related facility, or society conservation partner. If a TAG Chair's facility

loses accreditation, the TAG Chair must step down from the chair position and the Vice Chair will assume the Chair's duties until a permanent chair is selected by the WCMC. The former Chair may be appointed by the TAG as a non-voting advisor.

### **TAG Chair Resignation**

When a TAG Chair resigns, s/he must send a letter of resignation to the TAG Steering Committee and to the AZA Conservation and Science Department. S/he must also send all materials relating to the TAG business to the TAG Vice Chair.

### **TAG Chair Vacancies**

All TAG Chair vacancies must be advertised in the monthly Conservation and Science report (distributed via the consci listserv). To join this or any AZA listserv, see: <http://members.aza.org/Departments/ConScienceMO/>. All TAG Chair Applications should be submitted directly to the WCMC Vice Chair for TAGs and SSPs.

The WCMC Vice Chair for TAGs and SSPs will distribute the completed applications for review and vote by the WCMC Committee members. Upon selection of a TAG Chair, the WCMC Vice Chair will inform all the applicants and the AZA Conservation and Science Department of the final decision. The names and contact information of all new program leaders are published in the monthly Conservation and Science report and updated on the AZA Web site and in the AZA Directory.

## **REGIONAL COLLECTION PLANS (RCPs)**

Development of the Regional Collection Plan is the most important responsibility for the TAG. The TAG Chair is required to submit an initial RCP within 18 months of acceptance of the role of TAG Chair. The RCP must be updated and submitted for reapproval to the WCMC at least every three years. See the Regional Collection Planning Handbook for detailed information on RCPs.

## AZA TAG CHAIR APPLICATION

Individuals interested in chairing existing TAGs should complete the following application and return it to the WCMC Vice Chair for TAGs and SSPs for review.

1. Applicant Information

Name:

Institution:

Institutional Address:

Phone:

Fax:

Email:

AZA Membership Number:

Date Application Submitted:

2. Scope of taxa covered by the TAG:

3. Attach a curriculum vita, including all relevant experience with the taxon for which the applicant is applying.

4. Attach a list of all other AZA program leader positions (e.g., Studbook Keeper, SSP Coordinator, TAG Chair) you hold and the most recent publication date of relevant program documents (e.g., Studbook, Master Plan, RCP).

5. Complete the Statement of Individual Commitment and Statement of Institutional Support (below).

**Statement of Individual Commitment**

As TAG Chair, I am willing and able to devote the necessary time to oversee the TAG and publish a Regional Collection Plan. I am willing and able to meet all deadlines and responsibilities as outlined in the TAG Chair Handbook. These include (1) publishing an approved Regional Collection Plan within 18 months of approval as TAG Chair, (2) publishing an approved Regional Collection Plan at least every three years thereafter, and (3) working with institutional representatives, SSP Coordinators, PMP Managers, Studbook Keepers, WCMC, and the AZA Conservation and Science Department to ensure that the TAG runs effectively and efficiently. Failure to meet these obligations could result in my removal from the program.

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 \_\_\_\_\_ TAG as outlined in the TAG Chair Handbook. Responsibilities of the TAG Chair include (1) publishing an approved Regional Collection Plan within 18 months of approval as TAG Chair, (2) publishing an approved Regional Collection Plan at least every three years thereafter, and (3) working with institutional representatives, SSP Coordinators, PMP Managers, Studbook Keepers, WCMC, and the AZA Conservation and Science Department to ensure that the TAG runs effectively and efficiently. Failure to meet these obligations could result in his/her removal from the program.

The above-named institution further acknowledges that information gathered for TAGs supported by the institution is not the exclusive property of the institution and enters public domain upon publication on the AZA Web site.

Name of the Director/Governing Official: \_\_\_\_\_

Signature of Director/Governing Official: \_\_\_\_\_

AZA Membership Number of the Institution/Facility: \_\_\_\_\_

Date: \_\_\_\_\_

## PETITION TO CREATE A NEW TAG

Individuals interested in creating and chairing a new TAG must complete the following petition form in its entirety. The form should be submitted to the WCMC Vice Chair for TAGs and SSPs.

- Cover letter expressing the applicant's interest in and appropriate experience with the taxon
- Applicant's name, title, institution, professional address, telephone number, fax number, e-mail address and AZA membership classification, and membership number
- Common and scientific name(s) of taxa to be included in the TAG
- TAG justification: Outline the need for the proposed TAG, the immediate and long-term goals, and discuss the impact on conservation
- Biology and natural history of the taxa (by family or genus)
- Status of taxa in the wild as defined by IUCN, CITES, and/or USFWS. Appropriate information on the past, present, and future status should be included as supportive evidence of the need for TAG management.
- Status of taxa in captivity
  - Current species in AZA facilities and estimates of population parameters for each species (e.g., sizes, sex ratios, increasing/decreasing)
  - Husbandry (type enclosures, social considerations, special issues)
  - Breeding success and/or problems
  - Existing management and conservation programs for the taxa
- Bibliography  
A complete bibliography should be given for all references used in your proposal.
- Attach a copy of applicant's *curriculum vita*, including administrative, communicative, scientific, or other skills as well as training (e.g., AZA Population Management course, etc.)

- Statement of Individual Commitment

I am willing and able to devote the necessary time to successfully perform the duties of Chair for the \_\_\_\_\_ (name of taxon) Taxon Advisory Group. I am willing and able to meet all TAG Chair responsibilities as described in the AZA TAG Chair Handbook.

\_\_\_\_\_  
Name of Applicant (please print)

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

- Statement of Institutional Support

The \_\_\_\_\_ (Name of institution) commits itself to providing adequate time, resources and financial support for the establishment and maintenance of the \_\_\_\_\_ (name of taxon) Taxon Advisory Group.

In the event that \_\_\_\_\_ (Name of petitioner) is no longer employed at this facility, the \_\_\_\_\_ (Name of institution) agrees to transfer to the TAG's Vice-Chair within 30 days all relevant information and documentation regarding the TAG program.

\_\_\_\_\_  
Name of Director or Governing Official (please print name and title)

\_\_\_\_\_  
Signature of Director or Governing Official

\_\_\_\_\_  
Date

## AZA CONTACT INFORMATION

### Conservation and Science Department

Interim Director  
Brandie Smith  
301-562-0777 x241  
[bsmith@aza.org](mailto:bsmith@aza.org)

Program Assistant  
Rachel Penrod  
301-562-0777 x245  
[rpenrod@aza.org](mailto:rpenrod@aza.org)

Interim Assistant Director  
Ruth Allard  
301-562-0777 x239  
[rallard@aza.org](mailto:rallard@aza.org)

Program Assistant  
Melissa Yuen  
301-562-0777 x246  
[myuen@aza.org](mailto:myuen@aza.org)

### Population Management Center

Sarah Long  
Population Biologist  
312-742-3993  
[slong@lpz.org](mailto:slong@lpz.org)

Steve Thompson  
Advisor/Administrator  
312-742-7765  
[sthompson@lpzoo.org](mailto:sthompson@lpzoo.org)

Colleen Lynch  
Population Biologist  
312-742-7229  
[clynch@lpzoo.org](mailto:clynch@lpzoo.org)

Joanne Earnhardt  
Advisor/Administrator  
312-742-7745  
[jearnhardt@lpzoo.org](mailto:jearnhardt@lpzoo.org)

Louise Bier  
Studbook Analyst  
312-742-7250  
[lbier@lpzoo.org](mailto:lbier@lpzoo.org)

Lisa Faust  
Research Biologist  
312-742-7227  
[lfaust@lpzoo.org](mailto:lfaust@lpzoo.org)

### Small Population Management Advisory Group (SPMAG)

Chair  
Robert Wiese  
San Diego Zoo  
[bwiese@sandiegozoo.org](mailto:bwiese@sandiegozoo.org)

### Taxon Advisory Groups (TAGs)

A current list of AZA TAGs, including TAG Chairs and their contact information is available on the AZA Web site at: <http://members.aza.org/Departments/CandS/>

### Wildlife Conservation and Management Committee (WCMC)

A current list of WCMC members and advisors is available on the AZA Web site at: <http://www.aza.org/AboutAZA/ComWCMC/>