

Pan African Sanctuary Alliance

Operations Manual • Second Edition, December 2016



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Protecting Primates Together

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Part 1 • Introduction

The Pan African Sanctuary Alliance (PASA), the largest association of wildlife centers in Africa, includes more than 20 organizations across Africa which are securing a future for Africa's primates and their habitat by rescuing and caring for orphaned apes and monkeys, protecting primates from extinction, working to stop the hunting of primates and the illicit pet trade, educating the public, and empowering communities. PASA unifies its member wildlife centers and advocates on their behalf at the international level, provides support, and works to raise awareness globally about wildlife conservation issues.

PASA's mission is to secure a future for Africa's primates and their habitat through a unique collaboration of African sanctuaries, communities, governments and global experts.

PASA's Operations Manual provides guidance to its member organizations, as well as other organizations that work in the fields of primate conservation and primate welfare, to empower them to maintain high standards and conduct effective programs.

Part 2 • Government relations and compliance

Minimum Standards:

PASA member sanctuaries have in place, or are actively pursuing, a Memorandum of Understanding or similar agreement with the national government, wildlife authority and/or regional government that defines the sanctuary's role in national conservation and placement of animals, outlines the responsibilities and obligations of the relevant governmental authorities and outlines a means of coordination between the parties to the agreement. The following are required of sanctuaries:

- Register as a legal entity within the country of operation, when possible and applicable.
- Comply with national and international (CITES, IATA) regulations when transporting samples and live animals. (A CITES permit is required for the movement of all samples except feces. Refer to the websites of CITES and IATA for more information.)
- Have appropriate official documentation from the relevant government authorities for all animals in their care to verify their legal status at the sanctuary.

It is the responsibility of PASA member sanctuaries to be cognizant of relevant local and national legislation and policy. Likewise, PASA members ensure they are aware of relevant international policy and conventions.

Best Practice:

Where possible, a sanctuary should have NGO not-for-profit status in the country of operation.

Where possible, a sanctuary should have in place or actively work to negotiate a formal agreement and official permission from traditional and local authorities.

Part 3 • Sanctuary management and operations

3.1 Staff and volunteer management

3.1.1 Staff and volunteer development and training

Minimum Standards:

PASA member sanctuaries ensure that all staff members and long-term volunteers are familiar with the concepts, principles and philosophies of the sanctuary and PASA.

PASA member sanctuaries provide in-house training for local staff and volunteers to ensure that people caring for animals meet high standards of humane care. This includes developing a comprehensive training program for new staff and establishing continuing education and training programs to inform staff of new developments and improved practices in primate care and welfare (e.g., housing, animal care, handling, behavior, enrichment, health).

Best Practices:

Where possible, local staff should have access to additional off-site training. Training in veterinary care, primate welfare, handling, general management, and species-specific requirements is particularly pertinent.

Sanctuaries should include some form of ongoing staff assessment to ensure that suitable standards and competence are attained and maintained. Staff training and assessment of competence should be regularly reviewed as part of the animal care program. This helps to ensure that any possible improvements in primate care are considered and implemented without undue delay.

PASA member sanctuaries are encouraged to build the capacity of local staff to take on increasing levels of long-term responsibilities in areas of sanctuary management, personnel management, veterinary care, conservation education, government and community liaison, advocacy and other key disciplines.

PASA member sanctuaries should provide guidance on appropriate behavior (cultural and political) to all foreign staff, volunteers and visitors recognizing that inappropriate behavior by a non-national associated with a member sanctuary may

jeopardize the sanctuary itself and the spirit of wildlife protection. Likewise, national sanctuary staff should be held to high conservation standards on and off duty, including not hunting or eating bushmeat.

3.1.2 Organizational structure

Minimum Standards:

PASA member sanctuaries have an organizational structure such that if any staff member becomes incapacitated or leaves the organization, sanctuary operations continue without significant disruption in their absence.

PASA sanctuaries maintain appropriate records of personnel, finances, protocols and procedures.

Best Practices:

Sanctuaries should have a Standard Operating Procedures Manual, which is a set of protocols and procedures that are to be maintained and implemented by all staff and volunteers. The manual assists personnel in executing their duties in a standardized manner as per the policies of the organization. The manual should include general daily routines, rules, protocols, emergency procedures and diets.

At each sanctuary that has a Standard Operating Procedures Manual, a copy must be available in a staff area at all times. All personnel must be given an opportunity to ask questions if they want clarification on any aspect of it. When an updated version is produced, personnel should be trained in the new and updated procedures.

The Standard Operating Procedures Manual is a living document and should be updated on a regular basis, with no more than two years between updates.

All staff and other personnel of PASA member sanctuaries should have an understanding of management structure, lines of reporting, and reporting mechanisms. An org chart (organogram) should be used to facilitate understanding where appropriate.

Sanctuaries with large numbers of caregivers may consider creating smaller teams or units to streamline management. Most management protocols recommend between five and ten individuals per unit or team based on the assumption that one manager can only oversee ten people effectively.

3.1.3 Occupational health and safety

Minimum Standards:

PASA member sanctuaries can demonstrate that they have policies and procedures that protect the health and safety of staff, volunteers, and visitors to minimize the risk of disease transmission between animals and humans. These include requiring vaccinations for all individuals who will be in close proximity to primates, monitoring the health of staff and volunteers (by consent), monitoring work environments,

maintaining records, and engaging people who have appropriate skills and qualifications for tasks.

Policies and procedures regarding occupational health and safety are consistent with regional, national and local regulations. Sanctuaries communicate with local health authorities regarding local health issues and recommendations for staff disease surveillance and medical requirements.

PASA member sanctuaries have a biosecurity protocol which was developed by a veterinary team and was adapted to their local context. This protocol is available to and implemented by all staff members.

PASA member sanctuaries inform their staff of the human safety and health risks of working with non-human primates, their tissues, and their fluids. PASA members ensure all staff members are appropriately trained to care and manage animals in a manner that reduces risks of potential threats to the staff welfare such as disease transmission and injuries from those animals considered potentially dangerous.

Staff are notified if animals in their care are known or suspected to be suffering from potentially zoonotic infections. Additional measures (if any) to prevent transmission of infection are explained.

Staff and volunteers who are known to be immunosuppressed will be reasonably monitored for health concerns that may pose a risk to the animals in their care. Any individuals who pose a risk to the health or safety of any of the animals at the sanctuary are not permitted to work with such animals or their food, enrichment, cages or other materials that will come into contact with the animals in any manner that poses a health or safety risk to the animals.

Best Practices:

All persons at PASA member sanctuaries should receive the highest level of protection against risks to their health and safety that is reasonably practicable in the circumstances. "Reasonably practicable" is determined based on the following considerations:

- a) The likelihood of the risk occurring.
- b) The degree of harm that would result if the risk occurs.
- c) The availability and suitability of ways to eliminate or reduce the risk.
- d) The cost of eliminating or reducing the risk.

Staff are particularly careful to ensure safety when moving or transferring primates from one area or facility to another.

To reduce the dangers of disease transmission to primates, PASA members should comply with the following:

- New staff should undergo a thorough medical examination by a doctor before the start of their employment.
- Each sanctuary, in cooperation with the local health authority, should develop protocols for vaccinations and blood screens for new staff and for current staff. Vaccination protocols may include hepatitis A, hepatitis B, tetanus, measles,

meningococcus, and polio. Blood screens may include hepatitis B and hepatitis C. Sanctuary management should ensure each staff member's vaccinations are up to date.

- Fecal tests for pathogenic bacteria and parasites are advised for new staff before the start of their employment, and for current staff every six months.
- Skin tests for tuberculosis should be carried out for new staff before the start of their employment, and annually for all current staff. If this is positive, a doctor will probably suggest further tests.
- HIV tests are recommended for new staff before the start of their employment, and annually for all current staff. Test results are kept confidential. Staff members who test positive should have CD4/CD8 assessment every 3 to 6 months, and be provided with effective HAART medication when appropriate and possible.
- New staff members and volunteers should not have any contact with primates for the first two weeks of employment. This should allow sufficient time for the development of most infectious diseases that the new personnel may be incubating when hired, and for the completion of specific required tests.

Animal care staff exercise high standards of personal hygiene to minimize the transmission of zoonotic diseases. This includes the following:

- Smoking, eating, drinking or spitting are not permitted in animal areas.
- Adequate hand washing facilities are available for staff and volunteers, especially just outside toilets and animal holding areas.
- Washing is particularly important immediately before and after working with any primates. Hands are always washed after handling bedding and other enclosure materials, uneaten food, feces, urine, blood, saliva and any other body secretions. While disposable gloves should be worn when handling primates who are sick or material from sick primates, hands should still be washed after gloves are discarded.
- Education about personal hygiene is provided for the staff and volunteers, with periodic refresher courses.
- People with open cuts or sores on their hands should wear disposable gloves when working with primates.
- Staff are encouraged to keep hands away from their face when working in animal areas. It is remarkable how often people touch their faces without thinking about it! Similarly, staff are trained not to put pencils, pens etc. into their mouths.
- Staff with active herpes simplex lesions are not authorized to work with primates and are encouraged to seek medical advice about treatment.

Member sanctuaries should give due attention to the health and safety of staff and visitors by:

- Making continued efforts to resolve any potential threats to the safety of staff or visitors, in addition to complying with all statutory requirements.
- Having a written safety and emergency plan that is regularly reviewed and updated.
- Making sure all animal drugs, vaccines and other restricted veterinary products are kept secured with access by authorized persons only.
- Not allowing sanctuary personnel to possess or administer controlled drugs, except under the direction of the veterinarian.

Animal care staff should wear a range of protective clothing when working with sick primates. Generally speaking this involves the use of coveralls, rubber boots, and disposable gloves. Fully protective goggles and facemasks may also be necessary where a particularly high risk of serious zoonotic infection exists.

All injuries, accidents and illnesses of staff should be recorded. Bites and scratches should be thoroughly washed (not scrubbed) and medical attention sought if severe. Further detailed information should be available to staff working with animals in quarantine and animals in the population that have been incompletely screened.

At the discretion of the manager/veterinarian, staff who are sick at work may be sent home or may not be allowed to work with animals or prepare food for animals or people.

Staff with children or other family members with infectious diseases like measles, German measles, mumps, chicken pox, scarlet fever, mononucleosis, and Epstein Barr Virus (EBV) should not work with primates.

To reduce the risk of transmission of infectious agents between different primate enclosures, separate sets of protective clothing (coveralls) should be available for staff in each place. Work clothes should be washed at the sanctuary and should not be taken home by staff for any reason. Boots should be washed and preferably disinfected before entering and after leaving primate areas/enclosures.

Directors, managers and staff should exchange information and ideas about health and safety risks and ways to reduce or eliminate the risks.

Each sanctuary should have an Occupational Health and Safety Manual (OH&S) which is a set of policies and procedures for protective measures to be followed by staff members and volunteers. The manual should aim to:

- Promote and maintain the highest degree possible of physical, mental and social well-being of personnel;
- Prevent illness among personnel caused by their working conditions;
- Protect personnel from risk; and
- Make sure that personnel are physically suited, qualified and trained for the tasks to which they are assigned.

3.2 Management of animals and their environments

3.2.1 Animal confiscation, acquisition, and transfer

Minimum Standards:

No PASA member sanctuary is allowed to purchase or provide compensation as a condition of acquiring any animal. PASA member sanctuaries do not engage a third party, even a government official, to do so on their behalf. All animals must be

confiscated by relevant authorities or surrendered by the person(s) holding the animals.

PASA member sanctuaries are forbidden to sell, trade, loan or otherwise traffic in wildlife that have been placed in PASA member sanctuaries, except for situations that are judged to be in the best interest of those animals.

PASA and its members recognize the need to keep African primates in Africa, specifically in the country of origin, when possible. At no time will PASA sanctuaries transfer primates, either wild-born or captive-born, from Africa to Europe, North America, South America or Asia, except for situations that are judged to be in the best interests of the individual primates being transferred.

Because of the risk of zoonotic disease, when transferring animals between sanctuaries or other organizations, both organizations involved review their risk assessments prior to the movement of the animals and implement protocols for management of the species involved.

The organization receiving the animal(s) is provided, to the extent known:

- Full identification details of the animal(s) including description, age, sex, distinguishing characteristics, microchip number and location, and in some cases photographic identification.
- Basic information about the animal(s) including area(s) of origin, weight, temperamental characteristics, whether mother- or hand-reared, current diet, and any physical abnormalities even if not a clinical entity.
- Any significant evidence of disease among animals in the sanctuary or zoonotic disease in staff working in the sanctuary environment within the previous six months.
- Full clinical details (medical record), preferably 21 days prior to shipment. This includes any current treatment or medication.
- Current or past usage of any form of contraception and vaccination including the length of time used and interval of repetition, as well as any noted side effects, even if anecdotal.

Best Practices:

PASA member sanctuaries should make every effort to facilitate legal and judicial processes regarding the animals in their care, and to educate people in a positive and an interactive way.

PASA and its member sanctuaries should collaborate with trade, customs, military and civil law enforcement agencies to halt the illegal trade in wildlife, and strongly urge that all confiscations include a thorough investigation and legal proceedings against offenders.

PASA and its member sanctuaries may choose to prioritize confiscations that are accompanied by legal proceedings against offenders.

PASA member sanctuaries agree to cooperate with other PASA member sanctuaries in the placement of animals in the most appropriate facility for the individual, taking

into consideration the species or subspecies, natural origins, the welfare of the individual, the possibility for integration into a social group, and the possibility for release.

PASA member sanctuaries will endeavor to accept any African primate that is confiscated in Africa by law enforcement authorities and will provide permanent care and protection at the most suitable available facility, if they have the capacity to provide the new primate and their other animals with high-quality care.

PASA and its members recognize that any African primate that is illegally trafficked from Africa and confiscated outside of Africa as a result of the illegal trade should be returned to his/her country of origin, provided the country of origin is known, a sanctuary exists and has available space, and return to the country of origin is in the best interest of the primate involved. If not, he/she should be transported to another appropriate sanctuary.

The PASA Animal Arrival Form in ODK should be completed and uploaded for each animal that arrives in the sanctuary.

3.2.2 Release and reintroduction

Minimum Standards:

It is critical that PASA member sanctuaries incorporate systems for monitoring animals and recording data into their reintroduction programs to inform future reintroduction strategies.

Where appropriate, PASA member sanctuaries manage their populations in such a way that release back into the wild may be possible in accordance with the IUCN Guidelines for Reintroductions. Sanctuaries considering release carefully plan appropriate release programs, including site selection, from the outset.

PASA member sanctuaries follow the IUCN Guidelines for Reintroductions when conducting primate release programs, including pre-release quarantine.

PASA member sanctuaries conduct reintroductions in an open and transparent manner.

Best Practices:

It is important to involve all stakeholders in the planning of a major reintroduction, including relevant national, regional and local government agencies, NGOs working with wildlife in the release area, and local communities.

PASA's Conservation Policy should be used to inform program design and implementation.

Refer to Figure 1 for a summary of steps and potential outcomes in the reintroduction process.

Sanctuaries considering reintroduction should communicate with those already engaged in the process of reintroducing to facilitate transfer of knowledge and best practice.

Additional Information:

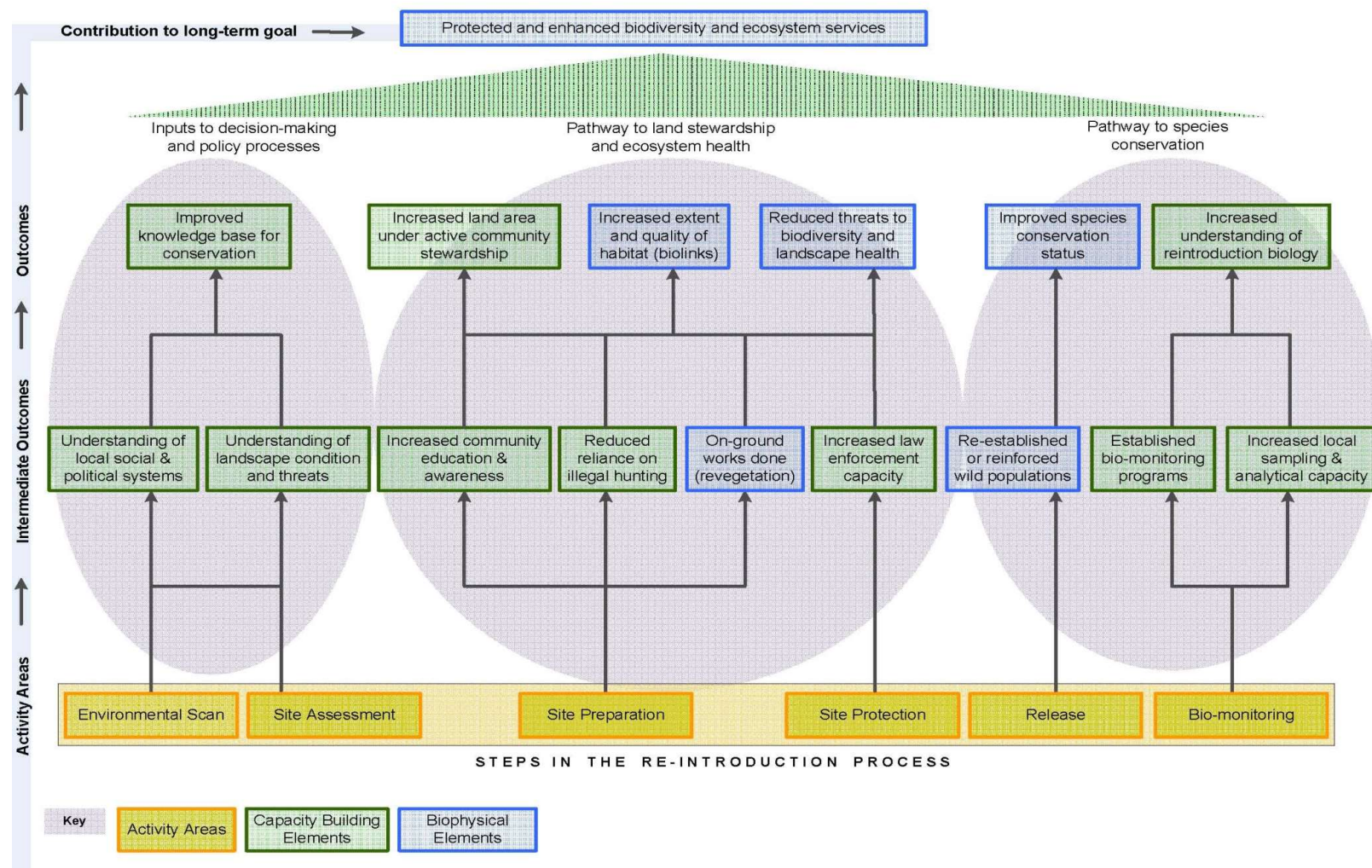
The following references are considered principal text if reintroduction is under consideration:

Beck, B., Walkup, K., Rodrigues, M., Unwin, S., Travis, S., & Stoinski, T (2007). *Best Practice Guidelines for the Reintroduction of Great Apes*. IUCN SSC Primate Specialist Group, Gland, Switzerland. Available from

Baker, L.R. (2002). IUCN/SSC Reintroduction Specialist Group: Guidelines for nonhuman primate reintroductions. *Reintroduction NEWS*, 21:29-57.

IUCN/SSC (2013). Guidelines for Reintroductions and Other Conservation Translocations. Version 1.0. Gland, Switzerland: IUCN Species Survival Commission, viiii + 57 pp.

Figure 1: Steps and potential outcomes of the reintroduction process



3.2.3 Reproduction

Minimum Standards:

PASA member sanctuaries only voluntarily permit animals to reproduce in the sanctuaries if the breeding is part of a currently active release program in accordance with the IUCN Guidelines for Reintroductions, and where reproduction does not compromise the resources of the sanctuary or negatively impact the health and welfare of the other animals at the sanctuary.

Contraception is used on hybrid individuals regardless of whether they are candidates for release.

PASA member sanctuaries holding species or subspecies that are not endemic provide long-term contraceptives or sterilization to prevent births.

Where non-endemic taxa may potentially interbreed with endemic taxa, permanent sterilization is employed.

Best Practices:

Reversible contraception should be used wherever possible on primates who may be reintroduced, according to the requirements of the animal and the availability of expertise and equipment.

In general, reversible contraception should be used on endangered species. While PASA member sanctuaries accept that in some cases permanent sterilization may be used, careful deliberation of the long-term implications should be considered.

However, permanent sterilization (e.g. vasectomies, tubal ligations) is recommended for hybrids when expertise and equipment are available.

3.2.4 Basic primate care

Minimum Standards:

PASA member sanctuaries implement specialized care and housing that provides for primate physical, physiological, psychological and social needs. Sanctuaries ensure that animals in their care have access to the five basic freedoms:

- Freedom from hunger and thirst
- Freedom from discomfort
- Freedom from pain, injury and disease
- Freedom to express normal behavior
- Freedom from fear and distress

Each PASA member sanctuary is expected to secure the services of a veterinarian(s). All PASA member sanctuaries have a dedicated veterinary treatment/hospital facility.

PASA member sanctuaries:

- Have appropriate facilities to ensure the wellbeing of the primates, as well as the safety of staff, volunteers, and visitors to the sanctuary.
- Ensure that all facilities, including quarantine or short-term temporary housing, provide a complex and stimulating environment to promote normal behavior as expressed by that particular species and prevent boredom.
- Ensure that all primates in their care are not kept in isolation unless necessary for quarantine or for treatment/recovery purposes.
- Have at least one fully employed staff member who has relevant experience/training in primate management, especially in the species being cared for by their sanctuary.
- Ensure all hard surfaces in enclosures and holding facilities, such as walls, floors and furniture, are washed at least once a day or as frequently as necessary to keep them free from contamination.
- Clean benches, shelves, ropes and climbing structures frequently enough to prevent the accumulation of fecal matter and urine.
- Where possible and especially in small enclosures, daily spot-clean soil and other natural substrates to remove organic waste.
- After using disinfectant, thoroughly rinse watering devices, feeding equipment and other metal or plastic equipment.
- Provide primates with access to dry areas during and after the cleaning process.
- Ensure all enclosures allow access to an area such as a satellite cage, sleeping cage, or night den, suitable for the physical isolation of individuals so that animals can be restricted for close examination and veterinary treatment.
- Ensure that when possible, all transfers of adult primates from one location to another are conducted in such a manner that caregivers and primates are not sharing common space.
- Consider that all infant primates require physical contact with their mother or a surrogate to ensure normal psychological and social development. Sanctuaries that care for infant primates have appropriate contact protocols (such as a human caregiver in the case of a great apes, or in some cases stuffed toys for certain monkey species).

Best Practices:

The veterinarian(s) should possess particular knowledge in the field of animal health as it applies to the species under his or her care.

The role of sanctuary veterinary staff should include the following:

- Routine inspections of the animals.
- Directing and conducting treatment of all sick animals.
- Administration of vaccines, deworming, and other aspects of preventative medicine.
- Health monitoring of animals, including laboratory examination of samples (via a submission process or in-house).
- Safe and proper collection and preparation of diagnostic samples.
- Training of sanctuary personnel in health, welfare and hygiene.

- Ensuring that post mortem examinations of animals are carried out on all deaths.
- Supervision of quarantine facilities.
- The establishment of written procedures to be followed in the event of the accidental misuse of dangerous drugs.
- In addition, veterinary staff should be involved in or consulted on:
 - The nutrition and design of diets.
 - Planning and design of enclosures.
 - Release program design and post-release monitoring.

Where possible, PASA member sanctuaries will maintain all primates in normal social groupings. Isolation of individuals should only be done for health (psychological or physical) reasons.

PASA member sanctuaries should ensure that at least one staff member trained in primate emergency veterinary procedures (by a suitably qualified veterinarian) is on site at all times.

Additional Information:

An example of how general health can be maintained in a PASA member sanctuary is provided on the next page. It is recommended each sanctuary fill this section out to make it specific to their situation, and use it to guide their preventative health program.

Animals that are in good general health are far less likely to carry or suffer from infectious diseases than those living on impoverished diets or in suboptimal physical or social conditions. Therefore it is essential to constantly provide top quality animal care.

3.2.5 Rescued primate management

3.2.5.1 Nursery care for orphaned infants

Best Practice:

Infant primate requirements are based on age, species and individual needs. All infants should be allowed to demand feed rather than feeding at strictly determined times.

When infant animals are hand-reared, where possible there should be one caregiver per one or two animals, and that person should not have contact with other animals in the sanctuary.

3.2.5.2 Peer group housing

Best Practice:

Peer group housing should be used in a limited manner especially if individuals are expected to be released. Sanctuaries should endeavor to create age and sex appropriate groups with the understanding that peer group housing often serves important primate management situations.

Caregivers who have hand-raised individuals may successfully use vocal commands from the outside of the enclosure to control bullies. However, whenever possible, human interference and contact should be minimal.

3.2.5.3 Integration procedures

Minimum Standard:

Non-human primates are housed in social groups at all times. The only exception is during quarantine in the weeks after arrival or if an individual is injured or suspected to harbor an infectious disease.

Additional Information:

There is extensive literature on integration processes from other facilities and it is highly recommended that these papers are read by PASA sanctuary managers and veterinarians before carrying out integration, particularly if there is a lack of experience in this process. Consultation with other PASA member sanctuaries is advised. Importantly, inclusion of senior staff members in the process is important as they will have worked with the primates for many years and will have extensive knowledge of the individual animals' personalities.

3.2.5.4 Management of social communities

Minimum Standards:

Monitor social groups daily for aggression, injuries, and other anti-social behavior.

While animals are feeding, observe them for injuries and anti-social behavior and to ensure all individuals, including low ranking individuals, receive appropriate amounts of food and that aggression levels are within normal social levels. Ensure that animals are actually eating what is being fed (i.e. not preferentially taking certain items).

For great apes and small groups of monkeys, visually account for each individual at each feeding; for large groups of monkeys count individuals at least daily.

Best Practices:

Sometimes well-formed groups of monkey species can collapse for unknown reasons or due to power struggles within the group. These events should be expected and the sanctuary managers should have backup systems, enclosures or facilities in place to allow for regrouping of these individuals.

3.2.5.5 Management of isolated individuals

Minimum Standards:

As individuals that have been isolated for many years often exhibit higher levels of abnormal behaviors compared to those living in groups, PASA member sanctuaries attempt re-socialization and acclimatization in a timeframe that is comfortable and minimizes stress for the individual. They also provide a secure, consistent environment that allows the individual to access new items/events.

In some cases sanctuaries have individuals that are not able to integrate into a larger social group. Management needs to ensure that provisions exist to care for pairs or small groups in appropriate facilities, so that no residents are left in holding facilities indefinitely. When necessary, sanctuaries incorporate into their infrastructure one or more smaller enclosures that allow socialization and an acceptable quality of life for pairs and smaller groups. They make every effort to ensure that no social primate is housed alone. If individuals are socially isolated for any period of time, it is important to maintain a high level of enrichment. Where possible, any individual housed alone is able to communicate with other primates through mesh or bars, to allow social interaction on his/her terms, which may slowly facilitate integration of such individuals into a group.

3.2.5.6 Enrichment programs and activities

Minimum standard:

PASA member sanctuaries maintain enrichment programs that are suitable to the species they care for and the conditions they live in. In most cases, social enrichment is addressed after integration into groups is completed, depending on the sanctuary and the primate's situation. Environmental enrichment will be required if the facilities cannot provide a full range of opportunities as would be experienced in the wild. Large forest enclosures in a natural setting may have enough natural enrichment.

Situations in which enrichment is particularly important include the quarantine period when a primate first arrives at the sanctuary, and when individuals or groups must spend time in holding areas. In these cases, a well-thought-out and regularly managed enrichment program is essential.

Best Practice:

It is important to continually evaluate enrichment devices and activities to facilitate prioritization of activities worth implementing, taking into consideration the amount of time and resources are required to prepare the activity compared to the amount of

time the primates spend engaged in the activities. A rating system will help staff decide which activities to implement in the time they have available to them.

Food can be used as an enrichment device to minimize stereotypic behavior and improve psychological wellbeing. However, this sort of enrichment should not impinge on meeting the nutritional requirements of the animal, nor should it be vital to them.

3.2.5.7 Cooperative learning procedures

Best Practice:

PASA member sanctuaries should evaluate the benefits of behavior modification through positive reinforcement and other forms of cooperative learning and consider implementing a cooperative learning program.

Cooperative learning should be used to facilitate:

(a) Veterinary care by permitting close monitoring and treatment of illnesses by:

- Presentation of chest or back, allowing stethoscope to touch skin permitting veterinarians to listen to heart and lungs without restraint or sedation.
- Opening of mouth for oral inspections to examine and check teeth, and even permit cleaning of teeth.
- Insertion of thermometer for temperature reading, also permitting fecal samples to be taken.
- Permitting nasal and ear swabs to be taken.
- Presentation of wounds for inspection and treatment.
- Presentation for injections (sedatives, antibiotics) and voluntary blood taking.

(b) Group management by:

- Movement of individuals or groups between areas easily on request.
- Improving acceptance of cooperative feeding which can reduce aggression during feeding sessions, particularly with dominant individuals who may monopolize food.
- Reducing or eliminating inappropriate behavior such as poor mothering, rocking, and throwing rocks.
- Providing enrichment and cognitive challenges to enhance quality of lives.

Additional Information:

Cooperative learning can eliminate the need to sedate individuals for annual health checks reducing the risk of anesthetic, stress to the individual animal, and financial costs to the sanctuary.

Learning is broadly defined as a change in behavior resulting from practice or experience. When this process is guided by humans, it may be called cooperative learning. Behavior modification through positive reinforcement and other forms of cooperative learning can facilitate animal management and veterinary care, and can reduce stress. Most PASA member sanctuaries conduct informal cooperative learning without many caregivers realizing they are doing it. However, it is important

that correct methods are used to ensure that primates are not rewarded for performing undesired behaviors. The best way is using positive reinforcement (i.e. giving the primate something that he or she wants after performance of the desired behavior).

For further information on cooperative learning techniques, caregivers and managers should read the current literature on the subject and seek advice from qualified professionals. Primates are highly intelligent and will cooperate well with proper methods.

Cooperative learning should only be conducted by personnel who have been adequately trained by an experienced professional. Learning programs need to be planned and time frames maintained to avoid reinforcement of inappropriate behaviors and confusion to the animal.

3.2.6 Nutritional program

Minimum Standards:

PASA member sanctuaries ensure that they minimize nutritional disorders by providing a nutritionally balanced diet to all animals in the sanctuary. Each PASA member sanctuary maintains records on the nutritional requirements for the stages of life of the species in their care (e.g., juvenile, pregnant, adult, geriatric). This information is used to create a recorded feeding plan for each species held. Candy or sweets are not fed to primates except in medical cases, for example to tempt ill primates to take medication.

Best Practice:

Wherever possible, PASA member sanctuaries should provide natural diets which include wild fruits and leaves. However, they should take great care to ensure that gathering and/or buying wild fruits does not impinge on the food supply of free-living primates, especially in habitats under high pressure from human settlements and poaching. If it is not possible or in the interest of conservation to purchase wild fruits, the diets of sanctuary primates should be based on nutritional content of foods. In the interest of health and psychological welfare, diets should aim for diversity. In most cases, raw natural foods are preferred to cooked foods. Diets should be evaluated regularly to prevent nutritional deficiencies.

Food should be monitored for potential poisons. Although it may not be possible in very large enclosures, as much as possible animal enclosures should be checked for toxic plants (especially new enclosures) and the plants should be removed if judged to be a hazard, i.e. if the animals are naive and consuming them. However, primates that are part of a reintroduction program need to learn what to avoid and can be taught to avoid toxic plants.

Additional Information:

For some species such as great apes, a daily children's chewable vitamin tablet ($\frac{1}{2}$ or 1 tablet depending on the size/age of the ape) can be a useful safeguard against

vitamin deficiencies, particularly where the correct diet may not always be available. However, supplements do not alter the necessity of species-appropriate balanced diets.

Nutritional deficiencies may cause overt disease, e.g., metabolic bone disease. Some nutritional deficiencies can be diagnosed with blood and serum tests (e.g., vitamin deficiencies, iron deficiency).

3.2.7 Quarantine

Minimum Standards:

All primates entering a PASA sanctuary population, regardless of their origin, undergo a period of quarantine. PASA sanctuaries prevent the introduction of new diseases to animals living at the sanctuary and from sanctuary residents to the free-living population, and prevent infection of staff to the best of their ability.

During the quarantine period, arriving primates undergo scheduled health exams and appropriate treatments and vaccinations.

Only primates who have cleared all quarantine and veterinary procedures are allowed to be moved to a location in the sanctuary or a release site where they may come in contact with other rescued primates and/or free-living populations.

Primates being hand-reared are placed with conspecifics in quarantine as soon as possible to help with the socialization process. Refer to section 2 of the PASA Veterinary Healthcare Manual.

PASA member sanctuaries follow strict hygiene procedures regarding quarantine, and thoroughly clean and disinfect quarantine areas after an animal leaves including food bowls and other items that were in the enclosure.

Testing procedures:

If the necessary resources are available, PASA sanctuaries conduct a range of tests for disease agents and bio-parameters during quarantine. It is recommended that the noninvasive aspects of this testing (e.g., parasitology) are initiated as soon as practical. Testing requiring general anesthetic can be delayed for seven to 14 days, depending on the animal history and physiological and psychological condition on arrival. At sanctuaries that have adequate resources, the testing includes:

- Full clinical examination under a general anesthetic, including a careful assessment of weight, teeth, eyes, reproductive organs and identification (microchip when indicated).
- A minimum of 3 fecal screens for parasites, as well as treatment as indicated. Refer to the PASA Veterinary Healthcare Manual.
- Serological tests for relevant diseases of concern. Refer to the list in the PASA Veterinary Healthcare Manual. Other pathogens may be added to this list as our knowledge of their significance advances. A wider range of viral screening tests is generally appropriate for wild-born animals.

Best Practices:

Where possible, quarantine facilities should have dedicated caregivers who do not come in contact with other primates in the sanctuary.

Resident primates who contract serious infectious diseases and constitute a risk to other primates in the sanctuary should be moved temporarily to a quarantine facility when possible.

When possible, a serum bank should be established for each individual.

The following quarantine procedures are advised:

- Tuberculosis testing: refer to tuberculosis testing chapter in the PASA Veterinary Healthcare Manual for up-to-date recommendations on tests (e.g., intradermal skin testing, Polymerase Chain Reaction [PCR], Rapid tests, Multiple Antigen Print ImmunoAssay [MAPIA], Primagam, culture). Intradermal palpebral tests for TB using Mammalian Old Tuberculin (MOT) and/or bovine + avium tuberculin is required for all primates. A minimum of two intradermal tests should be performed – one at the beginning and one at the end of the quarantine period. Accurate reading of TB tests requires experience and expertise (refer to TB chapter in the PASA Healthcare Manual on assessing skin tests).
- Hematology and blood biochemistry profiles.
- Personnel involved with quarantine should have specific experience with primates and health management.
- Staff should wear protective clothing such as gloves and masks. Footbaths with disinfectant or separate footwear should be used.
- If animals of the same phylogenetic order as an infected animal are housed with him/her, they too should be considered contagious.
- Domestic animals should be kept away from wildlife.

Testing procedures:

- To improve accuracy PASA recommends using more than one type of TB test when possible.
- Fecal cultures for bacteriological diseases of concern should be performed. Refer to the PASA Veterinary Healthcare Manual.
- Radiography if feasible, to check for such conditions as metabolic bone disease and air sacculitis.
- Banking of genetic material. See the section on correct sample collection and storage in the PASA Veterinary Healthcare Manual.
- When feasible, endocrine assessment (stress and reproductive hormonal analysis). Refer to the relevant section in the PASA Veterinary Healthcare Manual.

Additional Information:

For additional information, refer to section 2 of the PASA Veterinary Healthcare Manual.

3.2.8 Health checks

Minimum Standards:

Each PASA member sanctuary follows a policy for health checks which is developed for the species in the sanctuary in collaboration with a veterinarian(s) with relevant experience.

Health checks that require anesthesia, include a physical examination, the collection of blood samples for hematology, serum biochemistry and serology (plus banking where possible), urine for a urinalysis, and a TB test.

Best Practices:

If it is considered beneficial and practical and if resources allow, all resident primates should ideally undergo an annual health check.

During anesthesia for any reason, a health check should be performed which includes, vaccinations and injectable dewormers as required.

3.2.9 Equipment management

Minimum Standards:

Nets, gloves, squeeze cages, crates and restraint equipment are regularly inspected and maintained in good working order, as defective equipment can lead to injuries to animals and humans as well as escapes. Equipment is cleaned after each job to avoid the mechanical transmission of infectious material.

Needles, blowpipe darts and surgical instruments are handled with extreme care by competent personnel as after use they might be contaminated with various bacteria and viruses.

Personnel wear protective clothing (coveralls and boots) when cleaning animal areas. Protective clothing is washed, cleaned and stored at the sanctuary.

3.2.10 Identification and records

Minimum Standards:

Sanctuaries keep an accurate record of the veterinary management of each individual. Each animal is readily and reliably identifiable.

Best Practices:

Medical records should be computerized in a user-friendly database with all information in the history readily accessible, and should include photographs.

In large groups of primates where visual identification is only possible by a small number of caregivers, or when deemed necessary for tracking individuals, it is recommended to give animals microchips or tattoos when they are under anesthesia for another purpose.

All PASA member sanctuaries should aim to work with the same record keeping protocols/software as this will allow better collation of information across the network.

3.3 Veterinary healthcare

3.3.1 Veterinary healthcare manual

Best Practice:

Each PASA member sanctuary should develop its own written set of instructions for veterinary, animal care, and field staff, with the aims of preventing disease entering the sanctuary, maintaining the health of animals in the sanctuary, and preventing dissemination of disease to other facilities and populations. The instructions should be adapted to local circumstances and practices. The PASA Veterinary Healthcare Manual can be adapted to the needs of the sanctuary but should include sections on the sanctuary's disease surveillance plan, disease contingency plan and parasite control program.

All staff and volunteers who work in relevant areas should be adequately trained in the content in the manual to ensure they understand and can implement it.

3.3.2 Disease surveillance plan

Minimum Standards:

PASA member sanctuaries:

- Control and mitigate effects of endemic disease by disease surveillance and biosecurity.
- Minimize risk of imported disease by quarantine and testing protocols.
- Prepare for the introduction of exotic diseases by effective disease contingency planning.
- Maintain proper standards of sanitation in animal enclosures, food storage and preparation rooms, and treatment rooms.

The veterinarian designs and implements an annual disease surveillance plan which is subject to annual internal audits and PASA audits. It includes:

- Detailed animal records in a transferable format.
- A nutritional program to minimize health and welfare issues.
- A safe and effective program to control pests.
- Quarantine: newly arrived animals to be kept isolated as long as is necessary to ensure proper examination and disease screening before introduction to other animals at the sanctuary. (See Section 3.2.7, Quarantine.)

- An opportunistic disease screening program which includes routine examinations, including parasite checks and TB tests or as appropriate
- Preventative medicine, including vaccinations, to be conducted as appropriate and at such intervals as recommended by the veterinarian/veterinary team.
- Disease contingency plans for high risk diseases.
- A documented post mortem routine. (See the section in this manual on post mortem.)

Best Practices:

The annual disease surveillance plan might include:

- Daily written reports about the health of all animals in the sanctuary including any symptoms of disease, anomalous behavior, births, deaths, veterinary treatments, etc.
- Regular fecal testing for pathogenic bacteria and parasites every six months, and more frequently if a particular problem is known to exist. Where an infection with pathogenic bacteria or parasites has been treated, follow up fecal samples should be examined to establish the effectiveness of treatment.
- If there is a vaccination program, the vaccine status of each animal should be reviewed annually and boosters given when appropriate.
- Serum samples should be collected and stored at minus 70°C or below when the opportunity arises. Serum banks thus created can be invaluable in the diagnosis of viral disease, the determination of vaccine efficacy, and the screening for new diseases as they are described.
- If primates are immobilized for any reason (such as for a health exam), blood samples should be collected for hematology, serum biochemistry and serology, urine should be collected for a urinalysis, and a TB test should be performed.

Refer to Table 1, a sample disease surveillance form.

3.3.3 Disease contingency planning

Minimum Standards:

PASA member sanctuaries have a contingency plan which:

- Describes procedures to prevent the spread of a particular disease between the sanctuary and the wild, or a confiscation site and the sanctuary. There are examples of these in section 3.2 of the PASA Veterinary Healthcare Manual including tuberculosis, Ebola and *Strongyloidiasis*.
- Documents protocols for preventing pathogen transmission during a disease outbreak.
- Documents protocols for how the sanctuary would operate and provide care for its animals in the event of a human pandemic if the workforce were affected. For example, if a sanctuary lost a third of its workforce to disease, would it still be able to care for its animals? Have people in the sanctuary been identified who would be capable of stepping into important roles in the event of a human disease outbreak? The PASA Veterinary Healthcare Manual

provides general advice but sanctuaries liaise closely with the relevant in-country authorities.

Additional Information:

Disease control is centered on preventing pathogen transmission and disease contingency planning uses this as a starting point. Knowing how a disease is transmitted facilitates taking steps to prevent it. These contingency measures can be revised easily as the threat changes and our knowledge of the disease and its control develops.

Table 1: Sample disease surveillance form:

Sanctuary: _____

Infectious Disease Surveillance Program (to be completed by each sanctuary)

Who provides veterinary care in your sanctuary?

- e.g., Veterinary care is provided by 1 full time local vet who has an internationally recognized veterinary degree. The Government has been informed of our veterinary staff via the CVO (Chief Veterinary Officer) of the country (or appropriate Governmental body that the Sanctuary operates under such as a Department for Forestry and Environment). He/she is fully aware of the requirements to report any suspicion of diseases of national importance to the CVO and a series of international veterinary advisors.

NAMES and AFFILIATIONS:

DATE:

Recognition of infectious disease within the sanctuary (Example):

- Animal care staff undertakes daily observations of all animals in their charge (monitoring of animals by researchers in field based sanctuaries).
- Animal care staff notifies the veterinary department/vet promptly of any suspicion of disease (or vet checks each animal daily).
- The veterinary department investigates each report as soon as possible (according to priority) and will take further samples for investigation as appropriate.
- Animal care staff notify the veterinary department promptly of any deaths, including still births.
- The veterinary department will either perform a post mortem examination or arrange for one to be performed by trained veterinary pathologists.
- Where infectious disease is suspected relevant samples will be taken for further analysis.
- Opportunistic sampling and screening for diseases of concern (in both live and dead animals) is undertaken according to the attached protocol. Pre-release screening for diseases of concern.

Preventing dissemination of infectious disease (Example):

- Measures taken will be dependent on the type of infectious disease suspected. Where there is a strong suspicion of a disease of national importance protective measures will be put into effect and the CVO will be notified immediately.
- All animals are treated promptly to reduce the chance of them disseminating infections.
- Hygienic measures (e.g., foot baths, cleaning of equipment that must be shared between enclosures) appropriate to the type of infection suspected, are put into place to reduce dissemination of disease.
- Infected animals and their contacts are isolated from unaffected animals.
- Vaccination or prophylactic treatment will also be considered dependent on the disease concerned.

Other preventative measures (Example):

- Prophylactic treatments (e.g. vaccination, worming) (see relevant protocols in PASA Healthcare Manual).
- Pre-import screening/review of disease history of incoming animals - where possible.
- Quarantine/isolation of incoming animals (see Quarantine Protocols in PASA Healthcare manual).
- Screening (+/- prophylaxis) for diseases of concern during isolation period (see Quarantine Protocols in PASA Healthcare Manual).

Audit (Example)

- Daily records kept of animal care staff observations. Medical records updated as required.
- Weekly review of ongoing clinical cases and post-mortem examination.
- Quarterly review of causes of morbidity and mortality.
- Annual review of preventative health care plan.

3.3.4 Parasite control

Minimum Standard:

Every PASA member sanctuary has a parasite control policy which is based on a test and treat protocol.

Routine examination for endo- and ecto-parasites are performed on arrival and at regular intervals as appropriate given the circumstances of the sanctuary.

Best Practices:

Parasite testing should occur every three months, however this is dependent on the context of the situation.

Anthelmintics should be used strategically to control certain parasites.

Refer to the parasitology section of the PASA Veterinary Healthcare Manual for details.

3.3.5 Pest control

Minimum Standards:

PASA members take steps to minimize disease spread by controlling pests that can spread disease in their sanctuaries.

All food scraps are cleaned up regularly during the day from enclosures and food preparation areas. Soiled food is disposed of correctly and not left for rodents to eat.

PASA members take precautions to ensure that pest control measures do not harm the animals in their care or other wild animals.

If using pesticides, care will be needed to avoid contaminating human and animal food and housing areas.

Best Practices:

Sanctuaries should discourage domesticated and free-ranging wild species from entering the sanctuary where practicable.

PASA members should avoid attracting pests by farming or housing domestic animal species within the property of their sanctuaries.

3.3.6 Vaccinations

Minimum Standards:

Each PASA member sanctuary follows a policy for vaccinations which was developed for the sanctuary in collaboration with a veterinarian(s) with relevant experience.

Only non-replicating vaccines should be given to primates in sanctuaries.

Best Practices:

Sanctuaries should investigate the disease risk factors in their areas and their veterinarian should design vaccination protocols based on the real risks and appropriate for the particular primate species in their care. Refer to the PASA Veterinary Healthcare Manual for examples concerning vaccination regimes. Vaccination regimes should be dictated by what diseases are found in the local area, what diseases are found in the sanctuary, what diseases can be vaccinated for, and the future plans for the animals.

It is usually inappropriate (but not always) to vaccinate animals due for release.

When the opportunity arises, serum samples from vaccinated primates should be tested to establish the effectiveness of the vaccine schedules.

3.3.7 Euthanasia

Minimum Standards:

The acceptable method of euthanasia is:

1. Sedation (or full anesthesia as required) prior to the administration of the euthanasia drug;
2. Administration of an intravenous drug that will simultaneously induce unconsciousness, cardiac arrest and clinical death, thereby not subjecting the animal to pain, distress, anxiety or apprehension.

Euthanasia of primates in PASA sanctuaries can only be conducted for terminally ill individuals or critically injured individuals for whom there is no reasonable hope of recovery, as determined by the manager, the veterinarian of the sanctuary, and any consulting medical colleagues.

3.3.8 Post mortem examination

Minimum Standards:

For any animal that has died of an unknown cause, a thorough post-mortem examination is carried out by a competent and experienced pathologist or

veterinarian without unnecessary delay. (The PASA Veterinary Healthcare Manual contains post mortem procedures.)

Dead animals are handled in a way that avoids the risk of transmission of infection.

Following post mortem examinations, carcasses and organs are removed swiftly and disposed of safely.

Particular care is taken with primates dying in quarantine as these animals must be assumed to be of high zoonotic potential until proven otherwise.

Best practice:

A thorough post-mortem examination should be carried out by a competent and experienced pathologist or veterinarian without unnecessary delay on **all deceased animals, regardless of whether the cause is known or suspected.**

Samples collected during post-mortem examination should be documented and submitted without delay for analyses by competent specialists, e.g., histopathologists, microbiologists, virologists.

3.3.9 Animal use for veterinary instruction

Minimum Standards:

PASA prohibits animals to be harmed or euthanized for the purpose of veterinary instruction. Use of dead animals is acceptable only where there is 100% certainty that animals have unavoidably died and were not euthanized for any other purpose beyond humane care.

Live animals may be used in veterinary instruction if the procedure is a planned part of the animals' healthcare plan, and approved by the sanctuary director or veterinarian.

Use of wild animals culled for population management purposes is not appropriate.

3.3.10 Reference

The following publication is suggested text for additional reading about veterinary healthcare.

Unwin, S., Bailey, W., Boardman, W., Colin, C., Dubois, E., Fielder, J., Leendertz, F., Longley, L., Mahe, S., Magre, N., Mugisha, I., Travis, D. (2009). *PASA primate veterinary health care manual* (2nd Edition). PASA, Portland, Oregon USA.

The PASA Veterinary Healthcare Manual remains the only sanctuary-specific veterinary manual, and should be regarded as a primary text. Online resources including the PASA Animal Health Care Google Group are also available.

3.4 Primate housing facilities

3.4.1 General facility design and construction

PASA sanctuaries vary widely, from urban facilities with little space to large sanctuaries in forested environments with hundreds of hectares. Enclosure sizes and styles must suit the environment of the sanctuary. The following are general guidelines that can apply to cages and/or open forested enclosures.

Minimum standards:

Enclosure design minimizes direct and indirect contact between different primate species and prevent direct and indirect contact (other than visual) with visitors.

Enclosures provide adequate shelter to protect the animals from strong sun and heavy rain, as appropriate.

Enclosures include a double door system for staff entry in which both doors are never open simultaneously, to reduce the risk of escapes.

The inside and outside of enclosures do not have sharp edges on which animals and staff could cut themselves.

Inside or satellite cages/enclosures are designed to facilitate safe anesthesia and access by the veterinarian. Refer to the PASA Veterinary Healthcare Manual for more details.

Drains: Drains are external to primate access points.

Tunnels: If tunnels are used to transfer primates from one enclosure to another, the minimum required height of the tunnel is species dependent. In general, the interior height is no less than top of head to ground when primate is standing in normal quadrupedal position. In other words, primates do not need to crouch down or crawl to pass through the tunnel. Tunnels are made of the same material as cages, except for wider external tunnels in which electric fencing can be used.

Furniture: All rooms provide sleep space for all primates off the floor. Depending on the species these can be sleeping benches, platforms, hammocks, rope, bamboo, nest boxes or branches.

Where primates are housed indoors, there is sufficient ventilation to provide ample fresh air and prevent accumulation of odor and noxious gases.

Sufficient space is provided, both horizontally and vertically, to enable the animals to exercise, to protect individuals from undue dominance or conflict, and to provide for their social and behavioral needs. Climbing structures or other furniture are provided if needed, and will vary in design and type depending on whether the primate species is arboreal, semi-arboreal or terrestrial.

Best Practices:



Floors: Floors should always slope towards the drains (which are external to any animal access point). Floors for any indoor housing should be a hard, smooth surface that is easy to clean. Tiles can be used on floors if they are available and affordable (care is taken with grout spacing and use of antibacterial grout). Otherwise a satin finish concrete floor is acceptable.

Staff doors: For apes, two mechanisms to secure each door are recommended, and at least one is a padlock.

Electric fencing: The minimum height of fencing should be 2.5m, although most great ape sanctuaries use higher fences (4 m). Electric fencing systems have backup power. The poles and wires are maintained and inspected daily.

Where more than one species is housed in the same enclosure, the enclosure size meets the cumulative space and furniture requirements for both species. Minimum enclosure sizes should be as follows:

For indoor enclosures: Each room should be large enough to contain four individuals together overnight. Rooms should be no less than :

Great apes: 3m(H) x 5m(W) x 4m(L) (60m³)

Baboons: 2m(H) x 3m(W) x 4m(L) (24m³)

Small monkeys: 2m(H) x 2m(W) x 2m(L) (8m³)

For outdoor areas/enclosures:

Great apes: 250m² per individual (no less than 1000m²)

Baboons: 60m² per individual (no less than 250m²)

Small monkeys: 30m² per individual (no less than 120 m²)

Padlocks: All padlocks in the same building, or for all holding facilities, should use a master key, for convenience and to reduce risks in emergency situations. It is advised that all shanks of the padlocks that are exposed to the weather be made of brass, or in high risk areas, of reinforced steel. Training in padlock maintenance is advised to ensure longevity and security of the locks.

Caregiver corridors: For apes, internal corridors utilizing mesh or bars should be no less than 2m wide to prevent animals from reaching out and injuring staff. The width can be less for many monkey species if the mesh is small enough to prevent monkeys reaching through. If walls are solid, corridors can be 1.5m wide. Where bars are used on both sides of the corridor and primates have full reaching ability, corridors should be 3m wide.



Watering mechanisms: All rooms should have water access. Use of bowls is not acceptable as it is more difficult to maintain a good level of hygiene. While water is offered by hand in some sanctuaries, particularly those that do not have running water, it is not an ideal practice for it to be the only source of drinking water. The use of drinking nipples often referred to as “pig nipples” (see image to left) is affordable and easy to install. However, there are exceptions and each sanctuary must adapt to its particular situation.

Enrichment Devices: Rooms used for daytime or prolonged containment should have/utilize enrichment devices. Section 3.2.5.6 has information about enrichment.

Where possible, holding facilities should be no less than 3m in height (preferably 4m for apes). Adjoining rooms should facilitate separation of individuals into smaller compatible parties. Ideally all rooms should have two access doors for primates to enter/exit from which are on different walls and preferably at different heights. This allows for easy circulation of individuals and provides escape routes for submissive individuals in times of aggression or integration.

Caregivers should have a clear view of all rooms and doors when opening doors or operating tunnels for primates; avoidance of blind spots is highly recommended. This should be a consideration at the design stage.

Additional Information:

Bricks: Cement blocks or ordinary bricks (double bricked) can be used (with render or plaster on the inside to facilitate easy cleaning). High gloss paint that is waterproof is highly recommended if a satin finish render is not possible.

Internal walls: Solid walls made from bricks or concrete need to have a smooth finish to allow for easy cleaning. Paint can be used, either high gloss or water resistant if available. Otherwise a satin finish render with oxide pigmentation will suffice. Tiles can also be used if available and affordable.

Bars: Bars are generally not acceptable with monkeys, although they may be appropriate for ape species, especially adults. For apes, bars should be no less than 12mm thick. The spaces between bars should be no more than 8cm wide and 1m in length, and preferably smaller. For monkeys, the spaces should be much narrower and no wider than the diameter of the head of the smallest primate.

Welded mesh: For apes, the wire should be no less than 5mm thick and preferably thicker than 5mm. For most monkey species, 3mm thick is sufficient. The spaces between wires should be no more than 5cm x 8cm.

Chainlink: Chainlink mesh can be used for most monkey species although it is not suitable for apes. Care should be taken to ensure that the point of fixture to either timber poles or steel poles (angle iron or hollow section) is well fastened and there are no sharp edges or ends that could cause injury to either the monkeys or the

caregivers. The size of the spaces in chain link is important, and must be small enough to prevent young infants from passing through.

Furniture: Attachment points for hammocks and rope should be installed in all rooms during construction. Platforms and benches should be arranged at varying heights to allow primates to avoid eye contact with co-inhabitants. Tires can also be used in rooms that are sufficiently large enough for the tire to swing around without hitting the walls. Tires should be strung with chain and not rope. If using rope, care must be taken to avoid accidental hanging due to frayed rope. Rope ends must be secure (melting the ends of the rope can prevent unravelling). When available, marine rope is ideal.

Most PASA member sanctuaries are in the equatorial zone of Africa, where climate control will not be necessary other than ensuring adequate shelter from wind, rain and sun. Sanctuaries located outside the equatorial zone of Africa will need to consider temperature control when the temperature is below 18°C. Care must be taken when choosing heating apparatus to eliminate the possibility of fire in the facility. (Nesting materials such as hay and shredded paper are highly flammable).

Natural lighting of indoor facilities should be sufficient to easily view the primates. While lighting for nighttime use is recommended, it is normally not possible, and in such cases reliable high powered flashlights (torches) are recommended.

3.4.2 Nursery facilities

Whether a sanctuary needs a dedicated nursery facility depends on the number of infants that are typically at the sanctuary. Quarantine and veterinary treatment facilities can act as nursery facilities when they are not used for other purposes. In the design of a nursery key areas for consideration are a high level of sanitation (ease of waste disposal and food preparation) and security.

Minimum Standards:

Nursery facilities have a source of clean water and means of heating water for bottles, although water can be heated in another area and brought to the nursery if necessary.

Nurseries' indoor facilities are easy to maintain and clean, and outdoor play areas are safe and not accessible by older individuals of the same or other species.

The design facilitates easy access to a bathroom (with a shower and a toilet) for staff and for the disposal of fecal and urine waste of infant primates.

Best Practices:

In cases where the caregiver stays with the infant overnight, a separate bed or sleeping platform should be provided which allows the caregiver to sleep comfortably while still maintaining contact with the infant.

3.4.3 Quarantine facilities

Minimum Standards:

PASA member sanctuaries have quarantine facilities that ensure spatial separation between new arrivals or individuals suspected of harboring an infectious disease and other primates.

Quarantine facilities are as far as reasonably possible from other animals.

With open air enclosures, a wall surrounds the quarantine area and effectively restricts access.

Best Practices:

Quarantine facilities should be in a separate building or enclosure with separate drainage.

Spatial separation should be a minimum of 20 meters for inside housing and 50 meters for open air enclosures.

3.5 Emergency procedures manual

Minimum Standards:

Each PASA member sanctuary has an emergency procedures manual. All staff and volunteers are trained in the procedures and are trained in new procedures when they are revised.

Procedures include (but are not limited to) the following types of emergency situations:

- Escape of dangerous primates
- Evacuation of personnel due to war or civil unrest
- Fire
- Infectious disease outbreak in non-human primates
- Snake bite
- Serious illness or injury of staff or visitors to sanctuary
- Death of key personnel

Best Practice:

The manual should be revised every two years.

Part 4 • Record keeping

Minimum Standard:

PASA member sanctuaries maintain a thorough record keeping system of administration and financial information.

Best Practices:

PASA member sanctuaries should keep the following records, wherever applicable:

General administration:

- Copy of all external correspondence;
- Copy of all memos to staff and other internal correspondence;
- Copy of all trustee/institutional meetings;
- Trust deed/NGO registration;
- Lease agreements;
- Visitor record numbers;
- Release forms and medical records from visitors/volunteers having contact with primates;
- Electronic files of all email correspondence;
- Backup file copies of all computers on a weekly basis (save to server, USB flash drives, external hard drives, etc.); and
- Records of all fixed assets, including an inventory.

Financial management:

- Bank reconciliations;
- List of all major suppliers;
- Payroll slips of all staff;
- Copies of all credit advice notes;
- Copies of all bank statements;
- Copies of all visitor admission slips, if applicable; and
- Inventory of receipt books, visitor admission books etc.

Animal management records:

- Details of how, where, and why each animal at the sanctuary was acquired;
- Logbooks/diaries on individuals;
- Receipt for individual animals from the authorities;
- Any CITES permits of those transferred internationally;
- Individual veterinary/health procedures recorded data; and
- Up-to-date photographic record of individuals.

Personnel files:

- Contracts for personnel;
- Health records of personnel;
- Personal details of personnel;
- Disciplinary letters;
- Staff Handbook;
- Annually updated photos of all staff members;

- Volunteer and researcher manual;
- Volunteer and researcher release form; and
- Volunteer and researcher personal information and medical records.

Management of sanctuary:

- Standard Operations Procedures Manual;
- Occupational Health and Safety Manual;
- Incident reports;
- Minutes of meetings with sanctuary personnel;
- Minutes of all other meetings, such as community meetings.

Part 5 • Media

Minimum Standards:

At no time should a media project at a PASA member sanctuary compromise the health, safety or welfare of the primates or the staff, and in no way should the primates be used to participate in artificial, unnatural or dangerous acts.

Any media project conducted at a PASA member sanctuary must fairly reflect the work of the sanctuary and must be in the best interests of the primates and staff at the facility.

Best Practice:

Companies conducting media projects that aim to produce content with copyrights that will not be owned by the sanctuary should pay location fees to the sanctuary.

Additional Information:

Appendix 4 of this Operations Manual suggests fees, rights and protocols for any media agreements. If asked, PASA will assist member sanctuaries in negotiations.

Part 6 • Photography

Best Practice:

PASA strongly discourages the widespread distribution of photos that contribute to the perception that primates may be suitable pets or can be domesticated. As such, PASA discourages posting photos on public webpages of people posing for the camera while holding primates. Photos of people caring for primates in the course of their work or their volunteer roles are acceptable.

PASA suggests that member sanctuaries discourage volunteers from posting photos on the web that contribute to the perception that primates can be suitable pets.

Part 7 • Research

Minimum Standards:

PASA opposes the use of non-human primates by pharmaceutical and laboratory research facilities. Therefore PASA member sanctuaries need to very carefully consider the implications of every type of research proposal they receive and not assist with research that will in any way create the impression that a sanctuary is a surrogate laboratory.

PASA member sanctuaries may choose to be involved in non-invasive scientific research into areas such as primate welfare, conservation ecology, behavior, and cognition, as well as the collection of samples, in accordance with the following criteria:

- Research involving wild primate populations must not disrupt their behavior and ecology. This prohibits provisioning of food and habituation of primates where risks from hunting exist now or may exist in the future;
- Research involving non-invasive biological sampling (skeletons, hair, feces and extra blood drawn during routine examinations) may be conducted at the discretion of the sanctuary, but cannot be for human medical benefit.
- Primates at PASA member sanctuaries are not anesthetized or manipulated and their routines are not changed solely for the purpose of involvement in research if the study is not of direct diagnostic value to the individuals involved.
- PASA member sanctuaries must have an agreement with laboratories and/or researchers that ensure samples are used ethically. (Agreements may be PASA-wide, i.e. applicable to all sanctuary members, or arranged on an individual basis between sanctuaries and institutions.) PASA member sanctuaries ensure that the agreement specifies exactly what samples are to be used for and the laboratory/research institution must request permission to use samples for other tests. (Refer to Appendix 3, PASA research request form.) No laboratory or researcher can infect or inject other animals experimentally with infectious agents derived from samples obtained from PASA member sanctuaries. Research that encourages non-natural behaviors is strictly limited and is only deemed acceptable when it benefits the health and captive management of the primates, and is not detrimental to the individual or social group.

Best Practices:

- National staff, preferably caregivers of the animals concerned, should be involved with in-house research activities to build their scientific and technical capacity.
- When appropriate, sanctuaries are advised to request the opportunity to give editorial input and/or receive credit in publications, bearing in mind the potential value of the study's conclusions and how the study may reflect on the sanctuary and its host country.

Part 8 • Human contact with primates

It should always be remembered that all people who have access to the primates at the sanctuary may pose a health or safety risk to the animals and vice versa. Therefore, the roles and management of staff, volunteers, students, temporary staff, contractors and media personnel working in animal areas and, in some cases, visitors, need careful consideration.

Minimum Standards:

Whenever direct or indirect contact is anticipated between human and non-human primates, all reasonable precautions are taken to minimize the risk of injury and disease transmission. For example, the minimum standards of occupational and health safety as set forth in Part 3.1.3 are applied for all such individuals, including volunteers.

Due to the potential for disease transmission and the safety risk, under no circumstances are children allowed to have direct contact with primates.

Contact between individuals and non-human primates is not permitted as part of advertised tourism.

Best Practices:

Due to the potential for disease transmission between human primates and non-human primates and the safety risk to both human and non-human animals, PASA strongly urges that direct contact between sanctuary animals and non-staff members be prohibited.

If a PASA member sanctuary allows interaction between non-staff members and primates, it should ensure that the interaction is in the best interest of the non-human primates and facility operations; that the program does not compromise the work, goals or reputation of PASA as an organization; and that the general principles of eco-tourism are followed as per the guidelines presented throughout this manual.

PASA member sanctuaries should ensure that all staff, volunteers, researchers, and visitors that may have contact with the primates or their food, water or enclosures have complete health screens as recommended by local health authorities and/or risk assessments of disease hazards, including vaccinations and annual TB testing.

Part 9 • Environmental stewardship

Minimum Standards:

PASA member sanctuaries respect nature and the natural balance of life through environmental protection.

PASA member sanctuaries recognize that their work may have a direct or indirect impact on the local and/or regional environment. They are therefore committed to reducing any harm that this may cause to the environment.

Best Practices:

PASA member sanctuaries should:

- Reduce waste.
- Reuse materials at every opportunity.
- Repair rather than throw away when possible.
- Recycle.

PASA member sanctuaries strive to:

- Be responsible, environmentally conscious organizations.
- Use water and energies sparingly, and where possible, use renewable energies.
- Consider environmental impacts in purchasing.
- Endeavor to work with partner organizations that are environmentally conscious.
- Reduce the need for transport and its impact on the environment.

Part 10 • Education and conservation

10.1 Law enforcement

Minimum Standards:

Whenever acquiring illegally held or trafficked primates, PASA sanctuaries involve relevant authorities whenever possible.

When applicable, PASA member sanctuaries provide law authorities with information about illegal activity, technical assistance for confiscations, and evidence for prosecutions.

When applicable, member sanctuaries play a key role in identifying large-scale dealers in the primate trade and illegal wildlife products.

PASA member sanctuaries actively raise public awareness of wildlife laws and the risks and penalties for breaking them.

Best Practices:

When possible and appropriate, PASA member sanctuaries are encouraged to work with other NGOs (e.g. LAGA, EAGLE Network) to maximize the potential for arrests, prosecutions and convictions.

10.2 Conservation policy

Minimum Standards:

PASA member sanctuaries promote biodiversity and adopt approaches that consider and integrate conservation concerns and strategies into their projects and programs.

The work of member sanctuaries benefits the conservation of the species/subspecies they care for, benefits conservation locally and nationally, has the support of the government and local communities, and is feasible regarding local needs and exploitation patterns.

Member sanctuaries collaborate with governmental agencies and local communities to prioritize and address conservation issues in their respective areas.

Member sanctuaries strive to ensure that local communities are aware of the purposes of sanctuaries and their programs, the need for conservation in general, the need to protect wild primates and their habitat, and the need to respect primates in sanctuaries and in the wild.

Best Practices:

PASA member sanctuaries recognize that they play a vital role in preserving the future of Africa's wildlife and wild spaces, which can only succeed through collaboration with a broad and inclusive range of partners.

Member sanctuaries should strive to be aware of and participate in long-term land-use planning with governments, companies and communities in their areas of operation. As appropriate, member sanctuaries should advocate for the protection and conservation of these areas, to avoid future conflicts.

10.3 Conservation education and communication

Minimum Standards:

PASA member sanctuaries conduct education and communication programs which:

1. Promote primate conservation.
2. Influence people's long-term attitudes and behaviors to encourage the protection of species and their habitat.
3. Are designed to create ongoing public support, influence policy makers, and foster commitment to protecting primates and their habitats.
4. Describe specific ways that the audience can contribute to the conservation of species.

Sanctuaries demonstrate that they conduct education and communication programs by referring to specific projects, numbers of participants, and evaluation procedures.

All education and communication programs are evaluated on a regular basis for

effectiveness and content, and updated with current information. Sanctuaries use the results from evaluations to improve the existing programs and to create new programs.

Best Practices:

When developing programs, managers of PASA member sanctuaries should consider local politics, culture, sanctuary goals, audiences, and resources that reflect local conservation needs and priorities.

Sanctuaries should have a thorough understanding of the needs of their various target audiences. A sanctuary may not be able to reach all audiences equally, but should use a thoughtful approach to audience selection as well as strategic program development.

- Programs should include primate conservation issues such as habitat management and pet and bushmeat trade, species-specific information such as natural history, social structures, and unique attributes, the role of sanctuaries as centers for conservation, and information on the specific sanctuary and about PASA.
- Education and communication should be an integral part of every sanctuary visit. Additionally, where possible, sanctuaries should participate in education and communication programs in schools and local communities.
- Programs should clearly address diverse learning styles.
- Community engagement is a central pillar to successful education and communication programs. Programs should be culturally relevant and be designed in consultation with community members.

Conservation education and communication should be key elements in the mission of the sanctuary and be accompanied by a written education and communication policy.

- The policy should identify specific components of the program and set out the overall methods by which these components are accomplished.
- The education/communication programs should be under the direction of a staff member who is trained or has experience in education and communication programs, and whenever feasible is a national of the country where the sanctuary is located. In smaller sanctuaries, this role might be combined with other functions and be carried out by personnel such as the director or a senior animal caregiver.
- All sanctuaries should strive to train and employ nationals in the positions of education and communication, recognizing that these areas are culturally embedded and sensitive.
- Education and communication personnel should be involved in the development of all displays, graphics, media, curricula, and interpretations, as well as all structured programs for the visiting public and outreach programs for communities.

Where possible, sanctuaries should partner with local education groups. Sanctuaries should encourage active, ongoing collaborative partnerships with community groups, other informal education institutions, school districts, institutes of higher learning,

other conservation organizations, local and national governmental agencies, and other organizations and individuals that can contribute to the expansion of its educational and communication dimension and accomplishment of its mission.

Additional Information:

Integration of ideas from the PASA education and communication manual can assist with program design and delivery as well as training that augments current skills of sanctuary staff members.

The IUCN/SSC Primate Specialist Group's best practice guidelines address some critical issues in great ape conservation, e.g., survey and monitoring of great ape populations, mitigation of human-wildlife conflict, etc., and provide expert recommendations on how to address them.

Part 11 • PASA membership requirements

PASA member organizations must:

1. Operate a sanctuary within Africa that houses primates (recognizing some members take care of non-primate species, with the welfare and conservation of all species considered equal).
2. Abide by national and international wildlife laws and conventions.
3. Adopt PASA's mission and policies.
4. Comply with PASA's minimum standards.
5. Attend major PASA workshops and conferences. The annual Strategic Development Conference requires attendance by members of senior management who are able to participate in voting and make decisions on behalf of their wildlife center. Other workshops are designed to build national capacity and are aimed at long-term national staff members. It is expected that individuals attending the workshops will, upon returning to their facility, convey the information to all relevant staff to further build capacity throughout the organization.
6. Pay annual membership dues either by June 30 or by the annual Strategic Development Conference (whichever comes last).
7. Display PASA membership certificate at the sanctuary.
8. Display the current PASA logo on their websites which is a link to PASA's website, with the text "An Accredited PASA Member". PASA members may also put the PASA logo on printed materials and in presentations.
9. Aim to reduce and limit the environmental footprint of the facility and its activities.
10. Be reaccruited by PASA every five years to ensure compliance to PASA policies and minimum standards. This includes completing an accreditation questionnaire and may include a site evaluation at PASA's discretion.

PASA membership may be revoked or temporarily suspended if:

1. Members do not comply with PASA's membership requirements.

Complaints registered against a facility will be investigated and may require a site evaluation.

If it is confirmed through a reaccreditation and/or a site evaluation that a PASA member is not complying with membership requirements, PASA will contact them about correcting the issues.

If a PASA member does not correct the concerns in a timely manner, does not complete an accreditation questionnaire when required, or does not permit a site evaluation, membership may be temporarily suspended. If a PASA member still does not correct the issues, complete the questionnaire, or permit an evaluation, membership may be revoked. Sanctuaries can reapply to become PASA members 12 months or more after the date that their membership was revoked, and will follow the standard procedure for membership which necessarily requires a site evaluation. Furthermore they must demonstrate that the issues that caused their membership to be revoked have been addressed

2. Members continually fail to send an appropriate representative to the PASA Strategic Development Conference. Absence for two consecutive years from the conference may result in temporary suspension of PASA member status. Further absence may cause membership to be revoked.
3. Members fail to pay annual membership dues. If payment is not received within one month of the date it is required, PASA will send a reminder. If payment is not received within one month of the reminder, all privileges that membership confers (including participation in conferences and workshops) may be withdrawn until payment is received. If the PASA member continues to fail to pay dues, membership may be temporarily suspended or revoked. PASA members that are unable to pay membership dues on time because of financial difficulties are encouraged to contact PASA to arrange a mutually agreeable payment plan.

Part 12 • PASA members in a State of Crisis

When a PASA member sanctuary faces a threat to its existence, PASA may (at its own discretion) determine that the sanctuary is in a "State of Crisis." While PASA is dedicated to ensuring the sustainability of all its members, it may take extraordinary measures to support sanctuaries in a State of Crisis such as providing emergency grants of larger amounts or more frequently than is specified by PASA's guidelines for emergency support.

Additionally, PASA acknowledges that members in a State of Crisis may be temporarily unable to comply with PASA's minimum standards and policies and may be temporarily unprepared for re-accreditation. In these cases, rather than

suspending the sanctuary's membership, PASA may choose to postpone re-accreditation until a later date, with the requirement that the sanctuary has a viable plan for becoming compliant with standards and policies and becoming prepared for re-accreditation. If the sanctuary does not comply by the chosen date, PASA may temporarily suspend or revoke its membership or take other measures it deems appropriate.

Part 13 • PASA accreditation procedure

13.1 Introduction

PASA maintains high standards for its member organizations for a number of reasons:

- To give prospective members guidance for improvement.
- To ensure that member organizations sustainably provide high quality animal care and implement effective conservation programs.
- To uphold PASA membership as an indicator of excellence in the eyes of the wildlife conservation community, the animal welfare community, and donors worldwide.

PASA's accreditation and evaluation procedure ensures that only African primate sanctuaries that comply with PASA's policies may join the Alliance. The process assists wildlife centers in achieving their goals by providing an opportunity for independent review and validation of their efforts, and it ensures clarity, transparency and confidence in PASA.

PASA does not grant membership to individuals, and will only consider applications from groups or organizations that meet the definition of a PASA member: "A PASA member sanctuary provides a safe and secure home for African primates in need. The welfare of the individuals and the preservation of the species are of prime importance. The sanctuary uses an integrated approach to conservation, which can include rehabilitation and reintroduction."

In brief, the steps of the accreditation procedure consist of:

- **Step 1: Application phase:** communication between an applicant sanctuary and PASA, submission of an application, review of the application, research on the sanctuary, and a decision about whether to proceed with an evaluation visit.
- **Step 2: Evaluation visit:** a site visit and assessment by a PASA evaluator(s), along with the preparation of an evaluation report.
- **Step 3: Decision on membership:** analysis, discussion and a vote on whether to grant membership to the applying sanctuary.

13.2 The PASA accreditation procedure

This procedure applies to accreditation of both new members and those seeking to re-establish membership following temporary suspension or revocation of membership. A flow chart of the procedure is in Appendix 6. The process of becoming a member of PASA member typically takes years.

Summary of applicant's obligations:

- Applicants must pay an application fee of US\$500 to cover administrative costs.
- Applicants must cover the expenses of an evaluation visit of their institution by one or more people. All necessary expenses for the evaluation, including the evaluators' travel, visa, accommodation, meals, are the responsibility of the sanctuary being evaluated. (PASA will ensure that travel costs are minimized.) As much as possible, the sanctuary should handle all financial matters during the evaluation visit (e.g. hotels, meals). It should reimburse PASA for all other necessary expenses for the evaluation.
- If approved as a member of PASA, the PASA membership dues are payable within three months of approval. The first payment is prorated for the fraction of the year that the sanctuary is a member.

Summary of applicant's responsibilities:

- To complete the accreditation questionnaire. In submitting an application form the applicant agrees that the information provided is true and accurate.
- To provide PASA and the evaluator with all requested information and answers to questions.
- To assist PASA and the evaluator in organizing the evaluation visit (e.g. accommodation, travel).
- To ensure that, during the evaluation visit, all relevant staff members are present and available for questions.

If approved, the sanctuary must comply with PASA membership requirements to remain a member.

13.2.1 Step 1: Application phase

PASA strongly encourages sanctuaries to contact PASA when they first consider joining the Alliance to discuss the process and their expectations, and to maintain communication throughout the process. The application phase typically begins with a sanctuary requesting information regarding PASA membership. PASA responds by providing a copy of the PASA Operations Manual which contains all the necessary information for applicants, and which applicants should read. PASA encourages applicants to consider why they wish to join PASA and whether they can comply with PASA's policies and minimum standards. While an example of the application form is part of the Operations Manual in Appendix 7, a separate Microsoft Word format version is sent to facilitate electronic submission.

The application form requests information about:

- Status and structure of the sanctuary
- Mission, goals and strategic plan
- Financial matters
- Veterinary care (including contraception)
- Animals at the sanctuary (primate and non-primate)
- Animal care (including reproduction)
- Staffing (composition and numbers)
- Safety and security

Conservation
Environmental Education
Research

Additionally, because becoming member of the Alliance means joining the PASA family, an important part of the process is to build relationships with other PASA member organizations and develop mutual trust and understanding. An excellent way to do this is to attend PASA's Strategic Development Conferences and PASA workshops, which non-PASA members who work in primate protection are welcome to attend at their own expense.

If the sanctuary believes they comply with the Operations Manual and wants to proceed with accreditation, they submit a complete application and pay the non-refundable application fee of US\$500. In submitting an application the applicant agrees that the information provided is true and accurate.

PASA carefully considers every application it receives, and asks the applicant for clarification of the information submitted as well as additional information. PASA also researches the sanctuary, which includes contacting a number of people who have knowledge of it. The application and the additional information is shared with the PASA Board of Directors, which votes on whether the applicant sanctuary has sufficient potential to comply with PASA's policies and standards (as described in the Operations Manual) to warrant proceeding with an evaluation visit. A decision not to proceed with the accreditation process can save time and money for all parties concerned.

The decision is based on certain criteria including:

- Applicant must actively demonstrate a commitment to PASA's mission.
- Applicant must adopt PASA's policies.
- Applicant must meet all minimum standards.
- Applicant must be cooperative and make a positive impression when communicating with PASA.
- Applicant must have a positive attitude towards improvement.

If a sanctuary is denied membership in the application phase, PASA will inform the facility of the decision through an explanatory email. The sanctuary is welcome to submit another application in the future. PASA will continue to work with the sanctuary to encourage efforts to improve the animal care and operations.

If the PASA Board of Directors approves proceeding with the evaluation visit, PASA will inform the applicant.

13.2.2 Step 2: Evaluation visit

The evaluation involves a thorough review of facilities and operational procedures of the applicant by a suitably qualified evaluator(s), in addition to assessment of particular areas of concern if a complaint has been filed. PASA selects the evaluator(s) of a facility from the pool of all PASA evaluators based on their relevant background and skills to assess the facility in question. The sanctuary is informed of the PASA evaluator(s) to be sent to their facility and if they have a reasonable

justification as to why that person is not suitable, an alternative evaluator will be chosen. Below, the word evaluator is used in singular but also refers to multiple evaluators.

13.2.2.1 Criteria for PASA evaluators:

- Are fully cognizant and supportive of PASA's mission, policies, minimum standards, and best practices.
- Have substantial experience in Africa, in management, and in veterinary care.
- Have a good knowledge of the English language (both written and spoken) and in some cases a second language relevant to the country being visited (e.g., French, Kiswahili, or Portuguese).
- Are impartial regarding the particular institution to be evaluated.
- Are not currently directors or managers of PASA member organizations.

Evaluators are approved by PASA and its member organizations in advance of evaluation visits.

In addition to the evaluator, PASA may choose to send an advisor(s) who are specialists in areas in which the sanctuary should improve.

13.2.2.2 Preparation for the evaluation

The size and characteristics of the applicant facility will dictate the duration of an evaluation but a minimum three days is typically necessary.

If there is more than one evaluator, PASA will designate a lead evaluator. PASA introduces the applicant facility and evaluator(s) by email. A time period for the evaluation is agreed between the sanctuary and the evaluator. It is important to ensure that sanctuary management and other relevant persons are available during the evaluation. Once a time frame has been agreed, the logistics of travel and accommodation are left to the evaluator to organize with the facility, although PASA must be kept informed of all arrangements.

The evaluator is responsible for determining if it is safe to travel to the country in question (which should also be reassessed immediately prior to departure), arranging a visa if one is needed, and obtaining relevant insurance.

Prior to the evaluation, PASA will give the evaluator all the relevant available information such as the completed application form and attachments. The applicant may be requested to update certain information (e.g. animal inventory list) as some information may be outdated by the time of the evaluation visit. PASA will also give the evaluator a site evaluation questionnaire (Appendix 10) which they should complete during the visit and provide additional details as appropriate. Evaluators are requested to re-familiarize themselves with PASA's mission statement, policies, minimum standards and best practices, and take copies with them on the visit.

13.2.2.3 Evaluation visit costs

All necessary expenses of the evaluation visit are paid by the applicant. These can include (but are not limited to):

- Travel costs: flight tickets (international and domestic), car rental, fuel costs, parking fees, taxi rides, bus and train tickets, etc.
- Accommodation
- Food and drinks (non-alcoholic drinks only)
- Visa
- Insurance

Before making travel arrangements, the evaluator estimates the costs, informs the sanctuary and PASA, and receives agreement from the sanctuary to pay the estimated costs. The evaluator keeps detailed records of all expenses incurred, with receipts whenever possible, and submits these to PASA within two weeks after returning from the visit. Where possible the applicant will cover all in-country costs. PASA reimburses the evaluator for the remaining necessary costs for the evaluation, and the sanctuary reimburses PASA. All reimbursements are settled within two weeks after submission of the receipts and records of expenses.

Sanctuaries are often aware of economical airlines and routes, and furthermore may be able to personally accommodate the PASA evaluator. Therefore PASA requests that the evaluator coordinates with the applicant to ensure that costs are kept to a minimum. It is important that accommodation organized for the evaluator is considered safe and secure.

13.2.2.4 The evaluation visit

The evaluation visit begins with an introduction of all parties including the director of the facility, after which the evaluator explains the goal of the visit.

The evaluator then tours the premises of the institution, including off-site areas such as food storage and preparation, quarantine, and vet clinic. During this tour, relevant staff members accompany the evaluator to answer any questions. The evaluator takes photographs of anything noteworthy or unusual. If there are multiple evaluators, it is advisable that all conduct the tour at the same time to facilitate comparison of impressions and opinions.

After this general survey, the evaluator meets with relevant staff members to discuss matters that could not be observed during the tour (e.g. conservation efforts, environmental education and research activities, veterinary and safety procedures, community-based programs, record keeping, and strategic plans).

The evaluator also takes an unaccompanied tour of the facility if possible (e.g., with a release site this may not be appropriate or possible) and shadows staff in their daily routine activities.

The evaluator completes the evaluation questionnaire and meets again with the director and relevant staff of the facility to discuss any matters that need clarification and that the evaluator believes are clearly in need of improvement. After this final meeting, the evaluator can depart. The evaluator does not inform the director or staff of the sanctuary if they are successful in their application to become a member of PASA.

Appendix 5 contains detailed guidelines for evaluators.

13.2.2.5 Evaluation visit report

Within two weeks of returning from the visit, the evaluator submits to PASA an evaluation report which consists of the completed site evaluation questionnaire (Appendix 9 of the Operations Manual), photographs, and any relevant additional information. If there is more than one evaluator, the lead evaluator will collate all information and submit it on behalf of all evaluators. All evaluators are expected to use the questionnaire to maintain conformity although additional sheets can be attached if deemed necessary. PASA may request additional information and the evaluator may need to contact the sanctuary for the information in question.

If a facility does not comply with PASA's policies and minimum standards, the evaluator's report details what areas do and do not comply, and provides a suggested prioritized list of improvements for the applicant to make to become compliant.

13.2.3 Step 3: Decision on membership

The PASA Board of Directors reviews the completed evaluation report and may request additional information relevant to the decision of membership that is not in the report. The Board discusses the report and the application, and votes on approval of the sanctuary for PASA membership based on whether the sanctuary complies with PASA's policies and minimum standards (as described in the Operations Manual).

If the sanctuary is approved, the Board may recommend that the sanctuary makes certain changes within a timeframe. If the sanctuary is not approved, the Board recommends changes that may qualify the sanctuary for approval in the future. PASA then notifies the sanctuary of the decision. If membership is approved, the sanctuary is also sent a certificate that names the facility as a member of PASA. PASA members are requested to display the certificate and notify relevant government agency/ies that they have been approved to be members of PASA.

New PASA members pay the annual membership dues within three months of being issued membership. As membership dues are for each calendar year, a new member's dues are prorated for the fraction of the year in which it is a member.

Appendix 1 • Siddle-Marsden Award

The PASA Siddle-Marsden Award was created to honor sanctuary pioneers David Siddle and Stella Brewer Marsden. The award is given annually to an African staff member at a PASA member sanctuary who exemplifies a commitment to primates, a commitment to conservation, and a commitment to excellence.

Each PASA member sanctuary may nominate one staff member. Each nominee must be an African national and must be employed by the sanctuary. Volunteers and expatriates are ineligible.

To nominate a staff member, sanctuary directors are requested to state in 500 words or less how the nominee exemplifies a commitment to primates, a commitment to conservation, and a commitment to excellence, and submit a recent photo of the nominee.

PASA selects one winner each year and makes an announcement at PASA's annual Strategic Development Conference. The winner receives an engraved plaque and US\$250 monetary award (for personal use), and is invited to attend the conference.

By submitting this application, the PASA member sanctuary acknowledges, understands and agrees that PASA will publicize the winner of the PASA Siddle-Marsden Award, including the name of the sanctuary and related information.

Appendix 2 • Emergency Support Program

The Pan African Sanctuary Alliance (PASA) Emergency Support Program (formerly known as the Crisis Fund) was developed to provide an immediate means of addressing urgent needs in PASA member sanctuaries that compromise the normal operations of the facility and/or threaten the health and welfare of the primates and/or staff.

The program is primarily designed to counter extraordinary circumstances brought on by natural disasters, disease outbreaks, or events beyond the scope of day-to-day operations.

Due to the nature of the emergencies, PASA member sanctuaries seeking emergency grants are not required to submit a full proposal, but they must complete and submit the application form on the following page. PASA assesses each request and is committed to provide a response as quickly as reasonably possible. Sanctuaries that receive funding from PASA's Emergency Support Program must report the outcome of the emergency situation within three months of receiving the funds.

No PASA member sanctuary may receive funds from PASA's Emergency Support Program more than once in a 12-month period. An application may be submitted at any time. Awards are normally restricted to a maximum of US\$5,000.

PASA Emergency Support Program • Application Form

(Formerly known as the Crisis Fund)

1. Name of sanctuary:
2. Contact details:
3. Title of project or need:
4. Species targeted:
5. Briefly describe the situation:
6. Why is this deemed an emergency situation?
7. What is the solution to the situation, or what intervention is planned to solve it?
8. What is the expected start date and end date of the solution or intervention?
9. What will happen if the solution or intervention is not carried out?
10. What support is requested from PASA? (For example, identifying specialists, arranging for specialists to visit the sanctuary, or providing an emergency grant.)
11. How will support from PASA help you to solve the emergency?
12. If you request a grant, how will grant funds be used? Provide a simple budget.
13. Total cost of solution or intervention to solve the emergency:
14. Amount of money requested from PASA (if any):
15. Other funding sources:
16. Other organizations/partners involved:

By submitting this application, the PASA member sanctuary acknowledges, understands and agrees that PASA may, at its discretion, publicize the PASA Emergency Support Program grant award recipients, including the name of the sanctuary and project information.

Appendix 3 • PASA research request form

Project title:			
Brief outline:			
How will this project benefit the individual or group from which samples are taken?*			
Primary investigator:		Contact person:	
Contact's telephone number:		Contact fax number:	
Contact's email address:			
Estimated project completion date:			
Type of protocol? (Samples from living specimens only, samples from both living and dead, necropsy only)			
Shipping address:			
Shipping protocol:			
Sample collection and handling protocols:			
Species list:			

** Please Note*

If the request is approved, PASA sanctuaries can only supply samples opportunistically. In order to comply with the PASA Research Policy and the BIAZA Research Guidelines (;) PASA requires justification of any samples taken from live animals detailing how the provision of these samples will provide information for the direct benefit of the animal concerned or its group. Supplied samples, which will remain the property of the PASA sanctuaries and/or their respective Governments, will not be used for any other purpose than as described in this form, nor will they ever be used for commercial purposes. Please note that sample sizes will also be limited to amounts held and any research sample can only be a small proportion of that taken for diagnostic purposes.

After registering, researchers are bound by the terms and conditions of the PASA Research Policy.

By signing this Sample Request Form, researchers accept the terms and conditions of the PASA Research Policy, and agree to provide the sanctuaries involved and PASA with an electronic copy and a hard copy of the findings or project report. Or, for ongoing studies, an annual update, should samples be provided by PASA and/or its member sanctuaries.

Researcher's
signature.....Date.....

Appendix 4 • PASA filming protocol

The following information is presented to facilitate and guide the negotiation process with media companies, and was designed in partnership with the Great Ape Film Initiative (GAFI) and Nutshell Productions.

Stage 1: Preparation/pre-filming

- Assess whether the film/series has the kind of content you wish to be associated with;
- Assess the requirements of the film crew/media team, e.g., what do they want, for how long, who do they need to contribute/interview, what else do they need (especially with reference to community involvement or filming outside of the main remit of the sanctuary program);
- Clarify and confirm dates, logistics, and personnel they need;
- Confirm the channel, program or network the series/film will be shown on;
- Negotiate a contract that both parties agree upon and sign.

Stage 2: Preparation/pre-production

- Agree on a budget based upon the requirements and time-span; a base line of USD \$7,000 to USD \$10,000 per week is generally acceptable but this could go up if the production requires extra work or it could come down if the production is with the sanctuary for 3 or more weeks. It should never go below USD \$7,000 per week and it depends on the final output of the film; a feature film would be a lot more;
- Among the items to consider as part of this agreement are:
 - ✓ Filming permission to film your sanctuary;
 - ✓ Filming permission to film your staff;
 - ✓ X amount of time for coordination with production team before filming (this will include any coordination with local communities for filming);
 - ✓ X amount of time for you during filming;
 - ✓ X amount of time for your staff during filming;
 - ✓ X amount for accommodation and food;
 - ✓ X amount for vehicles, fuel and logistics;
 - ✓ X amount for anything else; office support etc., they will use; film permit (if required).
- The contract/agreement must state that the fee is for this one series/program only and if the footage is used in the future then a further fee has to be negotiated. The sanctuary is not only providing logistics but access to knowledge, practice and research accumulated over many years so this is what is being paid for;
- Any further sale or distribution via another medium (DVD, book, etc.) requires a separate fee and must be negotiated;
- Every sanctuary needs to establish its own criteria for terms and conditions especially around the protection of the animals, any sensitive research, damage to property, which should be included in the contract;

- The sanctuary should request that it receives a minimum two copies of the film and the right to share the film to raise awareness and funds for the sanctuary;
- A 50% deposit on all agreed fees must be delivered to the sanctuary/bank prior to the start of filming, with the remaining 50% to be paid within 30 days of completion of filming.

Stage 3: Production/filming

- No work is to start or film crew to arrive without the contract being signed and the deposit paid up-front; these fees are also non-returnable if the crew does not arrive as a lot of coordination work will have taken place beforehand.

Stage 4: Production/post-production

- Request a credit or acknowledgement regarding where the film is taking place in the footage (it can be by filming the sanctuary sign, in voice-over, etc.);
- Request a sanctuary credit at the end of the film, a PASA credit at the end of the film, and the listing of both organizations' websites;
- Request that both the sanctuary website and PASA website be linked from any network or production company website for the program;

Several items, although desirable, will not be granted and are not worth considering in terms of a contract. These include:

- Control of the final product;
- Control of the final edit;
- Control of re-sale;
- Control of narrative;
- Ownership of unused footage.

Appendix 5 • Guidelines for accreditation evaluators

Pre-evaluation

- Evaluators are expected to be well informed with the contents of the PASA Operations Manual.
- Evaluators are expected to read the materials about the applicant institution that PASA sends them well before the evaluation visit.
- Evaluators should organize travel and accommodation with the applicant and keep PASA informed of all arrangements.
- Evaluators determine if it is safe to travel to the country in question (which should also be reassessed immediately prior to departure), arrange a visa if one is needed, obtain insurance, etc.
- Evaluators should coordinate the visit with the applicant to ensure that costs are kept to a minimum.
- Evaluators should receive agreement from the applicant to the specified costs in advance of travel.
- Evaluators should provide PASA with an estimate of costs to be incurred.

Evaluation: general considerations

- Evaluators must be objective during the evaluation process.
- Evaluators should become informed of relevant national legislation.
- Evaluators should start the visit by explaining the evaluation process to the director and relevant staff of the sanctuary.
- Evaluators should tour the sanctuary (including off-site areas such as food storage and preparation, quarantine, vet clinic) and take photographs of anything noteworthy. During the tour, relevant staff should accompany the evaluators to answer any questions.
- Evaluators should conduct interviews with key staff in private, without the presence of other staff. If the number of animal care staff at an institution is too large to allow for individual interviews, evaluators should speak with animal care staff as a group and encourage them to speak freely.
- Evaluators should meet with relevant staff members to discuss matters that could not be observed during the tour (e.g. conservation efforts, environmental education and research activities, veterinary and safety procedures, record keeping, financial planning, and strategic planning).
- Evaluators should take an unaccompanied tour of the sanctuary (if possible) and also shadow staff in their daily routine activities.
- Evaluators should ask questions of individual staff when touring the sanctuary.
- It is extremely important that evaluators take photographs and that the photographs present an accurate overview of the physical institution as it exists. Photographs should include all parts of the institution, both the positive and problem areas (if any). The photos should be included in the evaluation report.
- While future plans should be considered in a general sense, evaluators must judge facilities based on what exists at the time of the evaluation and not on what is planned for the future.

- After the evaluation, evaluators should meet with the director and relevant staff to discuss matters that may need clarification.
- PASA relies on the evaluators to provide a clear picture of the sanctuary and therefore the report should include both positive and negative (if any) observations.
- Evaluators do not inform the sanctuary if they are successful in their application. They may discuss areas that they believe are obviously in need of improvement.
- If the applicant asks the evaluators for ideas on any problems, they may offer their opinion but it should be clearly stated that it is their opinion based on their knowledge and experience, and should not be considered as a recommendation of PASA.
- Evaluators should ensure that the site evaluation questionnaire is completed in full. The final version submitted to PASA should be typed.
- Evaluators should keep detailed records of all expenses incurred with receipts whenever possible.
- Preferably, the sanctuary should directly pay all in-country expenses. However, PASA will reimburse the evaluators for other costs and will in turn be reimbursed by the sanctuary.

Evaluation: specific considerations

When evaluating a sanctuary, evaluators should consider the definition of a PASA sanctuary:

“A PASA member sanctuary provides a safe and secure home for African primates in need. The welfare of the individuals and the preservation of the species are of prime importance. The sanctuary uses an integrated approach to conservation, which can include rehabilitation and reintroduction.”

The main focal areas for evaluating a sanctuary

1. Sanctuary management and general operations

Evaluators should:

General management

- Determine if the institution has a strategic plan to guide its development. Examine any strategic and management plans.
- Ask what other programs are being developed or are already in place, and determine if they are on schedule, being followed, etc.
- Check if actual management practices are in line with PASA's policies including: animal acquisition, housing and animal care, reproduction, euthanasia and release/reintroduction.
- Determine if the sanctuary has animal contact activities: review sanctuary policy for animal and public safety, and view the animals, and public contact areas.
- Attempt to view the facilities from the public's perspective. Are the buildings and grounds well kept? Are trash receptacles and trash collection sufficient?

Safety and security

- Check if the security program employed is sufficient to provide appropriate protection for the animals, staff, volunteers, and the visiting public.
- Check if procedures are in place to reduce the risk of injury by potentially dangerous animals. Review any emergency procedures.
- Check if facilities that house venomous animals have an appropriate supply of sera available and that there are policies/procedures in place for the safe handling of those animals.
- Determine when the most recent escaped animal drill was conducted.
- Determine if escape procedures are posted in animal backup areas and if staff understand safety and escape procedures.
- Review the files on the most recent safety incidents (e.g., escapes, accidents, injuries, attacks, public problems).
- Determine if the enclosures are safe for the animals, the staff and the public.
- Verify that adequate security is provided for the animals both day and night.
- Determine that any fencing (enclosures and perimeter) is intact and in good condition.

Financial information

- Determine financial stability of the sanctuary and review the availability of long-term revenue, contingency plans, reserve funds, emergency funds, and financial records.

Government authority

- Determine the levels of control on the part of the government authority (appropriate or inappropriate).
- Determine the government authorities' role in the day-to-day management of the institution, including staff and programs.
- Evaluate the relationship between the government authority and the director.

Staffing

- Determine if the sanctuary is maintaining a staff sufficient in qualification and number, as key element of an institution's successful operation is getting this balance right. Also evaluate effective communication, working relationships, and training.
- Become familiar with the qualifications of staff and review job descriptions.
- Casually talk to staff about their responsibilities.
- Discuss with management its relationship with staff, including problems and proposed solutions.
- Discuss with individual staff their relationships with other sanctuary personnel (including founders, management, animal care staff, and volunteers), including any problems (and assure them that their names will not be used).
- If possible, meet with each animal care staff member individually. If this is not possible due to the number of staff, meet with some animal care staff individually and also meet with all of them in one large group without other personnel present. Discuss relationships with other sanctuary personnel (including founders, management, animal care staff, and volunteers), including any problems (and assure them that their names will not be used).
- Evaluate staff training for detail, frequency, and appropriateness.

- Determine if appropriate support is available for staff travel and participation in PASA meetings and training.
- If the sanctuary has a volunteer program, determine its benefits to the sanctuary. Talk to volunteers. Identify past problems, current problems, and potential problems. Learn what is being done to address current and potential problems.

Support groups

- Ask the director about support groups, such as fundraising groups and registered nonprofits in other countries, their relationships with the sanctuary, and the benefits and problems of the groups.
- If no support groups exist, discuss whether they might be helpful.

2. Primate care

Pay close attention to the size and nature of the enclosures. Note whether the physical and psychological well-being of the animals is being met.

- Examine all animals in the sanctuary's care, including those not located at the main site.
- Haphazardly select animal records to check if they are up to date.
- Ensure that animal diets are of a quality and quantity suitable for each animal's nutritional and psychological needs. Examine animal diets, food coolers, freezers, etc.
- Look for signs of pests and determine what kind of pest control solutions are being utilized.
- Check if animals are provided with sufficient shade and shelter in outdoor enclosures.
- Check if there is adequate ventilation and light in buildings and holding areas.
- Check if animals have access to water. Check the method of delivery and frequency.
- Check if species are maintained in numbers sufficient to meet their social and behavioral needs.
- Check if there is appropriate enrichment on a regular and frequent basis.
- Check if enclosures are of sufficient size and nature to provide for the psychological and physical well-being of each species.
- Review the maintenance program, storage, and equipment. Evaluate how the overall grounds look.
- Consider the overall condition, suitability, and appearance of enclosures, including whether they are in good condition and whether they represent modern animal care practices and philosophies.
- Check if the animal care facilities meet or exceed all PASA standards.
- Ascertain if the sanctuary is engaged in reintroduction, and if so, examine their reintroduction policy and actual reintroduction management practice.

3. Veterinary and human health and welfare

The sanctuary's animal health care program must be under the direction (on-site or remotely) of a suitably qualified veterinarian. An appropriate number of persons must be employed in the animal health care program and the extent of professional services provided must be judged adequate for that particular sanctuary. Evaluators should:

- Determine if the institution follows the guidelines of the PASA Operations Manual and Veterinary Healthcare Manual.
- Check the animal record-keeping system, including whether it is adequate and current. Haphazardly pull medical records for review.
- Determine if the animal health care program is sufficiently staffed.
- Determine if the extent of veterinary services provided for the animals is sufficient.
- Evaluate quarantine procedures and their implementation.
- Check emergency procedures. Ask various staff to explain the procedure for retrieving an escaped animal.
- Review drug emergency protocol including locked areas, authorized staff, etc.
- Confirm that policies and procedures for handling venomous animals are adequate.
- Check health care policy and program for sanctuary staff.

4. Education, outreach, community engagement, and community development

Education must be an element in the visit of the sanctuary, and all institutions must have an education program. Evaluators should:

- Ask about all of the sanctuary's education, outreach, community engagement, and community development programs, including at the sanctuary and elsewhere, for children and adults, and locally and on a larger scale.
- Review the number and experience of staff dedicated to and/or involved with each education and outreach program.
- Ask how the sanctuary monitors and evaluates each program, and whether each program is meeting its objectives.
- If the sanctuary conducts community-based programs, ask how the staff engage communities and how members of the communities provide input and feedback about the programs.
- Find out how the education messages are conveyed to the casual visitor at the sanctuary.
- Examine publications, brochures, and other printed material.
- View any teaching areas at the sanctuary.
- Check if signage and graphics contain appropriate information and are in good condition.
- Ask about the availability of funds allocated to each education and outreach program.
- If animals are being used in off-site situations, review the program to determine if it is appropriate.
- Evaluate staff training and support for education programs.
- Determine who develops and designs the sanctuary's education and outreach programs and materials.

5. Other program/activities

Evaluators should:

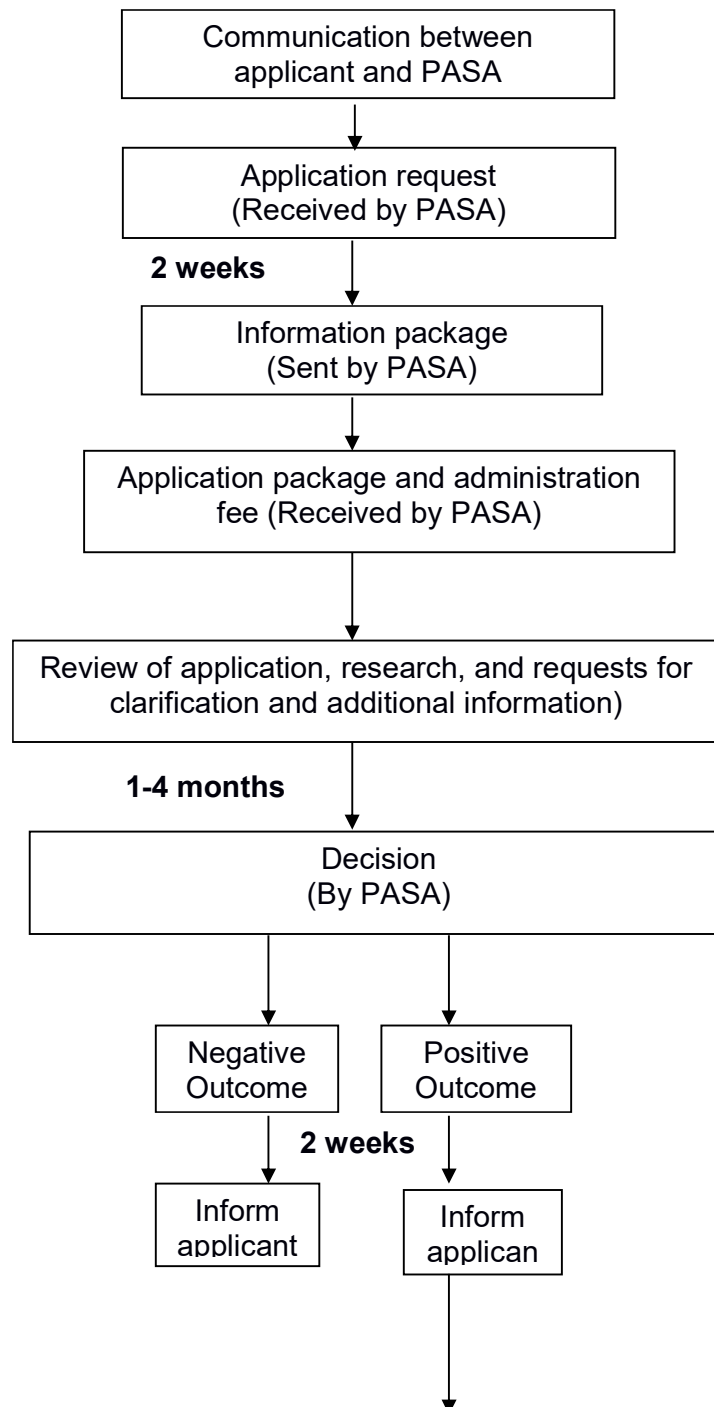
- Review the scope of the institution's participation in conservation and law enforcement activities.
- Determine participation in field conservation programs.

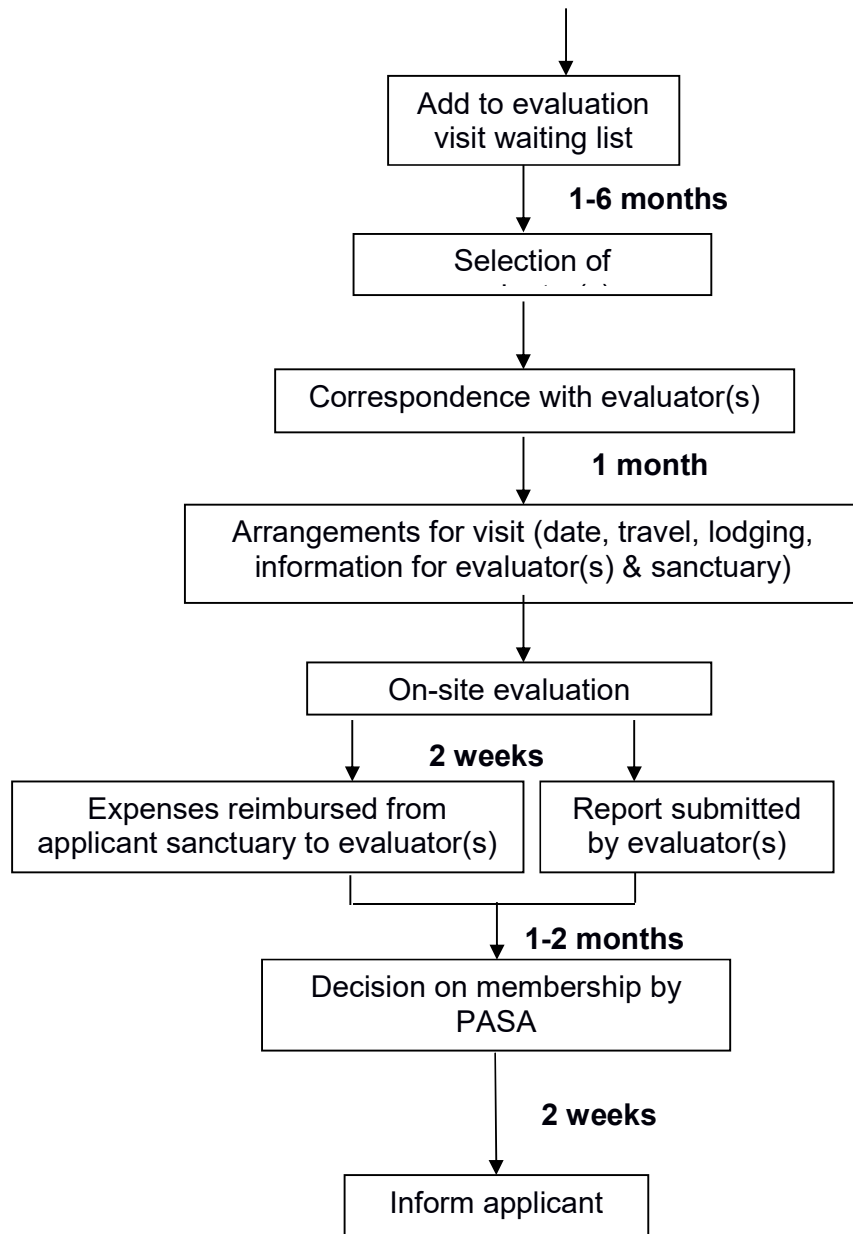
- Ask what efforts are undertaken for energy and natural resource conservation (e.g., recycling, water conservation initiatives, etc.).
- Determine the scope of the institution's research program, and ascertain if it complies with PASA's Research Policy.
- Review the protocol for evaluating potential research projects.
- Explore how research is viewed by staff.
- Verify if research information is published in appropriate journals.
- Determine the level of involvement with local academic institutions and specialists.

Post-evaluation

- The evaluator completes Evaluation Questionnaire which concludes with a recommendation on PASA membership.
- If there are multiple evaluators, the lead evaluator combines comments from the other evaluators.
- The submitted questionnaire should be typed.
- The evaluator submits the questionnaire, any supporting information, a complete list of expenses, and receipts to PASA within two weeks of returning from the visit.
- PASA may request the evaluator to provide additional information or clarification.

Appendix 6 • Approximate time frame and process of the accreditation procedure





Appendix 7 • Accreditation questionnaire for PASA membership

To be completed by PASA members and sanctuaries applying for membership

Please read the PASA Operations Manual before completing this form. In submitting this application form the applicant agrees that the information provided is true and accurate. This form should be completed electronically. Please use as much space as necessary to answer the questions in full. For questions where more than one option is presented, please indicate those that are appropriate by placing an X in the space [] provided.

Sanctuary information:		
Application category (please indicate as appropriate):		
1. New applying member 2. Reapplying member 3. Suspended member reapplying 4. Other (please describe)		
1	Name of sanctuary:	
2	Contact details of sanctuary (physical/ postal address, email, telephone, website, social media sites, YouTube channel, etc.):	
3	Name and position of person submitting the application:	
Sanctuary management:		
4	What is the species focus of your sanctuary?	(a) single species or [] (b) multi-species []
5	What is the <u>main</u> focus of your sanctuary?	(a) rehabilitation and long-term care []

	(Feel free to choose more than one.)	(b) reintroduction [] (c) species conservation [] (d) habitat conservation/management [] (e) environmental management [] (f) law enforcement [] (g) conservation/environmental education [] (h) community development [] (i) other [] please describe:
6	What is the legal status of your site(s)?	(a) former government facility [] (b) current government facility [] (c) privately owned land [] (d) community managed land [] (e) protected area: full or partial [] please describe:
7	What government agencies/ministries do you work with?	
8	Select the best description of your legal status: Please submit copies of any documents verifying your legal status.	(a) Nonprofit registered in the country where the sanctuary is located [] (b) Nonprofit registered in a different country [] which country/ies: (c) Private foundation [] (d) Private company [] (e) Other [] please describe:
9	Describe how your organization is governed, e.g., board of directors, trustees, members, owners, and provide details of members of the board/executive:	

10	Do you have a support group(s)? If yes, please give its name and country and describe nature of the relationship and support:	
11	Who owns the following within your institution? (a) Buildings (b) Grounds (c) Animals	
12	Is your sanctuary open to the public? If yes, please state how many days and hours: Please estimate the number of visitors per year for each of the past 5 years:	
13	Describe visitor services available in your sanctuary: (a) Services for day visitors (b) Overnight visitor services, e.g., lodge (c) Toilets (d) Gift shop (e) Restaurant (f) Other, please describe	
14	What is the minimum distance between visitors and the animals?	

15	Do you allow contact between non sanctuary personnel and animals? If yes, describe:	
16	Do you maintain administrative records e.g. budgets, payment vouchers, and personnel files? If so, please describe. Are duplicates kept at a different location?	
Sanctuary location:		
17	<p>What type of area is your sanctuary in?</p> <p>If you have marked (b) or (c) please indicate name and distance of closest large city:</p> <p>Do you have more than one site? If so how many? Describe the functions of each site and distances from each other:</p>	<p>(a) urban []</p> <p>(b) rural []</p> <p>(c) wilderness []</p>
Sanctuary finance:		
18	Please state your annual revenue and expenses for each of the past 5 years:	
19	Describe your fundraising strategies and projected annual budget for each of the next 3 years:	
20	Please list five major donors that support your program:	
Sanctuary personnel:		

21	Please indicate the number of personnel working for your institution:	Paid, full time: Paid, part time: Volunteer, full time: Volunteer, part time:
22	Please indicate the number of personnel in each role and the type of employment (e.g., full-time, part-time, temporary): Please submit an organizational chart of your institution if available.	(a) Management (b) Veterinarians (c) Vet technicians/nurses (d) Animal care staff (e) Educators (f) Administration (g) Researchers (h) Finance/accounting (i) Eco guards/forest patrols (j) Security guards (k) Maintenance (l) Gardeners and facilities maintenance (m) Drivers (n) Others: please describe
23	Please indicate the number of staff that are expatriates:	
24	Do you have a volunteer program (formal or informal)? If so, please summarize the role of volunteers, the amount of training they receive training,	

	fees they pay, duration of their time at the sanctuary, etc.:	
25	Do you have a staff training/development policy? Please summarize your staff training/development activities in the past 5 years:	
Animal management and care:		
26	Do you maintain animal records? If so please describe the information that is recorded and how it is recorded (eg in a database, spreadsheet, notebook, or paper forms). Please complete the provided animal list.	
27	How many new animals have arrived in the past 12 months?	
28	What is your present maximum capacity for each species? Describe:	
29	How is the animal care team structured, e.g., who makes the decisions and who is responsible for the team?	

30	<p>Describe the normal routine of the animal care team (e.g. start time, number of feedings per day, cleaning, management and repair of enclosures):</p> <p>If this varies according to species or type of confinement, please describe:</p>	
31	<p>If you reintroduce animals, is there a post-release monitoring team and what is their routine?</p> <p>Is telemetry used? Please describe:</p> <p>Are data collected? Please describe:</p> <p>Have the data been externally published? If yes, please list:</p>	
32	<p>Please submit a detailed list of the animal social groups, including number of animals in each group, species, type of enclosure, ages, and sexes.</p>	

33	How are decisions made about animal care, group changes, integration, and the movement of animals to other facilities?	
34	<p>What is the sanctuary's policy about breeding?</p> <p>If breeding is allowed: Is there a breeding management plan? Is breeding combined with reintroductions? In recent years, has the number of animals at the sanctuary increased, decreased, or stayed roughly the same?</p> <p>Is contraception used? If yes, please provide details on the type of contraception, methods, and how frequently contraception is applied.</p>	
35	How is fresh water provided, and how often?	
Animal enclosures		
36	Who designs and builds the animal enclosures?	
37	How are animals contained? E.g., cages, fenced enclosures, islands. Include descriptions of any overnight holding facilities, enclosures for young animals, etc.	
38	What is the size and capacity of the	

	enclosed areas? (include islands and continuous forest)	
39	Do you have regulations for minimum cage size for particular ages and maximum number of animals for a particular size cage?	
40	<p>If the sanctuary reintroduces animals, who is responsible for release site selection? What data are collected to support the decision-making process? Describe:</p> <p>Have these data been externally published?</p>	
41	Do you have an enrichment program and if so, please summarize:	
42	How is repair work managed (i.e. who monitors/authorizes the repairs)?	
Animal nutrition		
43	Who decides what the animals should be fed?	
44	Are the animal diets recorded (i.e. written diet sheets?) Please provide a copy of your standard diet sheet	

45	Please summarize your feeding protocol for infant primates:	
46	What proportion of the food provided is domestic versus wild?	
47	Do you have any feeding enrichment devices or programs? Describe:	
48	If your animals live on islands, are they nutritionally self-sufficient? If not, how is additional food provided?	
49	If your animals are reintroduced, are they nutritionally self-sufficient? If not, how is additional food provided?	
Animal identification		
50	Can each animal be permanently identified? Describe method(s) used, e.g., microchip, tattoo, photo, collar, physical markings, etc.:	
Medical records		
51	What medical records do you keep?	
52	How are disease issues discussed? Do you have regular review meetings? If so, who is involved and how often are they undertaken?	

Laboratory diagnostic techniques including necropsies		
53	Can you get medical tests performed (e.g., hematology, biochemistry, parasitology) when required?	
54	Can you get virology/serology performed when required?	
55	Are necropsies performed on all animals that die? If not, what proportion undergo necropsy and how do you determine which do and do not?	
56	Are necropsies performed at the sanctuary or at another facility? Are records of all post-mortem examinations kept on file?	
57	Are tissues examined histologically? If so, is this done at the sanctuary or at another facility? How often is this done?	
58	Are other diagnostic techniques used routinely? Describe:	
Health screening		
59	How are health problems brought to attention? Who conducts daily rounds? Who prioritizes what needs to be done for animal health?	

60	Do you employ a full-time veterinarian? If no, please describe how veterinary care is provided:	
61	What is the daily routine of the veterinary staff?	
62	Do you perform routine physical examinations on any of your animals? If so, which species and how often?	
63	Do you have a program of screening your animals for specific diseases? If so how do you determine which diseases you check for? (e.g., government requirements or because it has been identified as a significant cause of death in necropsy results, etc.)	
64	Please provide a list of the diseases you routinely look for in each species:	
65	If you are engaged in reintroduction, what diseases do you check for before release, and	

	is there any post-release health monitoring?	
Disease control program (including vaccination and parasite control)		
66	Do you monitor your animals for endo-parasites? If so by what method and how frequently?	
67	<p>Do you give any routine parasite treatments to your animals?</p> <p>If so what drugs do you use in which species and how do you administer these?</p> <p>How do you decide how frequently you should treat the animals?</p>	
68	What is your vaccination program? Describe:	
69	Do you have a disease contingency plan for high risk diseases?	
Therapeutics		
70	Do you have capture equipment on premises? Please describe:	

71	Do you have trained staff on site at all times who can use the equipment? Describe:	
72	Do you have specialized animal handling facilities allowing direct contact e.g., ability to inject animals by hand?	
Quarantine/bio-security/vermin control/staff and volunteer health screening		
73	Are newly acquired animals quarantined from the other animals in your care? If so, for how much time? What diseases do you check for during this time?	
74	How do you prevent disease spreading in the sanctuary, and especially from animals in quarantine? What hygienic measures are taken?	
75	How do you prevent disease entering the sanctuary: <ul style="list-style-type: none"> • In food or water? • With staff/visitors? • On bedding? • With wild rodents? 	
76	Do you have a staff preventative health	

	program? Please summarize:	
Security and safety		
77	Does your sanctuary have written procedures for emergencies e.g., for animal escapes, animal attacks, fire, flood, civil unrest, etc.? If yes, please provide a copy.	
78	Have there been any major injuries or deaths to humans or other primates caused by dangerous animals in the last five years? If yes, please provide a brief description of the event.	
79	Have there been any escapes in the past five years that required darting? If yes, please briefly describe the event, the staff's actions, and changes to procedures or facilities to prevent future incidents.	
80	Are all staff members provided with regular training in all emergency procedures?	
81	Do you provide staff and volunteers who handle animals with training and/or information on common issues?	
82	Does your sanctuary have a perimeter fence that is independent of all animal enclosures?	

Education program		
83	<p>Please summarize the key elements of your education, outreach, and community engagement programs. Include programs at the sanctuary and elsewhere.</p> <p>Who designs the education programs?</p>	
84	What educational materials are used?	
85	Who are the target audiences?	
86	What are the key education messages, i.e. what do the programs ask people to do? Please summarize:	
87	<p>How do you monitor and evaluate each program to determine if it is successful?</p> <p>How often do you evaluate each program?</p>	
Law enforcement		
88	Does your sanctuary facilitate law enforcement? If yes, please provide a brief description of your activities, e.g., investigation, confiscation, judicial process, etc.	

Reintroduction		
89	<p>If you reintroduce animals, what is the reason(s)?</p> <p>Please give details of recent reintroductions, including the species, number, ages, and sexes of animals; dates of reintroductions; location(s) of the reintroductions; methods of reintroduction; methods of monitoring animals after reintroduction; survival (including how and when it was measured); and their current status.</p>	
90	<p>If you are planning to reintroduce, please describe where you are in the process.</p> <p>What is the reason(s) for reintroduction?</p> <p>Describe the species, number, ages, and sexes of the animals to be reintroduced, if known.</p> <p>What is the projected timetable?</p>	
91	<p>Have you had any accidental releases? If yes, please detail numbers, species and outcome, e.g., returned or not returned etc.</p>	
Community development		
92	<p>Is your sanctuary involved in community</p>	

development programs? If yes, please summarize. If not, do you plan to conduct community development programs?	
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The application form should be completed electronically and be accompanied by the following supporting documents:

1. Copies of any documents confirming your legal status (e.g., as a registered nonprofit or a registered corporation).
2. A 1-2 page summary of your institution's history. This should include the date founded and opened, reasoning for facility development, dates of major events, description of sanctuary size, list of new facilities/capital improvements undertaken in the last five years, a brief description of any major projects planned for the next five years, and a brief description of the long-term plan for the sanctuary.
3. If available, the sanctuary's strategic plan and/or management plan.
4. Standard Operating Procedures Manual if available.
5. Organizational chart of institution if available.
6. Animal list (please complete the Excel spreadsheet provided).
7. List of group composition, including species, age, sex, and number of individuals in each group, and type and size of housing for each group.
8. Copy of standard diet sheet if available.
9. Procedures for emergencies if available.
10. Most recent annual report if available.

Appendix 8 • Example of the PASA animal list

(To be completed on an excel spreadsheet as provided)

Name of sanctuary:														
Name and position of person completing form:														
Date of completion:														
Cause of death	Date of Death	Present location	Legal document available	Area of origin (if known)	Confiscation site	Status before sanctuary arrival ²	Method of arrival ¹	Date of arrival	Sex	Est. DOB	Sub-species	Species	Name of animal	Permanent ID

Please expand spreadsheet as required

Method of arrival¹ C=Confiscation; S=Surrendered; T=Transfer; CB=Captive-born; O=Other (please describe)

Status pre-sanctuary² P=Pet; E=Entertainment; Z=Zoo; L=Laboratory; T=In transit; NK=Not Known; O=Other (please describe)

Appendix 9 • Site evaluation questionnaire for evaluators

To be completed by evaluators

Evaluators are advised to consult the evaluator guidelines, to cross-check answers with those provided on the application form, and throughout the whole evaluation process continually consider if the sanctuary demonstrates adherence to PASA policies and minimum standards, and reflects the overall ethos of PASA.

Sanctuary information:		
1	Name of sanctuary:	
2	Describe sanctuary location:	
Sanctuary management and operations		
3	Based on your observations, what is the focus/foci of the sanctuary, e.g., long-term care, reintroduction, conservation, education.	
4	Name and present role of founder:	
5	Name of director/manager:	
6	Time served as manager:	
7	Briefly describe the sanctuary's relationships with relevant government agencies.	
8	Does the sanctuary have a formal agreement with any	

	government authorities? Describe:	
9	How is the organization governed e.g. board, trustees, etc.?	
10	Does the sanctuary have a support group(s)? If yes, please give its name and country and describe nature of the relationship and support:	
11	Describe the visitor facilities and services you observed:	
12	What is the minimum distance between visitors and the animals? Was this adequately enforced?	
13	Does the sanctuary allow contact between non sanctuary personnel and animals? Describe:	
14	What administrative records (e.g. budgets, payment vouchers, and personnel files) are maintained and where? Duplicates?	
15	If the sanctuary is involved in data collection, has it published externally? Please list:	
Sanctuary finances		
16	View financial records for the previous 3-5 years	<i>Viewed/not viewed?</i>

17	Describe the sanctuary's plan for fundraising and expectation for finances in the next few years.	
Sanctuary personnel		
18	Obtain a list of all staff, including nationalities and responsibilities	<i>Obtained/not obtained?</i>
19	View examples of personnel records	<i>Viewed/not viewed?</i>
20	Based on what you observed, summarize the organizational structure of the sanctuary:	
21	Summarize the volunteer program (role of volunteers, training, fees, duration etc):	
22	View evidence of staff training and development. Summarize:	
Animal management and care		
23	Review the stock sheet / inventory list - is it is generally accurate?	
24	View animal records	<i>Viewed/not viewed?</i>
25	How do animals come to be at the	

	sanctuary, e.g., confiscated, surrendered, transferred, captive- born?	
26	Based on your observations, what is the maximum capacity for each species?	
27	How is the animal care team structured, e.g., who makes the decisions and who is responsible for the team?	
28	What is the normal routine of the animal care team (e.g., start time, number of feedings per day, cleaning, management and repair of enclosures)? If this varies according to species and type of confinement, please describe:	
29	If they reintroduce animals, is there a post-release monitoring team and what is their routine? Is telemetry used?	

	<p>Are data collected? Describe:</p> <p>Are data published externally?</p>	
30	Check the list of group composition provided in the application – is it accurate?	
31	Are species kept in appropriate social groupings?	
32	How are decisions made about animal care, group changes, integration, and the movement of animals to other facilities?	
33	<p>What is the sanctuary's policy about breeding?</p> <p>Is there a breeding management plan? Is contraception used?</p> <p>Describe species included and methods used:</p>	
34	How is fresh water provided, and how often?	
Animal enclosures		
35	How are animals contained? E.g., cages, fenced enclosures, islands. Include descriptions of any overnight holding facilities, enclosures for young animals, etc.	

36	What is the size and capacity of the enclosed areas? (include islands and continuous forest)	
37	What is the minimum cage size you observed for different species/ages? What is the maximum number of animals you observed in a particular size cage?	
38	Who is responsible for developing and monitoring enrichment? Describe evidence of enrichment program:	
39	How is repair work managed (i.e., who monitors/authorizes the repairs, etc.)?	
Animal nutrition		
40	Are the animal diets all recorded? View diet sheet if available	
41	Are animals' diets adequate for their needs? What is the feeding protocol for infant primates?	
42	Is food used as enrichment?	
43	If animals live on islands, are they	

	nutritionally self-sufficient? If not, how is additional food provided?	
44	If animals are reintroduced, are they nutritionally self-sufficient? If not, how is additional food provided?	
Animal identification		
45	Can each animal be permanently identified? Describe method(s) used, e.g., microchip, tattoo, photo, collar, physical markings, etc.:	
Medical records		
46	What medical records are maintained? View medical records. Can they track the medical history of any one individual or are these filed by groups?	
47	Can records be searched easily? (e.g., to review all cases of enteritis in previous 5 yrs or to identify the types and frequency of disease in any one species over the last 5 yrs)	
Laboratory diagnostic techniques including necropsies		
48	Describe the facilities and equipment for diagnostics, necropsies, and other laboratory work.	
Health screening		

49	<p>How are health problems brought to attention?</p> <p>Who conducts daily rounds?</p> <p>Who prioritizes what needs to be done for animal health?</p>	
50	<p>Is a full-time vet employed? If not, describe how veterinary care is provided:</p>	
51	<p>How is the veterinary team organized?</p>	
52	<p>What is the daily routine of the vet department?</p>	
53	<p>Is there a program of screening animals for specific diseases?</p> <p>If so, how does the sanctuary determine which diseases to check for? (e.g., government requirements or because it has been identified as a significant cause of death in necropsy results, etc.)</p>	<p><i>View list of diseases screened in the application form and check if it corresponds.</i></p>
54	<p>If the applicant engages in reintroduction, what diseases do they screen for before release, and is there any post-release health monitoring?</p>	

Disease control program (including vaccination and parasite control)		
55	What is the vaccination program?	
Therapeutics		
56	What access is there to remote injection equipment, e.g., dart gun, blow pipe, pole syringe, sufficient darts? Is the equipment accessible to staff?	
57	Are trained staff on site at all times able to use the equipment?	
58	Do they have specialized animal handling facilities allowing direct contact e.g., ability to inject animals by hand?	
Quarantine/bio-security/vermin control/staff and volunteer health screening		
59	Are newly acquired animals quarantined from the other animals? If so, for how much time? What diseases do they check for during this time?	
60	How is disease prevented from spreading in the	

	sanctuary, and especially from animals in quarantine? What hygienic measures are taken?	
61	How is disease prevented from entering the sanctuary: <ul style="list-style-type: none"> • In food or water? • With staff/visitors? • On bedding? • With wild rodents? 	
Security and safety		
62	Does the sanctuary have written procedures for emergencies, e.g. animal escapes/attacks, fire, flood, civil unrest, etc.?	<i>If a copy was provided in the application, check it corresponds to what is described/what you are shown.</i>
63	Have there been any major injuries or deaths to humans or other primates caused by dangerous animals in the last five years?	<i>If yes and description was provided with application, check it corresponds. If yes but no description was provided, briefly describe.</i>
64	Have there been any escapes in the past five years that required darting?	<i>If yes, check if procedures have been changed to prevent future occurrences.</i>
65	Are all staff members provided with regular training in all	

	emergency procedures?	
66	Are staff and volunteers who handle animals provided with training and/or information on common issues?	<i>Request to see training materials/information provided and comment on the degree of detail and usefulness.</i>
67	Does the sanctuary have a perimeter fence that is independent of all animal enclosures?	
Education program		
68	Please summarize the key elements of the education, outreach, and community engagement programs. Include programs at the sanctuary and elsewhere.	
69	What educational materials are used?	
70	Who are the target audiences?	
71	What are the key education messages, i.e. what do the programs ask people to do? Please summarize:	
72	Does the education program promote community	

	engagement? If so, please describe:	
Law enforcement		
73	Does the sanctuary facilitate law enforcement? If yes, please provide a brief description of the activities, e.g., investigation, confiscation, judicial process, etc.	
Reintroduction		
74	If the sanctuary is reintroducing animals, cross-check and update information provided in application concerning species, numbers, sex, age, etc. and current status	
75	If the sanctuary is planning to reintroduce, describe where they are in the process	
76	Has the sanctuary had any accidental releases?	<i>If yes, cross-check information provided in the application (numbers, species and outcome, e.g. returned or not returned, etc.). If yes, but no information previously provided, please describe.</i>
Community development		
77	Is the sanctuary involved in any community development programs? If so please describe:	

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Name of evaluator:	
Main contact at sanctuary:	
Date of evaluation:	
Date of form completion:	
List the names and positions of all staff interviewed:	

<p>Recommendation by evaluator to grant membership to PASA. Yes or no?</p> <p>If no, please describe key areas of concern, steps the sanctuary should take to improve in these areas and become eligible for PASA membership, and a timeline for these steps.</p> <p>If yes, please list recommended improvements and a timeline for these improvements.</p> <p>Please continue on additional sheet if necessary.</p>	
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