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**Professional Animal Retirement Center (PARC), Inc.**

**doing business as**

**Black Pine Animal Sanctuary (BPAS)**

**OPERATIONS STANDARDS**

**Last Updated:**

**December 21, 2018**

**OPERATIONS STANDARDS**

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# BLACK PINE ANIMAL SANCTUARY - DEFINITIONS

Professional Animal Retirement Center (PARC), Inc. operates as “Black Pine Animal Sanctuary” (BPAS). BPAS is a Facility that provides permanent refuge to displaced, captive-raised exotic animals for the ***rest*** of their lives, and educates people about responsible pet ownership.

1426 W. 300 N.

P.O. Box 02

Albion, IN 46701 USA

BPAS operates on 18 acres of land owned by the Noble County Commissioners and is the lessee.

Professional Animal Retirement Center, Inc. is recognized as a 501(c) 3 non-profit organization.

Federal Tax Identification number: 33-1020728

Indiana State Tax Exempt number: 0117958700 001

USDA Class “C” Exhibitors license 32-C-0191

Indiana State Department of Natural Resources (DNR) “Wild Animal Possession Permit” and “Special Purpose Educational Permit” is on file for housing a live alligator over five feet long.

# ACCREDITATION, RECOGNITION & AWARDS

BPAS has achieved the following recognitions for charitable giving:

* [BBB Accredited Charity](http://www.bbb.org/northernindiana/charity-reviews/charity-local/professional-animal-retirement-center-parc-in-albion-in-90000988) by the BBB of Northern Indiana, 2011-2018
* [Gold Partner](https://www.guidestar.org/profile/33-1020728) by the Guidestar Exchange since 2009
* [Top Rated 2011-2018](https://greatnonprofits.org/org/parc-inc-aka-black-pine-animal-sanctuary) by Great Non Profits
* 10 Wildlife Charities Worth Donating To by Petside.com in 2011
* [#8 Top 10 Indiana Summer Gotta-Do’s](https://visitindiana.com/best-of-indiana/winners/7-summer-gotta-dos) by Indiana Office of Tourism Development
* #1 Best Use of Facebook (In-House) 2015 by KPC Media Group

# MISSION

We exist to provide refuge to displaced, captive-raised exotic animals for the *rest* of their lives and to educate people about responsible animal care and conservation.

# VISION

PARC will plant a seed of awareness in people to positively impact the conservation and preservation of exotic and endangered species and their natural habitats.

# ARTICLES OF INCORPORATION

The undersigned, a natural person over 18 years of age, in order to form a corporate entity pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991, execute the following Articles of Incorporation.

**Article I**

**Name and Principal Office**

The name of the corporation is Professional Animal Retirement Center Inc.

The principal office of the corporation is: 0349 West Albion Road Albion, Indiana 46701

**Article II**

**Purpose**

This corporation is organized exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986. Professional Animal Retirement Center was formed to care for exotic animals in need, to increase public awareness for the conservation of endangered and threatened species, to educate the public about the proper and healthful care of animals.

**Article III**

**Limitations**

At all times the following shall operate as conditions restricting the operations and activities of the corporation.

1. No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.
2. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.
3. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

**Article IV**

**Type of Corporation**

Professional Animal Retirement Center Inc. is a public benefit corporation, which is organized for a charitable purpose.

**Article V**

**Registered Agent**

The registered agent of the corporation is: Karen A. Hoag 708 Taylor Lane Albion, Indiana 46701

**Article VI**

**Directors/Members**

The corporation shall have no voting members. The management and affairs of the corporation shall be at all times under the direction of a Board of Directors, whose operations in governing the corporation shall be defined by statute and by the corporation’s by-laws. No Director shall have any right, title, or interest in or to any property of the corporation.

**Article VII Debt**

**Obligations and Personal Liability**

No officer or Director of this corporation shall be personally liable for the debts or obligations of this corporation of any nature whatsoever, nor shall any of the property of the officers or Directors be subject to the payment of the debts or obligations of this corporation.

**Article VIII**

**Distribution of Assets on Dissolution**

Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes with the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

**Article IX**

**Incorporator**

The name and address of the incorporator is: Karen A. Hoag 708 Taylor Lane Albion, Indiana 46701

The undersigned incorporator hereby verifies, subject to penalties of perjury, that the facts contained herein are true.

(Signed copy on file)

Karen A. Hoag

*Amended by board of directors on November 13, 2003.*

# BY-LAWS

**An Indiana non-profit corporation**

**ARTICLE I – Purpose**

To give rescued and retired exotic animals a safe haven, and to educate people about exotic and endangered species.

**ARTICLE II – Location**

The corporation’s principal office shall be located inside of Indiana. The corporation’s most current Annual Report, filed with the Indiana Secretary of State, shall identify the location of the principal office. The secretary of the corporation shall maintain a copy of the records required by law at the principal office.

**ARTICLE III – Board of Directors**

1. Number of Directors. The authorized number of directors shall be no less than seven (7) or more than thirteen (13), until changed by a duly adopted amendment to these bylaws.

2. Eligibility of Directors. Any adult interested in the purpose of the organization shall be eligible to be a director.

3. Tenure of Directors. Directors shall serve one year terms, and shall be elected at a business meeting of the board of directors. Each director shall serve for their specified term, or until removed in accordance with Article V, Section 2 of these bylaws. However, if a director’s term expires, the director shall continue to serve until the board of directors has elected and qualified a successor.

4. Removal of Directors. A director may be removed with or without cause by an affirmative vote of a majority of the directors present at a duly called meeting, provided that not less than five (5) days and not more than thirty (30) days’ notice of such meeting, stating that removal of such director is to be on the agenda, shall be given to each director.

5. Director Vacancies. If a vacancy occurs on the board of directors, including a vacancy resulting from an increase in the number of directors, the directors shall fill the vacancy. If the directors remaining in office constitute less than a quorum of the board, they shall fill the vacancy by the affirmative vote of a majority of all the directors remaining in office. If a director resigns effective at a specific later date, the directors may fill the vacancy before that director’s resignation becomes effective; however the new director may not take office or vote until the resigning director actually leaves office.

6. Director Compensation. The board of directors may, upon approval of the majority of that board, pay each director expenses, if any, of attendance at a board meeting or committee meeting of the board. The directors shall not be paid a salary or fee for attending the meeting. Directors may apply for positions of employment within the organization and receive compensation provided they are appointed to such position by a majority vote of the directors. However, in the event a director assumes a paid position as an employee they waive all rights to vote on matters associated with compensation for that position.

7. Powers. Those serving in the positions of President and Treasurer of the board of directors shall be authorized to sign any documents required to secure financing for Professional Animal Retirement Center (PARC), Inc., on its behalf.

**ARTICLE IV – Meetings of the Board of Directors**

1. Regular Meetings. The board of directors shall hold a meeting at least once every quarter. One of those quarterly meetings shall be designated as the board’s annual business meeting, for the purpose of electing officers. The board of directors may provide, by resolution, the date, time and place of additional regular meetings.

2. Special Meetings. The presiding president, or two other directors, may call and give notice of a special meeting of the board of directors. Those authorized to call a special board meeting may select the place and time of the special meeting and must provide no less than three (3) days’ notice. Notice may be given via phone, email, letter, or verbally in person.

3. Meetings by Conference. If authorized by the board of directors, the board of directors or any designated committee of the corporation may participate in a board or committee meeting by means of a conference telephone, email, web chat or similar equipment, provided all persons participating can communicate at the same time with one another. The chairperson of the meeting may establish reasonable rules as to conducting the meeting.

4. Notice of Meetings. The corporation’s secretary shall give either oral or written notice of meetings, including meeting place (if applicable), day and hour. If the meeting is to be held by conference, the secretary must provide instructions for participating in the meeting.

5. Director Quorum. A quorum of the board shall be met when at least five (5) directors are present for the transaction of business at any board of director meeting.

6. Manner of Acting. The act of a majority of the directors present at a meeting at which a quorum is present (when a vote is taken) shall be the act of the board of directors. If no quorum is present at the meeting of directors, the directors may not take action on any board matter other than to adjourn the meeting to a later date.

7. Director Approval. The corporation shall deem a director to have approved of an action taken if the director is present at a meeting of the board unless:

a. the director objects at the beginning of the meeting, or promptly upon arrival, to holding it or transacting business at the meeting; or

b. the director’s dissent or abstention from the action is taken is entered in the minutes of the meeting; or

c. the director delivers written notice of dissent or abstention to the presiding office of the meeting before its adjournment or to the corporation immediately after adjournment of the meeting. The right of dissent or abstention is not available to a director who votes in favor of the action taken.

8. Rules of Order. Robert’s Rules of Order shall be used to conduct meetings.

**ARTICLE V – Officers**

1. Number of Officers. The officers of the corporation shall be a president, vice president, a secretary, and a treasurer. All officers shall be members of the board of directors. The officers shall be elected by affirmative vote of a majority of the board present at a duly held meeting. They shall serve terms fixed by the board of directors.

2. Removal of Officers. Any officer may be removed, with or without cause, by an affirmative vote of a majority of the directors present at a duly held meeting of the board of directors for which notice stating such purpose has been given in advance of the meeting. A vacancy in an office because of death, resignation, or removal may be filled by the board of directors.

3. President. The president shall be the principal executive officer of the corporation. The president shall be subject to the control of the board of directors, and shall in general oversee, in good faith, the affairs of the corporation. The president shall, when present, preside at all meetings of the board of directors. The president may sign, with the secretary or any other proper officer of the corporation that the board has authorized, corporation deeds, mortgages, bonds, contracts, or other board authorized instruments.

4. Vice-President. The vice-president shall perform, in good faith, the president’s duties if the president is absent, dies, is unable or refuses to act. If the vice-president acts in the absence of the president, the vice-president shall have all presidential powers and be subject to all the restrictions upon the president. (If the vice-president is unable or refuses to act, then the secretary shall perform the presidential duties.) The vice-president shall perform any other duties that the president or board may assign to the vice-president.

5. Secretary. The secretary shall, in good faith: (1) create and maintain one or more books for the minutes of the proceedings of the board of directors; (2) provide that all notices are served in accordance with these bylaws or as required by law; (3) be custodian of the corporate records; (4) when requested or required, authenticate any records of the corporation; (5) keep a current register of the post office address of each director; and (6) in general perform all duties incident to the office of secretary and any other duties that the president or the board may assign to the secretary.

6. Treasurer. The treasurer shall: (1) have charge and custody of and be responsible for all funds and securities of the corporation; (2) receive and give receipts of moneys due and payable to the corporation from any source, and deposit all moneys in the corporation’s name in banks, trust companies, or other depositories that the board shall select; (3) submit the books and records to a Certified Public Accountant or other accountant for annual audit or review; and (4) in general perform all of the duties incident to the office of treasurer and any other duties that the president or board may assign to the treasurer. If required by the board of directors, the treasurer shall give a bond for the faithful performance of the treasurer’s duties and as insurance against the misappropriation of funds. If a bond is required, it shall be in a sum and with the surety of sureties that the board of directors shall determine.

7. Loans to or Guarantee for Officers. The corporation shall not lend money to or guarantee the obligation of an officer of the corporation.

**ARTICLE VI – Committees**

The board of directors may establish one or more committees having the authority of the board in the management of the business of the corporation to the extent determined by the board. Committee members may be members of the board or other interested persons. The board may delegate the appointment of committees and their chairs to the board chair.

**ARTICLE VII – Indemnification of Directors, Officers Agents, and Employees**

To the full extent permitted by the Indiana Nonprofit Corporation Act, as amended from time to time, or by other provisions of law, each person who was or is a party or is threatened to be made a party to any threatened, pending, or completed action, suit, or proceeding, wherever and by whomsoever brought, including any such proceeding by or in the right of the corporation, whether civil, criminal, administrative, or investigative, by reason of the fact that he or she is or was a director, or officer of the corporation shall be indemnified by the corporation by an affirmative vote of a majority of the directors present at a duly called meeting of the board of directors, against expenses, including attorneys’ fees, judgments, fines, and amounts paid in settlement actually and reasonably incurred by such person in connection with such action. The indemnification shall inure to the benefit of the heirs, executors, and administrators of such person.

**ARTICLE VIII – Amendment of Bylaws**

The board of directors may from time to time adopt, amend, or repeal all or any of the bylaws of this corporation.

*These bylaws were adopted by a majority vote of the board of directors on September 15, 2003.*

*Amended by a vote of the board of directors on March 2, 2005.*

# CODE OF ETHICS

BPAS provides permanent refuge to displaced, captive-raised exotic animals for the rest of their lives. BPAS encourages animal advocacy, made possible by collaborating with like-minded volunteers, staff members, board members, and others with similar missions, who are willing to abide by the following Code of Ethics:

**ANIMAL CARE**

* We will accommodate as many animals in need as responsibly possible
* We will ensure every animal in residence is provided ‘end of life’ care with dignity
* We do not buy, sell, breed, trade or use animals for commercial purposes
* The welfare of the animals is the primary criterion for decision-making
* No exotic animal products, or by-products, will be used for any purpose

**PERSONNEL**

* We operate with a high level of professionalism, courtesy, and respect
* We exercise honesty and integrity
* We utilize teamwork to get things done
* We are friendly, knowledgeable, and open about our work
* We appreciate one another and express it regularly
* We put the charitable mission ahead of any personal or individual gain
* We are good citizens of the community
* We appreciate all who donate and support our mission and express it regularly

**PUBLIC RELATIONS**

* The safety of the public is of utmost importance
* We educate others about the realities of exotic animal ownership
* We educate others about conservation and species preservation
* We offer educational information that most zoos do not
* We strive to emphasize respect for all living creatures
* We exercise professionalism and respect in all collaborations within the industry
* We exercise honesty and integrity in all fundraising efforts
* We utilize donor-designated contributions in accordance with donor’s intentions

**GOVERNANCE**

* We abide by governing laws, regulations, and strive to follow best industry practices
* We maintain transparency in all facets of operations
* We maintain a staff training program and training records
* We maintain a staff incident reporting and disciplinary policy
* We maintain a harassment-free workplace policy
* We require a signed waiver of liability for all who actively engage in work activities

# BOARD DEVELOPMENT POLICIES

## Board Member Recruitment, Training & Orientation

The future of the Professional Animal Retirement Center, Inc. is ultimately dependent upon the quality and dedication of its board volunteers. Attracting and retaining qualified individuals to serve in this capacity requires that all Board members and staff give serious attention to thoughtful recruitment, proper orientation and on-going training for new members. The Board itself must be properly prepared before it can legitimately conduct any other business.

Procedures:

1. Every member of the Board shall be expected to participate in the recruitment process by actively seeking out potential new board members, inviting them to attend committee meetings, whenever board vacancies exist.
2. Committee chairpersons shall identify from those who attend committee meetings regularly, individuals who appear qualified, dedicated and otherwise to be good candidates for board membership.
3. Committee chairpersons may secure committee participants who will function as official “Advisors”. Advisors will receive invitations and be included in all activities of the committees. Advisors will form a pool of potential new board members, and receive first consideration in recruiting efforts for the Board of Directors.
4. With approval of the Board of Directors, the Board President may approach candidates and secure their commitment to serve a term of membership. Other board members and the Executive Director may be called upon to assist in these contacts as needed.
5. Once commitment has been secured, the Board President will present the candidate to the full board for consideration of the new board member.
6. The Board of Directors shall vote to accept or reject all such nominated new members.
7. The Executive Director and the President of the Board of Directors shall jointly assume the responsibility for orienting new Board Members.
* The President of the Board of Directors or his designee will schedule a meeting with the new board member to present information relating to the board structure and its organization, member responsibilities, meeting dates, committee assignments, parliamentary procedures, conflict of interest, and other such concerns. Other Board members may be asked to assist with conducting these orientation meetings.
1. With input from board members, the Executive Committee will assume primary responsibility for identifying and meeting general training needs of the board.
2. With support of the staff, attempts will be made to find resources and opportunities to satisfy any identified training needs.
3. The Executive Committee will consult to schedule needed trainings either at regular board meetings or at special sessions as may be required.
4. Board members will be made aware of various training opportunities as they become available and/or scheduled with regular Board of Director meetings.

*Board reviewed and adopted March 30, 2018.*

## Program Monitoring and Review

The Professional Animal Retirement Center, Inc. recognizes that a portion of the agency mission is fulfilled through its program services. Therefore, the Board assumes responsibility for remaining informed about current program operations, regularly monitoring progress being made toward achieving stated program goals and for periodically reviewing programs to determine the extent to which those programs align with and contribute to achieving the mission.

Procedures:

1. The Board of Directors will routinely monitor program progress.
2. The Executive Director will report monthly to the Board and provide progress reports on goals established by the Board.
3. The Board will discuss and assign any action plans to be implemented by the Executive Director and/or other staff which might be required as a result of that review.
4. Following the Board’s review, a copy of the report will be provided to each board member.
5. The Board shall periodically review individual programs to assess the degree to which that program is meeting agency mission, strategic direction, and long-range goal statements.
6. The Board will select the specific programs to be assessed, the timing of the assessments, and the methods or instruments to be used for assessment.
7. Program reviews will focus upon issues relating to the program’s relevance to and effectiveness in meeting the objectives of the Professional Animal Retirement Center, Inc.
8. The Board President may choose to include informational presentations on programs and services at board meetings. The Executive Director will arrange for appropriate staff to make these presentations upon request.

## Long Range and Periodic Planning Process

The Board of Directors expects that periodic planning and program implementation shall be conducted within the framework of mission analysis, strategic assessment, and the establishment of long-range goals. It is also recognized that planning service programs must be accompanied with planning for personnel, resources, and business development.

The Board of Directors will be responsible for producing a long-range (3-5 years) plan, which clearly states the organization’s priorities and strategic direction.

1. Annually, the Board shall determine the need to organize and conduct a planning session.
2. At such planning meeting, the full board will develop written statements of long term (3-5 years) strategic direction for the organization. At least one goal statement will be established in each of the following areas:
	* Programs
	* Personnel Management
	* Business & Financial Management
	* Resource Development
		1. Each established long-range goal statement will be reviewed and revised as needed.
		2. The Professional Animal Retirement Center, Inc. will formally adopt the Strategic Long-Range Plan by a majority vote of the Board of Directors at a regularly scheduled meeting.
		3. As requested, the Executive Director and staff will be responsible for determining what specific programs will be conducted to meet long-range goals and for establishing annual goals for each of those programs, subject to the approval of the Board of Directors.
		4. As requested, the Executive Director will present a plan detailing the specific programs and the measurable goals expected to be achieved in the coming year for each program.
		5. The Board will review the proposed annual program plan to determine its consistency with established long-term direction, and adjust the plan as deemed necessary with the full Board’s approval.
		6. The Board of Directors will consider and act upon the plan. Approval of this plan will be considered as a delegation of authority to the Executive Director to pursue the stated annual goals.

## Conflict of Interest and Disclosure

All members of the Board of Directors or employees must make known any situation which could appears as a potential conflict of interest between themselves, a potential vendor, employee or provider of any type, and the Professional Animal Retirement Center, Inc.

A potential conflict of interest could be described as:

* A contract or transaction between Professional Animal Retirement Center, Inc. and any family member of a Member of the Board of Directors or Employee.
* A contract or transaction between the Professional Animal Retirement Center, Inc. and an entity which a Member of the Board of Directors or an Employee has a material or financial interest or is affiliated in any way.
* A Member of the Board of Directors or an Employee who has any relationship with an entity that competes with the Professional Animal Retirement Center, Inc. in rendering services or any other type of contractual or business relationship.
* A Member of the Board of Directors or an Employee that accepts any type of gift, entertainment or other favor (financial or non-financial) from any entity or individual that is seeking to do business or is a competitor of Professional Animal Retirement Center, Inc.

Procedures:

1. Prior to a board or committee action on a transaction of any type involving a Conflict of Interest, a Member of the Board of Directors, Employee or Committee Member having a Conflict of Interest, who is in attendance at the meeting, shall disclose all facts material to the Conflict of Interest. Such Disclosure must be reflected in the minutes of the meeting along with verification that there was no participation in any discussion or decision-making regarding this action or transaction by the involved individual.
2. A member of the Board of Directors, an Employee, or a Committee Member who plans not to attend a meeting at which he or she has reason to believe that the board or committee will act on a matter in which the person has a Conflict of Interest shall disclose to the chair of that meeting all facts material to the Conflict of Interest. The chair must report the disclosure at the meeting and the disclosure must be reflected in the minutes of the meeting.
3. Any individual who has a Conflict of Interest with respect to a Contract or transaction of any type that will be voted on at a meeting may not be counted in determining the presence of a quorum for purposes of the vote. The person having the Conflict of Interest may not vote on the Contract or transaction and shall not be present in the meeting room when the vote is taken. Such person’s ineligibility to vote must be reflected in the minutes of the meeting.
4. Any potential candidate for the Board of Directors or any nominee for an office of the Board of Directors of the Professional Animal Center, Inc. must identify all known potential conflicts of interest with any other member(s) of the Board of Directors, Employees, Committee Members, vendors or contractors prior to the election or re-election.
5. In the event, that a Conflict of Interest is not entirely clear or that a Conflict of Interest exists, the individual with the potential conflict shall disclose the circumstances to the President of the Board of Directors at the earliest possible time. The President of the Board of Directors or his designee will them determine whether there is a Conflict of Interest that is subject to this policy
6. Each Member of the Board of Directors, Employee, or Committee Member will exercise care not to disclose confidential information acquired in connection with any status or disclosed information regarding Conflict of Interest.
7. No Member of the Board of Directors, Employee or Committee Member will disclose or use information relating to any business of the Professional Animal Retirement Center, Inc. for his or her own personal profit or advantage.

*Signed forms on file.*

**Committees**

The Board of Directors of the Professional Animal Retirement Center, Inc. will establish, but not limited to, five permanent committees of: Executive, Finance, Fund-Raising/Marketing, Healthcare and Personnel.

*Current committee rosters are maintained on Google Drive.*

Procedures:

1. Permanent Committees will conduct business appropriate to their purpose and according to the Standards for each committee.
2. The Board of Directors shall designate or appoint committee chairpersons.
3. The membership of permanent committees shall serve at the discretion of the Board of Directors.
4. Committees shall not have a majority of paid staff members, or shall limit voting privileges to ensure a majority of voting members are not made up of paid staff.

### *Executive Committee*

Members: The presiding President, Vice-President, Secretary, and Treasurer of the Board of Directors.

Purpose: To plan and coordinate Board Expansion, Training and Governance activities and to conduct any pertinent business that requires action before the next regular meeting of the Board of Directors.

Standards

The Executive Committee:

1. Will meet as deemed necessary at the discretion of any of its members.
2. Will have written minutes of each meeting, and a written report of each meeting will be provided at the next regular meeting of the Board of Directors. This report will include a summary of meeting activities and recommendations for any required board action.
3. Will conduct any pertinent business requiring action before the next regular meeting of the Board of Directors.
4. Will assume responsibility for orienting new members of the Board of Directors and schedule other training programs for the Board of Directors.
5. Will establish standards and monitor progress of all regular and ad hoc committees.
6. Will identify any Policy or By-Law needs and submit to the Board of Directors for consideration.
7. Will review all proposals to funding sources prior to submission for appropriateness and fiscal capabilities. When time allows, a recommendation will be forwarded to the Board of Directors.

### *Personnel Committee*

Purpose: To facilitate communication and oversee personnel functions.

STANDARDS

The Personnel Committee:

1. Will meet periodically as needed and advise the Executive Committee in advance of meeting dates.
2. Will have written minutes of each meeting, and a written report of each meeting will be provided at the next regular meeting of the Board of Directors. This report will include a summary of meeting activities and recommendations for any required board action.
3. Chairperson will report to the committee members about any discussion or action taken by the Board of Directors.
4. Will submit projected financial needs for the next fiscal year to the Finance Committee, no later than October 1st.

Note: Executive Committee may consider requests when action is required before the next scheduled meeting of the Board of Directors.

### *Healthcare Committee*

Purpose: To help manage the animal husbandry program and all related animal welfare policies and practices. This committee serves as a ‘sounding board’ for the Executive Director and provides the skilled and knowledgeable manpower to carry out many initiatives and improvements directly related to the animals.

STANDARDS

The Health Care Committee:

1. Make ‘emergency’ decisions related to the welfare of any animal in residence, such as euthanasia, as well as disposition of an animal.
2. Carry out disposition of animals.
3. Make recommendations to the Board of Directors about the welfare of any animal in residence; i.e. scheduled euthanasia, responsive veterinary care (surgical procedures, sterilization, etc.
4. Establish and maintain a program of preventive care with the consultation of the primary veterinarian and with recommendations of other consulting veterinarians.
5. Receive, review, discuss, and make recommendations to the Board of Directors regarding animal acquisitions by adoption/rescue or other circumstances as approved under other Animal-Related Policies.
6. Develop and make recommendations for continuous improvement to the Board of Directors, and help implement and maintain any adopted by the board, including but not limited to:
	1. Animal husbandry program.
	2. Housekeeping efforts.
	3. Habitat construction and maintenance.
	4. Building, property, and equipment needs and maintenance.
	5. Safety protocols.
	6. Husbandry-related training programs and policies.
7. Consider all adoption/rescue requests and make a recommendation to the Board of Directors.
8. Plan for building and managing of animal habitats and forward recommendations to the Board of Directors.
9. Will establish a regular, monthly meeting schedule and advise the Board of Directors of schedule.
10. Will have written minutes of each meeting, and a written report of each meeting will be provided at the next regular meeting of the Board of Directors. This report will include a summary of meeting activities and recommendations for any required board action.
11. Chairperson will report to the committee members about any discussion or action taken by the Board of Directors.
12. Will secure advance approval from the Board of Directors for any expenditure of funds for a non-budgeted activity.
13. Will secure advance approval from the Board of Directors for use of equipment or supplies for any non-budgeted activity.
14. Will submit anticipated financial needs for the next fiscal year to the Finance Committee no later than October 1st.

Note: Executive Committee may consider requests when action is required before the next scheduled meeting of the Board of Directors.

### *Finance Committee*

Purpose: To oversee the financial management of the organization.

STANDARDS

The Finance Committee:

1. The Board Treasurer and Executive Director shall serve on this committee, and others at the discretion of the Board of Directors.
2. Will establish a meeting schedule and advise the Executive Committee in advance of meeting dates.
3. Will have written minutes of each meeting, and a written report of each meeting will be provided at the next regular meeting of the Board of Directors. This report will include a summary of meeting activities and recommendations from the committee for any required board action.
4. Chairperson will report to the committee members about any discussion or action taken by the Board of Directors.
5. Will prepare the organization’s budget and submit to the Board of Directors for approval during the month of November each year. (See Financial Policies for additional information.)
6. Will develop procedures for the handling and distribution of funds. (See Financial Policies for additional information.)
7. Will develop or ensure the development of financial reports to be presented to the Board of Directors and establish a schedule for each report. (See Financial Policies for additional information.)
8. Will review annual fund development plans prepared by the staff and or any committees. In addition, they will review any proposal to a funding source prior to submission for appropriateness and fiscal requirements. Recommendations on these proposals should be submitted to the Executive Committee/Board of Directors for approval.

Note: Executive Committee may consider requests when action is required before the next scheduled meeting of the Board of Directors.

### *Fundraising Committee*

Purpose: Will plan and organize all Fund Raising Events and Public Relations / Marketing initiatives.

STANDARDS

The Fund-Raising/Marketing Committee:

1. Will establish a regular meeting schedule and advise the Executive Committee in advance of meeting dates.
2. Will provide a written report of each meeting at the next regular meeting of the Board of Directors. This report will include a summary of meeting activities and recommendations for any required board action.
3. Chairperson will report to the committee members about any discussion or action taken by the Board of Directors.
4. Will secure advance approval from the Board of Directors for any public event, any fund-raising event, or marketing initiative before any event is scheduled or publicized. Request will include planning details (time, location, equipment needed, staff needed, etc.).
5. Will secure advance approval from the Board of Directors for any expenditure of funds for a non-budgeted activity.
6. Will secure advance approval from the Board of Directors for use of equipment or supplies for a non-budgeted activity.
7. Will submit anticipated financial needs for the next fiscal year to the Finance Committee no later than October 1st.
8. Will develop an annual Fund Raising Plan, with planning details (time, location equipment needed, staff needed, etc.) with projected revenues, and submit to the Executive Director for advance approval prior to October 1st.

Note: Executive Committee may consider requests when action is required before the next scheduled meeting of the Board of Directors.

# STRATEGIC PLAN

**Strategic Plan (2018)**

**INTERNAL ASSESSMENT:**

**Strengths**

* BBB Accredited Charity several years in a row
* Top-Rated charity for several years in a row
* Gold-Level achieved on Guidestar.com – transparency well known and respected
* Established and strong relationships within the community; community support
* Lifespans achieved historically by animal residents are at or above average expectancies
* Respectable, and growing, cash reserves
* No outstanding liability, except for accounts payable and payroll tax accruals
* Significant and well-established sources of in-kind donations of consumables
* Consistently increasing number of sustaining gifts given annually
* A unified team dedicated to putting the animals’ needs first

**Weaknesses**

* Rural location means fewer funding sources; big targets further away
* Land is leased, not owned
* Financial struggle to maintain highly trained animal keepers on paid staff
* Significant investment of staff time training unpaid staff
* Too few sustaining donors
* Smallish large animal habitats for some residents
* Older/less attractive den buildings

**Opportunities**

* GFAS verification
* GFAS accreditation
* ASA accreditation
* Lifetime Legacy Alliance program
* Promoting/Increasing endowment gifts
* Purchasing the existing land – and more land
* Developing more high-dollar educational “experiences”; fewer guests, more funding

**Threats**

* Downturns in economy; fall-off on individual/sustaining donations
* Natural or man-made disasters and recovery
* Staff turnover
* No term limits on board seats; burnout
* Changing / different species in need; adaptability to changing population
* Heightened public awareness and higher expectations to meet

**EXTERNAL ASSESSMENT**

* Changing legislation – OH, federal Big Cat and Public Safety Act
* Change in the species mix of animals needing help over time
* Heightened public awareness and “higher” expectations
* More confiscations of more animals occurring more frequently
* Public’s desire to “engage” with animals; challenges to engage safely within mission

**Vision**

* Existing habitats increased to full potential
* More land and more habitats
* Building improvements / upkeep
* New quarantine facility
* Better equipment to maintain grounds/lawns/landscape
* Better employee benefits; less turnover
* More frequent, but fluid board member turnover; executive committee changeover
* Adapting to animal populations most in need of help

**Evaluation**

**Timeline**

**Review & Revisions**

Draft document filed 3/22/17, discussed at Board Meeting on 3/16/17.

# FINANCES

BPAS maintains an agreement, renewable annually upon approval of the Board of Directors, with a certified public accountant or firm of accountants to comply with the organization’s Finance Policies and to ensure utilization of accounting principles as prescribed by the Financial Accounting Standards Board (FASB) for BPAS.

*Signed annual agreement on file.*

## Finance Committee

The Board of Directors will appoint a finance committee which works with designated staff to ensure the preparation of an annual budget, appropriate handling and distribution of funds, and the appropriate preparation and presentation of regular financial statements. The finance committee will have oversight responsibilities in the area of fund raising and revenue. The finance committee directs, reviews and presents an annual audit to the Board of Directors.

Procedures:

1. The Finance Committee will work with appropriate staff to develop an annual budget, which is then presented to the Board for review and approval prior to the start of the organization’s fiscal year. The budget will reflect the Organization’s mission in the allocation of resources.
2. The Finance Committee will develop appropriate procedures for the handling and distribution of funds. These shall include but not be limited to disbursements, payroll, reconciliation of banking statements, security of cash and checks, signature requirements, and separation of functions to insure proper checks and balances.
3. The finance committee will establish the minimum financial reports to be presented to the Board of Directors and a schedule for each report.
4. The finance committee will annually review and approve fund development plans prepared by the staff or other committees.
5. The Finance Committee will select, through a competitive process when deemed necessary by the Board of Directors, an independent external auditor to review the organization’s books to assure they are in compliance with generally accepted accounting practices. The auditor will provide the Committee and Board of Directors a written opinion on the financial statements of the organization and a “management letter” outlining any weaknesses with internal controls or other issues relating to the financial affairs of the organization.
6. The finance committee will annually review all financial policies and procedures, making recommendations for any changes to the Board of Directors.

## Annual Budget and Approval of Expenditures

The Board of Directors will establish an annual budget based on the fiscal year starting January 1 and ending December 31. This budget will include planned expenditures in all regular areas of operation including capital expenditures.

Procedures:

1. The Finance Committee will prepare a preliminary budget which will be presented to the Board of Directors in November.
2. The Finance Committee will review the budget, make appropriate changes and recommend approval to the board of Directors.
3. The Board of Directors will approve an annual budget at a regular or special meeting no later than December 31 prior to the start of the fiscal year.
4. The Board will assure the budget reflects the mission and goals of the organization in the allocation of resources. The annual budget will direct how funds are to be spent throughout the year.
5. Approval of the Board of Directors will be required in order to spend any funds or make any financial commitments to projects not included in the annual budget.
6. Expenditures in excess of $1,000 will require prior approval of the Board of Directors regardless of their inclusion in the budget.
7. Capital expenditures in excess of $1,000 will require at three quote requests prior to approval.

## Financial Reporting

The Board of Directors will assure accurate and timely financial reports showing how funds are acquired and spent. All external reporting deadlines will be met including state and federal government filings and reports to funders. The books and financial records of the organization will be open to any Board member for review at any reasonable time and with proper notice.

Procedures:

1. Reports will be provided as prepared by the Board Treasurer and/or the contracted accountant or firm, each month.
2. The financial reports will include a comparison of the budgeted amount to the actual amount and an explanation of any significant variances.
3. At a minimum the financial reports will include:
	1. A statement of financial position (balance sheet) quantifying cash, securities, inventory, receivables, property, equipment, real estate, liabilities and fund balance (net assets)
	2. A statement of activity (income statement) itemizing sources of revenue including fund raising income, grants, contracts, business income and investments. This report will show how resources were spent and identify a surplus/deficit for the reporting period.
4. As part of their duty as Directors of the organization each Board Member will review the financial reports as presented.

## Independent Review

The Board of Directors will assure that an independent external review of the financial records of the organization is conducted if deemed necessary or required by law.

Procedures:

1. The Finance Committee will establish a competitive process for the selection of an independent external auditor.
2. The audit will provide a review of the organization’s books to assure they are in compliance with generally accepted accounting practices.
3. The Executive Director and Board Treasurer will provide the auditor with complete access to the financial records of the organization.
4. The auditor will issue a written opinion on the financial statements of the organization.
5. The audit report will also include a “management letter” outlining any weaknesses with internal controls or other issues relating to the financial affairs of the organization.
6. The Board of Directors will examine and review the audit report at a regularly scheduled meeting.
7. After thorough discussion the Board of directors will vote to officially accept the audit report. This vote will be recorded in the minutes of the meeting.

## Payroll

The Board of Directors will assure that payroll disbursements are made only to bona fide employees of the organization and only upon proper authorization. The Board will assure that payroll disbursements are properly recorded and that all legal requirements including payroll tax deposits are met. Payroll checks will not be distributed prior to payday and no employee advances are allowed.

Procedures:

1. The Executive Director will maintain appropriate records for all employees.
2. The employees will record their time worked per pay period on authorized time recording devices or documents. Time logs or sheets will be reviewed by the Executive Director and will be available for review at any time by the employee.
3. Payroll checks, if provided in hard copy, will be distributed by the Executive Director every two weeks. Records of direct deposit will be provided to employee(s) by e-mail, with copies archived for reference by the Executive Director.

## Petty Cash

The Board of Directors will authorize a petty cash fund to be maintained by staff. This fund will not exceed $150 at any time and will be reconciled at least monthly.

Procedures:

1. The Executive Director will maintain the petty cash fund and make or supervise all disbursements from this fund.
2. The Executive Director will assure that appropriate receipts are included in the record of this fund to account for all disbursements
3. The petty cash fund is to be maintained in a secured place at all times, such as a cash register, locking cabinet, or safe, at all times. Access will be restricted and authorized by the Executive Director.

## Signing Authority

In order to safeguard the financial resources of the organization, all checks written by Professional Animal Retirement Center, Inc. will be reviewed and signed by the Board President, Board Treasurer, and/or the Executive Director and will be prepared by the contract accountant or firm. Those authorized to sign checks will be as allowed by the By-Laws. Any checks not written by the accountant or firm will be issued only upon expressed consent of either the Board President or Board Treasurer and only in extreme circumstances when timeliness is critical.

Procedures:

1. The Board will designate the individuals authorized to sign checks as authorized by By-Laws.
2. The staff will submit requests for the preparation of checks to the accountant or firm at least bi-weekly. The check, together with supporting documentation showing authorization for the expenditure will be included in the transmittal packet provided.
3. All checks will be completely filled out before being presented for signature. No person authorized to sign will sign a blank check.
4. No authorized signer will sign a check made out to him/herself.
5. No checks may be made out to cash.

## Procurement, purchasing and contracts

Professional Animal Retirement Center, Inc. will maximize value and cost-effectiveness in all procurements and purchasing. Any purchase exceeding $1,000 will require the requests for bids or quotes from at least 3 vendors. No purchases will be made except those provided for in the annual budget or those with prior Board approval. No purchases will be made of goods or services except in furtherance of the mission and programs of the organization.

The organization will be alert to conflicts of interest in the solicitation of quotes or bids. Any such conflicts must be fully disclosed prior to selection of a vendor. No person having such a conflict may participate in the selection of a vendor or the award of a contract for that purchase.

Selection of a vendor will be made after evaluation of all quotes or bids and will be made on the basis of which is most advantageous to the organization. The organization is not required to accept the lowest cost but justification will be provided for an alternate selection.

Procedures:

1. The staff will obtain and document requests for, and replies to competitive quotes or bids on all purchases over $1,000. The decision to purchase is the responsibility of the staff after considering all options and the needs of the organization, unless restricted by other policies (such as for specific Committees or projects). If the lowest bid is not used the staff will provide an explanation of why the choice was made.
2. The staff will monitor to assure that the organization is in compliance with all government regulations pertaining to contracts and grant instruments.

## Banking Institutions & Accounts, Investments, Donations

In order to minimize risk and maximize benefit, Professional Animal Retirement Center, Inc. will use only federally insured local banking and savings institutions. The amount deposited in any one institution will not exceed the FDIC insured limit.

All income intended for the organization will be properly received, deposited, recorded, reconciled and kept under adequate security. Any cash received will be promptly and fully deposited.

The Board will oversee the investments of the organization. Decisions will reflect the mission and goals of the organization and will prohibit investments that pose a risk or present social policy concerns.

All grants and gifts will be properly received and recorded. Compliance with any and all restrictions will be assured.

A record of all donated goods and services will be maintained by the Executive Director and will include information about sources, materials, and estimated fair market value.

Procedures:

1. The Board will designate the financial institution(s) to be used by the organization. Any change in the institution(s) requires Board approval
2. The Executive Director or an appointed proxy will manage the receipts and deposits of all income, including grants, fees collected, reimbursements, and donations received. Routine receipts will be transacted through a cash register with documentation of source, purpose, restrictions (if any), etc.
3. Receipts will be reconciled using the cash register’s “close” functions and transmittals prepared for accounting purposes at least bi-weekly. Reconciliation will be the responsibility of the Executive Director, or their appointed proxy.
4. The Finance Committee will make recommendations to the Board of Directors regarding investment strategies when opportunities arise. The Board will have final approval.
5. The Executive Director will identify any grant or donation requirements when a gift is received. They will monitor compliance and will report progress and/or problems to the Board at least quarterly.
6. The Executive Director will maintain an In-Kind Ledger and will accurately record the following information for all donations of goods and services:
	* Source
	* Materials/items
	* Estimated fair market value
	* Service performed

## Retention of Records

Professional Animal Retirement Center, Inc. will retain all financial records pertaining to receipts and expenditures for a period no less than five unless otherwise required by a grant or contract. This policy applies to paper records, receipts, documentation for expenditures etc. and electronic records, computer files and disks.

Procedures:

1. The staff is responsible for the retention of all financial records.
2. Records for the preceding two years will be kept readily accessible at the office of the organization.
3. Records no longer required will be destroyed in a manner consistent with maintenance of confidentially of all information.

# VOLUNTEER PROGRAM

*Program opportunities, requirements, and application on website.*

*Training program at ProProfs.com*

**Volunteer Jobs**

The opportunity for one to advance to hands-on animal care depends directly on their willingness to commit time, listen, respect and follow established routines and protocols, and to perform tasks assigned in a satisfactory manner.

A volunteer stands to get out of the volunteer program what they put into it. The volunteer program allows one to progress and to gain more responsibility, and experience more things, based on their performance and time commitment. The various roles required to operate the Sanctuary include the following, all of which are volunteer opportunities:

 Exotic Animal Keeper Tour Guide Admissions / Gift Store Attendant

 Dietician Maintenance Fund raising Committee / Events

**Volunteer Program Minimum Requirements**

Black Pine requires all volunteers provide the following before starting the program:

* Tetanus vaccination or booster within the past 10 years
* Formal application with contact information
* Signed staff handbook receipt
* Signed waiver of liability and compensation
* Signed acceptance of Non-Harassment policy
* Other agreements as deemed necessary

In addition, any volunteer who wishes or intends to be an exotic animal keeper working in the Primate House will be additionally required to provide proof of a tuberculosis (TB) skin test with a negative result taken within the prior 12 months. This test may be required annually to continue working with primates.

**Animal Husbandry Training Overview**

A staff training table, maintained by the Director, outlines the various tasks that an animal keeper may be trained and authorized to carry out. Animal husbandry training is organized based on the risk posed by different animal species. All residents are categorized by level from one to five, with Level 1 being low risk, and Level 5 being high risk.

The opportunity to advance and take care of mid to high-risk animals (Levels 3-5) will be based on work performance, attendance, and the ability to establish repeatable, safe work habits and to gain the amount of experience required to be given such responsibilities.

Those who advance to Level 3 animal keeper will generally need to complete at least 50 hours of training within a three-month period. Level 4-5 keepers will typically have completed over 500 hours of training over the course of a year. Level 4-5 keepers are only advanced to work independently with Level 4-5 animals upon recommendation of the Healthcare Committee and approval from the Board of Directors by a vote.

Volunteers and interns will be trained by a number of staff members, including paid staff, volunteers, and possibly interns. Typically, those team members with more seniority than the trainee will conduct the training, but it is possible for a new trainee to be teamed up with others at the same level who may be just one step ahead of them and can help teach. This training program is always a TEAM EFFORT!

A file will be maintained on every member of the staff. An electronic record of training progress will be maintained by the Director to capture how many times the trainee has been assigned to and completed a task. This information will be tracked based on the daily task assignments issued to the husbandry team each morning. A trainee can directly influence how their training progresses by actively choosing specific jobs from the volunteer signup, when they sign up online to volunteer their time. (However, there is no guarantee that the job someone signs up for will be the job they are assigned to. Assignments are ultimately at the discretion of the paid staff considering safety first, as well as prioritization of tasks.)

After completing at least three rounds of one-on-one training, a trainee will be given access to take a written assessment (administered electronically) to ensure all critical information has been reviewed and is understood related to completing a task. Trainees will have up to three chances to achieve a “pass” (vs. “fail”) on the assessment.

If, or once the trainee achieves a 95% or better score on an assessment, they will be considered “authorized” to complete that task independently and their training chart will be updated accordingly.

**If at any time a trainee feels there is a discrepancy in training records, they may take up the issue with the Executive Director.**

**Advancement Opportunities**

In order for unpaid staff members to advance past occasional entry-level assignments at the Sanctuary additional training may be required, and/or agreements signed.

* **A ‘Back-up Keeper Agreement.** *This is a one-page form that outlines the definition of a “back-up keeper” and their role in assisting keepers authorized to provide primary care to Level 3-5 animals.*
* **Skidloader Use Agreement.** *Following the viewing of a safety instruction video, signature on an agreement outlining the liability and responsibilities for use of the skidloader may be required.*
* **Level 4-5 Animal Keeper.** *Additional training and authorizations, as agreed upon and approved by the Healthcare Committee and Board of Directors may be required.*

## Rewards Program

Those responsible for managing this organization want all who contribute to feel appreciated and essential to its success! As a part of that effort, your hard work and dedication will be met with various ‘rewards’. An “active” staff member is defined as anyone who has and is contributing a minimum of five hours each month in volunteer labor and service at the sanctuary site and/or at offsite events and public relation activities. If a typically ‘active’ volunteer is temporarily unable to meet the five hour per month minimum, that volunteer will remain “active” so long as the gap in service is communicated effectively ahead of the absence, and rewards will not be revoked until or unless the absence becomes apparently permanent. Communication about your availability is essential to remaining an ‘active’ volunteer within the program.

**Free admission –** Staff members who contribute a minimum of five hours each month of volunteer labor/service are eligible to enjoy free sanctuary admission for themselves and their immediate family. Family visits requested when the sanctuary is not open to the general public will require an appointment confirmed by a paid staff manager to help avoid any scheduling conflicts.

**20% off merchandise –** Receive 20% off the retail prices of any souvenirs offered for sale to the general public.

**Milestone rewards –** Staff members are eligible to receive the following ‘recognition’ rewards as various hours “milestones” are met:

50 hours: 50-hour volunteer pin

100 hours: 100-hour volunteer pin

150 hours: “STAFF” logo hat

250 hours: “STAFF” logo polo shirt

500 hours: “STAFF” logo hoodie

750 hours: BPAP embroidered knit cap

1000 hours: logo field bag

1500 hours: “professional” engraved nametag

2000 hours: logo denim shirt

5 years: 5-year volunteer pin

10 years: 10-year volunteer pin

15 years: 15-year volunteer pin

# INTERNSHIP PROGRAM

*Program opportunities, requirements, and application on website.*

*Training program at ProProfs.com*

Black Pine’s internship programs offer an opportunity for high school students eligible to participate in their school’s vocational work study programs (ICE, for example) and/or college-enrolled students and college graduates to gain unparalleled work experience in support of their career goals.

Interns, for the purposes of this handbook, are required to adhere to all of the same policies as outlined for volunteers, must abide by all employee policies as indicated, and/or any other applicable policies as mutually agreed.

# PERSONNEL POLICIES

## Maintaining and Reviewing Personnel Policies

The Professional Animal Retirement Center, Inc. has established personnel policies in order to provide an appropriate guide to personnel practices and to ensure consistency of personnel decisions. The Professional Animal Retirement Center, Inc. is committed to supportive relationships between the organization and its staff. It is our intention to administer our personnel program in a manner which complies with the letter and spirit of all applicable federal, state and local regulations.

Procedures:

1. The Board of Directors will be responsible for approving all employee personnel policies before they become effective.
2. The Board of Directors will review all existing personnel policies at least annually to ensure compliance, appropriateness and make revisions as necessary.

## Equal Employment Opportunity

The Professional Animal Retirement Center, Inc. is committed to the principles of Equal Employment Opportunity in all personnel policies and practices. It is the Professional Animal Retirement Center, Inc.’s policy to recruit, hire train and promote into all job levels, employees and applicants for employment without regard to race, color, religion, age, sex, marital status, sexual preference, national origin, physical or mental disability or veteran status. All such decisions are based on (1) individual merit, qualifications and competence as they relate to the particular position and (2) promotion of the principle of equal employment opportunity.

Procedures:

1. Equal Employment Opportunity will be foremost in considering any applicant for hire or existing employee for promotion.
2. The Board of Directors will appoint one individual to serve as the Equal Employment Opportunity Officer. This person will serve as an unbiased contact point for any employee to discuss concerns regarding any potential harassment or discrimination regarding race, color, religion, age, sex, marital status, sexual preference, national origin, physical or mental disability or veteran status. The EEO Officer will also assist the employee in process of seeking the best remedy to their concerns in a timely manner.

## At Will Employees

As per Indiana statute, all employees of the Professional Animal Retirement Center, Inc. are “At will employees”, which means that they may be terminated at any time with or without cause without subjecting the Professional Animal Retirement Center, Inc. to a claim for breach of employment.

Procedures:

1. Any supervisor who determines that it is appropriate for an employee to be terminated must notify the Executive Director and follow appropriate dismissal procedures.
2. A letter of termination will be provided to the employee according to the appropriate dismissal procedures. A copy of this letter will become part of the employee personnel file.

\*Designee may serve as Executive Director

## Maintaining Personnel Files

The Professional Animal Retirement Center, Inc. will maintain an individual file for all employees in a secure and confidential manner.

Procedures:

1. The Executive Director will maintain employee personnel files in a locked, fireproof cabinet.
2. All personnel files will be treated as confidential in nature and only made available to the Board of Directors and employee.
3. If a grievance or personnel related dispute arises, only related personnel documents will be provided to the Personnel Committee.
4. Individual paid-employee personnel files will contain at least the: Application for employment and related credentials, reference verifications, personnel hiring form with approval indicated, signed job description, personnel policy acknowledgement, equipment assignment listing, emergency contact information, annual performance reviews and termination letter.
5. Individual volunteer-employee files will contain at least the: Volunteer application and related credentials, signed job description, equipment assignment listing, emergency contact information and any other pertinent volunteer information.

\*Designee may serve as Executive Director

## Recruitment and Hiring Process

The Professional Animal Retirement Center, Inc. intends to recruit, hire and place applicants on the basis of the applicant’s relative knowledge, skills and abilities. The decision to employ an applicant will be based solely on the individual’s qualifications for the particular position along with other requisite job skills. Minimum qualifications shall be specified in the job description.

Procedures:

1. When a need for an additional employee is identified, the Executive Director will prepare a job description indicating all job responsibilities, physical and educational requirements and proposed salary level.
2. If the salary is part of an approved annual budget, and it has been determined that the appropriate funds are available to support and sustain this position, the Executive Director may proceed with the recruitment and hiring process.
3. If this is a new or additional position, the completed job description will be forwarded to the President of the Board of Directors and distributed to the appropriate board members for review prior to approval by the Board of Directors. After approval is obtained from the Board of Directors, the Executive Director may proceed with the recruitment and hiring process.
4. The Executive Director will prepare a job announcement identifying the position’s responsibilities, requirements and overall relationship to the organization for internal posting or circulation within the Professional Animal Retirement Center, Inc. for a minimum of ten days. Any current employee interested in an available position must indicate that interest to the Executive Director in writing within the ten-day posting period.
5. Appropriate consideration will be given to internal applicants and interviews scheduled for qualifying applicants.
6. The Executive Director and/or hiring supervisor will prepare an interview format to ensure consistency in interviewing and any appropriate testing materials.
7. The Executive Director and/or hiring supervisor will give appropriate consideration to all internal applications, rejecting unqualified candidates, scheduling required testing and interviews for qualified candidates and hopefully selecting a candidate for promotion or transfer.
8. If an internal applicant does not fill the position, then the Executive Director will prepare an employment advertisement and proceed with advertising the position.
9. When applications for the open position are received the applications will be maintained in a confidential file as they arrive. The Executive Director/hiring supervisor will give appropriate consideration to each application, rejecting unqualified candidates and contacting applicants who meet requirements to schedule any required skills testing and/or to schedule an interview.
10. As a rejection decision is made on an applicant who has been interviewed, a rejection letter must be sent to notify the applicant, and attach a copy to the application, after a selected candidate has accepted an employment offer.
11. All applications for employment received by the Professional Retired Animal Center, Inc. will be maintained in a confidential file for at least 90 days and may be reviewed for any other employment opportunities.
12. Upon selection of the best qualified candidate, the Executive Director and/or hiring supervisor will make a recommendation for promotion, transfer or new hire by preparing a Hiring Packet that includes:
	* Completed application form, if applicable
	* Completed tests, interview notes, reference checks, overall rating sheets or other hiring documents and
	* The original and one copy of a letter offering the employment opportunity from the Executive Director (NOTE: No job offer is official until signed by the Executive Director.)
	* After the Executive Director has signed the offer letter, the applicant will be contacted and/or the letter mailed.
	* If the applicant accepts the offer, all items in the Hiring Packet will become a part of the employee’s confidential personnel file and maintained in an appropriate manner.
	* If the applicant does not accept the offer or is no longer available, the Executive Director and/or hiring supervisor will review any remaining appropriate candidates, following the same process.

\*Designee may serve as the Executive Director

## Executive Director Recruitment and Hiring

It is the responsibility of the Board of Directors of the Professional Animal Retirement Center, Inc. to recruit appropriate candidates for the position of Executive Director, conduct interviews of appropriate candidates, extend an offer of employment to the selected applicant and complete the hiring process.

Procedures:

1. When a vacancy occurs for the position of Executive Director, the President of the Board of Directors or his designee will complete all responsibilities associated with filling this vacancy.
2. The recruitment and hiring policy (both internal and external) will be followed.
3. The official job offer for the Executive Director must come from the President of the Board of Directors.

## Emergency Succession Plan

The Board of Directors of Professional Animal Retirement Center (PARC) Inc. recognizes that this is a plan for contingencies due to the disability, death or departure of the Executive Director (ED). If the organization is faced with the unlikely event of an untimely vacancy, PARC Inc. has in place the following emergency succession plan to facilitate the transition to both interim and longer-term leadership.

The Board of PARC Inc. has reviewed the job description of the ED. The job description is attached. The board has a clear understanding of the ED’s role in organizational leadership, program development, program administration, operations, board of directors’ relationships, financial operations, resource development and community presence.

**IN THE EVENT OF A TEMPORARY, UNPLANNED ABSENCE, LESS THAN ONE MONTH:**

A temporary absence is one of less than one month in which it is expected that the ED will return to his/her position once the events precipitating the absence are resolved. An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as a vacation or a sabbatical. The Personnel Committee is authorized to appoint an Acting Executive Director (AED) in the event of the unplanned absence of the ED, and may delegate the same to the Personnel Committee.

**IN THE EVENT OF A TEMPORARY, UNPLANNED ABSENCE, MORE THAN ONE MONTH:**

A long-term absence is one that is expected to last more than one month. The procedures and conditions to be followed should be the same as for a short-term absence, with one addition:

The Personnel Committee will give immediate consideration, in consultation with the AED, to temporarily fill the management position left vacant by the AED. This is in recognition of the fact that for a term of more than three months it may be reasonable to expect the AED to carry the duties of both positions. The position description of a temporary manager would focus on covering the priority areas in which the AED needs assistance.

**COMPLETION OF LONG-TERM EMERGENCY SUCCESSION PERIOD**

The decision about when the absent ED returns to lead PARC Inc. should be determined by the ED and the Personnel Committee. They will decide upon a mutually agreed upon schedule and start date. A reduced schedule for a set period of time may be allowed, as set forth in the Medical Leave Policy and/or Paid Time Off Policy, or upon approval of the Board of Directors based on the recommendations of the Personnel Committee. Under such circumstances, the intention should be for the ED to work their way back up to a full-time commitment.

**IN THE EVENT OF A PERMANENT CHANGE IN THE EXECUTIVE DIRECTOR POSITION:**

A permanent change is one in which it is firmly determine that the ED will not be returning to the position. The procedures and conditions should be the same as for a long-term temporary absence, with one addition:

The Board of Directors will appoint a Transition and Search Committee, or task the Personnel Committee, within seven days of notification of permanent departure of ED to plan and carry out a transition to a new permanent ED. The Board will also consider the need for outside consulting assistance depending on the circumstances of the transition and the board’s capacity to plan and manage the transition and search. The assigned committee will also determine the need for an Interim ED, and plan for the recruitment and selection of an Interim ED and/or permanent ED.

**INFORMATION AND CONTACT INVENTORY FOR PARC, INC.**

|  |  |  |  |
| --- | --- | --- | --- |
| **NONPROFIT STATUS** | **Onsite Location** | **Offsite Location** | **Online URL** |
| IRS Determination Letter | Operations Standards Manual – Appendix | Google Drive – Board of Directors | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| IRS Form 1023 | Operations Standards Manual – Appendix | Google Drive – Board of Directors | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| Bylaws | Operations Standards Manual | Google Drive – Board of Directors | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| Mission Statement | Operations Standards Manual | Google Drive – Board of Directors | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| Board Minutes | Not maintained in hard copy as of 2018. | Google Drive – Board of Directors | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |

|  |  |  |  |
| --- | --- | --- | --- |
| **INFORMATION** | **Onsite Location** | **Offsite Location** | **Online URL** |
| Employer Identification Number (EIN) | 33-1020728 |
| Current & previous Form 990s | Safe in office | Sugar sync Back-up - digital | (2004) <https://www.sugarsync.com/pf/D6994668_07407512_973652> (2005) <https://www.sugarsync.com/pf/D6994668_07407512_973545> (2006) <https://www.sugarsync.com/pf/D6994668_98917450_784580> (2007) <https://www.sugarsync.com/pf/D6994668_98917450_784500> (2008) <https://www.sugarsync.com/pf/D6994668_686_299033439> (2009) <https://www.sugarsync.com/pf/D6994668_98917450_784541> (2011) <https://www.sugarsync.com/pf/D6994668_98917450_784604> (2012) <https://www.sugarsync.com/pf/D6994668_686_299034560> (2013) <https://www.sugarsync.com/pf/D6994668_98917450_6719166>(2014) <https://www.sugarsync.com/pf/D6994668_98917450_7909569> (2015) <https://www.sugarsync.com/pf/D6994668_07198158_702697>  |
| Current and previous audited financial statements | N/A | N/A | N/A – we have never had a professional audit of financials. |
| Financial Statements | Not maintained in hard copy as of 2018. | Board Secretary and/or President& digital | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| State or District Tax Exemption Certificate | Operations Standards Manual – Appendix | Back-up - digital | https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32 |
| Blank Checks | N/A | Butler CPA, Kendallville | N/A |
| Computer Passwords | Safe in office | N/A | passwords.google.com(Organization user ID lori@blackpine.org) Passwords saved on individual Chrome browsers, under Settings. |
| Donor Records | Archives in annual A/P boxes;Current Year in file cabinet in office, A/P drawer | Little Green Light “cloud-based” software system | <https://mylgl.littlegreenlight.com/home/login>  |
|  |  |  |  |
| **INFORMATION** | **Onsite Location** | **Offsite Location** | **Online URL** |
| Animal Records | Animal history files in file cabinet in office | Veterinary records at Kendallville Animal Clinic;Animal Care Software.com | Facebook.com page timeline may provide some historical data/datesCloud-based Animal Care Software.com(Each lead keeper has access). |
| Vendor Records | Archives in annual A/P boxes;Current Year in file cabinet in office, A/P drawer | Butler CPA, Kendallville | N/A |
| Volunteer Records | Excel database on BPSTAFF Desktop computer in office | Sugarsync Back-up - digital | <https://www.sugarsync.com/pf/D6994668_07974401_294805> Actual volunteer applications archived:<https://www.sugarsync.com/pf/D6994668_07407512_04832> Additional data may be found for current applications at the forms software site Wufoo:<https://secure.wufoo.com/login/>  |

**Bank:**

Community State Bank (CSB)

Checking Account: 8172697 (changed in 2018)

Savings Account: 172843

Branch Representative: Carla Fiandt

Phone: 260-636-3744

Email: carlaf@csbemail.com

Online account access: <http://www.csbbankonline.com/>

Authorized signers: Lori Gagen, Renee Runkle, Barb Smith

**Investments:**

CDs at Community State Bank

CD documentation in safe in office.

Partner’s 1st FCU - Member ID# 8007887

Share Savings Account (money market): 8007887-S1

IMMA Account (main share): 8007887-S6

Online account access: <https://o.partners1stcu.org>

Authorized signers: Lori Gagen, Renee Runkle

**Office Safe:**

Located in closet in office.

Safe Combination: See Mark Thaler or Renee Runkle

**Legal Counsel:**

Ted Storer

Phone: (260) 422-9454

TStorer@rlwlawfirm.com

|  |  |  |  |
| --- | --- | --- | --- |
| **HUMAN RESOURCES** | **Onsite Location** | **Offsite Location** | **Online URL** |
| Employee Records | Locked file drawer in Director’s office; Bottom right drawer. Key on ED’s keyring | Payroll data Butler CPA, Kendallville | N/A |

**Payroll:**

Staff Database in office tracks clock-in/out; paid bi-weekly; reported to accountant by Programs Coordinator.

Butler CPA

Payroll Rep: payroll@CPAButler.com

Phone: (260) 347-0475

Current salary / budget: <https://drive.google.com/drive/folders/0ACCoFXl6i-svUk9PVA?ogsrc=32>

**Facilities Information:**

Land Lease is filed in binder in safe, and a copy is backed up online at: <https://www.sugarsync.com/pf/D6994668_07407512_971199>

|  |  |  |
| --- | --- | --- |
| **INSURANCE** | **Agent** | **Policy Documents** |
| Commercial LiabilityPropertyVehicles & Equipment | Black & Ramer Insurance LLCJarrod Ramerjarrod@blackramerins.com(260) 636-7191Fax (260) 636-3102Underwriter: K&K Insurance | Blue binder in safe in office. |
| **INSURANCE** | **Agent** | **Policy Documents** |
| Directors & Officers | Black & Ramer Insurance LLCJarrod Ramerjarrod@blackramerins.com(260) 636-7191Fax (260) 636-3102Underwriter: K&K Insurance | Blue binder in safe in office, front of binder. |
| Workers Compensation | Black & Ramer Insurance LLCJarrod Ramerjarrod@blackramerins.com(260) 636-7191Fax (260) 636-3102Underwriter: Liberty Mutual Insurance | Blue binder in safe in office, front of binder. |

**Additional critical information is documented in:**

Animal Husbandry Resources (how-to’s)

Real-time Classroom, Courses, and Users maintained at Proprofs.com: <https://www.proprofs.com/training/mytrainings/?login=bpstaff>

Admin & Facility Resources (how-to’s)

Backup & real-time updated version: <https://www.sugarsync.com/pf/D6994668_07407512_858538>

Operations Standards – Binder in office

Backup & real-time updated version: <https://www.sugarsync.com/pf/D6994668_07407512_821499>

Animal Facts for Tour Guides – printed copies in office

Backup: <https://www.sugarsync.com/pf/D6994668_07407512_834476>

Individual documents at: <https://app.sugarsync.com/iris/wf/D6994668_98917450_944392>



*Adopted by board of directors on February 15, 2018.*

## Executive Director Job Description and Performance Evaluation

The Board of Directors shall review the Executive Director’s job description and shall conduct evaluation of the performance of the Executive Director regarding the assigned responsibilities on an annual basis.

Procedures:

1. At the beginning of each annual term, the President of the Board shall evaluate the Executive Director’s job description and update as necessary.
2. The President shall also identify the evaluation instrument to be used in evaluating the Executive Director’s performance.
3. The President of the Board shall conduct an evaluation each year, which must be concluded by the end of the President’s elected term. The evaluation may be completed in consultation with the Executive Committee, and may solicit written feedback from all board members.
4. The President may solicit feedback from appropriate staff members of the organization, but take care to ensure staff feedback is not directly identifying the individual staff person.
5. The results of the evaluation will be shared with the Executive Director in a face-to-face meeting between the Executive Director and Board President.
6. The results of the evaluation may be shared with the Executive Committee of the Board of Directors in an executive session.
7. A summary of the evaluation shall be filed in the Executive Director’s personnel file.

## Employee Job Description and Performance Evaluation

The Executive Director of the Professional Animal Retirement Center, Inc. will review all employee job descriptions at least annually for completeness and appropriateness. The Executive Director will also conduct an annual performance evaluation for each employee. Each performance review should be a positive and interactive process whereby both the organization and the employee receive information about his or her success in meeting the responsibilities of the job. Our goal is to conduct a performance review of each new employee during the sixth month of employment, after the first year of service, and annually thereafter.

Procedures:

1. The Executive Director will evaluate all employee job descriptions and update as necessary, at least annually.
2. The Executive Director will also identify the evaluation instrument to be used in evaluating employee performance.
3. The Executive Director may delegate the responsibilities of reviewing job descriptions and conducting an employee performance evaluation to the immediate supervisor when applicable.
4. The results of the evaluation must be shared with the employee in a face-to-face meeting.
5. All evaluations conducted by the immediate supervisor will be reviewed by the Executive Director to ensure appropriateness. The President of the Board of Directors or the Personnel Chairperson will review any evaluations conducted by the Executive Director, to ensure appropriateness.
6. A summary of the evaluation shall be filed in the employee’s personnel file.

\*Designee may serve as Executive Director

## Grievance Policy

PARC Inc. aims to resolve problems and grievances between employees promptly and as close to the source as possible with graduated steps for further discussions and resolution at higher levels of authority as necessary. Grievances held by unpaid members of the Sanctuary’s staff (such as volunteers or interns,) are not subject to this policy.

**Statement of General Principles**

* Complaints must be fully described by the person with the grievance
* The person(s) against whom the grievance/complaint is made should be given the full details of the allegation(s) against them and should have the opportunity and be given a reasonable time to share their side of the story before resolution is attempted
* Proceedings should be conducted honestly, fairly and without bias
* Proceedings should not be unduly delayed.

**Procedure**

The following is a four level escalation process:

1. The person with a grievance will attempt to resolve the complaint as close to the source as possible. This level is quite informal and verbal.

*If the matter is not resolved…*
2. The person with a grievance will notify the Executive Director (in writing or otherwise) as to the substance of the grievance and state what remedies have been sought. The Executive Director will speak with the parties involved, either individually or together, to try to resolve the grievance. This level will usually be informal, but either party may request written statements and agreements. Time given at this level should not exceed one week.

OR

If the person against whom the grievance/complaint is made is the Executive Director, then the Personnel Committee will speak with the parties involved, either individually or together, to try to resolve the grievance. Either party may request written statements and agreements. Time given at this level should not exceed two weeks.

*If the matter is still not resolved…*

1. The Executive Director will refer the matter to the Personnel Committee, if they are not already involved. A grievance taken to this level must be in writing from the person with the grievance. Written information will be forwarded to the Committee, and any additional information that the Executive Director deems relevant, at his or her own discretion. The Executive Director (or Personnel Committee, if the grievance/complaint is with the Executive Director) will provide a written response to the person filing the grievance, and will communicate with the parties involved. Time given at this level should not exceed one week following the next scheduled meeting of the Personnel Committee.

*If the matter is still not resolved…*

The person with a grievance, if a paid employee, will be advised by the Executive Director or Personnel Committee of his/her rights to pursue the matter with external authorities if they so wish.

*Adopted by board of directors on March 30, 2018.*

## Harassment Policy

At the Professional Animal Retirement Center, Inc., the rights of all employees must be respected. All employees of this organization must understand its position on harassment. Harassment is any unwanted attention or action prohibited by law, initiated by someone in the workplace that creates an intimidating, hostile or offensive work environment, including sexual harassment.

* If a person’s behavior makes an employee uncomfortable, the employee should feel free to immediately advise the person that, in the employee’s opinion, the behavior is inappropriate and that the employee would like it stopped.
* If the employee is not comfortable discussing the issue with the person, or if the person fails to respect the employee’s request, the employee should report the incident to his or his supervisor. If, for whatever reason, the employee does not feel that the supervisor is a suitable person to whom to report the incident, the employee should contact the Executive Director or, if appropriate, the President of the Board of Directors or a member of the Personnel Committee.

Procedures:

1. All members of the staff will sign an “anti-harassment” policy that will be retained in personnel or other staff files. This policy will be co-signed by the Executive Director or their designee as witness.
2. In all instances, a prompt, thorough and fair investigation will take place, giving careful consideration to protect the rights and dignity of all people involved.
3. All steps necessary to resolve this situation will be taken, which may include verbal or written reprimands, suspension or termination of the offending employee.
4. No retaliation of any kind will occur because an employee has reported an incident of suspected harassment.
5. The supervisor, or other person to whom the complaint was made, will work to establish mutually agreed upon safeguards against retaliation while attempting to mediate any harassment complaint.

\* Designee may serve as Executive Director

## Drug-Free Work Environment & Substance Abuse

It is the purpose of the Professional Animal Retirement Center, Inc. to provide a safe and drug-free work environment for our staff and our patrons. With this goal in mind, and because of the serious drug abuse problem today, we are establishing the following policy for existing and future employees of the Professional Animal Retirement Center, Inc.

Professional Animal Retirement Center, Inc. explicitly prohibits:

* The use, possession, solicitation for, or sale of narcotics or other illegal drugs, alcohol, or prescription medication without a prescription on Professional Animal Retirement Center, Inc. property or while performing an assignment.
* Possession, use, solicitation for, or sale of illegal drugs or alcohol on or off Professional Animal Retirement Center, Inc. property or while on assignment, if such activity or involvement adversely affects the employee’s work performance, the safety of the employee or of others, or puts at risk the reputation of Professional Animal Retirement Center, Inc.
* The presence of any detectable amount of prohibited substances in the employee’s system while at work, while on the premises of Professional Animal Retirement Center, Inc., or while on company business.

Procedures:

The Professional Animal Retirement Center, Inc. may conduct drug testing under any of the following circumstances:

* Random Testing: Employees may be selected at random for drug testing at any appropriate interval determined by Professional Animal Retirement Center, Inc.
* For Cause Testing: The Professional Animal Retirement Center, Inc. may ask an employee to submit to a drug test at any time it feels that the employee may be under the influence of drugs or alcohol, including, but not limited to the following circumstances: evidence of drugs or alcohol on or about the employee’s person or in the employee’s vicinity, unusual conduct on the employee’s part that suggests impairment or influence of drugs or alcohol, negative performance patterns, or excessive and unexplained absenteeism or tardiness.
* Post-Accident Testing: Any employee involved in an on-the-job accident or injury under circumstances that suggest possible use or influence of drugs or alcohol in the accident or injury event may be asked to submit to a drug and/or alcohol test.
1. The Professional Animal Retirement Center, Inc. believes that any employee found to be in violation of our Drug-Free Work Place policies will have an opportunity to participate in a treatment and recovery program, without compensation.
2. Employees who choose to participate in a treatment or recovery program will be allowed an uncompensated leave of absence for no more than three months, and if the employee successfully completes the program and provides appropriate documentation accordingly, may return to their previous employment status.
3. Employees of the Professional Animal Retirement Center, Inc. will be given assistance in identifying appropriate programs and systems for assistance.
4. Absolute confidentiality will be maintained in all instances.

## Nepotism

The Professional Animal Retirement Center, Inc. will not allow any type of favoritism shown to a relative on the basis of an immediate family relationship, for the purpose of employment, purchasing or any other type of transaction.

Note: Immediate family can be defined as parents, children, siblings, grandparents, same categories of in-laws, foster and stepchildren, or anyone living in the same household as a family member.

Procedures:

1. The Professional Animal Retirement Center, Inc. will not allow anyone living in the same household or an immediate family member to be supervised and/or managed by another individual who is living in the same household or is an immediate family member.
2. No pre-employment activities, at any level (i.e.: recruitment, interviewing or hiring) will be conducted by or influenced by an immediate family member or an individual living in the same household of the employment applicant.

## Attendance Policy

We respect the rights of volunteers to set their own work schedule at Black Pine based on their needs, interests, goals, and availability.

However, our entire team (paid staff, volunteers, and interns) have an obligation to meet the daily needs of the animals in residence, maintain tour schedules for guests, and meet other business commitments each day. Because BPAS does not employ enough paid staff to meet these commitments every day, volunteers (and interns) are essential on the team!

***To be clear, our expectations for all staff at Black Pine, with regards to attendance, are as follows:***

* You will routinely check your email inbox (if you have one), phone(s), social media accounts, and/or other communication methods you have indicated are for the purpose of communicating with BPAS, for messages sent or left regarding changing needs at the sanctuary.
* You will respond to BPAS recruiting messages – whether you can help or not – to ensure effective and efficient communication required to help us facilitate staffing needs.
* You will update us about changes in your contact information to help avoid a break in communications.
* You will advise of your anticipated availability to avoid having BPAS reach out repeatedly to seek out your help when you are not available.
* If you are a volunteer, you will utilize the online Volunteer Signup system to choose work shifts and to select jobs (tasks), adding comments as needed to clarify your availability and task preferences.
* You will provide as much advanced notice of your volunteer schedule as possible, understanding that one week to one month in advance is most helpful to avoid last-minute shortages on the roster.
* You will communicate any changes within 24 hours of a scheduled work shift by telephone at 260-636-7383, and will leave a detailed message on the answering system if no one is available to take your call. Any absence not communicated in advance by telephone may be considered an “unexcused absence”.
	+ A volunteer’s first unexcused absence will result in a verbal warning about violation of attendance policy. A second failure to comply may result in termination from the volunteer program.
	+ A paid staff member, or intern, may be at risk of termination for any unexcused absence.

**Call the Sanctuary office at 260-636-7383 if you cannot work as scheduled.**

## Paid Time Off (PTO) Policy

**Policy Statement**:  Professional Animal Retirement Center, Inc., will maintain a policy for employees for paid time off (PTO) for the benefit of our employees to provide some paid time away for their personal benefit and enrichment.

PARC operates and need to be staffed 365 days each year to care and to provide for the animal residents of the Sanctuary.  The Board and our Executive Team appreciates the commitment of all employees to our Mission and the care of our permanent guests.

Because we do not close, we are often required to seek assistance from our paid employees to staff the Sanctuary at all times in order to care and to provide for the animal residents of the Sanctuary or to supervise our volunteers.  Many of our busiest days occur on holidays where the “regular” working world has a day off.  We recognize that this a significant commitment on your part, and we want to provide the best benefits that we can based on our financial capabilities and the benefits provided by other similar not-for-profit entities.

Holidays

**All non-exempt, full time employees shall be paid 1.5 times their regular hourly rate only if they work on any of the following seven (7) holidays: New Year’s Day, Easter, Memorial Day, July 4, Labor Day, Thanksgiving Day, Christmas.**

The Executive Director will attempt to schedule paid staff in a fair and reasonable manner so that all employees have the opportunity to be off work on the actual holidays, although there is no guaranty of any particular holiday or date for any one employee.

PTO

**Employees have the opportunity to accrue PTO during each calendar year as follows:**

Year(s) of Employment PTO Amount

 Year 1 Up to 1 week or 40 hours of PTO

 Year 2 – 4 Up to 2 weeks or 80 hours of PTO

Year 5 – 9 Up to 3 weeks or 120 hours of PTO

Year 10 and up Up to 4 weeks or 160 hours of PTO

Full time employees are eligible to accrue the maximum hours noted above.  Part time employees are eligible to accrue a pro rata number of hours based on their standard hours per week as anticipated at their hire date (or increased at an annual review) divided by 40 hours.  As an example, a part time employee in their first year anticipated to work 20 hours each week may accrue up to 20 hours of PTO.

Any request for PTO must be provided in writing at a minimum of two (2) weeks before the requested time off.  Requests must be taken in increments of eight (8) hours.  Requests should be submitted to the Executive Director as soon as possible to allow for proper scheduling coverage.  The Executive Director should submit their requests for PTO to the President of the Board.  Requests for PTO will be approved on a first-come first-serve basis. It is likely not possible to have more than one person out on vacation at a time.

PTO must be used prior to simply taking an unpaid day off or using the Medical Leave Policy.  If an employee is eligible and requests Medical Leave, the employee will be paid and use up their PTO during the leave.

PTO accrues during the year.  PTO will not be carried over to another year, unless there is a specific issue where an employee requested to take PTO but was denied because of coverage issues.  This must be documented in writing by the Executive Team.  A copy of this memo must be signed by the employee. A copy of the memo will be given to the employee and one copy will be kept in the employee’s personnel file.  Unused PTO will not be paid to employees at the end of the year.

If an employee is terminated for cause, at the sole discretion of the Executive Team or the Board, the employee will not be eligible to receive any accrued but unused PTO and forfeits any right to the same.

If an employee is terminated without cause (due to business reasons), the employee will receive at their next regularly scheduled payroll payment any accrued, but unused PTO.

If an employee resigns or voluntarily quits, but provides at least two weeks’ notice, the employee will receive at their next regularly scheduled payroll payment any accrued, but unused PTO.

If an employee quits or retires without giving at least two weeks’ notice, the employee will not be eligible to receive any accrued but unused PTO and forfeits any right to the same.

*Adopted December 2017, effective January 1, 2018; amended April 19, 2018.*

## Insurance

As a general rule of thumb, injuries sustained by any paid employee, volunteer (including interns) or sub-contractors while carrying out normal work duties will be reported as a claim to worker’s compensation insurance policy. Reports will also be made simultaneously to the commercial policy agent who will use discretion to file additional claims.

Injuries sustained by any paid employee, volunteer (including interns) or members of the public (guests) while engaging in activities other than normal work duties will be reported as a claim to the organization’s liability insurance policy, via the agent.

## First Aid Plan

**Policy**

First-aid trained personnel are available to provide quick and effective first-aid.

**Scope**

This policy applies to all locations under the control of Sanctuary operations and staff. In general, employees identified as first-aid trained for the purposes of meeting this requirement do so as a collateral duty in that providing first- aid or other medical assistance is not their primary job assignment.

**Responsibility**

Each paid staff member is responsible for the health and safety performance in the area of their assigned tasks. This responsibility can only be transferred or to properly trained and authorized volunteers if those parties have signed the appropriate Back-Up Keeper document, accepting such responsibility.

The Programs Coordinator is responsible for scheduling any First Aide courses necessary to maintain adequately trained paid staff members, as well as keeping the supply levels in all first aid kits up to date and in adequate supply.

**General First-Aid**

1. Emergency access phone numbers are posted near all telephones throughout the compound, as well as in applicable emergency response binders and instruction manuals.

b) Personnel authorized as “emergency responders” are listed on the emergency contacts list.

c) One or more emergency responders are available at all times when employee(s) are present.

**First-Aid Training**

First Aid courses available locally may be found online at:

<http://www.healthyclass.com/site-map/indiana/albion/cpr-and-first-aid/class?zip=46701>

All paid staff members will be required to complete First Aid training at least once every five years, the cost of which will be paid by the Sanctuary. The approval of the course and venue conducting it will be up to the Executive Director. An approved provider’s course will cover, at minimum:

• Role and responsibilities of the first aid provider

• Assessing a scene

• Performing an initial and ongoing assessment of an injured or ill person

• Scene safety

• Body substance isolation / blood borne pathogens

• Performing an emergency move

• Placing an ill person in the recovery position

• Opening and maintaining an airway

• Providing rescue breathing

• Managing an obstructed airway

• Performing adult/one-rescuer CPR

• Recognizing the warning signs and symptoms of medical problems

• Recognizing and caring for an injured or ill person with decreased levels of responsiveness

• Controlling external bleeding and recognizing internal bleeding

• Recognizing and caring for victims of shock

• Recognizing and stabilizing spinal injury

• Recognizing and manually stabilizing suspected skeletal injuries • Knowledge of voluntary provisions of first aid, consent and confidentiality

First-aid training acquired through other approved providers must be documented to be considered adequate per this policy.

**Documentation of First-Aid Training**

Each employee who completes the first-aid course will receive a first-aid card which serves as documentation.

**First-Aid Supplies**

First-aid supplies are readily available to all staff, stored in clean, clearly marked, fixed or portable containers.

A primary First Aid kits is wall-mounted in the Sanctuary’s Dekko Training Room inside the Wolf Family Resource Center. Additional portable kits and supplies may be available at the Wolf Den Gifts & Things check-out counter, in the Commissary in a wall-mounted box, and in the medicine cabinet in the Office restroom.

**Good Samaritan Act**

Employees who obtain first-aid training to comply with this regulation do so as a collateral duty and not as a primary job assignment. Employees who may render first-aid to another employee in the work place are covered by the Good Samaritan Statute

(a) A person who in good faith administers emergency care, including using an automated external defibrillator, is not liable in civil damages for an act performed during the emergency unless the act is willfully or wantonly negligent.

(b) This section does not apply to care administered:

(1) for or in expectation of remuneration, provided that being legally entitled to receive remuneration for the emergency care rendered shall not determine whether or not the care was administered for or in anticipation of remuneration; or

(2) by a person who was at the scene of the emergency because he or a person he represents as an agent was soliciting business or seeking to perform a service for remuneration.

(e) This section does not apply to a person whose negligent act or omission was a producing cause of the emergency for which care is being administered.

**Blood borne Pathogens**

Employees who are first-aid trained as a collateral job duty are not required to have annual blood borne pathogen training nor are they required to be offered a Hepatitis B immunization.

In the event an employee is exposed to human blood or body fluids during the administration of first-aid or any other activity in the work place, the employee should notify the Executive Director immediately so that they can be referred to the appropriate health clinic for post exposure follow-up. In addition, an incident/injury/illness report, compliant with Occupational Safety and Health Administration (OSHA) guidelines, is to be completed. These records are available and maintained in the office of the Executive Director.

## Training Program

All staff training is administered at ProProfs.com.

# VISITOR POLICIES

## Visitation

The following policies are to ensure the comfort and well-being of animals living at BPAS, and the safety of the public.

1. All public visitations will be escorted by a tour guide, or chaperoned by docents, and monitored by paid staff members and surveillance.
2. BPAS may offer visitation when the following conditions exist:
	1. A proper visitor orientation to all rules and expectations for appropriate behavior around the animals and throughout the visit will be provided to all visitor prior to admission into the sanctuary grounds. Orientations will include an overview of:
		1. Mission and purpose of BPAS.
		2. Differences between BPAS and a “zoo”.
		3. No running, yelling, taunting, teasing, climbing on fences, mimicking animals, or other disruptive or annoying behavior.
		4. No unauthorized entry into safety perimeters or buildings.
		5. No unauthorized feeding of animals permitted.
		6. No physical contact with non-domestic animals.
		7. Other rules and requests as deemed necessary by senior staff.
	2. At least five staff members must be present on site.
	3. At least two staff members must be present to chaperone guest that are not participating in a guided tour program.
	4. At least one adult teacher, parent, or other “guest” chaperon is present for every 10 children present.
3. If visitors are present and carnivores are to be fed, senior staff has discretion to limit or terminate attendance by children under five years of age.
4. All animals will be provided full access to indoor dens/buildings to ensure undisturbed privacy and quiet if desired.
5. Lead keeper (paid) staff supervised, free contact with non-domestic animals is allowed only under two conditions:
	1. To carry out an approved enrichment activity. In this case, activity and handler must be authorized to carry out the activity by a paid lead keeper after having been properly trained. Training must be documented in the handler’s personnel file. Only animals that are not clearly resting/hidden, shedding, digesting, or otherwise potentially stressed or disrupted by a brief handling session may be selected for an approved enrichment activity.
	2. For the purpose of veterinary care under the conditions approved by documented “free contact” safety protocol(s).
6. Visitors are not allowed to handle or engage with any non-domestic animal.
7. Visitors will be advised of mandatory hand-washing requirements, post-contact with any domesticated animal(s), for disease control.
8. Animals shall not be transported, exhibited, or otherwise used for any commercial or research purposes.

## Education and Outreach

BPAS educational efforts are approved by the Executive Director and are carried out with the support of a volunteer Education Coordinator with assistance from student interns and volunteers.

Educational programs will not violate any established safety protocols, visitor policies, animal-related policies, or other established guidelines.

See all visitor program options described at <https://www.bpvisit.org>.

BPAS maintains educational signage for reference by both visitors and staff regarding animal species in residence, including some personal animal biographical information.

Guided tours include oral presentations that will include exotic pet trade history, statistics, and other related information.

General visitation is chaperoned by docents and paid staff members at all times.

No fewer than five staff members will be on site any time the sanctuary is open to the public.

Other educational programs are designed to meet specific requests from area scout and other youth organizations, teachers, college faculty, etc.

# FUNDRAISING POLICIES

## Charitable Gifts to Others

Black Pine is a 501c3 charity so the number and types of charitable gifts we can give to others is limited each year.

Requests for donations may be made online at [www.bpsanctuary.org/contact-us](http://www.bpsanctuary.org/contact-us), or in writing on letterhead from the beneficiary of the gift, mailed to:

Charitable Requests

PARC, Inc.

P.O. Box 02

Albion, IN 46701

Requests that meet the following criteria will be considered in the order received until or unless budgeted allowances for the year are met:

* Beneficiary(s) must be a 501c3 charitable organization; benefits for individuals will typically not be considered except by request of a Black Pine staff member or donor.
* Beneficiary(s) must live, work, and/or reside in northeastern Indiana, or have an obvious connection to Black Pine’s mission, or have an established relationship of support of Black Pine

Requestor is responsible for picking up any gifts that cannot easily be mailed.

Gifts may include:

* Single admission passes (prize request, door prize, etc.)
* Family admission passes (silent auction, grand prize, etc.)
* Merchandise/pass basket

Individuals asking for items for benefits may be interested in purchasing a gift card to give as their own gift for charitable fund raising efforts.

All gifts should include Black Pine brochures and a notation of total retail value. We do not require donation receipts because we do not pay any income taxes.

*Adopted by the Board of Directors on July 19, 2018*

## Approved Activities

Fundraising activities approved by the BPAS Fundraising Committee are allowed, provided:

1. The activity does not violate Visitor Policy regarding animal contact with the public.
2. The activities are not deemed to be distressing or in any way negatively disruptive to the animals and their normal routine by the senior keeper.
3. Normal routines are not designed specifically for fundraising purposes.
4. Animals are not housed in enclosures or habitats designed to minimize their privacy; animals have the ability to seek undisturbed privacy and quiet.
5. Animals are not being used for entertainment purposes.
6. Presentations are done in a ‘captive audience’ setting, not a ‘free for all’, or other potentially uncontrolled environment in which accomplishing the educational mission is difficult or impossible.

## Donor Bill of Rights

Professional Animal Retirement Center (PARC) Inc., doing business as Black Pine Animal Sanctuary, declares that, as a donor in support of this organization, you are entitled:

* To be informed of our mission and the ways in which we intend to use donated resources, as well as our capacity to use donations effectively for their intended purposes.
* To be assured that information about you and any donations are handled with respect and with confidentiality to the extent provided by law.
* To be informed of the identity of those serving on our governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
* To expect that all relationships with individuals representing us will be professional in nature.
* To have access to our most recent financial statements.
* To be informed whether those seeking donations are volunteers, employees, or others authorized to do so on our behalf.
* To be assured your gifts will be used for the purposes for which they were given.
* To have the opportunity for your name to be deleted from our mailing list and/or email distribution list.
* To receive appropriate acknowledgement and recognition for your gifts.
* To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

*Adopted by Board of Directors on July 19, 2018.***Fundraising Platforms**

### Your Cause LLC

An employee giving platform (AT&T, Unilever)

<https://nonprofit.yourcause.com/login>

<https://www.fisintegratedpayables.com/payments/login.aspx>

**PayPal Giving Fund**

A “no fees” service that allows the public to give through:

* Direct donations made on Paypal.com and/or PayPal’s “donate now” button
* eBay for Charity – where Black Pine can sell, or any other can sell & contribute $$ or %
* Humble Bundle – digital books and games offering buyers opportunity to donate
* GoFundMe – crowdfunding platform

<https://www.paypal.com/givingfund/about> (logs on through PayPal account)

### Facebook Donations

From the Black Pine Facebook page, fundraisers can be launched. Additionally, any Facebook user can launch their own fundraiser for the organization. Access reports through the Page Settings, Donations ♡ link.

<https://www.facebook.com/blackpineanimalsanctuary/settings/?tab=donations>

### JustGiving.org (formerly JustGive.org)

Online giving platform that collects fees for donations made. Fundraising can be promoted from the organization’s profile page. The public can launch fundraisers using the platform. Crowdfunding can be managed here. (Not actively promoting this platform due to the higher fees that apply. This platform went through a transition to an international company and their customer service was terrible. Dropped in favor of raising money using the Forms module on Little Green Light = less fees, better control.)

<https://www.justgiving.com/charities/home>

### Little Green Light Forms Module

This is an online platform included with Little Green Light Donor Software package that we subscribe to for managing donor information. This is the primary donation function embedded on the Black Pine website.

<https://admin.lglforms.com/accounts/yY1AADlVXFo/forms>

### Amazon Smile program

This is a non-profit program that allows shoppers to shop via smile.amazon.com, at no additional cost, and 0.5% of each purchase is donated by Amazon to the shopper’s charity of choice.

[https://org.amazon.com/ref=smi\_ge\_uaas\_org\_org](https://org.amazon.com/ref%3Dsmi_ge_uaas_org_org)

### Benevity

A platform for workplace giving, employer match gifts, volunteering, etc. Gifts are received from donors through the American Endowment Foundation and/or the American Online Giving Foundation. Workplaces that participate include:

* Microsoft
* Roche Diagnostics
* Total Quality Logistics
* Ameriprise Financial
* UnitedHealth Group

<https://causes.benevity.org/user>

### Network for Good

Online fundraising platform for ‘donor-advised’ gifts. (Not actively promoting this platform due to the higher fees that apply. Dropped in favor of raising money using the Forms module on Little Green Light = less fees, better control. Donors can still contribute if/when promoted by other organizations, employers, etc.)

<https://identity.networkforgood.org/login?signin=454c2e3d846d138a021e2b8a10b92b25>

### Thrivent Financial – Thrivent Choice

Platform for Thrivent members (customers) to direct dollars to charities of their choice. Enrollment as a charity is required by recommendation of a member. There doesn’t appear to be a log-in page for the non-profit to update the original application information.

Program info at: <https://www.thrivent.com/making-a-difference/living-generously/thrivent-choice/>

### Indiana State Employees Giving Campaign

### Giving Assistant

An online shopping portal that allows shoppers to earn cash back, which is donated to the charity of their choice, zero fees.

<https://np.givingassistant.org/#/app/login>

### LoveAnimals.org

An online platform for fundraising “campaigns”. We have not yet used this platform, but do have a dashboard to launch if we want to.

<https://www.loveanimals.org/dashboard/overview>

### SupporterWall.com

This is an online ‘virtual’ supporter wall where donors can purchase an image square at different levels and dedicate the square per their wishes, by uploading a custom image, or selecting one of ours. It can be used to dedicate memorials, etc. The actual application is embedded in the Black Pine website.

<https://www.supporterwall.com/login>

### Kroger Community Rewards

Customer loyalty card shopper program that allows shoppers to set up an online profile to enable a portion of all purchases at Kroger stores to be donated to their charity of choice. Promoted on Black Pine’s website and routinely on social media.

Info at: <https://www.kroger.com/topic/community-rewards-2>

### iGive.com

An online shopping portal that allows users to shop and donations are made by the stores to the charity of their choice. Promoted on Black Pine’s website and iGive automatically posts to Black Pine’s Facebook page wall to promote routinely.

<https://www.igive.com/html/login.cfm> (click on “cause” on menu)

# PROGRAM OF VETERINARY CARE

**Veterinary staff:**

Scott Taylor, DVM

Primary and preventive care, minor surgery, euthanasia, routine observations

Kendallville Animal Clinic

Ryan Rothenbuhler, DVM, MS, Diplomat ACVS

Primary radiologist, large animal surgeries

Patricia Funnell, DVM

Avian / exotic animal services
Pine Valley Veterinary Hospital

Jordan Hartleroad (paid staff) Vet Assistant

Lead Keeper & BPAS veterinary program administrator

Kelsi Nicholson, (paid staff) Vet Assistant

Lead Keeper

Linda Staats (volunteer) – Vet Tech

Former BPAS paid staff; retired (volunteer)

Kelly Blood (volunteer) – RVT

Kendallville Animal Clinic

**Current member of the Healthcare Committee may also be authorized to serve as emergency responders.**

## Preventive Care Program

Preventive medicine is the most important component of the health program for an exotic animal collection. One purpose is to provide early detection for disease or other

health problems before they become severe or widespread within a collection. Measures

implemented also reduce the severity of disease or even prevent disease altogether.

The following measures are meant to be used as a guideline only. Under certain

circumstances, the following measures may be done more or less frequently at the

discretion of the veterinarian. Also at the veterinarian's discretion, fewer or additional

measures may be performed.

For all animals, forms of identification (e.g. leg bands, tattoos, transponders, etc.) should

be confirmed any time the animal is restrained for other purposes. When possible,

serum should be banked any time venipuncture is performed on any animal.

1. Reptiles
	1. Sauria (Lizards, *Bearded Dragon, Green iguana)*
		* Twice a year: O/P
		* Annual: PE, Wt, Cryptosporidium testing
		* WA/AN: CBC, Chem, fecal culture, rads.
	2. Serpentes (Snakes, *Ball Python, Burmese Python, Honduran Milk Snake)*
		* Twice a year: O/P
		* Annual: PE, Wt, Cryptosporidium testing
		* WA/AN: CBC, Chem, fecal culture. Paramyxovirus ser (Viperidae), rads.
	3. Chelonia (Turtles, Tortoises, *Red-footed Tortoise, Sulcata Tortoise)*
		* Twice a year: O/P
		* Annual: PE, Wt.
		* WA/AN: CBC, Chem, Mycoplasma ser, fecal culture, rads.
	4. Crocodylia (Alligators, Crocodiles, *North American Alligator)*
		* Twice a year: O/P
		* Annual: VE.
		* WA/AN: PE, Wt, CBC, Chem, serum Pb, Serum Zn, Mycoplasma ser., rads.
2. Birds
	1. Struthioniformes *(Emu, Rheas*)
		* Twice a year: O/P
		* Annual: VE, fecal Chl DNA.
		* WA/AN: Wt, PE, CBC, Chem, fecal culture, E & W Encephalitis vacc., rads.
	2. Psittaciformes *(Parrots, Cockatoos)*
		* Twice a year: O/P, Wt.
		* Annual: PE, fecal Chl DNA.
		* WA/AN: Fecal culture, CBC, Chem, Chl ser, PBFD ser, PsHV ser, Polyomarvirus ser. rads.
3. Mammals
	1. Artiodactyla
		* Suidae *(Pot-belly Pig)*
			1. Twice a year: O/P
			2. Annual: VE, Wt, parvo Vacc, rabies vacc (killed), erysopelothrix vacc., Ivomec, UltraBoss
			3. WA/AN: PE, CBC, Chem, fecal culture, leptospirosis vacc, brucellosis ser. lepto ser. pseudorabies ser. EMC ser., rads.
	2. Carnivora
		* Felidae *(African & Asian Leopards, African Lion, Bengal Tigers, Bobcats, Cougars)*
			1. Twice a year: O/P.
			2. Annual: PE, dental exam, dental cleaning, fecal culture, CBC, Chem, HW Ag, FeLV, FIV, FcoV
			3. Every 3 years: rabies (killed), FVRCP vacc, PUREVAX distemper vacc.
			4. WA/AN: Wt, Toxoplasma ser, lepto ser, thyroid testing, rads.
		* Procyonidae *(Coati, Kinkajous)*
			1. Twice a year: O/P.
			2. Annual: PE, dental exam, dental cleaning, Wt, fecal culture, CBC, Chem,, HW Ag
			3. Every 3 years: rabies (killed), FVRCP vacc, PUREV AX distemper vacc.
			4. WA/AN: Toxoplasma ser, lepto ser, thyroid testing, rads.
		* Ursidae *(North American Black Bear)*
			1. Monthly: HW preventative
			2. Twice a year: O/P.
			3. Annual: PE, dental exam, dental cleaning, fecal culture, CBC, Chem, HW Ag
			4. Every 3 years: rabies (killed), FVRCP vacc, PUREV AX distemper vacc.
			5. WA/AN: Wt, Toxoplasma ser, lepto ser, thyroid testing, rads.
	3. Perissodactyla
		* Equidae *(Miniature Horse, Donkey)*
			1. Twice a year: O/P, Johne's Culture, Flu Rhino vacc.
			2. Annual: Wt, VE, fecal culture, tetanus toxoid vacc, rabies vacc (killed), E & W encephalitis vacc, West Nile Vacc., Patomic vacc., Ivomec, UltraBoss
			3. WA/AN :PE, farrier exam, Coggins, CBC, Chem, WNV ser ~ EPM vacc, rhinopneumonitis vacc., rads.
	4. Primates
		* Callitrichidae *(Cotton-top Tamarin)* ·
			1. Twice a year: O/P
			2. Annual: PE, dental exam, dental cleaning, Wt, comp culture, CBC, Chem, TB test, rabies vacc. (killed).
			3. Every 3 years: virus panel C, serum Vit 0 3, WNV ser, UA, lipid panel, thyroid testing.
			4. Every IO years: tetanus toxoid vacc.
			5. WA/AN: Wt., rads.
		* Cercopithecidae *(Hamadryas Baboon, Lion-Tailed Macaque, Rhesus Macaque, Java Macaque)*
			1. Twice a year: O/P
			2. Annual: PE, dental exam, dental cleaning, Wt, comp culture, CBC, Chem. TB test, rabies vacc. (killed).
			3. Every 3 years: , virus panel For G, virus panel H, WNV ser, UA, lipid panel, thyroid testing.
			4. Every 10 years: tetanus toxoid vacc.
			5. WA/AN:Wt., rads.
		* Galagidae *(Greater Bush Baby)*
			1. Twice a year: O/P
			2. Annual: PE, dental exam, dental cleaning, Wt, comp culture, CBC, Chem, TB test, rabies vacc. (killed).
			3. Every 3 years: virus panel C, serum Vit 03, WNV ser, U A, lipid panel, thyroid testing.
			4. Every 10 years: tetanus toxoid vacc.
			5. WA/AN: Wt., rads.
		* Rodentia (Patagonia cavy)
			1. Twice a year: O/P
			2. Annual: PE, dental exam, Wt.
			3. WA/AN: CBC, Chem, rads.

***Abbreviations / References:***

Aspergillus panel = Aspergillus antigen test, Aspergillus antibody test, protein electrophoresis

BVD =bovine viral diarrhea

CBC =complete blood count

Chem =serum biochemical analysis

Chl = Chlamydophila

comp cultme = fecal culture including Salmonella, Campylobaeter, Yersinia, Vibrio, and Shigella.

DA2PPC = distemper, infectious hepatitis (adenovirus), parainfluenza, parvovirus, coronavirus.

EHD = Epizootic Hemorrhagic Disease

EMC = encephalomyocarditis virus

EPM =equine protozoal myelitis

FCo V =feline coronavirus

fecal culture = fecal pathogen culture (includes Salmonella & Campylobacter)

FeLV = feline leukemia virus

FIV = feline immunodeficiency virus

FVRCP = feline viral rhinotracheitis (berpesvirus), calicivirus, panleukopenia virus

HW Ag beartworm antigen ELISA

HW prev heartworm preventative

lcpto=leptospirosis

O/P =ova & parasite check (direct & float)

Opt =optional testing

PE = physical exam

PsHV = psittacine herpes virus

rads= Radiographs

Req = required testing

ser =serology (detects antibodies)

TB = tuberculosis

vacc = vaccination

VE =visual exam

virus panel C =Herpes tamarinus, Herpes saimiri, measles, squirrel monkey or Cebus monkey

cytomegalovirus.

virus panel D =influenza A & B, parainfluenza 1, 2, &3, measles, respiratory syncytial virus.

virus panel E =herpes simplex l , herpes simplex 2, SA8, EbsteinBarr virus, human varicella zoster

virus, chimp cytomegalovirus.

virus panel F =herpes simplex 1, herpes simplex 2, SA8, EbsteinBarr virus, simian varicella zoster

virus, SA6.

virus panel G =herpes simplex 1, herpes simplex 2, B-virus, Ebstein-Barr virus, simian varicella

zoster virus, Rhesus cytomegalovirus.

virus panel H =simian retrovirus, simian immunodeficiency virus, simian T -cell leukemia virus,

foamyvirus.

Wt = body weight

WA/AN =when available or as needed

*WN'V* =West Nile virus

*Created 10/16/10. Revised 9/21/18. Approved by healthcare committee December 4, 2018.*

## Animal Acquisition

No animals will be actively sought out unless deemed necessary for the well-being of existing animal residents and as recommended by a majority vote of the Healthcare Committee. In such event, no money will be exchanged between any parties. The purpose of any such transaction will be solely to facilitate proper care and/or socialization of a particular species.

All reasonable efforts will be taken to spay, neuter, or otherwise control the reproduction of animals when housing multiples and/or with the opposite sex.

All requests for adoption of animals will be reviewed by the Healthcare Committee. The Committee has been authorized by the Board of Directors to adopt or decline, at their discretion and with Board approval, unless expenses exceeding $1,000 would be incurred to accommodate adoption of the animal. The Executive Director will be included in any adoption decisions that meet that criteria.

Those requesting the adoption of an animal will be required to provide pertinent information regarding the animal. Responses will be used, in conjunction with fiscal considerations, by the Committee and/or Board of Directors, to determine whether or not an adoption will be approved. Considerations will include:

* Species
* Age
* Origin (captive bred, wild caught, etc.)
* Sex
* Fertility
* Veterinary records
* Permits
* Current accommodations
* Diet
* Behavior
* History
* Likeliness of monetary support for ongoing care
* Cost estimates of ongoing care

**Animal Disposition Policy**

It is the intention of PARC Inc. to provide lifetime care for all animal residents.

* No animals will be adopted, sold, or otherwise removed from the sanctuary, except for transfer to another sanctuary.
* No animals will be transferred/adopted to a sanctuary that lacks the appropriate expertise or resources to care for them appropriately.
* Movement of animals to another sanctuary will not compromise the welfare of that individual, or others with which they are housed.
* No animals will be disposed of at auctions, transferred under any circumstances to breeders, dealers, brokers, “kill buyers”, or slaughterhouses.

**Euthanasia Policy**

Only upon recommendation of the Healthcare Committee, with approval by the Board of Directors, and under the supervision of a licensed veterinarian, will an animal be humanely euthanized.

Only in extreme circumstances of animal suffering when a veterinarian is unable to respond in a timely manner will methods such as the use of a firearm to euthanize an animal be considered. In such circumstances, euthanasia shall be performed by a trained and qualified staff member only.

Examples of cases when euthanasia may be approved:

1. Incurable disease/injury that is likely to cause unmanageable pain or suffering.
2. Disease/injury where treatment is likely to cause unreasonable pain or suffering.
3. Disease/injury where treatment will not be effective in restoring the animal to an acceptable quality of life.
4. Disease/injury where treatment could cause excessive burden on resources without significant extension of quality of life.
5. Where the process of aging has resulted in an unacceptable quality of life.
6. In the event of presenting an infectious disease risk to some or all of the residents.

Administration of euthanasia will be by or under the supervision of a licensed veterinarian, ideally one with an established relationship with the sanctuary.

The person authorized or appointed by the veterinarian will be knowledgeable and skilled in performing euthanasia in a compassionate and professional manner. Euthanasia will be performed in a manner that avoids stress to the animal(s).

**Disposal Policy**

The Healthcare Committee has ultimate authority and responsibility for all aspects of disposal of deceased animals. The Healthcare Committee will consider options regarding the disposal of a deceased animal on a case by case basis. When possible and practical, carcasses will be buried in the on-site memorial cemetery. Alternatively, carcasses may be buried in a secondary designated site, or disposed of by the attending veterinarian at his/her discretion using professional services.

In the event of death:

1. A member of the Healthcare Committee will record details of the animal’s death, such as cause of death, date of death, and disposition. This and other pertinent healthcare records will be archived in a “fossil” file.
2. All staff will conduct themselves in a respectful manner at all times during disposal activities.
3. Disposal of the deceased animal shall meet the requirements of all acceptable practices along with applicable local, state, federal, and international regulations and laws.
4. The species and ecosystems shall be carefully considered during disposition activities.

*Revised and adopted by healthcare committee on December 4, 2018.*

## Quarantine Protocol

Quarantine for all species will be conducted under the supervision of a veterinarian. Standard minimum quarantine period will consist of thirty days (unless otherwise directed by the veterinarian). If, during the 30-day quarantine period, additional animals are introduced into a designated quarantine area, the 30-day period must begin again.

**Quarantine Personnel**

Ideally, a keeper should be designated to care only for quarantined animals whenever possible. If staffing levels will not permit this, a keeper should attend to quarantined animals only after fulfilling responsibilities for other residents.

**Equipment**

All equipment used to feed and clean animals in quarantine should be used only with those animals. If this is not possible, then equipment will be cleaned with an appropriate disinfectant (as designated by the veterinarian supervising quarantine) before use with post-quarantine animals.

All precautions will be taken to minimize the risk of exposure of animal handling personnel to zoonotic diseases which may be present in newly-acquired animals. These precautions may include, as prescribed by the veterinarian, use of disinfectant footbaths, the wearing of appropriate protective clothing and masks (in some cases), and minimizing physical exposure/contact.

**Tests**

During the quarantine period, fecal samples will be collected on at least two occasions, and examined for gastrointestinal parasites. Examinations may be completed internally by properly trained veterinary staff, or by the attending veterinarian.

Treatment should be prescribed by the attending veterinarian.

**Release from Quarantine**

Ideally, release from quarantine should be dependent on obtaining two negative fecal results at a minimum interval of two weeks, either initially or after parasiticide treatment. In addition, all animals should be evaluated for ectoparasites and should receive appropriate treatment, if necessary.

Vaccinations, as ordered by the attending veterinarian, should be updated as deemed appropriate for each species. If an animal arrives without a vaccination history, it should be treated as being immunologically naive and should be given an appropriate series of vaccinations.

Whenever possible, blood should be collected for disease and wellness evaluation. Additional orders, as prescribed by the attending veterinarian, may also be advised.

Whenever animals are restrained or immobilized, a complete physical examination, including dental examination, will be performed. Complete medical records of all animals should be kept, and should be available for consultation during the quarantine period.

If any animal dies during quarantine of unknown causes, a necropsy should be performed under the supervision of the veterinarian, and tissues should be submitted for histopathological examination to uncover any risks to personnel or other animals in population.

**Considerations**

The Association of Zoos and Aquariums (AZA) offers the following recommendations for additional consideration by the attending veterinarian:

**Primates**

* A minimum of two negative tuberculin tests using a tuberculin containing at least 1,500 units/ml or other appropriate regimen as necessary for the species in question
* A complete blood count (CBC) and serum chemistry profile
* In appropriate species, serology should be performed for Herpesvirus simiae (herpesvirus B) and other appropriate viruses.
* Feces should be cultured for Salmonella, Shigella and Campylobacter.
* Chest radiographs and urinalysis are strongly recommended.

**Small mammals and carnivores**

* Whenever possible, blood should be collected from small mammals and carnivores for CBC, serum chemistry profile and appropriate serology (feline infectious peritonitis, FIV, feline leukaemia virus)
* Urinalysis and testing for heartworm should also be conducted in appropriate species.

**Parrots**

* Serological and fecal tests for Chlamydia
* CBC, serum chemistry profiles, fecal cultures for Salmonella spp., and faecal Gram staining

**Reptiles**

* Examination by a veterinarian

**Other**

* CBCs and serum chemistry profiles are strongly recommended
* Paramyxovirus titration should be performed on appropriate species

*Reviewed and approved by Scott Taylor, DVM in 2018.*

## Relocation of Animals

BPAS will only allow an animal to be relocated temporarily, or permanently, to another location if:

1. The animal’s health needs cannot be adequately addressed at the facility.
2. Another facility is better equipped to provide veterinary care, or meet long-term “special” needs the animal has.
3. BPAS is insolvent or facing closure.
4. The animal’s well-being or quality of life has diminished to the point that, upon the recommendations of the Healthcare Committee, the animal is recommended for humane euthanasia.
5. The animal has died.

## Research

BPAS does not allow any research involving animals that might interfere with daily husbandry activities, or inhibit animal routines. Behavioral observation may be conducted if deemed appropriate and non-intrusive by the Healthcare Committee. Additional recommendations for research may be approved by the Committee if such research is determined to benefit the animal(s) in residence.

## Breeding

BPAS operates under a strict “no breeding” policy. Propagation will be prevented by use of standard preventive measures as recommended by a licensed veterinarian and approved by the Healthcare Committee. Staff will be trained to locate and remove all eggs laid by egg-laying species on a routine basis, and to dispose of them in an environmentally appropriate manner. No animal by-products are intended, or provided. for human consumption.

In the case of large egg-laying birds (ostrich, rhea, etc.), unfertilized eggs may be collected, cleaned, blown out, and the shells used for educational and/or fundraising purposes only.

## Handling of Animals

BPAS maintains a training program known as “BEAR” Training. These trainings are conducted by the most experienced members of the staff for newer, less experienced staff, as part of the mandatory training process. Trainers may be any caregivers who have been authorized as a level 3-6 keeper by the Executive Director based on their own personal hours of service and proven work history.

“BEAR” is an acronym used for the following topics, covered in training:

B = Behaviors; this portion of training provides an overview of both species-specific and individual residents’ behaviors, and is designed to inform staff of typical behavioral responses, warning signs, lack of warning signs, etc. Additionally, detailed personal histories as to declaws, defangings, and/or totally “intact” characteristics are reviewed. The purpose of this portion of training is to illustrate what “is” or “is not” appropriate in terms of protected or unprotected contact with animals residing at the Sanctuary.

E = Educational message; this portion of training is intended to provide staff members with information related to each species regarding the exotic pet trade, conservation status, myths, and truths to further advance the Sanctuary’s mission to educate people about responsible pet ownership and to encourage conservation of species and their native habitats.

A = Appropriate Interaction; this portion of training reviews the “level” of risk assigned to the species or individual, why, what kind (if any) of contact is allowed – free or protected – under what circumstances, and the appropriate safety precautions to take. Under this portion of training staff can apply info about behaviors to how that relates to being safe. Reviews of use of harnesses, leads, etc., are also covered in this portion where applicable.

R = Recovery/Restraint; this portion of training reviews the protocols that will apply in the event an animal requires restraint for handling, veterinary care, or has become uncontrolled. In addition, clarification is made to indicate which animals in residence fall under the “Dangerous Animal Emergency Escape Protocol” and which may be recovered or restrained by non-emergency response team personnel. Recommendations are provided for recovery.

## Pest Control Practices

### *Flying insects*

Captivator (plastic, jar-type) fly traps and sticky fly strips may be used throughout the compound and serviced routinely during warmer months upon notice of common household flies, fruit flies, and other flies becoming prevalent. Additionally, standing water on the compound may be treated using Summit Mosquito Dunks to prevent the development of adult mosquitoes on the compound at the discretion of Lead Keepers and/or Facilities Manager.

Any receptacles used throughout the compound will be managed to prevent stagnant standing water from forming. This may include turning buckets, wheelbarrows, and other items upside down to prevent gathering of rainwater.

Inside animal containment buildings, Country Vet metered Fly Spray devices may be mounted on walls and refilled routinely, year-round, for the prevention of flying insects and related diseases. Sprayers will be checked routinely as part of the prescribed “housekeeping” tasks supervised by Lead Keepers.

Fly traps will be ‘baited’ using a small amount (1-2 oz.) of raw meat placed in the container, then filled about half-way with tap water (or using commercial bait that may accompany a trap). Fly traps will be placed outside of animal living spaces, out of reach/contact with animals, away from guest areas, in a strategic way to help prevent fly bites to animals and other infestations, at Lead Keeper discretion. Traps will be changed out no less than once each week during summer, and more frequently if filled to the point of no longer being effective, and/or if associated odors are significant.

Locations of Fly Traps:

Field Barn (#5)

Fallow Deer Habitat

North Tigers (#8)

Bear Barn (#7)

Holding Barn (#1)

Wolf Habitat

Fox Habitat

Small Cat Habitat, near Dens B & C

Den E Habitat

Den H Habitat

Den G Habitats

Compost / Butchering Area, behind #3

Locations of Fly Sprayers:

Commissary/Office (#3) X3

Aviary (#9)

Primate House (#4) X2

Reptile House (#6)

Veterinary Clinic (#1)

### *Rodents*

Protecta brand (or similar) bait stations and Contract Blox brand (or similar) rodenticide may be used, as well as d-Con (or similar) disposable mouse bait stations for the eradication of rodents on the compound. Stations will be monitored as part of the prescribed “housekeeping” tasks supervised by Lead Keepers on a routine basis. Storage of bait will be managed in a prescribed area to ensure no access by resident animals. Stations will be placed outside the reach of resident animals and guests.

Locations of Rodent Bait Stations:

Primate House X3

Den K

Den E

Reptile House (#6)

Den A

Field Shelter (#5)

Den F

Den G

North Tiger House (#8)

Vet Clinic (#1)

Holding Barn (#1)

Butchering Area (#3)

Walk in Food Storage Unit

Maintenance Building (#2)

Bear Barn (#7)

Aviary Building (#9)

# ANIMAL TRANSPORTS

The purpose of this plan is to give consideration to the welfare and wellbeing of animals to be transported, the safety of personnel involved, and the timeliness of the process.

**Pre-Transport Considerations**

1. **Who is going to lead the team?** There will probably be lots of opinions and ideas for how best to pull off a transport, and everyone involved should work together in advance if possible to figure out a rough outline of plans. It is helpful for one team ‘leader’ or ‘co-leaders’ to be identified to guide the way in the event any of the plan turns out not to be going well. Typically, those most familiar with the animal’s typical behaviors and responses are invaluable in the planning process, as they can best predict what may, or may not, prove to be obstacles to success. Some animals have enjoyed socializing with lots of people, others with only a handful of people, which may affect their responses along the way. Some may be acutely affected by the sounds of heavy equipment, while others may be used to it. Some may be more food motivated than others. All of those factors should be discussed if possible and drive the transport plan.
2. **Dress appropriately.** Animals can be sensitive to bright colors, strong or artificial scents, bright and shiny objects, etc. As a precaution, dress appropriately. Drab colored clothing is best. No dangling earrings, belts, chains, or loose clothing should be worn. Avoid perfumes, colognes, and heavily scented products. Wear appropriate footwear and consider the possibilities of encountering mud, standing water, ice, snow, and other potential obstacles.
3. **Are there veterinary considerations?** Will the animal being transported benefit from blood tests, vaccinations, etc.? If so, consider coordinating with the attending veterinarian ahead of time to determine if a squeeze cage should be used, if chemical immobilization makes the most sense for immediate assessment, etc. Avoid the prospect of transporting an animal for relocation, only to have to load that animal back into a transport for veterinary purposes very soon after, if possible.
4. **Will the animal be hungry?** Consider the motivation that most animals find in food! If it will not harm the animal involved, consider reducing or eliminating the meal or meals just prior to the scheduled move. For example, big cats and other carnivores in particular will probably be more motivated to leave their known ‘safe place’ if they are hungry and food is made available to ‘bait’ them into a transport cage. Primates may have special favorite treats or toys that provide comfort. In those cases, fasting the animal for the day prior to transport is reasonable and within USDA regulations for fasting. On the day of transport, have one or two familiar faces assess the animal’s behavior just before beginning the actual transport. If necessary, have them provide enough of a ‘treat’ to take the edge off, but don’t satiate the animal’s appetite completely. The goal is for the animal to be excited at the prospect of food, not overly aggressive in the presence of food, and not satiated to the point of being inactive.
5. **Can equipment be made less ‘scary’?** A flurry of noise from skidloaders, trucks, rolling cages, etc. - if not part of the animal’s daily routine – will quickly alert the animal that “something is up”. It is best to plan a day or two in advance to stage any transport cage or cages as close to where it will be ultimately used as possible, even secured up against a chute door, and if possible, allowing access to the animal for hours in advance. The more time the animal has, alone, to become acquainted with the sights and sounds of the equipment, the less afraid and stressed they will likely be. For animals that have not been transported or traveled before, this may be critical to success in facilitating a ‘voluntary’ animal transport without negative reinforcement or chemical immobilization.
6. **How many and who are ‘essential’ personnel?** It should be a goal to avoid putting the animal into a ‘fight or flight mode’, and allowing too many people to witness the first stages of transport is one of the quickest triggers during a transport. Even a constant, yet unusual stream of people lurking in the general area of the animal’s safe place can begin to arouse suspicion, making success less likely without use of negative reinforcement or drugs. Create an atmosphere of understanding before the transport is to take place that will ensure only the most essential personnel are allowed access near or at the animal’s safe place before attempting to load up the animal for transport. If the animal’s primary caregiver is available, they should be allowed the first attempt(s) to lure the animal into a transport cage. While one or two others may be needed to help maneuver transport equipment into place, this can be done in advance and use of tension straps and other security measures may help enable just one or two familiar caregivers the opportunity to encourage a quiet, non-threatening load-up. If more people must be present limit to 3-4 at most, with others standing by, but out of sight, until the animal is secured in the transport cage. Use of radios will aid in this effort. Once the animal is secured, it is still best to keep the number of other witnesses to a minimum, and definitely at a distance, until the transport is completed. Having a few familiar faces at the other end of the transport may also help ease the animal’s fears.
7. **What might fail?** Give consideration to equipment before beginning to carry out the transport. Consider creating a checklist of things to know before you begin:
	* 1. Will the transport cage fit up against an exit point in the animal’s home?
		2. Will the cage fit through doorways or other passageways?
		3. How will the cage be moved to the ‘end’ site? Truck, trailer, skidloader, manually on wheels?
		4. Are the cages doors, levers, latches, locks all in good working order? Safe?
		5. How does the cage operate? (If someone needs to stand on top of it to operate a door, is there equipment needed to get up there? And down? Safely?
		6. Be prepared to use the best option to quickly block the animal from backing out of the transport cage. Sometimes if the animal is passing through a keeper door, the hinged door can be shut much more quickly than the cage’s sliding door, for example. Having a rope tied to the hinged door with someone ready to pull it shut can be an effective option. Consider all options for fastest – yet effective - method.
		7. Do you have a back-up plan? Tension straps, bungee cords, locks, etc. are good to have on hand to ensure safety!
		8. If something goes wrong and the animal is loose, do you have the proper equipment loaded and ready to react? Darts, drugs, kill gun, etc.
		9. Is the ‘other end’ of the transport properly prepared for immediate receipt? Has water, bedding, food, shelter, etc., all been prepared?
		10. Have instructions been giving at the receiving end of expected behavior? Don’t crowd; be quiet; back off; etc… this is not meant to be a “show”.
8. **Inventory and prepare equipment needed**
	* 1. Plan ahead; make a list of all the items needed whenever transporting a potentially dangerous wild animal.
		2. Stage as much of the equipment as possible in a known location and maintain an inventory list to manage.
		3. Locate (gather) and load up all the necessary equipment.
9. **It’s transport time!**
	* 1. Secure the transport cage against an exit from the animal’s home. Block any gaps!
		2. Ask any non-essential personnel to leave the area.
		3. If other animals are in the building or visible to the animal being transported, shift them (if possible) out of sight, or put up temporary visual barriers. Once one animal becomes upset, they all may become agitated, raising the tension levels quickly!
		4. If possible, limit or prohibit any escape routes for the animal. i.e., if the animal has multiple ‘rooms’, close off access to adjoining areas so if the animal chooses to flee it may only flee into the transport cage.
		5. Place a favorite treat, toy, or other ‘bait’ far inside the transport cage, making sure if the animal pursues it they will be forced to enter all the way into the transport to retrieve it. Animals will almost certainly grab and back out quickly if not forced to move fully into the cage.
		6. Assign someone to closing the door (or otherwise securing the animal inside) once the animal has entered the transport cage. Some cage doors are sliders that can quickly become jammed in the track, thwarting the “shut it quick” effort.
		7. DO NOT get “trigger happy” when operating doors! The animal will certainly be on high alert already; being too quick to begin closing the door – unless doing so is going to physically force the animal into the cage - is not going to improve the likelihood of success on subsequent attempts. Often, if the door hits an animal’s back to soon, they will quickly retreat and then have no interest in trying to enter the cage again – sometimes for hours if not days! Patience is very important!
		8. If at first you don’t succeed, try, try again. Avoid ‘insanity’, if the bait being offered doesn’t work, if the animal is clearly agitated at someone in particular, if the animal is avoiding movement altogether, change the plan. Change roles, back off and give the animal time to regroup, try different forms of bait, do whatever is necessary to allow the animal to gain back its confidence in its safe place. Typically, changing nothing will not create a different behavior! Changing nothing will more likely make for a very long, ultimately unsuccessful event.
		9. More extreme measures may be necessary. With carnivores, harmless yet negative motivation can work, such as spraying a cat’s butt with cold water; a slight poke in the butt to a bear; a loud annoying noise (water on metal siding, banging pots and pans, etc., behind an animal; these are all negative reinforcement methods that may help motivate an animal to lunge forward and into the transport cage – away from what is bothering them. Be careful, the animal may turn backwards, too! Don’t be abusive; don’t allow negative reinforcement to continue if it’s not working rather quickly.
		10. Chemical immobilization is always the last option if no veterinary procedures are called for. If an animal has been given lots of patient attention and will still not move, and time will not allow rescheduling the move to another day, then chemical immobilization with veterinary guidance may be necessary. Use of a pole syringe is always the most likely to succeed, followed by blowpipes and darts, and in extreme cases where the animal is in a very large, open environment, projectors and darts may be used. Safe-Capture International offers an excellent 16-hour, two-day training course on chemical immobilization that also features tips on use of other forms of capture equipment and typical animal behavior considerations.
		11. Once the animal is secured in the transport cage, proceed calmly and quickly to the unloading. Check to ensure the receiving location is ready to receive the animal. Go about unloading as quickly, yet safely, as possible. Allow experienced animal caregivers to judge the level of stress to the animal from witnesses, and respect instructions that may follow to ensure the animal’s best interests are met. Some animals may be confidently curious and uninterested in people watching. Others may be terrified of their new surroundings, sights, and sounds, other nearby animals, etc. If clearly distressed, it is best for everyone to vacate the area and allow the animal time to adjust. This may take days or even weeks, with only essential personnel providing daily care and building new relationships.
	1. **Return to “normal” as quickly as possible.** The sooner things can return to ‘normal’ for all the animals involved in a transport, the better. Be sure to go back to the animal’s original home and allow neighboring animals to return to ‘normal’ conditions if locked out or down temporarily. Remove all evidence of the move (equipment, cages, tools, etc.) in a timely manner as animals may associate their presence with continued ‘upset’ of their safe place.

# EMERGENCY RESPONSE

***Current emergency preparedness documents maintained in the “911 Emergency” binder, including disaster plans, evacuation plan(s), and dangerous animal escape protocol.***

## Evacuation Plan

This plan is designed to provide instruction to employees, volunteers, and guests for their protection in the event of a disaster/emergency while on these premises, including:

* Tornado
* Fire
* Train Derailment
* Sudden Power Outage

*A separate plan has been written and adopted and should be followed in the event of a dangerous animal escape. Consult the Staff Training Manual for the latest safety protocols and instructions related to animal care.*

### Tornado

**Pre-Storm Preparations**

1. **At the beginning of storm season,**

* Stage all pet taxis and small animal cages/crates with larger transport cages in transport trailer.
* Stage capture net(s), keeper safety gloves, harnesses, leashes, and any other capture supplies inside transport trailer.
* Inventory and prep all emergency response drugs, darts, projectors, and other supplies to be ready for use. Stage in Director’s office / safe.
* Check and refill inventory of gas, bar oil, for chain saws, generator, etc.
* Check and replenish batteries and flashlights.
* Dump, clean and refill 5-gallon water bottles stored in reptile house (fresh supply)

2. **In the event of imminent storms,** the town of Albion’s emergency sirens will be audible at the sanctuary site. In the event of inclement weather, staff on duty will be responsible for monitoring weather alerts via a weather radio maintained and plugged in inside the office/commissary, cell phones subscribed to NIXLE emergency alerts, and/or on computers located in the commissary/office building. With tornado watches (or warnings) issued in the immediate area, the following steps should be taken in preparation for possible animal capture response.

* Take down and lay flat any outdoor folding chairs, patio umbrellas, or other possible ‘projectiles’
* Move all large portable transport cages out of storage to a cleared area such as staff parking, visitor parking, or elsewhere away from buildings.
* Move all small animals in cages into empty area within south primates welded heavy metal habitat; senior staff may instruct additional animal containment measures as warranted.
* Crack open building windows and garage doors slightly.
* Secure dangerous animals – all level 4-5 animals should be locked inside den buildings.
* Secure all additional containment – barrier fence rows, compound entry gates.
* Ensure grazing animals have access to flee their shelter areas; release from quarantine stalls and other indoors spaces.

### Sheltering

**If tornado warning / siren sounds:**

1. **Turn off propane tanks** – shut-offs on each of two tanks.
2. **Cut electricity** – shut off main electrical panel feeds.
3. **Seek shelter and hunker down until storm has passed.** Senior staff should immediately notify all guests and fellow staff, via two-way radios, portable PA announcements, and/or in-person communications, to take cover immediately. Assistance should be given to people with disabilities to ensure their safe passage to shelter. Shelter is available as follows, and in the order of preference:
* **PRIMARY SAFE SHELTER:** **Back keeper area inside bear den building (below grade).**
* **South end of primate house:** Inside heavy steel welded caging areas.
* **Commissary/Office building:** Seek shelter inside, closing all windows and doors. Enter enclosed spaces first (where there are no windows), including storage and service closets, restrooms, and the butchering area. If forced to be in areas with windows, use desks and counters additional protection by getting under them if possible.
1. **Conduct staff inventory**. Once the “all clear” is evident, a senior paid staff member will attempt to account for all persons and animals by consulting the staff roster of assignments to determine who is on site.
2. **Conduct animal inventory**. If applicable, begin emergency response for dangerous animal escape as warranted.
3. **Determine what/if emergency services are required.** If there is reason to believe someone is missing or injured, call 911 immediately.
4. **Engage Dangerous Animal Escape Protocal** if warranted.

### Fire

In the event of a fire inside a service building smoke detectors should sound. If a fire breaks out, the foremost concern is for the safety of staff and guests. Animal safety is secondary! It is the responsibility of all staff to know where fire extinguishers are located, and to ensure all smoke detectors are in working order at all times.

Fire extinguishers are located in every building and are in close proximity to every den structure. A list of locations and service records is maintained for reference.

Main electric, propane, and water shut-offs are located near the commissary. See the Emergency Preparedness Map for details.

### Train Derailment

In the event of a hazardous spill caused by train derailment on the tracks just south of the sanctuary, Noble County Emergency Management has indicated a mandatory evacuation may be ordered. In the event of such occurrence, little time will be available to do the following to protect animals:

* **Perching Birds –** All birds should be moved inside the Avian Building. Close and lock all windows. Turn off all HVAC operations. Birds may alternatively be evacuated if resources are available and evacuation can be accomplished quickly.
* **Primates** – Lock all primates indoors, inside the primate house. Close ALL shift doors and windows, and latch shut. Turn off all HVAC operations.
* **Bears –** Lock all bears indoors, close all shift doors and windows. Seal up air vents in side walls.
* **North Tigers** – Lock all tigers indoors, close all shift doors.
* **Servals & Reptiles –** Lock all animals indoors and close all windows and shift doors.
* **Other** – Other outbuildings are not air tight enough to be effective; do not waste time attempting to lock other animals indoors.

Refer to the Railway Incident Plan Map and brochure provided by Noble County Emergency Management for additional recommendations.

### Long-term Power Outage

In the event of a loss of power a propane-powered back-up generator will automatically power the Primate House, Avian Building, and Reptile House. A hookup to a portable gas-powered generator may be found inside the well house to provide back-up power to the well pump. Animals may be at risk if outside temperatures are likely to fall below 55°F and power is out for more than 10 hours (beyond what the back-up generator will run). If that occurs, the following steps should be taken:

* Monitor the back-up generator. Follow the instructions provided in the Staff Training Manual.
* Call Noble REMC to report outage at 1-800-933-7362 24 hours a day, seven days a week.
* If power remains out as the end of day approaches, and temps are falling, contact the Noble REMC on the local number at 636-2113 and/or inquire by email at remc@nobleremc.com to request an expected length of outage update. If it cannot be determined that electricity will be restored before temps fall to 55°F, then carry out the following steps:
	+ Consolidate at-risk animals into Primate House, Reptile House and/or Avian Building. Portable non-electric heaters may also be deployed in animal quarantine holding areas in holding barn (spaces are insulated).
	+ Identify a team of at least three emergency response team members and set up a time to meet at the site to deploy supplemental heat and/or transport animals off-site.
	+ Close and seal up all buildings to contain heat.
	+ Add straw to small animal habitats for bedding. Give blankets to primates.
	+ Check and refill inventory of gas for generator(s).
	+ Check and refill inventory of diesel or kerosene for use in portable heaters.
	+ Check and refill inventory of propane tank(s) for use with any portable propane heaters.
	+ Check and replenish batteries and stage flashlights for use as needed.
	+ Check and maintain at least three 5-gallon water bottles for use for drinking water and essential cleaning during outage. An ‘emergency’ supply of water is to be maintained in the catwalk above the alligator indoor house in the Reptile House.

The response team may assess needs and:

* + Capture and transport small animals to single heated building using portable cages, crates, taxis, etc.
	+ Use gas generator(s) and supplement heating equipment to heat spaces.
	+ Continue to replenish fuels as needed.
	+ Determine if more extreme measures are necessary, such as transporting small animals off site to another location (veterinary clinics, homes, or other community locations.)
	+ Hook up gas powered generator to well pump. Instructions are posted inside the well house.

*Updated December 21, 2018.*

## Fire Arms Policy

**Physical Security**

Detailed guidance in relation to access to firearms and security of weapons and munitions is under the jurisdiction of the Facilities Manager.

Firearms are secured in a locked gun safe which is bolted to physical property on site in a locked building, behind a padlocked gate. Only approved staff have access to the key to unlock the gate and building. Only currently authorized AFSs are be able to open the gun safe.

The Facilities Manager will maintain the padlock. The Facilities Manager will authorize the issuance of key copies. In the absence of the Facilities Manager, the Executive Director may also issue key copies.

**Weapons Maintenance**

The Facilities Manager, or an approved proxy, will ensure all weapons are maintained in line with manufacturer’s guidelines.

**Authorized Firearms Staff (AFS)**

A sufficient number of staff, with no less than three persons, will be trained and qualify as AFS for standard operational coverage. Training will be to national firearms training curriculum, and include a formal chemical capture component.

Additional AFSs will be selected by the following process:

* Suitability to undergo firearms training
* Job responsibilities
* Fitness test and medical clearance

It may be necessary to consider recruiting employees with firearms experience for open positions.

**Selection of Authorized Firearms Staff**

Potential AFSs should be assessed against the following key competencies:

* Communication and Planning,
* Restraint and Control,
* Emotional Strength,
* Teamwork and Co-operation,
* Information Assimilation,
* Decision Making under Pressure,
* Alertness,
* Impact and Assertiveness,
* Interpersonal Sensitivity.

**Fitness**

The Facilities Manager should satisfy themselves that AFSs are of an appropriate level of fitness.

* Stability - satisfied that potential and current AFSs have a stable and mature attitude towards the carrying of firearms in stressful situations**.**
* Hearing - Part of the selection procedure for instructors and AFSs should include an audiometric test. Regular testing thereafter will help detect any signs of hearing damage.
* Eyesight - satisfied that staff meet an approved standard of eyesight necessary to become and remain AFSs (whether wearing aids to vision or not).
* First Aid - All AFSs will comply with the First Aid Plan.

# Emergency Dosage Chart

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **ANIMAL FAMILY** | **BODY WEIGHT(LBS)** | **BODY WEIGHT (kg)** |  | **Dart 1 (3cc)** |  | **Dart 2 (3cc)** |
|  |  |
|  | **Ketamine** | **Medetomidine** | **Saline** |  | **Ketamine** | **Med.** | **Saline** |
|  | **200 mg/ml** | **10mg/ml** |  | **200 mg/ml** | **10mg/ml** |
|  |  |  |  |  |  |  |  |  |  |  |
| **CAT** | **100** | **45.4** |  | **0.7** | **0.1** | **2.2** |  |  |  |  |
| **150** | **68.0** |  | **1.0** | **0.2** | **1.8** |  |  |  |  |
| **200** | **90.7** |  | **1.4** | **0.3** | **1.3** |  |  |  |  |
| **250** | **113.4** |  | **1.7** | **0.3** | **1.0** |  |  |  |  |
| **300** | **136.1** |  | **2.0** | **0.4** | **0.6** |  |  |  |  |
| **350** | **158.7** |  | **2.4** | **0.5** | **0.1** |  |  |  |  |
| **400** | **181.4** |  | **2.5** | **0.5** | **0.0** |  | **0.2** | **0.0** | **2.8** |
| **450** | **204.1** |  | **2.4** | **0.6** | **0.0** |  | **0.7** | **0.0** | **2.3** |
| **500** | **226.8** |  | **2.3** | **0.7** | **0.0** |  | **1.1** | **0.0** | **1.9** |
|  |  |  |  |  |  |  |  |  |  |  |
| **BEAR** | **200** | **90.7** |  | **0.7** | **0.4** | **1.9** |  |  |  |  |
| **250** | **113.4** |  | **0.9** | **0.5** | **1.6** |  |  |  |  |
| **300** | **136.1** |  | **1.0** | **0.5** | **1.5** |  |  |  |  |
| **350** | **158.7** |  | **1.2** | **0.6** | **1.2** |  |  |  |  |
| **400** | **181.4** |  | **1.4** | **0.7** | **0.9** |  |  |  |  |
| **450** | **204.1** |  | **1.5** | **0.8** | **0.7** |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **WOLF** | **60** | **27.2** |  | **0.5** | **0.2** | **2.3** |  |  |  |  |
| **75** | **34.0** |  | **0.6** | **0.2** | **2.2** |  |  |  |  |
| **85** | **38.5** |  | **0.7** | **0.3** | **2.0** |  |  |  |  |
| **100** | **45.4** |  | **0.8** | **0.3** | **1.9** |  |  |  |  |

**Dangerous Animal Escape Protocol**

## Definitions

“Dangerous” animal: The following animals or groups of animals, for the purposes of this protocol, are those considered potentially able to inflict serious injury or death in the event of an escape or other free contact encounter:

 **Lions**

 **Tigers**

 **Leopards**

 **Cougars**

 **Bears**

 **Wolves**

Escape: Any instance during which an animal normally contained, controlled, or confined (in a cage, in a corral or pasture, in a kennel, etc.) has become uncontrolled and requires recapture and/or transport to become contained, controlled, or confined again.

Capture: Immobilization achieved by containment through use of physical force, restraints, or portable containment during which the animal is fully alert.

Tranquilization: Immobilization that achieves calmness, but during which the animal can still be aroused by stimulation from pain (can feel pain) or noise (can be startled by environmental conditions).

Sedation: Immobilization that achieves a sleep-like state during which the animal is sleeping, but can be aroused by stimulation from pain or noise.

Anesthesia: Immobilization that achieves a total loss of consciousness (awareness) and sensation (touch, hearing, vision).

Team leader: The most senior, trained and authorized staff member present; the individual who will take charge of the recovery of an escaped animal.

## Objective

The purpose of this protocol is to provide clear instructions for attempting to bring an escaped, potentially dangerous animal under control through capture or chemical immobilization in the event the animal has escaped or is otherwise “uncontrolled”; and to help ensure the safety of patrons, staff, and animals.

## Personnel

Only properly trained personnel are authorized to act as a “team leader” in the event of an uncontrolled dangerous animal incident. Team leaders are authorized to operate capture equipment, administer drugs, and/or provide instruction to others during an emergency escape involving a dangerous animal.

The most experienced/tenured person present at the time of the escape will take charge of recovery of the animal(s). In the event none of the authorized team leaders are present, the most senior working staff member will be responsible for making phone calls to recruit one or more team leaders to the site immediately.

Emergency contact numbers for all team leaders is maintained and posted prominently in the office for reference. Currently, trained personnel include:

 **Mark Thaler**

 **Lori Gagen**

 **Jordan Hartleroad**

 **Kelsey Woosley**

 **Erin Keenan**

 **Kelsi Nicholson**

 **Renee Runkle**

 **Amy Hartzell**

 **Lin Staats
 Dr. Scott Taylor**

Any other personnel present during an emergency escape will stand by and await instruction from the team leader.

## Communications

All staff members will carry, or be in close enough proximity to hear, a working two-way radio at all times while on site. Radios will always be set to audible and responses when addressed will be concise and timely.

Additionally, essential personnel that possess working cell phones will keep their phones on to aid in communication with emergency responders assisting with an emergency. Team leaders will ensure their personal cell phones contain other team leaders’, and local emergency responder contact numbers.

## Safe Zones

* Empty cages or shift stalls inside den buildings
* Keeper areas inside den buildings
* Commissary / office
* Public restrooms
* Field animal shelter building
* Avian building
* Reptile house
* Wolf Resource Center
* Maintenance building
* Well house
* Horticulture shed
* Outside the compound’s perimeter fence (parking lots & driveways)
* Inside vehicles, doors closed, windows up

## Personal Safety Measures

All level 4 and 5 keepers will carry a holstered Counter Assault bear deterrent (pepper) spray canister whenever servicing/shifting dangerous animals, or when otherwise engaging in work that requires unlocking and opening any dangerous animal containment doors.

In the event of an incident that places a human in danger of a dangerous animal attack, they should respond by considering and/or using the following evasive measures:

* Rakes, shovels, tubs, boards or other items may be used as a barrier to encourage the animal to back off, and/or to help relocate and re-secure the animal in a den or den building
* Vacant interior dens should remain unlocked for immediate access for evading uncontrolled animals in a den building
* Locks on main keeper entry doors leading into the interiors of den buildings may be used to lock an unsecured animal outside of the den building, away from keepers that may be vulnerable (using interior locking mechanisms) or to secure an animal outside of its den/habitat but still inside the den building (using exterior locking mechanisms)
* Do not approach the escaped animal if it posing a threat!
* Stand tall and face the animal, moving slowly backward, away from the animal
* Seek a place of shelter as quickly as possible
* If immediate shelter is unavailable and the animal is clearly agitated, wave arms overhead and yell loudly while backing away
* Means of counter-attack: Counter Assault pepper spray, CO2 extinguishers, rakes, shovels, boards, etc. Only level 5 keepers should attempt a counter-attack! Any efforts to stop an attacking animal that involve direct contact should be done away from the animal’s head/face: striking the animal’s “butt” may draw the head away from biting; spraying water from a hose may also distract the animal
* Anyone who finds themselves under attack should lie down in a fetal position and clasp hands tightly to protect neck and head; hand combat measures may include gouging the animal’s eyes or attempting to place hands down throat to “gag” the animal

***ONLY LEVEL 5 STAFF SHOULD EVER CONSIDER OR ATTEMPT TO ENGAGE AN ANIMAL THAT IS ALREADY ATTACKING ANOTHER PERSON!***

## Calling 911

No one is authorized to call 911 unless explicitly instructed by the team leader. If instructed to call 911, the caller will clearly instruct emergency dispatch that any emergency responders should be told to arrive *without* lights or sirens. Lights and sirens could potentially escalate an already dangerous situation.

## Capture Equipment

All capture equipment, including snare poles, pole syringes, guns, nets, dart projectors, and tranquilization drugs will be stored in the office of the Executive Director. Guns and controlled substances will be locked in a gun cabinet.

Drug dosages will be posted inside the controlled substance container, and posted in the office and the veterinary office for reference.

## DURING AN ESCAPE

The immediate actions taken by the first responder in the event of an escape will depend on the situation. Every incident is different. Safety is paramount! If measures can be taken to immediately re-secure an animal without endangering personal safety, such measures are warranted, but will ideally be taken by level 4 or 5 keepers ONLY. Such measures are described above under “Personal Safety Measures”. Actions not listed are not considered “approved” actions under this protocol.

As soon as it is evident that an uncontrolled dangerous animal poses a threat and requires actions to secure:

**1. Announce escape**

The first staff member notified or bearing witness to an incident – *regardless of their experience or level of authority* - will make an announcement over a two-way radio, stating slowly and clearly which animal(s) is/are involved and their last known location. The announcement will be repeated for clarity. For example:

***“Mufasa, the male lion, has escaped. He is standing on the pathway near the keeper entrance to the woods. I repeat, Mufasa is loose and he’s near the service entrance to the woods.”***

When possible, without jeopardizing personal safety, the witness should maintain visual contact with the escaped animal and continue reporting movement as needed to facilitate safe recovery, until further instruction from the team leader.

**2. Team Leader response**

Upon announcement of an uncontrolled dangerous animal incident, the most senior, authorized staff member on site will act as team leader to take charge. The team leader will announce an emergency recovery is now underway and all personnel will listen and reply clearly and quickly when addressed.

**3. Roll Call**

The team leader will use, or assign a proxy to use the radio, visual, and verbal communication to determine the location of all staff members and patrons and provide instruction to ensure their safety.

**4. Cut off escape routes**

When possible without jeopardizing their own personal safety, staff who are near entry doors to dens, buildings, or perimeter fence gates should immediately close those potential escape routes if doing so will help contain the escaped animal(s). Awaiting instruction to do so is not necessary.

**5. Secure other animals**

If a large predator is uncontrolled in the main compound, and it is possible to safely secure other animals indoors in dens and/or buildings, staff members should do so and report on their progress so that the team leader can continue assessing the situation. This includes especially grazing (prey) animals and others that may not be secured in a fully enclosed habitat. Awaiting instruction to do so is not necessary.

**6. Seek “safe place” shelter**

Staff in close proximity to patrons will immediately assist and direct patrons to move to a place of safety/shelter immediately. At least one staff member should remain with patrons during the escape to provide updates and reassure patrons. Patrons will be asked not to leave the premises until or unless the team leader instructs them to do so. (We cannot, however, prevent a patron from leaving our site if they insist.)

**7. Assess and recover (secure)**

Each recovery of an escaped animal will be different! Only the team leader and any other personnel instructed to assist, will participate in the recovery.

1. Remove distractions. Lock other neighboring animals in/out and remove other potential distractions.
2. Assess the animal. Type of recovery will be determined, in part, by the level of aggression, excitement, flight risk, danger to humans, etc.
3. Determine method of recovery. Based on level of risk, personnel available to assist, etc., the team leader will determine what method(s) of recovery will be used and in what order: collar and leash, capture net, portable transport cage, snare pole, vehicle, and/or chemical immobilization.

**8. Announce recovery (securement)**

Once the animal is in a controlled situation, no longer posing an immediate threat, the team leader will announce further instruction, restrictions, and/or an “all clear” over the radio. At that time, and only then, will patrons and non-essential staff will be allowed to re-enter the compound.

*Updated 12/21/18.*

**Recovery Guidelines**

These “personality profiles” are offered to help determine the best method of recovery for individual animals in residence at Black Pine. They are based on previous behavioral observations, keeper relationships, and other actual personal experiences.

**Africa, African lioness**

Africa has experienced free contact with the public and keepers, but not at Black Pine. She has shown aggression with food. She has willingly entered transports on multiple occasions.

Probable options:

* Baiting to encourage free will return to containment
* Visual barrier to encourage walking in a particular direction
* Squeeze cage or other portable rolling cage
* Oral sedative to enable approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Cita, Pookie, Taz, Ticha, Top Cat, Millie, Eragon, Nefertiti (tigers)**

These resident tigers have all been transported numerous times in portable rolling cages. They have willingly entered transports on many occasions. All have shown little, if any aggression towards keepers except when food is present. Probable options:

* Visual barrier to encourage walking in a particular direction
* Baiting to encourage free will return to containment
* Squeeze cage or other portable rolling cage
* Oral sedative to enable approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Luna, Bengal tiger**

Luna is very sensitive to any indication of pending transport. She has shown too much physical threat while contained to attempt any free-contact methods of capture unless select personnel are on hand and have appropriate lethal weapon back-up. She has only entered portable rolling or squeeze cages using negative reinforcement, or following extended periods of operant training. Probable options:

* Baiting to encourage free will return to containment
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Timber, cougar**

Timber was once trained to enter a transport cage, however he had to be tranquilized in order to move him to Black Pine. He is young, very athletic, and fully clawed. For these reasons, utmost precautions should be used. Probable options:

* Baiting to encourage free will return to containment
* Squeeze cage or other portable rolling cage
* Oral sedative to enable approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Chui or China, leopards**

Chui and China were habituated to walking on leashes up to two years of age. They were routinely transported in portable rolling cages until 2006 and have willingly entered the squeeze cage, however only with extremely limited personnel present. Probable options:

* Baiting to encourage free will return to containment
* Visual barrier to encourage walking in a particular direction
* Squeeze cage or other portable rolling cage
* Oral sedative to enable approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Betsy, black bear**

Betsy is blind and poses virtually no significant physical threat. Probable options:

* Solid barrier to encourage/force her to walk in a particular direction
* Food baiting to encourage walking in a particular direction
* Hand or pole syringe injection

**Ben, Tasha, Taz, Trouble, Cinny - black bears**

All of these bears have loaded into transports easily more than once and are food motivated, and rarely show any aggression. Probable options:

* Food baiting to encourage walking in a particular direction
* Visual barrier or food baiting to encourage walking in a particular direction
* Squeeze cage or other portable rolling cage
* Oral sedative to approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun

**Beo, Trio and/or Six, Gray wolves**

These animals have all experienced free contact with humans, however remain very skittish and are not socialized. Probable options:

* Visual barrier or food baiting to encourage walking in a particular direction
* Squeeze or transport crates/cages
* Oral sedative to approach with pole syringe
* Blow-pipe (short range)
* Projector gun (longer range)
* Kill gun