Guideline

Guidelines for handling captive New Zealand fauna for advocacy interaction purposes

About this document

Disclaimer	This guideline has been written for Department of Conservation (DOC) staff. As a result, it includes DOC-specific terms and refers to internal documents that are only accessible to DOC staff. It is being made available to external groups and organisations to demonstrate departmental best practice. As these procedures have been prepared for the use of DOC staff, other users may require authorisation or caveats may apply. Any use by members of the public is at their own risk and DOC disclaims all liability for any risk.
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Department of Conservation
Te Papa Atawhai

Policy
Standard Operating Procedure
Guideline

New Zealand Government

Contents

1 Purpose and Scope

The intended use of this document is to provide guidance for the appropriate handling of captive New Zealand protected fauna (hereafter also referred to as 'wildlife') for education and advocacy interaction purposes. Any person or institution handling wildlife must be in possession of an active Wildlife Authority that authorises handling as an approved activity.

The Department of Conservation ("The Department") has the statutory responsibility for permitting holding of protected NZ native species in captivity under the Wildlife Act 1953. Current practice is to authorise the holding of these species in captivity, but typically a permit's Special Conditions restrict animal handling to those required for health, welfare and husbandry purposes. Reflecting interest of operators and public in engaging more closely with wildlife in the form of interactions, and considered conservation benefits of encounters, authority holders may also wish to carry out additional handling to enable the general public to have "close encounters" with these species for education and advocacy purposes. A recent review underlines the prevalence of this activity in zoos and aquariums on a global scale, finding petting of wildlife in particular to be a highly popular and widely advertised visitor experience, despite a dearth of research on animal welfare into this practice (D'Cruze et al., 2019).

Close encounters between captive wildlife and members of the public, here referred to as "advocacy interactions", offer potential to connect people with New Zealand species in a more direct and meaningful way than viewing them in an enclosure. An advocacy interaction is intended as an opportunity for wildlife holders to educate the public about conservation issues and advocate for pro-conservation behaviour. Interactions may involve participants physically interacting with wildlife and generally require the animal(s) to be removed from their usual holding enclosures.

Although there may be benefits to enabling interactions, there are also risks. These include the animals involved experiencing physical or psychological harm, distress or escaping; and risks to human health and safety, such as injury or zoonotic disease transmission. Poorly managed advocacy interactions with native species could potentially negatively impact the public's perception of native species, conservation and captive management, fail to deliver pro-conservation behaviours, or encourage harmful behaviour. Animal-visitor interactions that are anthropocentric or not managed effectively or not appropriately messaged, may fail to deliver necessary protective benefit under the Wildlife Act 1953 (see Supplementary Guidance for Permissions Advisors on section 53 of the Wildlife Act 1953, DOC-6182664).

The New Zealand Code of Welfare for Zoos includes some relevant standards and specific reference to animal-public interactions (MPI, 2018). There are also several DOC guidelines that include protocols for advocacy display of wildlife (Blanchard, 2002; Colbourne et al., 2020). Currently, there is limited experience and knowledge within the Department about the appropriate balance of benefit and risk of this activity. Consequently, when advising on applications to handle captive protected NZ fauna for advocacy interaction purposes Advisors tend to adopt a conservative approach when supporting Decision Makers with quality advice.

Overseas, there is a range of regulations, standards and guidelines relating to captive animal advocacy programs. These include the 2019 Australian Animal Welfare Strategy for Exhibited Animals (NSW-DPI, 2019) and position statements and recommendations from within the zoological and aquarium industry e.g. (WAZA, 2020; ZAA, 2022) and these can serve as useful reference information.

This guidance document will ensure best practice advice is consistently provided to help Decision Makers evaluate applications and ensure robust and consistent permit conditions are developed. It also seeks to set a standard for industry and privately-authorised persons handling of captive protected NZ species for advocacy.

2 Terms and Definitions

Term	Definition
Advocacy	Speaking in favour of, recommending or arguing for conservation and encouraging pro-conservation behaviours.
Advocacy Interaction	Handling of wildlife performed by keepers in front of public, or a supervised direct or indirect physical encounter between wildlife and public. Activity typically occurs outside of the animals' usual holding area and may include demonstration of natural behaviours *e.g.* free flight or use of static props/furnishings such as perches. Some of these interactions are referred to as Animal-Visitor Interactions (AVIs) in zoos and fauna parks.
Advocacy Interaction Plan	A document provided to DOC describing how the advocacy interaction will fulfil these Guidelines. Use the template provided in Appendix I.
Animal, Captive NZ Fauna	Wildlife protected under the NZ Wildlife Act 1953. Also referred to as 'wildlife' within this document.
CTAG	Department of Conservation's Captive Technical Advisory Group.
Display	Presenting wildlife to the public through talks, shows, demonstrations or handling. Display of animals may include holding in temporary enclosures.
Education	Helping people to appreciate wildlife, understand the pressures faced by native species and ecosystems, and demonstrating how they can help. Increasing understanding to improve advocacy message effectivity.
Ethogram	Inventory of behaviours or actions exhibited by an animal.
Hacking	A training method that gives young captive raptors exercise and experience with flying and hunting.
Handling	For the purposes of this document, handling (touch, hold or restrain) an animal for advocacy interactions, i.e. a purpose other than health, welfare or husbandry.
Hold	Animal is bodily supported by a person (keeper or member of public) during handling.
Keeper	A person who is permitted or authorised by the permit holder to be in direct charge of an individual animal or a group of animals. The keeper is responsible for the animal(s). Sometimes referred to as "Carer" outside of zoo settings.

Term	Definition
Protective Benefit	An activity involving wildlife that is aligned with the purpose of the Wildlife Act (1953) through providing protective benefit directly to the animal involved or indirectly to the species. For public handling of captive wildlife the activity must serve advocacy rather than anthropocentric purpose.
Pro-conservation behaviours	Person's positive actions that support conservation goals such as those that have an impact on conservation of nature, biodiversity and the environment.
Touch	Animal is touched by a person who is not physically holding or restraining the animal. Includes supervised petting of wildlife.
ZAA	The Australasian Zoo and Aquarium Association.

3 Process

This guidance is used by DOC staff and applied when advising or deciding on applications to handle captive NZ fauna for advocacy interaction purposes. This document may also be used by externals to guide appropriate handling of wildlife for education and advocacy purposes and to apply for an appropriate authorisation.

4 Background Information to Handling Captive New Zealand Fauna for Advocacy Purposes

Zoo and conservation practitioners perceive advocacy to be the most important role of a zoo (Maciaszek, 2012), and that interactions between animals and visitors can represent a positive and powerful method of advocacy if managed appropriately. There is some evidence that these advocacy interactions can connect with the public and increase pro-conservation actions; however, there is also evidence this may negatively impact on animal welfare (Learmonth, 2020; Mellor et al., 2020; Sherwen & Hemsworth, 2019). Advocacy interactions are offered by the majority of zoos and aquariums globally, recognising a need to balance animal welfare against goals such as advocacy (D'Cruze et al., 2019).

2.1 million people visit zoos and aquariums annually in New Zealand (according to ZAA in 2019). Zoos and aquariums are uniquely placed to influence their visitors to change behaviours towards wildlife and the environment. As a result of visiting zoos, over 92% of visitors stated they had learned about threats faced by animals in the wild, and over 89% planned to make a conscious effort to do things to help conserve the environment (https://zooaquarium.org.au/).

When the display of animals is carefully planned to ensure that the security, welfare and dignity of the animal is maintained, and there is a considered cultural interpretation, animals in captivity can present significantly more opportunities for advocacy than animals in the wild. Inclusion of wildlife in demonstrations may positively affect visitor information uptake, change attitudes and impart a sense of personal responsibility and conservation-based actions (Baird et al., 2016). However, it is less clear, and harder to measure, the direct benefits to species from animal visitor interactions, or whether they represent "protective benefit" for wildlife protected under the Wildlife Act 1953.

4.1 Types of advocacy interactions

- Keeper interpretation talks while holding or handling a captive animal *within* its' usual holding enclosure;
- Keeper interpretation talks while holding or handling a captive animal *outside* its' usual holding enclosure or setting;
- Free-flight demonstrations, such as hacking raptors;
- Allowing members of the public to touch or hold captive animal/s under supervision;
- Outreach advocacy, where animals are relocated off-site from their permanent site of holding, for example, to schools;
- Media advocacy, where animals are handled for photography or filming;
- Other scenarios where an animal is handled to achieve an advocacy purpose.

4.2 Risks associated with advocacy interactions.

There are risks associated with advocacy interactions to both wildlife and humans, including acute and longer-term impacts on health and wellbeing, and also a risk of compromised conservation messaging and outputs.

Captive wildlife intended to be involved in advocacy interactions should be individually assessed as suitable for such programmes and receive prior training and desensitisation to mitigate associated risks.

- Physical or psychological harm, distress or escaping;

  Exposure to unfamiliar people, handling, locations and stimuli can place animals at risk of becoming distressed, sick or injured. Fluctuating temperatures and prolonged periods on high alert in the presence of unusual stimuli, such as bright lights, can cause an animal to become fatigued or dehydrated and can result in an animal becoming stressed and agitated. Not all species outwardly show signs of stress or agitation so it may not be overtly obvious, but studies often show major increases in stress hormones, like cortisol, in these situations e.g., (Leeds et al., 2019; Pauling, Lankford, & Jackson, 2017; Price et al., 2019). These situations can cause animals to experience longer-term manifestations of stress in the form of psychological or physical disorders (Baird et al., 2016; Benn, McLelland, & Whittaker, 2019; Mellor et al., 2020). Wildlife exposed to an environment or action it finds confronting may struggle or act defensively leading to escape or injury.
- Risks to human health and safety due to potential for injury, or zoonotic disease transmission;

Animals of all species are unpredictable, with potential risks of being injured (*e.g.* bruised, bitten or scratched) or contracting illness from parasites and zoonoses. Injury to humans or animals can occur if wildlife are not appropriately restrained or if they are mishandled during an interaction, a problem when dealing with an unfamiliar handler, other person or audience. There is a risk of people becoming injured if an animal tries to escape. Even when an animal appears relaxed and calm, its' normal repertoire of behaviours may be a problem when dealing with an audience. For example, birds may fly off when members of the audience try to touch them.

Animals carry a range of pathogens and microorganisms, including some that are particularly harmful to humans, without showing any signs of disease. Infections or allergic reaction to wildlife can result from contact, a bite or ingestion/inhalation of animal material such as fur or feather dust. There are reported cases of children contracting diseases such as *Escherichia coli* from petting zoos (NZ Public Health Surveillance Report, 2017) and 19 children contracted cryptosporidiosis from an educational trip to a farm (Stefanogiannis, McLean, & Van Mil, 2001). There is also the possibility that people at the interaction may become stressed or anxious due to phobias or the perceived threat from an animal (e.g., a bite).

- Poorly managed advocacy interactions with native species could potentially negatively impact public's perception of native species, conservation and captive management, fail to deliver pro-conservation behaviours, or encourage harmful behaviour.
- Advocacy interactions that are anthropocentric or not managed effectively or not appropriately messaged may fail to deliver necessary protective benefit under the Wildlife Act 1953.

5 Principles of Handling for Advocacy Interactions

Each species and each individual animal will have its own unique welfare requirements. At a minimum, captive holders including native species in advocacy interactions should adhere to the below principles.

1. **Keepers must be deemed competent to handle the species, be familiar with the species' behaviour (especially stress behaviour) and be experienced with the individual(s) selected for interactions**

   Explanation: Many species (e.g., birds) are prone to stress from handling, but are very good at masking stress behaviour, so signs of stress can be subtle and/or an animal can be in extreme stress by the time signs are presented.

   Standard: Keepers with appropriate knowledge and skill are the only persons who handle the animal. The process for selecting keepers for the interaction is included in the Advocacy Interaction Plan.

2. **A full written risk assessment of the species and selection process for suitable individual animal(s) has been made to ensure they cope with the proposed activity**

Explanation: Understanding the full range of natural species' behaviours (ethogram), including stress behaviours and their triggers, is important. Individuals can vary widely in their tolerance of stress and in the behaviours they exhibit.

Standard: Relevant ethograms available and keepers have a demonstrated understanding of stress behaviours. Risk assessment of individuals undertaken and recorded. The process for assessment of species and individual suitability is included in the Advocacy Interaction Plan.

3. **A full written assessment of the appropriate number of times an individual can be handled has been made**

Explanation: Species and individuals will vary in their tolerance of encounters and this may vary with season, e.g., daily handling of a lizard in summer may have less impact than daily handling in winter.

Standard: There are justified limits to the number of times that an animal can be used in interactions, e.g., animals will be handled for a maximum of X minutes at any one time; no animal will be included in more than X encounters per week. The process for assessment is included in the Advocacy Interaction Plan.

4. **There is a fully described protocol to assess behaviour throughout the interaction, and contingencies that manage adverse stress events.**

Explanation: It is important that there are plans in place to recognise and manage stress before it becomes an issue.

Standard: Written protocols for routine assessment and triggers/contingencies on how to manage stress events if they occur. Protocols should ensure alignment with MPI Code of Welfare: Zoos, Minimum Standard 11. Protocols used are included in the Advocacy Interaction Plan.

5. **Where training/conditioning/hacking is needed to "prepare" animals for advocacy interactions, the training sessions are conducted to the same standards as the interaction sessions (i.e., have written protocols, contingencies etc.).**

Explanation: The additional handling required to train or habituate animals to a situation/site may also put pressure on animals.

Standard: Written protocols for routine assessment and triggers/contingencies on how to manage stress and escape events if they occur. Protocols should ensure alignment with MPI Code of Welfare: Zoos, Minimum Standard 11. Protocols used are included in the Advocacy Interaction Plan.

6. **A full risk assessment of the situation/audience has been conducted.**

Explanation: An audience may be unpredictable, and spontaneous behaviours (whether deliberate or accidental) can be distressing/stressful/harmful for wildlife. Keepers need to ensure that animals are safe from spontaneous audience reactions.

Standard: Environmental conditions are considered, hazards/risks are identified, and appropriate precautions put in place. The process for assessment is included in the Advocacy Interaction Plan.

7. **Best practice is ALWAYS adhered to during public interactions, and regularly reviewed.**

Explanation: Best practice applies to all aspects of the advocacy interaction, from selection and training of the animal, safe and appropriate containment, restraint and handling practices, advocacy messaging, animal and human safety, monitoring and recordkeeping. Where protocols are available these must be adhered to. For example details for handling of advocacy birds is detailed in the Kiwi Best Practice Manual (Colbourne et al., 2020).

Standard: A keeper is familiar with best practice for the species or taxon and adheres to that for all aspects of an advocacy interaction. If intending to replace a current best practice based on new evidence, this must be reviewed by the captive coordinator or Recovery Group leader.

8. **Keepers are continuously reviewing and improving their understanding and practice of welfare standards.**

Explanation: New research and increasing awareness in animal welfare and this field of interactive animal advocacy means best practice is continually evolving.

Standard: Keepers are always looking to upskill or learn from peers and regularly review protocols.

9. **If animals escape, there are pre-set protocols on how to respond.**

Explanation: Animals are unpredictable and despite previous experiences or precautions taken, captive individuals may escape.

Standard: Containers used for animals are secure, interaction areas are selected, designed/modified to minimise chance of escape and maximise re-capture with minimal stress or potential injury to the animal. A recapture plan is developed and equipment on hand, and keepers are familiar with the protocol to follow in the event of an escape. The recapture plan is included in the Advocacy Interaction Plan.

10. **Animals are monitored for an appropriate time after the interaction, to ensure they have not reacted adversely.**

Explanation: Studies on stress in wild birds have shown it may take several days to fully recover from handling events.

Standard: Written records of animal health and behaviour are maintained following the encounter and keepers adhere to the protocol and regularly report and adapt any future handling events accordingly. Protocols for selecting and monitoring individuals are included in the Advocacy Interaction Plan.

11. **Species or individuals with a low stress tolerance are never used for handling interactions.**

Explanation: Some species, such as kiwi, penguins, seabirds and others, do not cope with repeated handling and may suffer serious health consequences.

Standard: Only species known to be resilient to handling are used for interactions. Protocols for selecting and monitoring individuals are included in the Advocacy Interaction Plan.

12. **Handling considers species' life history and behavioural traits.**

Explanation: Certain life history or behavioural traits may be incompatible with handling interactions. For example, nocturnal or crepuscular species may not be suitable for daytime handling.

Standard: Handling interactions should take into consideration animal's life history and behavioural traits, and be scheduled to provide least disturbance to animals. If this cannot be done, alternative species should be considered.

13. **Handling demonstrates natural behaviours – not tricks.**

Explanation: Audiences should be encouraged to understand and appreciate species' natural behaviours, rather than behaviours that would not be exhibited in the wild (e.g., taught 'tricks').

Standard: Only natural behaviours are displayed to the audience. Demonstrations should align with MPI Code of Welfare: Zoos, Minimum Standard 11.

14. **Individuals in a 'breed for release' programme are never used.**

Explanation: Animals destined for release into the wild should not be habituated with human contact.

Standard: Only individuals in approved advocacy programmes may be used for advocacy interactions.

15. **Wildlife Authority holders have clear objectives of what advocacy goals are intended to be met by the advocacy interaction and have a way to measure these.**

Explanation: If the advocacy interaction does not have clearly defined objectives, and ways to measure progress, an evaluation of the success or otherwise of the activity is not possible.

Standard: Written objectives are set and included in the risk assessments for any advocacy interaction (i.e., an Advocacy Plan is in place – see section 6.2). The approved Advocacy Plan is included with the Advocacy Interaction Plan.

6 Acknowledgements

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8 Additional Resources

- Captive Management Standard Operating Procedure DOCDM-266180
- Approved Policy Captive Management of Wildlife Absolutely Protected under the Wildlife Act 1953 OLDDM-140178
- Captive Management Document Templates DOCDM-92036

9 Document History

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	Annual check – minor amendments		

10 Appendix I. Organising an Advocacy Interaction

To ensure advocacy interactions achieve their purpose, captive holders using native species for advocacy interactions should adhere to the below key considerations as the interaction is developed.

10.1 An advocacy interaction may be appropriate when:

- Protective benefit can be demonstrated
- The advocacy interaction has relevant conservation action messages;
- There is a conservation need for a particular action message;
- Cultural perspectives are considered, including mātauranga Māori
- There is a clear relationship between the interaction and participant/visitor action;
- There is a strong conservation message that justifies the inclusion of wildlife;
- A risk assessment has been undertaken and deemed the activity to be low to medium;
- The chosen species and individuals are suitable for interactions; and
- The context is appropriate (e.g., setting and purpose).

10.2 Planning a quality advocacy interaction

- Aim to ensure the welfare of the animal is not negatively affected
- Advocacy interactions and messages must be intended to have a direct and positive impact on behaviours of the public.
- Written and verbal messaging should be well developed and ensure content of message is factual, up to date, culturally appropriate and consistent with conservation advocacy and education goals.
- An Advocacy Plan (including key messages, methods, level of public exposure envisaged and the means of assessing the impact of messages – see Appendix 1) is written up and approved by DOC as part of Wildlife Act permitting requirements.

10.3 Selecting a keeper for an advocacy interaction

- The keeper/s must be appropriately trained in relevant animal behaviour, health and welfare and be familiar with handling the species. Personnel should have adequate experience working with and handling the species to ensure competence, confidence and strong understanding of species' behaviour. They must be able to easily identify common behaviours, and interpret subtle behaviours, particularly those that may indicate, or are directly related to stress. They must have an understanding of the species' behavioural interactions with humans and negative impacts.
- The keeper must have appropriate familiarity with the individual animal selected for advocacy (e.g., wildlife should be familiar and comfortable with their handler – "trust").

- The keeper must have the knowledge and skills to deliver the advocacy messages, or be supported by personnel that does.

10.4 Selecting an individual animal for an advocacy interaction

To determine whether an animal is suitable for including in an advocacy interaction, an assessment will need to be carried out on a case-by-case basis and determined as appropriate to the circumstances. In general:

Animals that may be appropriate for an advocacy interaction include:

- Individuals already on public exhibit and accustomed to handling.
- Individuals that are regularly monitored for health and behaviour.

Animals which MUST NOT be used for an advocacy interaction include:

- Individuals that are not physically healthy or psychologically fit, individuals in poor condition, e.g., underweight or with poor skin condition;
- Individuals identified as at high risk of carrying zoonoses, including healthy animals that may be carriers;
- Individuals undergoing medical treatment;
- Individuals that are part of a conservation 'breed for release' programme ;
- Individuals that are moulting or in ecdysis;
- Individuals during an active phase of their breeding cycle, including those that are pregnant, gravid, nesting, incubating eggs or have fully dependent young; parent-dependent / very young juveniles, or aged individuals;

10.5 Developing protocols for an advocacy interaction

Clear protocols should be developed to ensure advocacy interactions minimise risk and any impact on animal welfare. In addition to the principles outlined above, these key considerations must be adhered to;

- If animal/s are to be transported off-site from their permanent holding location a transport protocol must form part of the advocacy protocols and is subject to DOC approval.
- Off-site advocacy plans need to include details of animal containment during transport (including crating etc.) and practices to ensure security, health and welfare of animals and people are managed, including contingencies in the event of injury, illness or emergency.
- Animal containers must be maintained in a controlled and appropriate ambient temperature and environment and kept out of direct sunlight to avoid overheating the animal/s.
- The animal/s must not be left unattended when in the vehicle, container or any other time and the keeper shall always be aware of its location.

- Safety briefing before the advocacy interaction: The safety of animals and people requires that those present always adhere to the instructions of the keeper. If the interaction is off-site the briefing should include transport protocols.
- Public participants must be instructed not to interact with the animal except at the specific invitation of the keeper.
- All present shall remain seated in the areas provided or standing nearby. This should be covered in the briefing and the ratio of personnel to visitors should be considered.
- Appropriate instructions and group management is in place, and persons attending are supervised accordingly. Children shall be closely supervised and remain with accompanying adults.
- Good hygiene practices – Hand washing facilities are to be available and utilised, and if people are invited to touch the animal, handwashing/hand sanitiser shall be used both before and after contact.
- Selecting visitors for interactions – keepers should carefully choose participants to ensure the safety of all involved, considering the strength and behaviours required. Appropriate behaviour during the interaction should be explicitly explained to the visitor before the interaction begins.

Contingency processes

- If at any time the keeper is concerned about animal health or welfare or there are safety issues or risks, including resulting from public behaviour, the interaction shall be terminated.
- In the event of an animal escape, the appropriate animal escape emergency protocol shall be followed.

11 Appendix II - Template

Advocacy Interaction Plan

1. General information

{*Species Common Name} at {Institution*}

Taxon (*scientific name*)		
Common name		
DOC Recovery Group		
DOC Captive Management Plan		
Approved Advocacy Plan		
Species contact or coordinator:		
Contact details:	*Email:*	
	Phone:	
Document prepared by:		
Last updated:	Date	

2. Key Messages and Personal Action Suggestions

These should be messages from your Advocacy Plan that will be delivered through Advocacy Interactions.
Describe how Advocacy Interactions will improve uptake of these advocacy messages.

3. Description of Advocacy Interactions

Describe how animals will be handled and what behaviours they will demonstrate. Explain how these behaviours align with the messages outlined in Section 2. and with natural behaviours.

4. Calendar of Events

Provide a summary of actions against a timeframe to show the order in which advocacy events are planned to occur and frequency of events.

5. Assessment

Refer to your Advocacy Plan objectives for assessing the impact of your project. The objectives should be measurable statements that support your goal and key messages. Record in this section the planned methods of assessment for the programme at each participating institution as far as they are known.

6. Advocacy Interaction Processes and Protocols

- Risk assessment and selection process of the species and selection process for suitable individual animal(s)
- Protocol to assess animal behaviour throughout the interaction or training, and contingencies that manage adverse stress events
- Protocols for monitoring individual animals after interactions and how these will feed back into the selection process
- Process for assessment of the appropriate number of times an individual animal can be handled and justification for the proposed frequency
- Protocols for escape and recapture of animals
- Process for risk assessment of the situation and audience