



Preparing for a Breeding and Transfer Plan

Check off the following items to ensure that you are ready to plan.
Some plans may be conducted electronically.

Please refer to the PMC calendar (<http://www.lpzoo.org/PMC>) or contact the PMC's Studbook Analyst, Rachel Low (rlow@lpzoo.org), for your planning meeting date.

6-10 weeks in advance

- Send your studbook to the Population Management Center's Studbook Analyst, Rachel Low (rlow@lpzoo.org), for validation and to confirm your scheduled planning meeting date.

4-6 weeks in advance

- Review all the data validation documents received from the PMC's Studbook Analyst and address any data issues as instructed.
- If your data has unknown or multiple parentage issues, doing the following will enable the PMC to work with you at the meeting to create an analytical studbook:
 - o "UNK" parents in the pedigree – consider whether any of these unknown ancestors might have been wild caught or possibly related to other animals in the studbook.
 - o "MULT" parents – all potential parents should be noted in the MULT assumptions, but indicate the most likely parent, if possible.
 - o Create a list of your assumptions – DO NOT ALTER YOUR TRUE STUDBOOK WITH ASSUMPTIONS, ONLY TRUTHS
- Gather wants and needs from each holding institution.
 - o Survey each institution as to what they want/need specifically in terms of breeding, holding, placing, or receiving animals.
 - o Obtain information on any animals that are unable to breed or be moved.
 - o Also obtain information about exhibits, holding facilities, or social groups if applicable. Please contact the PMC if you would like to see some survey examples or templates.

3-4 weeks in advance

- Send the following to the PMC:
 - Your super-clean studbook (based on validation report) to the PMC for preliminary analysis. Send via email as a .zip file or by mail on a CD. Include documentation of any assumptions and/or unresolved parentage issues.
 - A compiled list of institutional wants and needs.
 - A list of any animals to be excluded from the breeding population:
 - Non-participating institutions
 - Medical exclusions
 - Behavioral exclusions
 - Other
 - A list of Institutional Representative (IR) contact information (in EXCEL template given to you by the PMC). This will be used to determine the distribution list - include your contact information here too.
 - A list of the expected meeting attendees (for an in-person meeting) and number of people driving.

2 weeks in advance

- Check in with your Population Management Center Advisor.

Meeting day

Bring the following:

- A copy of your studbook and institutional wants & needs for reference during the planning meeting.
- Any last minute updates to the database on CD or flash drive.

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