Management Guidelines For
AZA Dedicated Funds

All Animal Population Management (APM) Committee and Wildlife Conservation Committee (WCC)-approved AZA Programs (Species Survival Plan® (SSP) Programs, Taxon Advisory Groups (TAGs), Scientific Advisory Groups (SAGs), and SAFE Species Programs) are eligible to manage funds in support of their objectives. These funds should be managed according to the following guidelines:

1. A proposal for the creation of a Dedicated Fund account should first be submitted to the AZA Conservation and Science Department. Forms can be downloaded from the AZA website.

2. All funds established to support projects initiated and/or coordinated by AZA Programs should be placed in an account which is managed by the home institution of one of the program’s officers (preferably the chair or treasurer). When funds are acquired to support a specific project, they become the responsibility of the sponsoring institution. If funds are held in a separate bank account, the account must be established using the Employer Identification Number (EIN) (for U.S. organizations) or the equivalent (for non-U.S. organizations) of the sponsoring institution.

3. Revenue from merchandise sales, independently or at the annual AZA TAG Mart, must be reported on the institution’s federal and state tax returns, and the required sales tax must be paid by the institution.

4. Groups soliciting grants or contributions may only use the EIN (for U.S. organizations) or the equivalent (for non-U.S. organizations) of the sponsoring institution of the dedicated fund. Revenue must be reported on the institution’s federal and state tax returns.

5. Revenue from conservation activities should be deposited into a Dedicated Funds account, to be managed by the institution where the Fund is based. Revenue must be reported on the institution’s federal and state tax returns.

6. Conservation Grants Fund grantees that are not employed by or affiliated with an AZA member institution must arrange for their awards to be deposited by AZA into one of the Dedicated Funds account.

7. When a program wishes to transfer a Dedicated Fund to a new institution, a new Dedicated Fund Application must be completed and submitted to the AZA Conservation and Science Department. The AZA Conservation and Science Department must be informed of the new contact person for the fund in writing (via e-mail or letter). Forms can be downloaded from the AZA website. Contact the AZA Conservation and Science Department at conservation@aza.org or 301-244-3367 with any questions.

DISCLAIMER
The Association of Zoos & Aquariums and its Board of Directors shall not be held liable for unauthorized funding solicitations, tax liabilities, or individual misappropriation of funds.