

Society for Range Management Advocacy Guidelines

(Rev. July 2002)

These guidelines provide guidance to SRM members and sections who propose or prepare advocacy statements on behalf of the parent Society (hereinafter referred to as Society) or its subunits (Sections and Chapters). The guidelines that follow were designed to ensure that:

SRM's external advocacy will be ethically and professionally sound; advocacy statements will not degrade the SRM's reputation as the most reliable source of scientific information on rangeland resources; rangeland related scientific information will be used appropriately when members address rangeland resource issues; and advocacy statements will be widely supported within the SRM because they will be technically correct, respectful of alternative views, and consistent with SRM Policy Statements, Position Statements, Bylaws, the SRM Code of Ethics, and Standards for Conduct for SRM Members Providing Public Service.

Members and Sections planning to influence an external issue and to invoke the credibility of the SRM or its members shall adhere to the SRM's Bylaws, which state:

Sections, in their speech, writing, and action shall conform to the principles, policies, and objectives of the Society, as set forth in its Articles of Incorporation, Bylaws, or duly approved statements of policy and principle (SRM Bylaws, Article VII. Sections, Section 6.) The purpose and functions of a Chapter shall, in general, be the same as those specified for Sections, and in all their actions and activities Chapters shall conform to the principles, policies, and objectives of the Society as set forth in its Articles of Incorporation, Bylaws, or duly approved statements of policy and principle (SRM Bylaws, Article VIII. Section Chapters, Section 5.).

Each Chapter and Section shall have the authority to formulate statements within the area of its jurisdiction and consistent with Society Policy Statements (SRM Bylaws, Article XI. Policy, Section 7. (g)).

A. What is Advocacy?

Advocacy may be simply defined as arguing for a cause, often on behalf of others. Arguments may be written or expressed orally, and sometimes they must be developed reasonably quickly. Advocacy is on its strongest ground when it is based on a hierarchy of instruments used as official expressions of SRM views.

The principal instruments are SRM Policy Statements, Position Statements, legislative briefing statements, and Resolutions.

Policy statements are general statements of principle about resource topics that explain and justify the SRM's perspective or attitude in largely philosophical terms. Policies generally have a long life span, perhaps 10–20 years. Policies may be approved by the Board of Directors or referred to the membership for ballot vote.

Position statements are specific stands on specific issues. They are prepared by experts, scientifically documented, and rigorously reviewed. They must be consistent with SRM policies, and are approved by the Board of Directors.

Legislative briefing statements include written statements detailing specific stands on specific items of legislation. These are developed and approved like position statements, with which they must be consistent. Legislative briefing statements also include testimony made before legislative committees and other information provided to legislative bodies. Anyone offering such testimony or information as a representative of SRM, or a section or chapter of SRM, must ensure that it is consistent with SRM policies. SRM Board of Directors approval must be given before a member represents SRM in providing testimony or information.

Resolutions are issue statements that are peer-reviewed by committees and approved at an official Society or Section meeting. They are less analytical than position statements or legislative briefing statements but must be consistent with SRM position statements and policies.

Position statements, legislative briefing statements, and resolutions become void when the issues they address become moot. Use of

any of these instruments to promote the principles, policies, and positions of the SRM may be considered a form of advocacy, especially when it is used to influence public policy.

B. Criteria for Advocacy at the Parent Society Level

The following criteria shall be used to determine whether it is appropriate for the SRM to prepare an advocacy statement on an issue, and they provide a checklist of the steps needed to properly arrive at a statement on a particular issue. The criteria were developed to ensure, without unnecessary restrictions on advocacy, that a member does not improperly attribute personal views to the Society or one of its Sections or Chapters. Sections or Chapters preparing statements on a position should consider the additional criteria outlined in the subsequent section.

1. The issue is pertinent to SRM's goals and objectives as stated in its Articles of Incorporation and Bylaws.
2. The importance of the issue warrants the effort of SRM's officers, members, and staff to address, given the existence of other issues. Urgency may be a factor if failure to act will place a resource in jeopardy.
3. The appropriate organization level of SRM was considered to address the issue (ie; parent Society, Sections, chapters). Considerations include the geographic limits of the issue and the locations of experts able to prepare an accurate position.
4. Significant membership support for action is evidenced or known, or if not, the reason why members are unaware of the issue is legitimate.
5. Alternative views on the issue were considered.
6. Administrative resources and funds to pursue the action to completion are available or can be secured.
7. Consideration has been given to joint action with other concerned organizations in order to strengthen the position taken.

C. Guidelines for Subunits on Development of Advocacy Statements

Sections or Chapters should adopt internal procedures to manage the development and

advocacy of policy statements, position statements, legislative briefing statements, and resolutions. The internal procedures should address the criteria used to select issues. Procedures should provide sufficient guidelines for quality control, such as peer review, of written products that advocate a position or action. Subunits should consult SRM headquarters to develop a mechanism for relaying and promoting their policies and positions to all concerned parties. The following steps provide procedures for developing and advocating subunit policy statements, position statements, legislative briefing statements or resolutions:

1. A member or committee raises a formal concern or issue.
2. The subunit's executive or other committee reviews the issue based on the following questions:
 - a. Is the issue pertinent to the subunit's goals?
 - b. Do (or will) subunit members support the position?
 - c. Is the position consistent with parent society position?
 - d. Does the subunit have adequate expertise and technical information to develop a position?
 - e. Have alternative views been considered?
 - f. Is the urgency of the issue so great that the officers or executive committee would have to act without full membership approval?
 - g. Would the subunit be willing, and does it have the resources, to follow through?
 - h. Do geographic boundaries and other aspects of the issue make subunit involvement appropriate?
 - i. Should other subunits or entities be involved?
 - j. Do the potential benefits of taking action outweigh the risks?
3. When the subunit determines that the issue is appropriate for action, it:
 - a. subjects the issue to further development if necessary,
 - b. solicits an independent review (necessary for all but the most minor issues; the greater the sensitivity and importance of the issue, the more intensive the review should be), and
 - c. takes the recommended action and notifies SRM headquarters.

4. The actions taken by the subunit may include (but are not necessarily limited to):
 - a. sending a letter with a request for action or comments;
 - b. drafting and sending a resolution;
 - c. preparing a position paper, legislative briefing paper, or policy paper (copied to SRM headquarters);
 - d. referring the issue to SRM headquarters with recommendations;
 - e. recommending an educational forum;
 - f. taking no action but providing supporting rationale to proponents.

D. Accountability and Oversight

The SRM must be assured that when members advocate their own interests or personal opinions, they clearly distinguish their views from those of the SRM. Members must not leave the impression that personal views represent the Society or subunit views. When a position is identified with the Society or subunit, some level of review is essential to ensure quality control and membership concurrence with the position expressed. However, this must be balanced with the equally valid concern that an overly lengthy or structured review process interferes with SRM's ability to act or respond quickly when necessary.

The following guidelines address the accountability for and oversight of advocacy activities:

1. New subunit leaders should attend the orientation and training that is to be provided for emerging leaders at annual meetings of the SRM, and when possible at the Section level. Training sessions should include a section on the sensitivity, policies, and oversight associated with advocacy.
2. When it develops, reviews, and promulgates advocacy statements, each subunit must conform to the SRM's established position on the subject and to the overall policy on development and advocacy of SRM positions, as stated at the beginning of this chapter.
3. When possible, the subunit's executive committee should review the relevance and urgency of advocacy statements, the appropriateness of a response by the subunit, general membership support, minority views, available resources, and potential for achieving the desired effect.

4. In an emergency, when lack of action may result in serious harm to a resource, the SRM president and/or other officers, including the executive director, should be consulted. With their concurrence, the executive director or a subunit member should forward the best professional opinion or position to appropriate officials. Prior consultation with SRM experts or concerned subunits should be conducted by whatever means possible. If time permits, membership approval should also be obtained.
5. Except for emergency resolutions, subunit resolutions advocating a position must undergo a rigorous review by an appropriate number of independent experts knowledgeable on the subject. Subunits advancing resolutions are directed to follow the guidance provided in SRM Bylaws, Article XI. Policy, Section 7. Resolutions submitted by subunits for adoption by the SRM at its annual meeting will be considered by the Public Affairs Committee, which may solicit additional independent reviews.
6. For each formal position taken, the organizational sponsor Society, Section, or Chapter should be clearly identified so there is no confusion as to the position's source.

E. Authorized Representation

The SRM and its subunits must have mechanisms to ensure that their letterheads, logos, and other identifiers are used for advocacy purposes only as specifically authorized pursuant to the SRM's advocacy policies and procedures. It is emphasized again that when members present an SRM position, they must state the position accurately, identify the SRM organizational unit responsible for it, and refrain from embellishing with personal opinion unless the opinion is identified as such. All of the foregoing is to be guided by the SRM Bylaws and Code of Ethics.

F. Education and Outreach Need

The SRM's advocacy guidelines must be conveyed to newly elected officers and representatives at all SRM organizational levels. Newer members entering leadership positions often lack exposure and sensitivity to SRM's concerns about advocacy of issues. Longtime members may find advocacy a new experience in the SRM, even though many other

professional societies have assumed advocacy roles for many years. For these and other leaders, the SRM should develop training and information programs that foster awareness of and adherence to established advocacy protocols.

Training and Information

The SRM will offer leadership orientation each year at the annual meeting, and at as many subunit meetings as opportunities permit. This instruction will cover advocacy procedures as well as introductions to SRM's Bylaws, Policy Statements, Positions Statements, Legislative Briefing Statements, Resolutions, Code of Ethics, and Robert's Rules of Order. It will cover any training materials and documents that have been developed by the SRM and its subunits as well as manuals, videos, or other media that record current positions or roles. All members, and subunit officers in particular, are encouraged to attend any such orientation available to them.

Subunit leaders and developing leaders should stay abreast of SRM advocacy activities as published in *Rangelands*, *The Trailboss News*, and other SRM communications. They are expected to become familiar with the legal ramifications, risks, and liabilities pertaining to their professional activities as representatives of the SRM. Before engaging in any advocacy action on behalf of the SRM, members should be thoroughly familiar with these guidelines and with all related material in SRM Bylaws and Articles of Incorporation. To help members and officers to become familiar with the positions of the SRM at all levels, a central registry of Policy statements, Position Statements, legislative briefing statements, and resolutions will be maintained on the SRM homepage (<http://www.rangelands.org>).

In addition to the above training, the SRM will offer continuing education workshops at the annual meeting regarding legislative affairs and formulation of public policy. Members and officers representing policies and positions of the SRM or its subunits are expected to present themselves and their positions in accordance with the highest standards of professionalism, including but not limited to matters of dress, language, demeanor, and sensitivity to the rights and opinions of others. Subunits are encouraged to institute multi-year progressions for elected officers or multi-year presidencies to expand corporate memory.