

Reference Handbook for **SCB Groups**

SCB's Who, What, When, Where, Why and How



Society for Conservation Biology

This version of this document was updated in May of 2011.
This version supersedes all previous versions.

Table of Contents

Introduction	1
Abbreviations Used in this Document.....	2
Overview of SCB Groups.....	2
Scope.....	2
Size/Composition.....	2
Leadership.....	2
Activities.....	3
Representation.....	3
Relationship between Groups and Global Society	3
Support by the SCB Executive Office.....	3
Section 1. Business Management.....	5
Tax Exempt Status	5
Management of Finances	5
Reimbursements.....	5
Policy on reimbursement documentation and timing	5
Per Diem reimbursements.....	6
Personal vehicle mileage reimbursements.....	6
Air travel reimbursements	6
Annual Budgeting Procedure Overview.....	6
Section 2. Members	8
Membership Composition.....	8
Opt-in Policy.....	8
Member Lists and Reports	8
Disclosure of Member Information.....	8
Section 3. Communication with Members.....	10
Emailing Your Members	10
Email Address Lists.....	10
Sending Group-Specific Emails – Mass Emails	10
Mass Email frequency	10
Email limitations	10
All-member emails.....	11
Print Communications	11
Newsletters	11
Listservs	11
Other Forms of Member Communications.....	11
Section 4. Governance	11
Board Positions.....	11

Ex-officio Board Members.....	12
Nominations, Elections, and Voting.....	12
Nomination Schedule.....	12
Election Schedule	12
How to Hold a Section or Working Group Election.....	12
Resources for Section and Working Group Boards of Directors	13
Intranet.....	13
Communications.....	14
Annual Chapter Registration.....	14
Section 5. Fundraising	15
Coordination & Communication.....	15
Budget Process	15
Procedure for Submitting Proposals	15
Individual Donors.....	16
Individual donations.....	16
Non-monetary or In-kind Donations	17
Tax Credit/Tax Exempt Status.....	17
Section 6. Public Policy.....	18
Policy Approval Process.....	18
Steps for approving your policy proposal.....	18
Disclaimers	19
Definitions and Examples	19
What is scientific advice and what is advocating a policy position?.....	20
Direct Lobbying.....	20
Grassroots Lobbying.....	21
Record Keeping	21
Policy Plan.....	22
Why the strict process?	22
Section 7. SCB International Congress for Conservation Biology (ICCB).....	23
Fundraising / Finances.....	23
Booths and Exhibits	23
Marketing.....	23
Symposia, Workshops and Short Courses	23
Business Meetings.....	23
Social Events.....	24
Section 8. Regional SCB Meetings.....	25
Planning to Host a Meeting	25
Scheduling Regional Section Meetings.....	25
Fundraising for Group Meetings or Events	25
Conference Guide	25
Discounts for SCB Members	25

Services Offered by SCB for Meeting Coordination.....	25
Development of Meeting Logos.....	26
Development of Meeting Websites	26
Section 9. Non-SCB Meeting Participation	27
Joint or Co-hosted Meetings.....	27
Sponsoring Meetings	27
Group-Sponsored Symposia or Workshops at Other Meetings	27
Fundraising for Group Meetings or Events	27
Section 10. Marketing Policies	28
Use of SCB Logo	28
Inclusion of SCB logo.....	28
Misuse of SCB logo	28
Letterhead	28
Marketing Materials	28
Use of SCB images	29
Web sites	29
Regular Website Updates.....	29
Editorial Discretion	29
Website Requirements for SCB Groups	29
Section 11. Awards	32
Section 12. Forms	33
Mass Email Form.....	33
Reimbursement Request Form.....	34

Introduction

This document was assembled to orient Society for Conservation Biology (SCB) groups—Sections, Chapters and Working Groups to the procedures and policies that they are expected to abide by as constituents and representatives of the Society for Conservation Biology. All documents are available on the SCB Intranet. Procedures and guidelines presented in this document were created by either the SCB Executive Office (EO), or the SCB Board of Governors (BOG). Note that this is not an all-encompassing handbook—there are other documents that describe operational procedures and guidelines for the Society that may be relevant to SCB groups. Please see the SCB bylaws, your group’s bylaws, the Society’s Strategic Plan, your group’s Strategic Plan, any relevant Committee Terms of Reference, and the budgeting guidelines that are distributed in advance of the budget cycle for further information.

Roles and responsibilities presented herein are intended to:

1. Enhance and coordinate the participation of SCB groups in SCB operations, governance, outreach, policy, and fundraising activities.
2. Strategically integrate SCB groups’ materials with the Society’s core identity as directed by the Strategic Plan (2011-2015).
3. Maintain the Society in compliance with all California state laws (where SCB is incorporated), U.S. federal laws (where SCB has its non-profit status), and international law as appropriate.

This document was developed in response to the Society’s global growth. Efforts to internationalize the Society in recent years, as well as interest in strengthening under-represented conservation science disciplines, have greatly expanded SCB’s reach. With this expansion, groups under the SCB umbrella continue to grow and increase in number, become more active, and engage in new arenas such as conservation policy. Consistent operations become necessary to maintain organizational stability and a strong reputation as the Society expands. The ability to inform conservation policy and to be recognized as the world’s leading authority in conservation science depends upon a consistent and united vision and voice. This document outlines the operational procedures and guidelines needed to achieve our common goals for the Society.

This is a living document that will change and be adapted as the Society grows and changes. We welcome your comments and suggestions for future versions.

Please note that the most current version of this document is always available on the SCB Intranet and the most current version always supersedes all previous versions.



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May 13, 2011

Abbreviations Used in this Document

- **BAI – Burk & Associates, Inc.**, is the organization that manages SCB’s membership, finances, and meetings
- **BOD – Board of Directors** of an SCB group. People on these boards are elected by the membership of the groups.
- **BOG – Board of Governors** of the Society. People on this board are elected by the full membership of SCB.
- **EO** – This is the **Executive Office** or headquarters of the Society; presently housed in Washington, DC, US.
- **Groups / SCB groups** – Collectively, the phrase we use to describe SCB Sections, Working Groups, and Chapters.
- **ICCB – International Congress for Conservation Biology**. This is the official name for what has been known as the SCB annual meeting.
- **SCB – Society for Conservation Biology**

Overview of SCB Groups

Scope

1. **Sections:** Seven Sections associated with the regions of Africa, Asia, Austral and Neotropical America, Oceania, Europe, North America, and the oceans/marine realm (Marine), work towards the mission and goals of the SCB.
2. **Chapters:** Chapters are self-defined. Some Chapters focus on a single city or campus; others cover broader geographic regions. Some Chapters draw membership primarily from students and faculty at academic institutions; others include practitioners and conservation scientists from a wider spectrum.
3. **Working Groups:** Working Groups focus on a topical area relevant to the mission and goals of SCB. Presently, SCB maintains four working groups focused on Freshwater, Social Science, Religion and Conservation Biology, and Ecological Economics & Sustainability Science.

Size/Composition

1. **Sections:** Active, self-identified members of SCB interested in focusing their efforts on conservation issues in specific geographic regions. SCB members may join up to two Sections. Section membership is tracked by the Executive Office. Sections must maintain 100 members to remain active within SCB.
2. **Chapters:** Active SCB members who are interested in focusing on conservation issues in specific geographic regions. SCB members may join as many Chapters as they wish.
3. **Working Groups:** Self-identified members of SCB interested in specific conservation issues. SCB members may join as many Working Groups as they wish.

Leadership

1. **Sections:** Nominated and elected by Section members according to established Section Bylaws and Executive Office procedures.
2. **Chapters:** Active SCB members. Nominated and elected by Chapter members according to established

Chapter Bylaws and Executive Office O procedures.

3. **Working Groups:** Nominated and elected by WG members according to established WG Bylaws and Executive Office procedures.

Activities

1. **Sections:** Self identified in relation to the mission and goals of the Society.
2. **Chapters:** Self identified in relation to the mission and goals of the Society.
3. **Working Groups:** Self identified in relation to the mission and goals of the Society.

Representation

1. **Sections:** Section Presidents serve on the SCB Board of Governors (BOG) representing the interests of the Section. Section Presidents are expected to attend at least one Board meeting per year.
 - a. Sections do not independently represent policies and positions on behalf of SCB without approval from the Policy Director and/or Policy Committee, nor can they use the SCB logo except for situations as described elsewhere in this Handbook.
2. **Chapters:** The Chapter Representative on the BOG represents the interests of the Chapters collectively.
 - a. Chapters do not independently represent policies and positions on behalf of SCB without 1) approval from the Regional Section within which they are located as well as 2) approval from the Policy Director and/or Policy Committee.
 - b. Chapters can only use the SCB logo as described elsewhere in this Handbook.
3. **Working Groups:** Do not have direct Board of Governors representation; nor do they independently represent policies and positions on behalf of SCB without approval from the Policy Director and/or Policy Committee. They can only use the SCB logo for situations as described elsewhere in this Handbook.

Relationship between Groups and Global Society

1. **Sections:** The BOG expects Sections to pursue projects that are regionally significant. Per the Society's 2011-2015 Strategic Plan, Sections should "develop effective working relationships between SCB's Board of Governors, staff, and sections to enhance the sections' growth and capacity." Sections and their activities should integrate with SCB's core identity, central messaging, and outreach efforts.
2. **Chapters:** Operate in the context of the regional Section in which they are located and pursue projects that are regionally significant. Chapters and their activities should integrate with SCB's core identity, central messaging, and outreach efforts.
3. **Working Groups:** The BOG expects that the WGs operate in accordance with their topic areas and that they pursue projects that are meaningful for their members. Working Groups and their activities should integrate with SCB's core identity, central messaging, and outreach efforts.

Support by the SCB Executive Office

1. **Sections:** The Executive Office offers a suite of support services including but not limited to free web hosting, listservs (fee applies), mass emails to section members, conference calling services, surveys, and SCB marketing materials. Limited financial support (as approved by the BOG during the annual budget process) for Section activities is derived from general, unrestricted SCB funds. Additional funding can come through grant funds restricted to the Section, dues, fundraising events etc. Information about these and other issues is detailed later in this document.
2. **Chapters:** The EO offers a suite of support services including but not limited to free web hosting, listservs (fee applies), conference calling services, surveys, and SCB marketing materials. Limited

financial support (as approved by the BOG during the annual budget process) for Chapter activities is derived from general, unrestricted SCB funds. Additional funding can come through grant funds to the Chapter, dues, fundraising events etc. Information about these and other issues is detailed later in this document.

3. **Working Groups:** The Executive Office offers a suite of support services including but not limited to free web hosting, listservs (fee applies), mass emails to WG members, conference calling services, surveys, and SCB marketing materials. Limited financial support (as approved by the BOG during the annual budget process) for WG activities is derived from general, unrestricted SCB funds. Additional funding can come through grant funds restricted to the WG, dues, fundraising events etc. Information about these and other issues is detailed later in this document.

Section 1. Business Management

The Society is a registered non-profit 501(c)(3) organization in the United States and is supported by individual memberships, institutional and individual subscriptions to scholarly and other publications; by conference fees collected from attendees; by gifts, grants, bequests, trust funds, and similar instruments; by loans approved by the BOG; by the proceeds of the sale of publications or other items the Society may issue with the approval of the BOG; and from such property or funds as it may acquire. All members of the BOG serve without compensation, although they may be reimbursed for their expenses if they meet BOG adopted criteria. The Society has paid professional staff. The finances of the Society are reviewed and audited annually by an accredited accounting firm.

Tax Exempt Status

SCB has United States Federal 501(c)(3) tax exempt status. SCB groups usually do not have independent 501(c)(3) tax exempt status and may be considered subgroups of SCB as noted elsewhere in this document and, for Chapters, in the Chapter Agreement. U.S. Federal law requires that we operate all of our accounting for 501(c)(3) tax exempt status out of one central office. For SCB, the central office is the EO in Washington, DC, USA.

Management of Finances

All finances for Sections and Working Groups will be managed through the EO for consistency in accounting and reporting and to protect SCB's 501(c)(3) status. Chapters are responsible for managing their own dues and grant funding, unless otherwise stipulated in Section 5 of this document. PLEASE NOTE: Chapters may **not** use SCB's Employer Identification Number to open a bank account. We recommend opening an account through a University where applicable.

The Section or Working Group's financial representative will coordinate with the Assistant Director on financial matters, reimbursements, expenses and reporting. All fundraising will be coordinated with SCB's Executive Director.

Reimbursements

Reimbursements for travel, food, lodging or other must be approved by the group's board and SCB's Assistant Director **prior** to making the transaction. An individual must demonstrate that a reasonable effort has been made to keep expenses down.

After the transaction has taken place the policies for reimbursement are as follows:

Policy on reimbursement documentation and timing

Reimbursements requests must be made using SCB's reimbursement request form and must include documentation of actual expenses (receipts). If you do not have this documentation, you must send SCB's Assistant Director a signed letter on your institution's letterhead stating why particular receipts are missing. Acceptance of these claimed expenses is determined by the Assistant Director. All reimbursements must be requested within 90 days of the incurred expense.

Reimbursements will not be considered after 1 February of the year following the activity. For example, if you fly on 15 December 2010, you must submit your reimbursement request by 1 February 2011, for the expense to be considered reimbursable. Note that SCB will not reimburse travel, car rental, lodging, etc., when purchased with airline flyer miles or credit card bonus points.

Per Diem reimbursements

Per Diem reimbursements will be considered only if approved in advance. Per Diem is set according to US Federal government rates: <http://www.irs.gov/pub/irs-pdf/p1542.pdf>

Personal vehicle mileage reimbursements

When using a personal vehicle to travel for official SCB business, reimbursement is made according to US Federal government rates: www.irs.gov. Note that these rates are adjusted annually.

Air travel reimbursements

Due to increasing costs of airline tickets and prohibitively expensive last minute purchase prices, reimbursable tickets for air travel must be purchased 45 days (or more) in advance of travel. If a ticket is purchased less than 45 days from travel dates, only the difference between the two prices will be reimbursed.

Annual Budgeting Procedure Overview

The SCB operates within a fiscal year that corresponds to the calendar year. Annual operational budgets are developed two years in advance and are refined and adjusted in the year before they are adopted. This is in accordance with Article 7 of the Society's bylaws: "the Board of Governors shall adopt a budget and approve in advance proposed annual expenditures."

SCB Sections and Working Groups should follow the procedures below. The Chapters representative to the Board may submit a request on behalf of all chapters. Individual chapters may apply for support through the Chapters grants process when funds are available. Chapters will be notified of the timeline and process through the Chapter listserv.

Estimated Dates:

- August 1 – Request is sent out for items to be included in budget
- August 15 – A reminder email is sent
- September 1 – Deadline to receive budget requests
- September – SCB's books are prepared for the budget process
- October – A draft budget is created
- October 20 – Draft budget is sent to SCB Treasurer
- November 7 – Draft budget is sent to SCB Executive Committee
- November 15 – Executive Committee Call
- November 22 – Draft budget is sent to full board
- December 1 – A Board Discussion Call is scheduled
- December 7 – A board Vote Call is scheduled

Procedures:

1. **Solicit budget requests:** SCB Assistant Director sends out request for items to be included in budget to the Board of Governors, staff and Working Group presidents.
 - a. Early August start, early September deadline
2. **EO review of requests:** All requests will be documented. The Executive and Assistant Directors will review all proposals and remove items that are already included or that have been previously approved by the Board. The Executive Director will make recommendations based on fundability.
 - a. Process to be completed in coordination with the budget

3. **Executive Committee:** All remaining requests will be forwarded to the Executive Committee for evaluation based on their relevance to the Strategic Plan and SCB as a whole, with less concern for eventual sources of funding.
 - a. Work of the committee to be completed in coordination with the Executive Committee budget call
4. **Fundraising strategy decisions:** Once the final budget has been approved, the Executive Director will review the fundraising goal and prioritize the need against the available funders, and/or help seek new funders to match need.
 - a. Work of the Committee to be completed in December or early January

Section 2. Members

Membership Composition

SCB members may join up to two regional Sections. Members are not required to geographically reside in the Section(s) they choose to join. Joining a Section is voluntary, i.e., if a member resides in a particular geographic area (Europe, for example), that does not mean that s/he will automatically be a member of that Section (e.g. the Europe Section).

SCB members may join multiple chapters. We strongly recommend that members reside in close geographic proximity to their Chapter's focal region.

SCB members may also join multiple Working Groups.

Opt-in Policy

SCB employs an 'opt-in' policy for all group membership features. This means a member must choose to join a group or a listserv. Members will never be automatically added to any list.

Note that the opt-in policy can cause some confusion for members. Some members erroneously believe that because they reside in a region or and/or because they join a listserv, they are part of that Section or Working Group. This is not the case. Please encourage participants in your meetings to check their Section or Working Group status online.

SCB members may opt to join a local chapter, and all chapter members should be in good standing with SCB (i.e., pay their SCB membership dues in addition to their chapter dues). Chapters are required to manage their own rosters.

Member Lists and Reports

You can see some information about group membership in different locations.

- **Intranet** – The SCB intranet is a secure part of the SCB website that is available only to elected members of the BOG and Boards of Directors (BODs) of SCB's Sections and presidents of Working Groups. If you are part of one of these groups, you must be logged in to the SCB website via your SCB profile before you can access the intranet from your Member Home page.

The intranet hosts regular monthly reports for the purpose of tracking member demographics. Email addresses and full mailing information are not available from this resource.

- **Expertise Database** - The SCB Expertise Database includes basic contact information and can be accessed at any time by SCB members. The available data is only as good as the updates provided by members.
- **Reports** - Additional demographics and/or reports may be obtained from the Executive Office by special request. These reports will not contain direct contact information unless special permission is granted (such as for Board nominations).

Disclosure of Member Information

SCB member privacy is of utmost importance. SCB members voluntarily join SCB groups, however, member information is not accessible to group members. Member information is protected by the EO and sharing of information is regulated for security and privacy reasons.

The SCB's EO closely controls access to full membership information. We work hard to protect our members' privacy and the integrity of our membership data. However, a limited amount of information about our members is publicly available.

- **Expertise Database** - The SCB Expertise Database has an incomplete list of current SCB Members and modest contact information and can be accessed at any time by SCB members.
- **Reports** - Additional demographics and/or reports about members in your region may be obtained from the Executive Office by special request. These reports will not contain direct contact information unless special permission is granted, such as for Board nominations.

SCB employees are paid representatives of the organization and are responsible for the protection of membership data. Membership lists are administered by Burk & Associates, Inc., a third party membership management organization. BAI manages and protects member privacy to avoid potential misuse.

Section 3. Communication with Members

Emailing Your Members

Electronic communication is the most inexpensive and frequently used means of communicating with your membership. We recommend that you encourage your group's members to join the respective listserv for your group. Communication via the listservs is free and open – available to you any time.

Overuse of electronic communication will have three likely outcomes:

1. Members may become frustrated if contacted too frequently – many members belong to multiple SCB groups.
2. SCB gets flagged as a “spammer” by spam filtering software and no one gets our emails!
3. Frequent contact dilutes the messages sent by the organization.

The following policies protect member information and help us moderate the number of messages sent to members by the Society.

Email Address Lists

Email addresses of individual members are not provided to SCB groups or any outside entities, except under special circumstances (for example, in a search for prospective SCB Group Board members).

Sending Group-Specific Emails – Mass Emails

If an SCB group wishes to send an email to its members, subset of its members, or SCB members who live in a particular region but who are not group members the President of that group or the marketing designee must complete a form and submit it to the Assistant Director. The Assistant Director may make recommendations on messaging and will oversee delivery of the final message to the group.

Working through the EO prevents excessive email delivery to members—remember that there are seven Sections, four Working Groups and dozens of Chapters, all communicating via email with SCB members!

Mass Email frequency

Section Presidents (or marketing designee) may send unlimited emails to section members (unless content is deemed inappropriate) and may send two emails to a subset of its members, or SCB members who live in a particular region but who are not group members the that group.

Aside from necessary email functions such as voting and calls for nominations, Chapters and Working Groups, as a rule of thumb, are allowed two mass emails per year. We limit the frequency of emails to members out of respect for their email inbox management and based on the availability of EO staff to satisfy these requests.

Email limitations

Nearly all requests for queries (specific subsets of SCB's membership) may be arranged; however, on occasion we will not be able to arrange complicated queries quickly. For example, pulling all members in a particular geographical area who are members of a particular section and employed by a college or university is possible, but requires that a custom query be built.

All-member emails

All-member emails (i.e., those sent to the entire Society's membership) are sent out periodically to highlight upcoming events and present important Society notices. We average one email per month, though the frequency of emails increases in advance of the SCB's International Congress for Conservation Biology (ICCB).

Contact SCB's Assistant Director, Heather DeCaluwe (hdecaluwe@conbio.org) if you wish to include something in an all-member email. We typically include two to four items, and we send all-member emails when enough content is available. Content of mass-emails is Society-wide and will only be included if the content is relevant to all SCB members.

Print Communications

Member mailing information is not provided under any circumstances. Groups can only conduct mail solicitation in coordination with the Assistant Director who must approve messaging. All mailing services and payment must be coordinated by the SCB group with group funds.

Newsletters

SCB groups may create a newsletter to communicate about their activities. The newsletter may be circulated either in print (at the expense of the group) or electronically (recommended) via listservs and via the SCB website.

Please coordinate with SCB's Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org) for design recommendations... The SCB also has templates available for use.

Groups are encouraged to submit quarterly updates to the SCB Newsletter and to update their website content regularly.

Listservs

To maintain consistency with Society web and email addresses, group listservs must be set up by SCB's Webmaster. Groups should not use a listserv provider other than that offered by the EO.

Other Forms of Member Communications

We often evaluate new ideas and applications to broaden your group's reach. If you have suggestions for future development, please contact the Assistant Director to discuss the possibilities. Forms of communication not included in this section should be approved by the Assistant Director.

Section 4. Governance

Board Positions

All Board of Directors (BOD) positions are described in Section, Chapter and Working Group bylaws (located on the SCB website). Terms of office may not exceed three years in order to facilitate succession of new candidates.

All Chapter Board of Directors (BOD) positions are described in Chapter bylaws (located on the SCB website). It is very important to consider which terms of office and election periods will give your chapter the most viability and longevity. For example, depending on your chapter's needs and scope, terms of office may range from one year to three years. Elections may happen simultaneously or with overlapping terms. Decision points should include institutional memory, leadership pool, and membership needs.

Ex-officio Board Members

An ex-officio member of a Board is a position appointed by the current President of that Group. Their position is relevant to the activities of the Group at that time and runs for the duration of that President's term. The position may be renewed by the incoming President or a new representative may be chosen. Ex-officio members have limited access to BOG resources and are not voting members of the BOG or BOD.

Nominations, Elections, and Voting

PLEASE NOTE: The EO only supports election procedures for Sections and Working Groups. Chapters are responsible for hosting their own elections.

Nomination Schedule

A call for nominations among Sections and Working Groups is issued in either February/March or August/September, as determined by the schedule in the group's bylaws.

A call for nominations among Chapters is determined based on the particular chapter's preference.

Election Schedule

Chapters are expected to run elections via email or other electronic means, independent of the EO, as described in their bylaws.

Section and Working Group elections will be held around one of the following pre-determined schedules:

1. Elections occurring around the SCB's ICCB:
 - a. February/March - Call for nominations
 - b. April/May - Voting
 - c. SCB's ICCB - New officers take office
2. Elections occurring around the first of the year:
 - a. August/September - Call for nominations
 - b. October/November - Voting
 - c. January 1 - New officers take office

How to Hold a Section or Working Group Election

Elections are administered via the SCB website. SCB's Administrative Assistant serves as the "election official," and facilitates the election process. To execute an election, the group's Board of Directors should follow these guidelines:

1. Select a nominations representative from your board to assist with the election process.
2. Solicit nominations via an email to your group - encourage self-nominations.
 - To do this, send text for the nominations request email to (elections@conbio.org). The Administrative Assistant will post it to group members.
 - Send the same message to your listserv, in multiple languages if you wish, but English must be included—English is the official working language of the Society. Latin-based languages only, please--this is a restriction due to some peoples' computer limitations.
3. The nominations representative must collect nominations, verify that the nominees are SCB members in good standing, ensure nominees are willing to serve, and solicit short statements from nominees about why they want to serve.

- We can also post short résumés of each nominee, but only if résumés are available for **all** candidates. Include multiple (Latin-based) languages for the statements if you wish.
4. Send the following information, in a single email, to elections@conbio.org.
 - a. Proposed start and end date of the election NOTE: we do our best to accommodate dates
 - b. All nominees' names, organizational affiliations, contact information, bylaw requirements met, statements, and résumés (if applicable.)
 - c. Text for the email to announces the open ballot
 - d. Test for a reminder email to be sent two weeks later (if desired)
 - We will send these email notes via the SCB membership system. We can provide sample text for the announcements if desired.
 5. The Administrative Assistant will set up the election to start and end automatically at zero-hundred hours (12:00 a.m. Pacific Time, GMT -8) of the dates you choose. Elections will automatically show up on the Member Home page of your respective members.
 6. The election system automatically tallies final votes, and the Administrative Assistant informs your nominations representative of the final count at the end of the election.
 7. Your group's nominations representative must contact all candidates and your group's Board with the results.
 8. After notifications are complete, the Administrative Assistant will send welcome packets to all new Section board members and Working Group presidents, and will update the boards in various places.

Resources for Section and Working Group Boards of Directors

Intranet

The intranet is a resource for active Board members. It contains Society governing information (e.g., this handbook), marketing materials, links to publications, SCB group information and details about upcoming Board meetings. It is available to board members in the following groups only:

- Full access - All current Section BOD members and Working Group presidents

Two ways to access the Intranet:

1. Go to: <https://www.conbio.org/intranet/>, and log in
2. Log in on the SCB homepage. Once you are logged in, you will see "You have administrative privileges" highlighted at the top of the web page. Click on the Intranet link.

Intranet resources – use them!

The intranet is a very useful tool for those who have access and should be utilized by your Board to assist with group operations and planning. The following information is available on the intranet:

- BOG – This link includes information on Board of Governors activities including travel information for upcoming meetings, Board structure, BOG policy decisions throughout time, email lists and orientation materials.
- Procedures & Guidelines Documents – SCB Groups Handbooks (this document)
- SCB Marketing – Download logos and other images useful for developing marketing materials (be sure to share your designs with SCB's Senior Designer before circulation).
- SCB Timeline – Search all SCB events back from the founding of the Society.
- Email lists
- Sections and Working Groups – This link sends you to a page where you can view reports mentioned in Section 1 of this document.
- Meeting Resources – A guide developed to assist Local Organizing Committees in development and implementation of SCB Meetings.

Communications

SCB maintains Board contact information in various places. If your email address or contact information changes, it is your responsibility to contact SCB's Assistant Director. Additionally, if a Section or Working Group board member resigns, your President must contact the Assistant Director immediately.

If a Chapter board member resigns, please notify the Chapters Committee Chair so that updates to chapter contacts can be made online and on the Chapters listserv. Chapters are strongly encouraged to establish mechanisms for change-overs so that in-coming Board members remain in contact with SCB.

Annual Chapter Registration

All Chapters are required to register with SCB between January 1st and January 31st. The registration form is online on the Chapters' main website (<http://www.conbio.org/Chapters/>). The information gathered from registration is vital to SCB's ability to maintain its 501(c)(3) status—tax-exempt status in the United States.

Registering your Chapter provides SCB with changes in Chapter leadership and membership, the year's activities, and financial reporting for the IRS. Registration allows Chapters to remain in good standing with SCB and provides access to services from the EO.

Chapters that do not register for two consecutive years are considered inactive and must forward any remaining monies to SCB's Assistant Director, Heather DeCaluwe (hdecaluwe@conbio.org). We will try to hold monies for up to two years. If the Chapter reactivates within two years, any remaining monies will be returned to the chapter.

A Chapter unregistered for four years is considered dormant and is terminated (see Chapter Agreement and Bylaws for details).

Section 5. Fundraising

Coordination & Communication

ALL MONIES RAISED IN THE NAME OF THE SOCIETY FOR CONSERVATION BIOLOGY REGARDLESS OF TAX STATUS MUST BE COORDINATED VIA THE EXECUTIVE OFFICE.

Only the Executive Office may provide SCB's 501(c)(3) information to donors (monetary or in-kind).

All grant proposals—regardless of amount, recipient, or potential funder—must be submitted to, reviewed by, and approved by the Executive Director before the proposal is submitted to the potential funder. *All proposals must match one or multiple goals of SCB's Strategic Plan.*

As a global society, SCB is funded by global foundations, corporations, and NGOs. A coherent and cohesive Society using consistent language and communication that reflect unity is the way to ensure lasting support from funders. If a funder gets the impression that one SCB group is operating without coordinating with other units of SCB, the funder will be less likely to support any of our activities.

Unless otherwise arranged, all proposals are signed by the SCB Executive Director to maintain consistency and accounting. Proposals are submitted by the Executive Director or an alternate designee who may be a member of the group. Please note that all grant proposals will have direct costs applied against them or have a 15% overhead included in the budget that will be kept by the EO.

The Executive Director facilitates fundraising coordination between the Society as a whole and the needs of various SCB groups and committees. The Executive Director enables the various arms of SCB to coordinate, communicate, and collaborate in achieving local and regional fundraising goals.

Budget Process

The EO develops the annual budget for the Society and plans the overall budget two years in advance. Budget planning begins in August of each year. Groups are urged to plan ahead, outline their fundraising priorities, and identify potential funders through the formal budgeting process. While most groups' budgets and projects will not officially be a part of the overall society budget, SCB groups should follow the same timeline as the Society so that coordination among the groups can begin early.

Procedure for Submitting Proposals

1. Plan early! Develop your fundraising goals and prioritize your group's projects during SCB's budgeting process (one to two years in advance).
2. Before communicating with potential funders about funding ideas and projects, send an email to the Executive Director describing your intentions.
3. Send the proposal via email to the Executive Director *at least two weeks in advance* of submitting your proposal to the potential funder. Work with SCB's Executive Director to obtain approved language about SCB and for legal documents as necessary. All proposals must be reviewed and approved by the Executive Director before they are submitted to a funder.
4. Send proposal to potential funder. Remember that unless otherwise arranged, all proposals are signed by the SCB Executive Director to maintain consistency and accounting. Proposals are submitted by the Executive Director or an alternate designee who may be a member of the group.
5. If the proposal is accepted, work with the Executive Director on any paperwork.

Reporting

Groups are responsible for drafting all reports to funders and partners if they have been active in soliciting the grant or if they have significantly benefited from the grant. Draft narrative reports are due to the Executive Director *at least two weeks* before the deadline. For the financial report, begin to work with SCB's Executive Director at least two weeks before the deadline. If needed, we can generate a financial report and reconcile the group's monies with what is in SCB's accounting books.

In the case that money does not come through the EO (for example, if a group has a financial partner or in the case of some Chapters, a separate bank account), copies of all proposals and reports should still be submitted to the Executive Director for SCB records and for auditing purposes.

Individual Donors

Only the Executive Office may provide SCB's 501(c)(3) information to donors (monetary or in-kind). **ALL MONIES RAISED IN THE NAME OF THE SOCIETY FOR CONSERVATION BIOLOGY REGARDLESS OF TAX STATUS MUST BE COORDINATED VIA THE EXECUTIVE OFFICE.**

Individual donors are essential to raising funds for all organizations and events. No review process is required for individual donors except that the following guidelines must be followed to protect SCB's 501(c)(3) status.

Individual donations

Donors giving \$250 USD or more must donate funds to the Society, via SCB's Assistant Director. If funds are dedicated to a particular group, that money will be deposited into that group's account. SCB will also send a receipt and thank you letter (if appropriate) to the donor as required by US Federal law.

Donations of less than \$250 USD can be received by a group, but the donor may not claim the donation as a tax deduction unless the funds are routed through the Executive Office. The only exception to this rule is if the SCB group has its own 501(c)(3) status. In this instance, the SCB group can provide its own tax exempt ID number to the donor.

Procedure for mailed monetary donations:

- Check payments or other non-electronic donations should be mailed directly to the EO address, and to the attention of the Assistant Director.
- The donation should include a note with the name of the group that is to receive the donation along with a contact name and the address of the group's representative (if applicable).
- The funds received by the EO will be allocated to the appropriate group and a "Thank You" will be sent to the donor to serve as their tax exempt receipt.

Procedures for online credit card donations:

- Groups should use the online SCB donation form and **ask patrons to specify their group in the 'comments' field to properly allocate the donation.** If the comments field is not used, their donation will be applied to the Society as an undesignated donation and will not be allocated to the group.
- The funds received by the EO will be allocated to the appropriate group and a "Thank You" will be sent to the donor to serve as their tax exempt receipt.
- Please note, if credit card donations are received, the group will receive the amount of the donation less transaction processing fees imposed by the bank.

Non-monetary or In-kind Donations

Only the Executive Office may provide SCB's 501(c)(3) information to donors (monetary or in-kind). **ALL MONIES RAISED IN THE NAME OF THE SOCIETY FOR CONSERVATION BIOLOGY REGARDLESS OF TAX STATUS MUST BE COORDINATED VIA THE EXECUTIVE OFFICE.**

Donations of goods, labor, or services may also be claimed as tax exempt. To receive tax exempt receipts, a similar process must be followed.

- Direct your donors to send clear *documentation* of their non-monetary donations to the EO address and to the attention of the Assistant Director. This should include the dollar value of the donation.
- The documentation should include the name of the group receiving the donation and the contact name and address of the group's representative.
- The Assistant Director will mail a receipt to the donor and cc the group's representative.

Tax Credit/Tax Exempt Status

Only the Executive Office may provide SCB's 501(c)3 information to donors (monetary or in-kind). **ALL MONIES RAISED IN THE NAME OF THE SOCIETY FOR CONSERVATION BIOLOGY REGARDLESS OF TAX STATUS MUST BE COORDINATED VIA THE EXECUTIVE OFFICE.**

Even if you do not invoke SCB's tax exempt status, **ALL MONIES RAISED IN THE NAME OF THE SOCIETY FOR CONSERVATION BIOLOGY REGARDLESS OF TAX STATUS MUST BE COORDINATED VIA THE EXECUTIVE DIRECTOR.**

The procedures in Section 5 of this document are mandatory. These procedures protect the Society's 501(c)(3) status, particularly if we are audited.

As of 1 January 2009, all donations received outside of the U.S. are also subject to these requests and reporting procedures. Tax exempt claims made in reference to SCB must have supporting documentation from the EO. For tax exempt receipts, follow the appropriate procedures throughout Section 5 based on the type of donation.

Section 6. Public Policy

SCB works to include conservation science in the policy decisions of major international conventions, governments, organizations, and foundations. We work with organizations to ensure that conservation science is applied accurately in policy decisions. We accomplish this through our counsel, analysis, and recommendations.

SCB groups have considerable influence in the policy arena, representing local, national, international, and topical interests among SCB members. SCB's policy process ensures that all SCB groups (including the EO) comply with the regulations that allow us to continue operating as a 501(c)(3) organization (i.e., a not-for-profit corporation operating under Section 501(c)(3) of the U.S. Internal Revenue Code, and governed by the Internal Revenue Service [IRS]).

Policy Approval Process

New policy statements (testimony, formal comments, or positions) as well as significant changes to previously approved statements need to be coordinated with the SCB Policy Director or SCB's Policy Committee in a timely manner. This means that you typically allow several weeks for review, based on the scale and scope of the issue to be addressed. New position statements cannot be initiated or significantly altered independently of the SCB policy process.

The easiest course of action for a group is to propose policy positions on topics that are fairly common within your group. We can approve these positions and associated actions far in advance of implementation. As such, your group will have a suite of policy statements to choose from to address a given subject/issue.

SCB always gives priority to reviewing statements that pertain directly to a decision being made in the near future.

The policy approval process applies to any new (not yet approved) public policy position(s) or the application of an existing policy position in a very different context, taken by SCB or a sub-group of SCB with the attention of announcing that position of working toward it in relation to any specific change in policy, including but not limited to :

- Treaties, Protocols or implementation plans
- Legislation, regulations, and litigation
- Confirmation of judicial and political appointees.

NOTE: IRS regulations ban any 501(c)(3), including SCB and its groups, from participating in any attempt to influence the election of any public official.

Steps for approving your policy proposal

No SCB member or group may issue a statement without approval from the SCB Policy Committee. If you or your group wishes to issue a policy statement, or if you would like SCB Global to issue a policy statement, you must follow the SCB policy approval process.

We will most likely expedite the review of and accept your statement if the statement is:

- a. Based on science published in *Conservation Biology*, other peer-reviewed journals, or white papers approved by SCB or its groups.
- b. Consistent with the strategic policy priorities of SCB or your group. A description of SCB policy priorities is available at www.conbio.org/activities/policy/Priorities.cfm. Several SCB groups post their policy priorities on their web sites.

Please ensure that your proposal is written in clear, objective language that is appropriate for conservation researchers, managers, and policy makers.

To request approval of a policy statement any SCB group should follow these steps:

1. Submit the draft statement to the President and Policy Chair of Section that is most relevant to your initiative. For example, a chapter based in North Dakota seeking to address something before the US congress, should submit a draft statement to the President and Policy Chair of the North America Section. Email addresses for these individuals are available on Section websites.
2. At the same time, submit the draft statement to SCB's Policy Director (John Fitzgerald, jfitzgerald@conbio.org) and the SCB Policy Committee Chair (Jeff McNeely, JAM@iucn.org).

If these four policy leaders agree that your statement meets criteria a and b above, the Policy Director will submit it to the Policy Committee for three working days' review after which it will be deemed approved while incorporating suggestions by the Committee members as needed.

If your statement does NOT meet the criteria above, your statement may be reviewed by independent scientists or practitioners. If additional review is needed, you can be expected to be notified of your statement's acceptance (with revisions, if needed), or rejection within no more than 11 business days of submission.

Even if not all four of the policy leaders agree, you may still ask the Policy Director to submit your proposal to the Policy Committee. If it garners a majority vote in favor you will be permitted to pursue it and to publish the position statement. If it does not, the Policy Director will explain why so you can choose whether to amend it or set it aside.

A detailed description of the policy approval process (the internal steps SCB takes to review your document) is available at www.conbio.org/Activities/Policy/PolicyInnerWorkings.cfm

Please consult with SCB's Policy Director if you have further questions.

Disclaimers

THERE ARE NO DISCLAIMERS. Before taking any public action with respect to a proposed position or policy statement, your group **must** first obtain SCB approval by email by following the procedures above.

Why? SCB is a not-for-profit corporation operating under Section 501(c)(3) of the U.S. Internal Revenue Code, governed by the Internal Revenue Service [IRS]. Any statement made by the Society or any of its groups must be made in compliance with the regulations governing 501(c)(3) organizations. Our policy approval process ensures that the Society and all of its groups adhere to these regulations. If we fail to adhere to them, SCB could lose its 501(c)(3) status, which would be seriously detrimental to the organization and our work.

Definitions and Examples

SCB defines public policy advocacy as the process of recommending changes in the public law or its implementation.

What is scientific advice and what is advocating a policy position?

Example 1 (Scientific advice)

Loudoun County's transportation board is considering widening route 7 west of Leesburg to Round Hill. The local SCB chapter wants to acknowledge that this project will have detrimental impacts on Eastern Bluebird habitat.

The chapter provides input to the transportation board stating that the County's proposed expansion of the highway will alter X habitat, resulting in Y impacts on the Eastern Bluebird. These impacts are significant because of (1, 2, 3 science-based reasons).

This is scientific and technical advice, not *necessarily* advocacy. However, your chapter should still report this type of activity to SCB. You can include this information in your annual report.

This scientific and technical advice is probably not considered to be lobbying if limited to cause and effect statements (for additional guidance, see the Packard Foundation's summary of IRS rules on lobbying posted on our policy website -- <http://www.conbio.org/activities/policy/Tax%20Law%20Lobbying%20Rules1.pdf>).

Example 2 (Adopting a position on public Policy)

Loudoun County's transportation board is considering widening route 7 west of Leesburg to Round Hill. The local SCB chapter wants to acknowledge that this project will have detrimental impacts on Eastern Bluebird habitat.

The chapter provides input to the transportation board stating that the County's proposed expansion of the highway will impact X habitat, resulting in Y impacts on the Eastern Bluebird. These impacts are significant because of (1, 2, 3) science-based reasons. **Furthermore, the SCB chapter recommends that the County not adopt the proposed plan.**

This **is** a policy statement and it may be lobbying according to the IRS, depending on whether the adoption of the plan is a legislative act. If you are unsure, check with the policy office or a local attorney or accountant who is familiar with IRS regulations, and record any expense as possible lobbying and report it to the SCB Policy Director (at least semi-annually – May and December).

Per this example, if the transportation board or other legislative body for Loudoun County had asked SCB or a subgroup in writing for testimony or technical advice, that advice or testimony is generally not lobbying according to the IRS. However, it is considered a policy statement in terms of SCB's approval process. As such, you must submit your testimony or written advice in advance via the SCB Policy process.

Direct Lobbying

Direct lobbying is a subset of policy advocacy. Policy advocacy has no legally binding definition. Rather, it refers to a broad set of actions that go beyond scientific observations but don't necessarily constitute lobbying for a particular bill or amendment.

Direct lobbying is a communication with a legislator (national or international) or legislative staff member which:

- (1) Refers to specific legislation (a bill or an amendment); and
- (2) Asks that the official vote in favor or against that legislation.

Referenda, Initiatives and Recall efforts are decisions to be made by the voting public to repeal a law, create a law or remove an office holder from office, via their votes cast on a ballot. Communications to the public in favor or against these are considered direct lobbying.

Executive branch officials: Most communication with executive branch officials is not considered lobbying for purposes of tax rules.

Direct lobbying and grassroots lobbying include communications seeking to affect votes for or against:

- (1) Specific legislative proposals even before they have been introduced;
- (2) Treaties requiring U.S. Senate ratification from the time the President begins negotiating the U.S. position with the other treaty parties
- (3) U.S. Senate confirmation of administration appointees, for example federal judges and cabinet officials
- (4) Resolutions, even if they have no binding legal effect.(see the Packard Foundation's summary of IRS rules on lobbying).

Grassroots Lobbying

SCB and its groups, like all 501(c)(3) organizations, may only spend a small portion of their budgets on lobbying and only a fraction of that small portion on grassroots lobbying. SCB must report all lobbying by any of its subparts to the IRS annually

Grassroots lobbying is defined as a communication **with the public** or subsets of the public (as opposed to our own SCB Members) which communication:

- (1) Refers to specific legislation
- (2) Takes a position on that legislation
- (3) Includes a "call to action"

A call to action includes the following:

- (1) Urging a recipient to contact a legislator or staffer (e.g. "Tell Congress what you think," "Call your Representative.")
- (2) Providing the address or telephone number of a legislator
- (3) Providing a petition, tear-off postcard, etc. addressed to a legislator
- (4) Identifying a legislator as opposing the legislation, as being undecided, as being a member of the committee considering the legislation, or as being the recipient's representative. Identifying the sponsor of the legislation does not count as a call to action.

Record Keeping and Reporting

Reporting policy advocacy activities is critical to SCB's ability to maintain its 501(c)(3) status. We are required by law to report all lobbying activities each year. This includes all funds from SCB accounts, not personal funds spent by people who happen to be SCB members.

If we spend more than the permitted percentages of our budget on lobbying or grassroots lobbying, we may lose our non-profit status. Therefore, we must know where we stand at mid-year and be impeccable in tracking our expenditures. This includes the amount of any group's funds spent in direct lobbying and grassroots lobbying.

Groups must report their advocacy expenditures and designate which, if any, were for lobbying or grassroots lobbying purposes. Guidance for that determination is available on the SCB policy website, from the Policy Director, and if necessary, from our legal counsel.

All major policy advocacy actions, and all lobbying expenditures, must be recorded and *reported to SCB twice each year: by July 31st*, - for the first half of the year *and again by January 31st* - for the entire previous calendar year.

Policy Plan

The SCB policy activities are based on the annual recommendations of the Policy Director and Policy Committee Chair as reviewed and amended by the Policy Committee and the BOG. Current areas of focus for SCB's overall policy program can be found on the SCB Policy website. SCB groups can engage in policy other activities not listed on the website but before undertaking any public statements on any areas not yet addressed by SCB any SCB subpart must have Policy Committee approval as outlined above.

Why the strict process?

SCB's policy procedures protect the Society. We know that none of our members would ever abuse the name of the Society. Only once in the 20+ years of the Society, has the adoption of a policy statement caused concern. We would like to see our peaceful record continue.

In addition, to protect our 501(c)(3) status, we have to be very careful about how we approach policy matters. The IRS in the United States is very strict about what non-profit organizations can and cannot do with respect to lobbying and politics. Since SCB reports lobbying expenditures to the IRS in detail we must record and report carefully. If we make mistakes, we may lose our non-profit status. Losing our non-profit status would jeopardize many of the donations and grants we receive.

Section 7. SCB's International Congress for Conservation Biology (ICCB)

Fundraising / Finances

Fundraising for the ICCB is a very big task and is a requirement for the Local Organizing Committee (LOC) staff. The Society at-large is not responsible for raising all of the necessary funds for hosting an ICCB. Commitments to fundraising on the part of the LOC are a required part of winning a bid to host SCB's ICCB.

As with all other fundraising activities, fundraising for group events must be conducted in compliance with the fundraising policies and guidelines stated in Section 5 of this document. Please coordinate with the Executive Director. Joining efforts by combining several proposals among SCB groups may increase SCB's chance of obtaining funding. If all groups are coordinating with the Executive Director, these synchronicities can be identified. Also, coordination is absolutely necessary to avoid the same funders receiving requests from different SCB groups. Competing with ourselves for funds makes us look disorganized, and diminishes our chances of receiving future funding..

SCB groups should also remember to obtain funding for travel support for their members to attend the meeting.

Booths and Exhibits

Groups are integrated into SCB's primary exhibit space at the ICCBs (individual groups will not have exclusive exhibit space). This approach serves our Strategic Plan by providing central messaging from SCB and maximizing outreach efforts to the meeting's attendees. This policy also serves to help us cope with the increasingly important issues of 1) equal representation across all groups, 2) booth staffing needs, and 3) the problem of lost revenues from limited exhibit space "sold" to SCB groups at no or little cost at our own meeting.

At the ICCB, "Event Days", including Sections Day, Chapters Day, and Working Groups Day, highlight each type of SCB group type at the SCB booth; each day coincides with other special events and allows groups to be highlighted at the meeting. This plan was initiated in 2007 and remains in effect. Please contact Lori Strong, Meetings Coordinator at BAI (lstrong@burkinnc.com) for questions or plans for upcoming meetings.

Marketing

Marketing space can be provided for all groups in the meeting program and throughout the duration of the meeting. Any additional marketing at the ICCB must be approved by the Assistant Director and the Local Organizing Committee. Please contact the Assistant Director and Lori Strong (lstrong@burkinc.com) at BAI for details.

Symposia, Workshops and Short Courses

SCB groups are encouraged to submit proposals/abstracts for Symposia, Workshops and Short Courses that address the group's regional or issue-based foci. All abstracts and proposals must be submitted through the same process as an ordinary proposal and will be reviewed/approved in the same manner. Official events/activities/symposia of the Society, which are approved by the Executive Director or the Board of Governors, may bypass the approval process. This will be done in full cooperation with the meeting secretariat and the LOC.

Business Meetings

All groups are encouraged to hold a business meeting or social at ICCBs. This helps to increase exposure for the group, to satisfy the need for a regular business meeting, and to attract new members and interest. The LOC can

assist you in planning the space for your meeting or venue. Please contact the Meeting Coordinator, Lori Strong (lstrong@burkinc.com) who will coordinate with you and the LOC to find the most appropriate time and venue.

Social Events

Groups may host social events if time allows in the program and if space is available for the proposed event (meaning if there is free meeting space available or vacant space that is already paid for—no additional expenses should result from these activities unless they are externally funded). As an alternative, groups may choose to sponsor an event or a part of an event that is already in the program agenda. This allows for visibility for the group with little planning or staff time.

Section 8. Regional SCB Meetings

SCB Meetings are an important networking opportunity for both members and non-members. They are also important for visibility and recognition of the organization. As groups begin to host more meetings independently of SCB's ICCB it has become important to establish policies for those meetings and to develop meeting materials.

Planning to Host a Meeting

Hosting a meeting means that the group plans and executes the meeting independently. Groups interested in planning a meeting of more than 100+ individuals should contact the Assistant Director as soon as discussion begins and no later than 18 months before the expected date of the event. This is in order to keep the Meeting Coordinator and other EO staff informed of upcoming events and to avoid overlaps that may cause logistical problems or losses in attendance. It also allows the Assistant Director to inform membership or make announcements of upcoming meetings when possible. The Meeting Coordinator should not be expected to assist with planning but may be able to provide advice to those planning a meeting. Alternatively, a separate contract may be arranged with BAI for meeting planning services.

Scheduling Regional Section Meetings

SCB's ICCB is the highlight of the organization's networking opportunities. In an effort to ease ICCB planning logistics and to maximize attendance at both ICCBs and SCB group meetings, groups **meetings with more than 100 expected attendees may not be scheduled in the same year as ICCBs without prior approval.**

Fundraising for Group Meetings or Events

Fundraising for group events should be conducted in compliance with the fundraising policies and guidelines stated in this document.

Conference Guide

The planning of any meeting that will represent SCB in an official capacity should be coordinated using the SCB Conference Guide. This Guide can be found on the intranet at: <https://www.conbio.org/intranet/AnnualMeeting/> or can be attained by contacting the Meeting Coordinator. This guide is a living document; new versions should be available on a regular basis.

Discounts for SCB Members

Regional meetings should offer a discounted registration rate for SCB members. This rate is determined by the organizing committee but it is important that it be greater than the basic fee for joining the Society. A link can be displayed to the SCB Join page allowing non-members to join the organization and get the discounted registration rate. Authentication of membership can be coordinated with SCB's Executive Office.

Services Offered by SCB for Meeting Coordination

Beyond the information in this document and the Conference Guide, the Executive Office has a number of tools to assist planning regional meetings. Organizing committees for regional meetings are encouraged to use these tools as they are proven instruments for meeting planning. These tools include a conference registration system, an abstracts submission system, and a travel support management and review system.

Development of Meeting Logos

Groups may develop a meeting logo appropriate to the meeting and its theme. The SCB logo must be displayed anywhere the meeting logo appears. Any meeting logos developed for SCB group meetings must be approved by SCB's Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org) prior to use. Please contact SCB's Meeting Coordinator, Lori Strong (lstrong@burkininc.com) to begin this process.

Development of Meeting Websites

SCB groups hosting a meeting and developing a meeting website must incorporate the following items:

- The SCB logo must appear on the homepage and be linked to the SCB homepage, www.conbio.org
- A special page must be created describing SCB and linking to the SCB website
- The homepage must clearly state that they are XX Section of SCB
- Final website design must be approved by the Meeting Coordinator before release

A meeting website template is now available for Annual Meetings and Regional Meetings. To begin the design process and content input for the site, please contact Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org).

Section 9. Non-SCB Meeting Participation

Joint or Co-hosted Meetings

SCB groups may co-sponsor or hold a joint meeting with another organization. To be considered a joint or co-sponsored meeting, the SCB group must play a formal role in organizing the meeting. A two month black-out period around the ICCB is required.

Sponsoring Meetings

When an SCB group sponsors a meeting, they contribute time, services or finances to the final event, and are one of several sponsors, but they are not considered a major organizer. There is no black-out requirement for sponsored meetings.

Group-Sponsored Symposia or Workshops at Other Meetings

SCB groups are strongly encouraged to sponsor symposia, workshops or other activities at non-SCB meetings. These activities can be advertised to your group's membership in order to draw attendance to the meeting where the event will be held. These are also good opportunities for hosting business meetings if members will be in attendance. Please confer with the Assistant Director if your group plans to undertake an event of this sort for marketing purposes, and to ensure that there is no conflict of interest involved.

Fundraising for Group Meetings or Events

Fundraising for group events should be conducted in compliance with the fundraising policies and guidelines stated in Section 5 of this document.

Section 10. Marketing Policies

SCB is guided in its activities by the goals set forth in the 2011-2015 SCB Strategic Plan. One of the Plan's objectives is to coordinate and integrate the style and production of global-level and section-level communication materials, including websites and conference and marketing materials.

The way in which we communicate SCB's image to the world relies upon a translation of our vision and mission into a visual message that resonates with our stakeholders, e.g. current and future members, current and potential donors, and decision-makers. In an age when professional society memberships are in decline, the Society continues to grow both in numbers and in global breadth. Our future ability to serve our mission is dependent upon building public awareness, preserving our reputation, and upholding our values. Aligning our products and services with a consistent aesthetic is an important part of this process.

Detailed branding standards are available on the Intranet. An abbreviated and basic form of these standards is included here and on the Intranet, and all downloadable graphics, fonts, and marketing materials are also available on the Intranet.

When designing group marketing materials, please communicate with SCB's Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org) she will be available for help and advice in integrating your work with SCB's aesthetic while retaining the group's individuality. She will issue final approval for all design aspects of marketing and outreach materials.

Use of SCB Logo

Inclusion of SCB logo

The SCB logo is the image which members and non-members alike associate with SCB. It should be included on all organizational documents and marketing materials. This includes any group marketing items such as letters, brochures, conference bags, etc.

Except under special circumstances, the name – Society for Conservation Biology -- should appear with the logo.

Misuse of SCB logo

The SCB logo may not be used in a disparaging form. Use of the logo by outside parties or in an inappropriate manner may result in criminal prosecution. Please contact the EO if you think the SCB logo is being used inappropriately.

The SCB logo may not be altered for any reason. Although we seek to coordinate cross-marketing for SCB events, altering the logo dilutes branding effectiveness. Minor design elements may be pulled from the logo to create a cohesive design for marketing materials as indicated in the design standards available on the Intranet. All marketing products must be approved by the EO.

Letterhead

SCB letterhead is available on the intranet. SCB groups are required to use electronic letterhead template for official purposes, and may not use their own letterhead in its place. SCB letterhead may not be used for personal use.

Marketing Materials

All marketing materials should be sent to SCB's Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org) for approval before public circulation. This includes, but is not limited to t-shirts, conference bags, fliers, presentations,

programs, etc. While groups are afforded many creative liberties, the EO retains final approval of all marketing materials and may be able to assist with overall design.

Use of SCB images

Other images related to the Society such as covers of publications or images from meetings should be approved for use by the Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org). Some of these images may not be available due to copyright or privacy restrictions.

Web sites

Sections and Working Groups are required to host their websites on the SCB site, and Chapters are encouraged to do so. All pages hosted on the SCB site must be designed in accordance with the “Template and Requirements for Group WebPages.” A copy of this may be obtained from the Senior Designer, Autumn-Lynn Harrison (aharrison@conbio.org). See the segment below – Website Hosting / Access for SCB Groups – for further details.

Regular Website Updates

Websites must be updated no less than bi-annually by the group’s Web Administrator or Communications Committee and updates should be submitted to SCB’s Webmaster, Cathy McIntosh (cmcintosh@conbio.org). If site content is not maintained, the EO will contact the group for new content or add new content as it becomes available.

Editorial Discretion

The EO maintains final editorial authority over all website and other Society content. SCB has a global membership and as such must be sensitive to issues that can be interpreted in unintended ways. Content must be directly related to the business and mission of the Society. Any books, reference material, products, or services added to the website should contain a generic disclaimer that SCB does not endorse the product. SCB’s only endorsed partners, products, or services are those that have been vetted through the SCB Endorsements, Sponsorships, and Partnerships protocol of the BOG: <http://www.conbio.org/endorsements/>.

The Senior Designer also maintains design authority and may change website design if necessary per the constraints found in the “Template and Requirements for Group WebPages”.

Website Requirements for SCB Groups

The following is a set of requirements for the creation and maintenance of Section, Chapter and Working Group websites. These templates and requirements are set forth to maintain a sense of continuity within the SCB website and to present key information for all constituents of the parent organization.

Requirements and Restrictions for Sections and Working Groups

1. Homepage: Sections and Working Groups must have a basic homepage that offers a short (one paragraph) description of the group, left sided navigation, and one optional photograph or news box that depicts the activities of the group.
2. Subsequent pages: These pages must contain all of the following information and must be easily navigable:
 - a. Contact information for the group
 - b. A list of Board members
 - c. At least one full page describing the activities of the Section

- d. A full page on group membership and on how to join the Society
3. Page formatting and design: Every effort is required to maintain a similar aesthetic between ALL pages on the Society's website. Any special design requests are subject to review and/or alteration by the Webmaster. In particular, no special fonts may be used, font size is restricted to that set forth in the style setting of the SCB website, any colors must coordinate with the SCB website, and images must be relevant to activities of the group and not in violation of copyright laws. Please contact the Webmaster and/or Senior Designer with any questions.
4. Page content: SCB groups are expected to post well phrased and articulate work on the website. Content is expected to represent SCB goals as well as those of the group. Any postings with political or controversial content must first be approved by the Assistant Director.
5. Monitoring: All web pages on the SCB Server are overseen by the Webmaster. All groups who add their own content will be expected to adhere to the 'Website Templates and Requirements' available from the Senior Designer or on the Text Edit Website. SCB will periodically review content for each group that maintains their own website to be sure that both formatting and content are appropriate. If formatting or content are found to be inappropriate, your group's webmaster will be contacted by the SCB Webmaster or another representative from the EO with a reason and recommendations for correction. Two days will be allowed for your group's webmaster to correct the situation. If corrections are not made in this time, the SCB Webmaster will intervene and make corrections or edits as necessary. This is a precaution set forth to make certain that content is legitimate and relevant but also to guard against content that could harm the Society.

Requirements and Restrictions for Chapters

1. Homepage: Chapters must have a basic homepage that offers a short (one paragraph) description of the group, left sided navigation, and one optional photograph or news box that depicts the activities of the group. For those wishing to have SCB host their chapter's site, contact the Webmaster (webmaster@conbio.org). A simple template which adheres to the above guidelines and is easy to update can be implemented on the site
2. Subsequent pages: These pages must contain all of the following information and must be easily navigable):
 - a. Contact information for the group
 - b. A list of Board members
 - c. At least one full page describing the activities of the Section
 - d. A full page on membership in the group and how to join the Society
3. Page formatting and design: Every effort is required to maintain a similar aesthetic for ALL pages on the Chapter's website. If the pages are hosted by SCB, any special design requests are subject to review and/or alteration by the Webmaster. In particular, no special fonts may be used, font size is restricted to that set forth in the style setting of the SCB website, any colors must coordinate with the SCB website, and images must be relevant to activities of the group and not in violation of copyright laws. Please contact the Webmaster and/or Senior Designer with any questions.
4. Page content: SCB groups are expected to post well phrased and articulate work on the website. Content is expected to represent SCB's goals as well as those of the group. Any postings with political or controversial content must first be approved by the Assistant Director.
5. Monitoring: All web pages on the SCB Server are overseen by the Webmaster. All groups who add their own content will be expected to adhere to the 'Website Templates and Requirements' available from the Senior Designer or on the Text Edit Website. SCB will periodically review content for each group that maintains their own website to be sure that formatting and content are appropriate. If formatting or content are found to be inappropriate, your group's webmaster will be contacted by the SCB Webmaster or another

representative from the EO with a reason and recommendation for correction. Two days will be allowed for your group's webmaster to correct the situation. If corrections are not made in this time, the SCB Webmaster will intervene and make corrections or edits as necessary. This is a precaution set forth to make certain that content is legitimate and relevant but also to guard against content that could harm the Society.

Section 11. Awards

The SCB presents awards to deserving members of the conservation community every year. There are three types of awards given annually: Edward T. LaRoe III Memorial Award, Distinguished Service Awards (DSA), and Early Career Conservationist Awards.

In addition to these awards, SCB encourages its groups to provide awards and sponsorships when the group has sufficient funds available. Any awards given by a group must first take into consideration expenses such as travel costs that will be required to bring the recipients to a regional or global meeting.

The Society at-large is not responsible for providing such travel funds to award recipients, except for the aforementioned LaRoe, DSA, and Early Career awards. SCB groups may solicit travel funds from an outside source via grants; however, as with any other grant solicitation, SCB's protocols must be followed.

Section 12. Forms

Mass Email Form

Instructions

Submitter:

Target Audience (full membership, subset of membership, meeting registrants, etc.):

Template to be used, if any:

Option 1
(best for single item)



Option 2
(best for multiple items)



Other

Date to be sent:

Special Instructions:

If you would like memberID's inserted please indicate with: (INSERT MEMBERID)

Text for Email

Subject Line:

To Line (Dear colleague, Dear member, Dear author, etc.):

Text for Email:

Signature Line:

Attachments:

Approved by: _____

Final Checklist before sending:

1. Pull the final text back into Word for a final spell check
2. Check all the links to be sure working and correct
3. Send test email to be sure all the pictures display properly

Reimbursement Request Form

Name:
Date:
Institution:
Address:
City, State, Zip:
Country:
Phone:
Email:

SCB Group/Project Reimbursement Associated with:

(Africa ANA, Asia, Europe, Marine, NA, Oceania, Chapters, SSWG, FWWG, RCB, WGEES, Other-please describe)

Reason for Reimbursement:

Number of Receipts Attached (stapled), if no receipts attached, please explain:

Please summarize attached receipts below (continue on back if necessary):

Vendor	Description (if necessary)	Amount
SUBTOTAL		
Any Deducted Amount		
TOTAL REQUEST		

Address Reimbursement should be mailed to, if different from above:

If outside the US and wire payment is preferred, please check box and fill out wire payment information form:

I certify that the reimbursement request above is not reimbursable through other means and I am the person responsible for the initial payments.

Signature: _____ Date: _____

Approval Signature: _____ Date: _____