



Conservation Affairs Network Policy Toolkit

SECTION 2: POLICY ENGAGEMENT FOR
THE WILDLIFE PROFESSIONAL

2.1 YOU ARE THE EXPERT AS A WILDLIFE PROFESSIONAL

Engaging in policy advocacy can often be an intimidating concept. It is not unusual to feel a bit anxious or nervous about the idea of asserting your opinion to those individuals who make big decisions that impact our country every day. You might think, “Why should they listen to me?”

But you are exactly the person policy creators and decision-makers want to hear from. As a wildlife professional, **you are the only one capable of explaining the realities of how their policies and decisions impact on-the-ground situations in wildlife conservation.** TWS advocates for the appropriate use of science in decision-making processes and supports its members’ use of wildlife, ecological, and conservation science when engaging with policy issues. You have the specialized knowledge and information regarding wildlife science that legislators and agency administrators want – *and need* – to hear.

You do not need an in-depth understanding of the legal concepts and frameworks in order to be an effective advocate on behalf of your TWS Section or Chapter. Don’t be intimidated by the legal jargon and processes that are inherent in public policy situations. A basic understanding of policy processes and legal frameworks (see Section 5) will enable you to be an effective advocate for wildlife conservation and the wildlife profession. **Providing your real-world knowledge and experience is all you need to do to educate policy makers** so they can make the best decisions possible for our wildlife resources.

You carry the single most powerful tool for policy advocacy with you – your personal story. Nothing is as effective as the person who can communicate their story and give a face to an issue for a policymaker – and you are the one with the effective story regarding the wildlife conservation and our profession. Once your issue gets the personal attention of an elected official or the press you have a much better chance of getting appropriate action.

Generally, policy makers are not going to know much about wildlife issues or what is important to you or the wildlife profession. If you aren’t there to bring attention to the issue and grab their personal interest with your own story, who else will do it?

You might have some concerns about being an advocate for wildlife and the wildlife profession. You might feel that you...

- *Don’t know enough about the issues.*

Odds are that you know a lot more than you give yourself credit for, especially when compared to the legislative and agency personnel you will be talking to about the issue. There are ways to address this concern:

1. TWS has resources available at wildlife.org that can help you learn more about current policy topics.
2. Discuss the issues with other wildlife professionals to obtain a broader understanding of the issues. TWS Chapter and Section Conservation Affairs



Committees (CACs) can be excellent places to test arguments on behalf of your position.

- *Don't know the ropes at the Legislature or in Agencies.*

You need not be intimidated by people serving in the legislature or agencies – the people you will be meeting with and interacting with are just that – people. Do not be afraid to talk with them, even if you don't feel like you “know the ropes”. Plus, other sections in this document provide you with a basic understanding that will help you get on your way.

- *Don't have the necessary contacts.*

Finding out who to talk with about your issue is pretty simple. Much of the information about who serves on specific legislative committees or in administrative posts in agencies is available on the web. If you still aren't sure, ask! TWS Staff are here as a resource to help your policy efforts.

- *Are only one voice.*

One voice can – and does – make a difference! You are the only one who can tell your story – your story and knowledge about wildlife conservation is what policy makers need to hear. Remember that other members of the Conservation Affairs Network and TWS staff are here to support you in your efforts.

- *Cannot engage with policy as a government-employed wildlife professional.*

TWS' members include natural resource management agency employees from all levels of government. Governmental agencies typically have formal policies on how their employees can interact with professional societies and with policy advocacy in a professional and personal capacity. Members who are government employees and are interested in taking a leadership role in their unit's CAC may require supervisor approval; consult with your employer's policies as needed. Importantly, your professional expertise is ***always*** of value to your CAC, the Conservation Affairs Network, and TWS' advocacy for wildlife and wildlife professionals.

- *Don't have the needed skills.*

Practice makes perfect! Get out there and do your part – you will learn what you need along the way, and this document will help you with the basics.

- *Don't have the budget.*

While money could help with just about everything, you can have a big impact without spending lots of dollars traveling or launching big campaigns. Simply making a phone call or sending a letter are less expensive ways of getting involved that can really make a difference in the outcomes for policy. Many decision makers



are also very open to meeting virtually. For more on how to prepare for a virtual meeting with decision makers, see Chapter 3.2.

Many organizations advocate for the general concept of wildlife conservation. But remember –

You are the Expert!

As a professional in the wildlife field, you have a unique and valuable perspective that can truly advance the issues. You have the on-the-ground information legislators and agency administrators need to improve wildlife management policies.



2.2 RULES FOR SUCCESS

An effective advocate is largely determined by how well one can communicate their issue(s) or position(s) to policy makers. Numerous communication techniques are available, but there is no one best method to achieve your goals. There are, however, some basic things you can do to enhance your advocacy efforts. These basic rules are mostly common sense, common courtesy, or both.

- **Understand the basics of the legislative process.** This will help you speak intelligently in regards to proposed solutions or ways of moving forward with your issue. See Section 5 for an overview federal legislative processes in the U.S. and Canada.
- **Be able to provide a concise, clear description of the issue.** Realize that most legislators likely do not know the details about wildlife issues. You need to be able to provide a quick explanation of the issue and why it is important to their constituents. Trying out your pitch on individuals that do not have an understanding of the issue can be helpful in honing your argument.
- **Develop a powerful personal story.** You are the one with the first-hand knowledge of how these policies impact your ability to manage and conserve wildlife – use that to your advantage.
- **Know how to win – and lose – with grace.** Be respectful of those who agree and disagree with your position. You won't win every battle, but how you lose one battle might impact your ability to win the next.
- **Be generous in your thanks and praise.** Take the time to express appreciation and support to legislators and agency members that make tough decisions in your favor. This will assist in relationship building with these parties.
- **Find common ground on issues.** Work to find issues in common with other people and speak with one voice on the issues whenever possible. Partnerships with other organizations can really help strengthen your arguments and elevate your issues in the eyes of decision-makers.



2.3 SCOPE OF INVOLVEMENT

Effective engagement in the wildlife policy arena in an official capacity for your Chapter or Section of TWS requires that you pursue issues for which you have a perspective backed by sound wildlife science. We advocate for the use of science in policy making - you need to be sure to ground your policy statements in scientific facts.

Involvement of your Conservation Affairs Committee (CAC) will depend on the specific charge and goals established by your Chapter or Section's Executive Board and or the CAC's Terms of Reference. Generally speaking, issues that 1) involve the ability of wildlife professionals to conduct their work, 2) impact wildlife populations, 3) impact wildlife habitats, or 4) impact how wildlife or their habitats are managed by an agency may warrant your committee's involvement.

Defining your CAC's Policy Priorities

Defining and planning for a pre-determined set of policy priorities can help your CAC be proactive and keep your focus on vetted topics supported by your memberships. Though other issues of direct impact to the wildlife profession will come up in your region, prioritization of priorities will allow your unit to make quick, as-needed decisions on whether diverting limited CAC capacity and resources to a non-priority topic is worthwhile for your broader unit. Policy priorities vetted by a unit's leadership can also help streamline the process of obtaining approval to issue correspondence on a policy issue, as the priority has already been agreed to.

Use the considerations and resources provided below to help define the scope that best fits the interests and expertise of your CAC's members:

Regional Priorities

These are rules and policies of concern within your organization unit's jurisdictional boundaries. Decision-making at the regional level can have an extremely varied and potentially faster pace compared to the national level, making it important to have an understanding of:

- The schedule of your state or province's legislative body (see Appendix G for links to state and provincial legislative websites)
- The process of rule development within relevant commissions or other bodies overseeing your state or provincial natural resource agencies

National Priorities

Rules and policies with federal-level oversight in which decision makers from within your unit's jurisdictional boundaries (e.g. a state's federal congressional delegation or Members of Provincial Parliament [MPPs]) have buy-in. The Wildlife Society has [established policy priorities](#) that help dictate our engagement with U.S. federal policies. TWS updates its U.S. federal policy priorities every two years to align with the start of a new session of Congress.



Policy resources are updated and made available to TWS members following this cycle to help inform organization unit engagement with these policies.

CACs may consider stepping down TWS' U.S. federal policy priorities to a regional focus. For example, TWS's priority of "securing dedicated funding for State Wildlife Action Plan implementation through the passage of the Recovering America's Wildlife Act" can be tailored to a regional priority, such as working to secure cosponsorship of the Recovering America's Wildlife Act by members of Congress in the unit's region.

Establishment of Priorities

Priorities for the Section or Chapter CAC can be identified in several ways. Consider surveying your unit's membership for issues they feel are of current and future importance or discussing policy topics with members of your Executive Board. Below are steps that your CAC and/or Section/Chapter can take to set its own policy priorities.

1. ***Assemble your policy prioritization team.*** A unit's CAC can be an excellent place to begin discussions of policy priorities and determine a process for soliciting feedback from unit members. If your unit does not have an existing CAC, suggestions for creating one can be found in Chapter 1.2. Consider including other unit members (e.g. elected officers, members with relevant subject matter expertise, etc.) from outside the CAC to either participate in or provide review of the prioritization process.
2. ***Reflect on prior policy engagement.*** Before engaging in the prioritization process, take time to reflect on your CAC/unit's previous policy engagement. Questions to consider include:
 - What issues have you engaged with in the past? What type of input was your unit able to provide to those discussions?
 - What issue areas do your unit's members have expertise in?
 - What are the biggest issues impacting the ability of wildlife professionals to perform their job in your unit's jurisdiction?
 - What coalitions and partnerships do you currently engage with? Progress towards your desired policy objectives cannot be accomplished by operating in a vacuum. How can you best leverage the expertise and capacity of partners in support of your goals?
3. ***Conduct outreach to solicit unit member feedback.*** Input from unit members is invaluable during the policy prioritization process. By soliciting feedback from outside your policy prioritization team, you're accessing more diverse perspectives on policy items deserving of unit engagement and increasing buy-in on future engagement efforts. Your outreach may be broad (e.g. an email to the unit's listserv asking for any/all relevant policy items that members would like included in the prioritization process) or targeted (e.g. a poll including a list of priorities pre-selected by the



prioritization team and ranking options to assess the relative importance of each item). Make sure to record whatever process you decide on for soliciting feedback so that you can repeat and improve upon this approach year after year. Your unit can also consider outreach to existing coalitions and partners to determine community priorities and how a professional society may appropriately play a role.

4. **Compile feedback and finalize priority policies.** The process of coming to a final list of priority policies will vary between CACs or units. Remember, use your previously-defined scope of policy engagement, considerations from past engagement, and expertise and feedback from the membership of your unit to guide you. Additional considerations that may help you finalize your policy priorities include:
 - *Urgency:* Where is action needed immediately to prevent undesirable impacts (or ensure positive impacts) to wildlife and/or wildlife professionals?
 - *Impact versus effort:* The “bang for your buck” consideration; what policy issues have you identified that allow your unit to maximize its impact relative to the amount of effort required to meet priority objectives?
 - *Capacity:* What time and resources are available to your CAC and unit members to engaging with the priority policies your team has identified?
5. **Conduct outreach on finalized priorities.** Your prioritization team should make a point of thanking everyone who feedback provided during the process of developing policy priorities, and be sure to provide the list of finalized priorities to all unit members so they are up to date on where policy engagement efforts are likely to be focused in the near future. You may also find it useful to conduct a second round of outreach and solicit feedback on any objectives that should be associated with each of your identified policy priorities. More on establishing these objectives can be found in the next section.

Creating Effective and Actionable Unit Priorities

Your CAC, and more broadly your unit, will benefit from creating policy priorities that are specific and actionable. It can be difficult to determine clear next-steps or actions to address policy priorities that are general or overly broad. For example, “secure cosponsorship and build partner support for the Recovering America’s Wildlife Act in our region” is a specific policy priority that easily lends itself to the development of actions for your CAC.

Once your policy priorities are established, it may be helpful for determining some objectives for those priorities to direct your actions and give you a goal to work toward. This can enable your CAC to be more proactive, and work toward certain policies, rather than reactive and constantly responding to policies already in action. Objectives that correspond to the example policy priority above could be:



1. Submit letters requesting cosponsorship for the Recovering America's Wildlife Act to all members of Congress in our unit's jurisdiction who are not current cosponsors.
2. Work with regional partners to set up and participate in meetings with local congressional offices to seek support for the Recovering America's Wildlife Act.
3. Develop regular communications to unit membership highlighting individual-level opportunities to engage with members of Congress in support of the Recovering America's Wildlife Act.

The establishment of objectives may be supported by the formation of policy position statements that are developed by your committee (see Chapter 4.1). The more specific you can make the objectives, the better.



2.4 STEPS FOR NON-PRIORITY INVOLVEMENT

When interacting with issues outside of the scope of your policy priorities, consider the steps below:

1. If identified wildlife issues fall outside the scope of an existing policy priority (see Chapter 2.3), it may be appropriate not to engage with the issue at this time. If determined that the unit has the bandwidth to proceed on the non-priority issue, proceed with next steps.
2. Determine if the identified wildlife issue falls within scope of a current TWS or organization unit position statement. If yes, proceed with step 4. If no, proceed with step 3.
3. Determine if policy issue relates to larger wildlife conservation issue that directly impacts professionals. If no, you may consider not getting involved in this issue. If yes, proceed to step 4.
4. Engage with your unit's leadership to seek authority and develop buy-in for action on the issue. If buy-in exists, proceed with remaining steps.
5. Determine if the policy issue involves any existing or potential partnerships or coalitions you may have. Involve other groups in the issue where possible and practical – there is strength in numbers.
6. Use relevant TWS or TWS Chapter/Section position statements to frame your actions on the current issue. Determine what action would be best; which action is best is likely based on the content of the issue and at what step in the policy process the issue is currently (See Section 5). Potential options include:
 - Develop a unit position statement for distribution to relevant stakeholders (see Chapter 4.1)
 - Submit a letter to legislature or executive agency administrators
 - Write a Letter to the Editor of a local newspaper or other media outlet
 - Submit comments on proposed agency rules
 - Meet with agency or elected officials to discuss the issue
 - Refer to Section 3 for in-depth guidance on these potential actions
7. Engage membership in your actions, if applicable. Actions taken with congressional representatives, in particular, can be heavily influenced by the involvement of your members that live in their districts. Be sure to keep your members aware of the work you are doing on their behalf.



8. Follow-up on your actions. Thank members of the legislature or agency for meeting with you and listening to your concerns. If they made a favorable decision, express your support, and consider doing it publicly.



2.5 LOBBYING FOR NONPROFITS

Lobbying is an attempt to influence legislation, including bills, referenda, and Constitutional amendments. Lobbying activities can be either direct or indirect.

Direct lobbying: any attempt to influence any legislation through communication with any member or employee of a legislative body or with any government official or employee who may participate in the formulation of the legislation and grassroots lobbying

Indirect lobbying: any attempt to influence any legislation through an attempt to affect the opinions of the general public.

In the United States, nonprofit organizations like TWS and our organization units are legally allowed to lobby. However, we must remain within certain restrictions in order to maintain our tax-exempt 501(c)(3) status designated by the IRS.

Funds expended on lobbying efforts must be reported to the IRS. For example, hiring someone to represent your unit or spending money to travel to your legislator's office are expenses that must be reported.

The IRS determines whether or not an organization's lobbying activities constitute a substantial part of its overall activities using the [substantial part test](#). This considers the time and funds dedicated to an activity to determine whether the lobbying activity of the organization can be considered substantial. If more than 5% of all unit resources are spent on lobbying, then you need to complete Form 5768. If you file this form, your unit can spend 20% of the first \$500,000 of annual expenditures on lobbying. If less than 5% of all subunit resources are spent on lobbying, all expenses must still be reported on Schedule C of Form 990 or Form 990EZ each year.

Organizations (other than churches and private foundations) may elect to use the IRS' expenditure test to measure lobbying activity as an alternative to the substantial part test. Guidance on the limits around lobbying under the expenditure test can be found [here](#).

Lobbying does not include:

- Actions by volunteers that otherwise meet the definition of lobbying, as long as there is no expenditure of funds by the organization.
- Contact with the executive or legislative branches in support of or opposed to regulations.
- Communicating a position in support of or against legislation to members of the organization, as long as the communication does not ask members to take action.
- Providing testimony requested by a legislative body.
- Making available the results of legislative analysis.



- Discussion of policy issues, as long as the merits of specific legislation are not part of the discussion.

The Canadian Section of The Wildlife Society (CSTWS) was incorporated with charitable (not-for-profit) status under the Incorporation Acts of Canada in 2020. Following incorporation, similar stipulations around lobbying apply to CSTWS and other units in the Canadian Section that have not-for-profit status. The Canada Revenue Agency (CRA) enforces limitations on lobbying activities for charitable organizations in Canada, as established in the federal Income Tax Act. More information on policy activities allowed under charitable registration in Canada can be found [here](#).

