



NATIONAL CONSERVATION POLICY COMMITTEE
GUIDELINES FOR DEVELOPING NEW POLICY AND GUIDANCE PROPOSALS
APPROVED BY THE BOARD ON MARCH 17, 2022

Introduction

This document summarizes the policies and procedures that have been developed by Sierra Club's Conservation Policy Committee (CPC) for preparation and approval of new conservation policies. It is designed for use by the Club's authors and task forces to streamline development of policy and guidance for consideration for formal approval by the Club. Questions or comments on the policies and procedures summarized here can be directed to the Chair of the CPC, currently [David Scott](#).

Direction from Existing Sierra Club Policies

Direction from the [Charge for the Conservation Policy Committee](#)

“Overview: This committee will provide advice and recommendations regarding all aspects of the Sierra Club's conservation policies, and will serve as Sierra Club's lead entity for the process of conservation policy adoption, revision, review and repeal, making recommendations to the board of directors for board action.

Policy adoption, revision and repeal: The committee will coordinate the process by which Sierra Club entities can request that new conservation policy be adopted or that existing policy be revised or repealed. Based on the committee's sense of the merits, urgency and resources required, the committee will make recommendations to the board as to which requests should lead to further action.

Working with the Vice President for Conservation, the committee will communicate with other Sierra Club entities about requests for policy revisions and development, and will advise when existing policy allows for positions to be taken, or when non-binding guidance would suffice without new policy being adopted through board action.

The committee may also make recommendations for policy adoption, revision or repeal on its own initiative. Where policy changes are modest, the committee may recommend specific changes to the board without appointment of a task force. But in most cases, if the Board agrees with the committee's recommendation to develop new policy or to reevaluate, revise or rescind existing policy, the committee will appoint a task force of experts on that policy. Those task forces will work in conjunction with the committee, and the committee will submit to the board its views regarding task force recommendations.

This document clarifies that the CPC has authority to appoint task forces and develop charges for their work, provided that CPC shall notify the Board, which retains authority to modify or override CPC's decision.

Direction From [Board Policy on Jurisdiction within the Club](#)

“Policy vs. Guidance: The Board of Directors establishes all *conservation policy* for the Sierra Club, except when it is established by a vote of the membership. Policy consists of statements of Sierra Club conservation objectives and principles, along with appropriate limits outside of which Club entities may not operate. Policies are generally framed in broad terms and embody the ideals to which the Club aspires. Development of new policies and modifications, updates and repeals of existing policies are authorized by the Board and managed by the Conservation Policy Committee (CPC). The CPC decides which policies to act on and works with the Board Executive Committee to appoint a task force to work on a policy and develop a charge for each task force. The CPC oversees soliciting Sierra Club entity input from Chapters, Teams, volunteer leaders and Staff and then provides a recommendation to the Board for consideration and action.”

As noted above, long-standing practice has been for CPC to appoint a task force to work on policy and to develop a charge for each task force, with notification to the Board. This clarifies that the CPC has authority to take these actions.

The Jurisdiction Policy also clarifies the distinction between “Policies” and “Guidelines.”

“Additional *guidelines* may also be adopted by the Board to provide details and additional constraints with regard to policy. Guidelines may be recommended by a campaign or team and do not require broad Club review as they are not binding. However, in the judgment of the CPC it may decide to circulate guidelines for broad Club review and comment. All guidelines must also be submitted to the Conservation Policy Committee for review and recommendation before being presented to the Board for adoption. ([Jurisdiction within the Sierra Club Policy](#)).”

While Board-adopted *conservation policy* is binding, and all Club guidance and positions must be consistent with Club policy, *guidelines* or *guidance documents* provide elaboration, clarification and justification of policy including documentation. Proposed policy documents should be brief (often 1-3 pages in length), clear, and generally framed in broad terms reflecting the club's ideals. Documentation should be provided when essential but used judiciously.

Guidelines or guidance documents may be longer (often 1-30 pages in length), with more detailed rationales and thorough referencing and documentation. Guidance documents often serve the dual functions of clarifying policy and educating club members about the issues under consideration (see for example the Club's [Guidance on Cement Manufacturing](#)). Guidance may refer to specific example projects for the application of policy, but these applications are exemplary only. The scope and length of a guidance document should be as concise as possible to maximize accessibility and use of the document, but it should also contain sufficient detail to clearly explain the guidance offered. These documents are referred to as *Guidance*, rather than *Guidelines*, to reflect the Board's intent that such documents provide formal recommendations for the interpretation and implementation of Club policy. While this is the primary role of Guidance documents, in some cases Guidance may be adopted when no

approved policy exists on the same issue, if the issue is commonly faced by Sierra Club activists, and some structured guidance is seen as helpful in developing positions.

The Jurisdiction Within the Sierra Club Policy also distinguishes between Sierra Club policies and guidance and “positions” which are defined as “statements of the Club's stand on a specific legislative, administrative or private proposal at a given point in time.” Since Sierra Club is a single entity under our Bylaws, we “can have only one position on any proposal, and positions may be adopted only by the Club entity authorized to take such a position.” Generally Sierra Club positions on local issues (adoption of a new regional wastewater treatment plan or siting of a sewage treatment facility, for example) may be adopted by the relevant local entities, including Chapters, Groups, and Sierra Club California, so long as they are consistent with applicable Sierra Club policies. Local entities are required, however, to coordinate positions on issues that are relevant to national campaigns with representatives of those campaigns (for example, positions on issues related to the renewable energy development should be coordinated with the Beyond Coal campaign). Disputes about positions must be referred to the Board of Directors or designees that have been established under specific policies. “Positions of international, national economic and social issues with environmental relevance,” however, may be taken only by the Vice President for Conservation and the Program Director or her/his designee. Positions are NOT developed through the Conservation Policy Committee. Questions relating to specific positions should be referred to the Vice President for Conservation.

Procedures for Adoption of Policy and Guidance

As described above, an effort to develop new policy or guidance may be initiated by the Board, the CPC or by another unit of the Club that brings the need to the attention of the CPC. Once a decision has been made to proceed, the designated task force works independently to craft the new policy or guidance, in consultation with campaigns and other units of the Club who have expertise and opinions on the topics. The present guidelines provide the format for the document to be submitted to the CPC. Task forces are encouraged to consult the CPC during the project to clarify the scope of the work, questions concerning format, or challenging content issues. Authorship of the document should clearly recognize the individuals who contributed to the work of the task force.

Once a policy is ready for consideration, it is presented to the CPC by the task force, and the committee votes on whether to recommend adoption of the policy by the Board. Additions or modifications may be recommended by the Committee, and the task force makes the editorial changes before final approval. When the new or revised policy is recommended for adoption, the committee chair forwards the recommendation to the Board, who takes action at the next available opportunity (usually at its next Board meeting).

Similarly, Guidance proposals are presented to and voted on by the CPC. The CPC may conduct a broad Club-wide review, and may forward the Guidance to the Board for its consideration and approval, but these steps are subject to the discretion of the Committee. In some cases, Guidance may be simply adopted by the Committee and publicized.

Editorial Style

The Conservation Policy Committee has adopted the Chicago Manual of Style (CMOS) as the common format for club policies and guidance (University of Chicago, 2017). Again, task forces and authors are encouraged to seek help and collaboration from the CPC if desired.

Citing References

Citing a proposal's source references is an important component of both new policies and guidance. Citations should follow the CMOS Author-Date referencing style. The [Author-Date](#) system is more common in the sciences and social sciences and is perhaps the most familiar format for Sierra Club task forces. In this system, sources are briefly cited in the text, usually in parentheses, by author's last name and year of publication. Each in-text citation matches up with an entry in a reference list, where full bibliographic information is provided (University of Chicago, 2017, [Citation Quick Guide](#)).

Example entries in a Reference List from the CMOS Author-Date format:

Keng, Shao-Hsun, Chun-Hung Lin, and Peter F. Orazem. 2017. "Expanding College Access in Taiwan, 1978–2014: Effects on Graduate Quality and Income Inequality." *Journal of Human Capital* 11, no. 1 (Spring): 1–34. <https://doi.org/10.1086/690235>.

Bouman, Katie. 2016. "How to Take a Picture of a Black Hole." Filmed November 2016 at TEDx Beacon Street, Brookline, MA. Video, 12:51. https://www.ted.com/talks/katie_bouman_what_does_a_black_hole_look_like .

Google. 2017. "Privacy Policy." Privacy & Terms. Last modified April 17, 2017. <https://www.google.com/policies/privacy/> .

Yale University. n.d. "About Yale: Yale Facts." Accessed May 1, 2017. <https://www.yale.edu/about-yale/yale-facts> .

Austen, Jane. 2007. *Pride and Prejudice*. New York: Penguin Classics. Kindle.

Borel, Brooke. 2016. *The Chicago Guide to Fact-Checking*. Chicago: University of Chicago Press. ProQuest Ebrary.

Kurland, Philip B., and Ralph Lerner, eds. 1987. *The Founders' Constitution*. Chicago: University of Chicago Press. <http://press-pubs.uchicago.edu/founders/> .

Melville, Herman. 1851. *Moby-Dick; or, The Whale*. New York: Harper & Brothers. <http://mel.hofstra.edu/moby-dick-the-whale-proofs.html> .

Referencing Internet Sources

Documenting an internet source for an idea should not be accomplished by simply adding a link in the text. When such a link is the only reference information and the link later goes dead, the reader may have insufficient information to find the source document.

Referencing and Interfacing with Existing Sierra Club Policy or Guidance

Another common and important component of new policy and guidance is how to reference material from *existing Sierra Club policy or guidance*. This is especially true for authors writing new guidance for existing policy (e.g. the new [Urban Infill Guidance](#)). Such already existing material should most often be referenced rather than re-summarized in the new document to reduce redundancy and length, and to help familiarize the reader with existing policy. It may be important to provide context for an existing policy through a new guidance document, with a reference to a specific element of the already-existing

policy. In the text of the new document, authors should simply cite the existing policy (e.g. Sierra Club Cement Kiln Task Force, 2020). Then enter the citation in the reference list as follows:

Sierra Club Cement Kiln Task Force. 2020. *Sierra Club Guidance: Cement Manufacturing*. Last modified July, 2020. Oakland, CA: Sierra Club.
<https://www.sierraclub.org/sites/www.sierraclub.org/files/Final%20Cement%20Guidelines%20January%202021.pdf>.

Technical Accuracy

In addition to use of the CMOS Author-Date referencing style, the Manual provides the definitive resource for grammar and usage, punctuation, spelling, use of mathematics, graphics and tables in the text and more. The CMOS Manual should be viewed as the definitive authority for these technical writing issues.

Writing Styles

Sierra Club policies should lead with an expository style (The Arena Group, 2022), providing the essential function of explaining the Club's objectives and principles for a given content area in a factual manner. A good example is the Club's brief [Urban Infill Policy](#). Guidance documents, on the other hand, may be a combination of expository and persuasive styles (The Arena Group, 2022). The basis of any argument we make for a policy or guidance on a particular issue will most often be the scientific and professional findings that underpin it, but a guidance document legitimately makes the complete case for our policies and stances on issues, and documents that case through references. The Club's extensive [urban infill guidance](#) exemplifies this mix of expository and persuasive styles.

Sierra Club policies and guidance should essentially be presented in a data-based descriptive narrative, (sometimes called the indicative or evidential mood, Wikipedia, 2021). Experienced Sierra Club leaders writing guidance documents for local activists may be tempted to offer advice and direction in their writing (this is the imperative mood, which emphasizes commands, prohibitions or requests, Wikipedia, 2021). However, using lots of direct advice may sound blunt or even condescending, so it is recommended that this style be used sparingly.

Use of Sidebars and Appendices

In the preparation of Guidance, there are often clear and specific recommendations to be made to Club activists about how to handle an issue. These recommendations are usually the primary function of the Guidance and should form the core of the narrative. There may also be rationales, contextual issues, or basic information necessary to understand the issue. These may be organized as appendices to the Guidance document, or if they are brief, as sidebars separated out at the location of the primary recommendations.

References

The Arena Group. 2022. *Owlcation*. New York: The Arena Group.
<https://owlcation.com/humanities/Four-Types-of-Writing>.

University of Chicago. 2017. *Chicago Manual of Style, 17th edition*. University of Chicago Press.
<https://www.chicagomanualofstyle.org/home.html>.

Wikipedia. 2021. "Grammatical mood." New York: Creative Commons Corporation.
https://en.wikipedia.org/wiki/Grammatical_mood