



Guidelines for IUCN SSC Specialist Group and Task Force Chairs

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Introduction

Welcome to the leadership of the Species Survival Commission (SSC) and thank you for agreeing to Chair one of SSC's expert Specialist Groups (SG) or Task Forces (TF). In this document we expand on the topics covered in the Terms of Reference for Specialist Groups and Task Force Chairs with the aim of sharing some of the accumulated wisdom of SG/TF Chairs gained over many years.

In the broader conservation and development community and in many global fora, the Chairs of SSC's Specialist Groups and Task Forces (hereafter, collectively referred to as Groups) are held in high esteem and command a great degree of respect for the office they hold. Chairs can be very influential, representing the highest level of scientific rigour and credibility with regard to the conservation of species within their remit. This places a very high degree of responsibility and accountability on all those agreeing to take on the role of an SG/TF Chair.

Over several decades and across more than 130 SGs and TFs, Chairs have gained wide experience in processes and approaches to this complex task. The following represents some accumulated wisdom that may assist you in succeeding at this task. In addition to this document,

we encourage SG/TF Chairs to exchange their experiences as much as possible through contacting each other directly – see the [SSC Specialist Group Chair photo guide](#) – or through the SG/TF Chair listserv (ssc-sg-chairs@lists.iucn.org).

SSC leadership

The management structure of the SSC includes:

- the Chair and Deputy Chair of the Commission (currently Dr Simon Stuart and Dr Jon Paul Rodríguez, respectively);
- a [Steering Committee](#) appointed by IUCN Council on the recommendation of the Chair;
- a number of [Sub-committees](#) (currently, Freshwater, Invertebrate, Marine, Plant, Policy, Red List, Species Conservation Planning, and Standards and Petitions) on issues needing particular attention; and
- more than 130 SG and TF Chairs (as well as a number of Red List Authority (RLA) coordinators). For a full list, refer to the [SSC Specialist Groups and Red List Authorities Directory](#).

The SSC encourages SG/TF Chairs to consult regularly and closely with the SSC Chair, other SG Chairs and IUCN Global Species Programme (GSP) staff on matters of mutual concern and to suggest improvements to the modus operandi of the SSC.

Appointing Specialist Group/Task Force members

At the start of each new quadrennium, the Chair of the SSC is appointed at the IUCN Congress, who then appoints / re-appoints SG/TF Chairs, after which they are invited to renew their own membership. This is done by each SG/TF Chair and should be completed as quickly as possible after the Chair's appointment / re-appointment.

Appointing SG/TF members is one of the SG/TF Chair's most important and influential activities. Appointments can be as formal or as informal as the Chair wishes, but typically involve a letter of invitation sent to a prospective member of the group, with a written response (electronic or otherwise) received from proponent confirming acceptance to serve. Once accepted, the Chair should send members a copy of the document "[Welcome to the IUCN Species Survival Commission](#)" – which articulates the responsibilities of all SSC members – and member's details (full name, country, email) to the SSC Membership officer (for relevant staff click [here](#)). Updates to membership details should be provided as and when new members are appointed, to ensure that new members are included on SSC-wide communications.

Chairs should utilize their existing members, any appointed deputies, vice-chairs, taxa or regional coordinators and other knowledgeable sources to identify potential new members. The SG/TF Chair should assess carefully an individual's interest in being a part of the SSC and the specific SG/TF, their willingness to contribute and their personal attributes / expertise before making appointments. Chairs should also be receptive and open to requests from outside the current SSC membership to become a member of a SG, and should consider each such expression of interest on their own merit providing timely feedback to such enquiries. Assembling an international group of volunteer experts into a SG or TF, and mobilizing their energy in support of conservation and IUCN's mission, is a substantial challenge. Differences in culture and ethnicity, resources, personal perspectives and individual goals for example can impede effective action.

There are no restrictions for appointing SG/TF members. Some Groups consist of a small and exclusive ensemble of highly-specialized researchers; others are large, inclusive groupings of diverse interests and expertise. There is an obvious trade-off between group size and logistical

effectiveness. While experience has shown that smaller Groups sometimes tend to be more effective, lasting conservation action in the international sphere almost requires that Groups be more than small coteries of like-minded colleagues. Diversity of experience and perspective is often the core of a Group's effectiveness, although managing this diversity may be a challenge. A good rule of thumb is that the larger the group, the clearer and more rigorously defined the structure and operations need to be. The degree of autonomy accorded the internal sub-groupings within a Group requires careful balancing and management between efficient decentralization, effective operation and the SG/TF Chair's statutory final responsibility.

Membership of the SSC and its SGs and TFs remains a privilege and a valuable professional accolade that should be protected by careful attention to all appointments. The SSC's strength is in quality and not quantity. Each SG/TF member should be a strong contributor to ensure that the reputation and respect accorded the SSC and its members is not devalued. However, it is important also to balance experience with the need to build professional capacity and encourage the contribution of younger experts or in some cases non-experts that are key stakeholders, especially those from less economically developed countries.

Relationships within each SG/TF and between SG/TFs, the SSC and IUCN are based on mutual benefits and reciprocal advantages. SG/TF Chairs should examine and articulate the exchange of services and influence that SG/TF membership involves.

Benefits for SG/TF members:

- Professional honour, peer recognition, and personal and professional satisfaction;
- An ability to influence policy and decision making within the group, the SSC and IUCN, as well as internationally through policy fora that IUCN engages in, such as the Convention on Biological Diversity (CBD) and the Convention on International Trade in Endangered Species (CITES);
- Up-to-date information on the most important threats to biodiversity and the actions being taken to mitigate these threats;
- Leveraged and amplified effectiveness on conservation issues;
- Access and support for valuable tools such as the Red List and the Species Information Service (SIS); and
- Communication with a global network of experts within and outside their own field of expertise

Benefits for the SSC and IUCN:

- Expert advice and cutting-edge information to contribute to global conservation targets;
- A global profile for the cumulative expert knowledge of all SSC members;
- Direct access to experts who provide data for biodiversity assessments and Red List indicators;
- Direct communication to IUCN governmental and non-governmental members;
- Technical support for IUCN's thematic and regional programmes;
- Participation and contribution to SSC and IUCN work plans and policy work; and
- Enhanced support and recognition for IUCN's activities and technical contributions.

Sharing responsibility within the group

An SG/TF Chair's duties are made easier if he/she can delegate well-defined component tasks among members of the Group, mindful of the fact that the ultimate responsibility for the Group's activities remains their own. Assembling a cooperative and energetic set of advisors and assistants is always helpful and almost obligatory in larger groups. Many SG/TF Chairs designate Vice-Chairs, Deputy Chairs, Regional Deputies or Regional Vice-Chairs, Task Force or Working

Group Leaders and specific task-oriented positions for fund management, fundraising, membership management, communications, newsletter production, etc. Increasingly, many Chairs have established informal senior advisory bodies or steering committees to aid in decision-making, and to provide strategic guidance and advice to the Chair. Many groups, especially those with SG/TF Chairs who are unable to keep up with very large email loads, also designate a Programme Officer, who is copied on all correspondence from the IUCN Species Programme. In some special circumstances, Programme Officers operate as full-time paid positions in groups; more commonly, Programme Officers are members who operate at a part-time level. This has proved to be particularly helpful for maintaining regular contact with the IUCN Secretariat and SSC Chair's Office.

For SGs dealing with species in trade (whether they are CITES-listed or not) it is recommended to appoint a focal point with the necessary experience and interest, especially if the Chair is lacking in this experience. The GSP coordinates the input of Groups to the CITES process.

Specialist Groups and democracy

Specialist Group and Task Force Chairs hold sole responsibility for group governance and oversight. This might appear to be a potentially autocratic structure, but most Groups develop suitably consultative, collegial and cooperative modes of governance that ensure respect, equity and effectiveness. There is no single successful model. Some Chairs are benign dictators and others fully representative leaders, but most have found that the authority, charisma and political adroitness of the SG/TF Chair is an important component of the Group's success. In the final analysis and at the end of any dispute, the SG/TF Chair has final responsibility to the SG/TF's members, the SSC and IUCN. It is beneficial to ensure that SG/TF members clearly understand and agree to such a governance structure at the time they are appointed.

SGs and TFs have generally avoided burdensome or onerous documents detailing their procedures, rules and by-laws. However, with the increasing complexity of SG/TF activities and their integration into SSC and IUCN work plans, the SG/TF Chair may find that developing some written guidelines to assist the SG/TF governance process and members' expectations may be useful. These should be developed by the SG/TF Chair in consultation with members, mindful of the limited time that members can give to the Group. Chairs should not generate wasteful or excessive processes that displace volunteer efforts from productive and meaningful conservation action.

Decision-making in the Specialist Group

The exact mechanism of decision-making within a SG/TF is variable, and set against an underlying reality that volunteer members will not carry out activities that they fundamentally disagree with. A SG/TF Chair's effectiveness depends upon his/her skill at articulating issues, redefining approaches and integrating diverse views, so that the Group can find agreement or an acceptable middle-ground on the decision they are called upon to make. Often the best that can be expected is for the SG/TF Chair to keep the majority of members in agreement and, in most cases, consensus is not synonymous with unanimity. It should also be recognized that some decisions will not be resolvable by a Group due to the volunteer nature of SGs and TFs and the resultant diversity of views and experience. SG/TF Chairs must weigh up the benefits of pushing to resolve such issues against the possibly disruptive effects of highly divisive agendas on group cohesion. Ultimately, the SG/TF Chairs have to take responsibility for decisions and decision-making processes in their Groups.

Speaking on behalf of the Specialist Group

Many SG/TFs and their Chairs have grappled with the manner in which individual members, groups of members, the SG/TF Chair and the Group as a whole expresses their views in public fora, especially in the media or Conventions (e.g., CITES, CMS and CBD). A generally workable formula adopted by many groups is:

- On appointment by the SSC Chair and as noted in the Terms of Reference for SG/TF Chairs, only the SG/TF Chair is authorized to speak on behalf of the SG/TF, either in person or over his/her own signature and on SG/TF letterhead;
- The SG/TF Chair may delegate that authority to another member of the SG/TF in writing;
- Individual SG/TF members or groups of members may make any statement they wish on any matter in their independent and private capacity, but they *shall not* represent themselves as speaking on behalf of the SG/TF, the SSC or IUCN (including on SG/TF letterhead) unless the SG/TF Chair has expressly authorized it. This is to ensure consistency within the group in communicating science-based information on behalf of IUCN, the SSC and/or SG/TF;
- Individual SG/TF members may identify themselves as a member of their SG/TF below their signatures, in correspondence such as emails and letters, on their résumés and elsewhere, clearly understanding that this is an indication of factual membership and is not an indication of the Group's agreement or endorsement of any statement;
- SG/TF Chairs should specify to all SG/TF members that the credibility and effectiveness of the Group should not be compromised by unauthorized, deceptive or inaccurate representation on any topic and in any forum, particularly on controversial matters. SG/TF members' discretion and cooperation on such matters should be required as a condition of membership;
- IUCN has specific rules about who has authority to speak on behalf of the organization, in public fora, including the SSC. The [IUCN Statutes](#) give the right of intervention on behalf of the organization to the Director General or others delegated by her or him. For SSC, this means that at international meetings, only SG/TF Chairs or their designees who are formal members of the IUCN Delegation are permitted to speak on behalf of IUCN or the SSC and then only with the agreement of the Head of the IUCN Delegation. The SSC Chair, if present, and the Head of the IUCN Delegation (generally a member of the IUCN GSP staff), must be consulted on any planned interventions before they take place and as early as possible before the intervention is planned to be given.

Motivating your members

Motivating SG and TF volunteers requires the identification of the goals and rewards that act as incentives to volunteers. SG/TF Chairs need to provide these “motivators” and minimize disincentives. The SSC's informative study on “[Voluntarism in the SSC](#)” highlighted the desire for recognition and praise as the foremost incentive. Others include the rewards of conservation delivery at all levels, influence on events, access to powerful decision makers, professional advancement, technical assistance and social gratification. The study further demonstrated that members want to be more involved in activities and that they are simply waiting for guidance and leadership. Thankfully, recognition and praise are the least costly rewards in both time and resources and are infinitely divisible. A SG/TF Chair's frequent expressions of appreciation and thanks keep many volunteers active and happy. In addition, staying on top of awards and other opportunities, and providing this information to Group members, can provide enormous dividends.

Use of logos

Use of the IUCN and SSC logos by the SG or TF is at the discretion of the SSC Chair, and permission for use can only be granted by the SSC Chair. The SSC logo must always be used in tandem with the IUCN logo, and for this reason permission for its use must be sought from the SSC Chair's Office. The IUCN SSC logo is commonly used, for example, on Group websites and newsletters; invariably, requests for permission to use the logo in such cases are a given, but there may be instances in which the Chair may consider that the use of the IUCN SSC logo would not be appropriate. Note that there are strict guidelines governing the use of the IUCN SSC logo, which must be followed. For more information on this and to obtain the logos, please contact the Marketing and Communication Officer in the GSP (for relevant staff click [here](#)).

Specialist Groups in particular are actively encouraged to develop a logo for their group – the majority of SSC SGs have already done this (collectively they form a very powerful communication tool for the SSC network) and it is an excellent way of promoting and raising the profile of the group. Note that use of the logo of the SG/TF is at the discretion of the Chair of the relevant group, and permission for use can only be granted by the Chair.

Communications

Communication of SG/TF activities to the SSC Chair and Chair's Office staff and to GSP staff (especially the Communications and Marketing Officer, the two SSC Network Support Officers and the Membership Officer) is important. These people can ensure that your work is communicated within the IUCN network (e.g., on the Species website, through the SSC e-bulletin and Species magazine (the annual report of the SSC), which are circulated to all 8,000 or so members of the SSC, to other IUCN Commissions, the other IUCN programmes and IUCN members) and beyond the network (e.g., through local and international media). In turn, it is the duty of staff to communicate with SG/TF Chairs on work that is taking place within the IUCN network (e.g., other Programmes, Commissions, and the work of the members).

For more information on communication, see the SG/TF Chair Terms of Reference and the document "[SSC Communications Quick Reference Guide](#)".

Many SGs and TFs have chosen to create their own websites so that they can communicate the work of their groups. Some have paid to have them created and hosted, others have been donated web-space or design, and a number have used the IUCN system to do this. For more information, see the document "[SSC Specialist Group Websites: Options for Managing and Hosting](#)".

The legal status of Groups

Under the IUCN Statutes, Groups are not legal entities, and for this reason they have no rights to enter into, or sign, any legally binding agreement or document. For the same reason, Groups themselves are unable to manage finances themselves (see next section). SG/TF Chairs requiring any clarification on this particular point are encouraged to contact the SSC Chair's Office.

Managing finances

Although not legal entities, Groups may need to manage financial resources that allow the group to operate. Beyond providing vital support, money introduces complexities and an additional administrative burden for the SG/TF Chair. Firstly, there are the obvious requirements for proper

record keeping and reporting to ensure that funds are not lost, wasted, misappropriated or stolen. Secondly, most countries have tax and other fiscal consequences of handling funds that need to be noted and carefully followed. It is recommended that the SG/TF find an institution or registered NGO (ideally one whose accounts are audited) to assist the Group with financial management. Management of Group funds is frequently offered by NGOs as a contribution to SSC, and is frequently fulfilled by a Group's host institution.

Groups must be accountable to individual donors. IUCN appoints SG/TF chairs with the understanding that he/she will meet financial reporting requirements of donors in a professional and timely fashion. Control over the distribution of a Group's funds can be a major source of friction, particularly when the level of affluence of members in different countries or regions is markedly different. Expenses, professional fees or salaries perceived as normal in one place may be perceived as absurdly high and expensive, or low and exploitive in others. Transparency and frank discussion of these issues helps defuse antagonisms and suspicions.

With regards to fair use and management of SG/TF funds, some Chairs retain direct fiscal control and others deliberately buffer themselves by assigning financial management to an honorary or paid treasurer. In either case, clear separation of SG/TF funds, personal funds and other funds is essential. For their own protection, SG/TF Chairs and financial officers should avoid mingling different funds, incurring debt on behalf of the Group, and unsupervised or opaque fund management.

Maintaining distance between Groups and host institutions

Host institutions play an important and often pivotal role in providing day-to-day support to Groups, the Chair and Group activities. In return, certain benefits may accrue to the host institution, including, for example, conferring a certain degree of status on that institution. The relationship between Groups and host institutions is a key one, and vital to the proper functioning of any Group – indeed, the support of a host institution/s is seen as a near prerequisite in the establishment of any Group. However, the boundaries between the identity, operations and management of the Group and that of the host institution can sometimes blur. This can lead to tensions among Group members if the identity of the Group becomes inseparable from the host; it may also jeopardize the Group's standing as a neutral body in certain fora if the distinction between the host and Group are not clear. In cases where the Chair is employed by the host institution, it is important that the Chair is conscious of this possible tension, and ensures that there is always a clear distinction made when speaking on behalf of the Group and when on behalf of the host institution.

Establishing and maintaining realistic expectations

Clearly stated expectations and a definition of responsibilities allow everyone to understand their roles and limits, as well as the roles and limitations of others. It is important for the SG/TF Chair to understand what he/she can and cannot expect from the SSC Chair, the SSC Chair's Office and the staff of the GSP. This understanding should be shared with SG/TF members to ensure realistic expectations. In general, the SSC Chair's Office staff and GSP staff are able to respond and work directly with the SG/TF Chairs and officers, but not with individual Group members (SSC has ~8,000 individual members). The SSC Chair's Office and GSP staff provide advice and assistance on subjects such as the IUCN Red List and SIS, contributing species conservation knowledge to influence environmental policy, communication, and advice for fundraising, but in general are unable to help on individual fundraising approaches or day-to-day SG and TF administration.

Each SG has a designated Network Support Officer (either in the GSP or SSC Chair's Office) who will be assigned to the Group as the Chair is appointed. It is the duty of that Officer to

provide help and support to the Group when needed, in terms of communications, policy work, project facilitation, fundraising, etc., to be the first point of contact for any queries and also act as a liaison to facilitate strong links between IUCN and SSC.

Dispute mediation

It occasionally happens that despite a Chair's best efforts, disputes arise that disrupt group cohesion. It remains the SG/TF's Chair's responsibility to manage these incidents but if necessary the SG/TF Chair may call on the SSC Chair for help.

Avoiding conflicts of interest

While SG/TF Chairs are asked to serve in their individual, technical capacities and not represent institutional interests, it is possible that SG/TF members may still operate from deeply personal or institutionally-held views. Conflicts can become acute when financial and economic rewards are involved. SG/TF Chairs need to be aware of potential conflicts of interest that may drive members' and their own actions.

One way to address possible conflicts of interest is to invite all members, and if necessary ask individual members, to confidentially advise the SG/TF Chair of any actual or perceived conflicts of interest. In this case members will need to be assured that their personal interests, affairs and aspirations will remain confidential, and their activity within the Group will not be compromised. Chairs should also transparently reveal their own conflicts, but they need not exclude themselves from discussion or relinquish their leadership role.

Fundraising

Most Groups operate primarily on a volunteer basis. However, increased conservation impact can be amplified with operational funds. It is important for Chairs to consider their own role and those of their staff (if they have any for the group), the activities they and their staff are responsible for on behalf of the SG and, therefore, what they might require funds for.

In general, Chairs, and even Groups, are not implementers of conservation projects or programmes on the ground. Implementing conservation action should largely remain the domain of individual SG members or groupings of members. The SG Chair and other SG officers play an important role in supporting their members, albeit not necessarily in the implementation of projects or programmes *per se*. In essence, the SG/TF Chairs and support staff will generally act in a support function to better enable their members to collect species information and to implement species conservation action. The role of the SG/TF Chairs and support staff could be described as facilitation and networking at a higher level to support the conservation activities of their members in the field.

Specialist Groups and Task Forces are encouraged to seek funds to support the group's operations if necessary but preferably to focus any fundraising efforts on support for priority conservation actions. At times, this may involve helping individual SG members or groups of members to secure funds for activities which their SG has identified as priorities.

SSC Network Support staff will regularly send out opportunities for fundraising and Chairs can ask them for assistance if they would like help in identifying current fundraising opportunities. For more information on fundraising, see the documents "[A Guide to Seeking Funding from Foundations](#)" and "[Fundraising a Summary for SSC Specialist Groups](#)".

Coordination of fundraising efforts

There are currently more than 130 SSC structures, five other IUCN Commissions, nearly 40 [IUCN Regional and Country Offices](#), and a number of IUCN global thematic programmes. All are pursuing funds, often from the same sources, so coordination is essential! IUCN proposals have been rejected in the past on the sole basis that the donor received several proposals from different components of the organisation and deemed IUCN to be lacking in internal coordination.

Fortunately the IUCN Secretariat has established contacts with many funding agencies and often is able to submit multiple proposals on behalf of IUCN. For this reason, SGs and TFs are requested to contact the GSP or SSC Chair's Office prior to approaching donors for funds exceeding USD100,000. For approaches to regional funding agencies, SGs are requested to contact the appropriate IUCN regional or country office. Most approaches will be cleared quickly. However, a few might require discussions with other IUCN entities and the development of joint strategies.

Chairs are reminded that SG/TFs are not legally recognized bodies, except where in exceptional cases the group has registered itself as a charity. In many cases this poses a challenge to fundraising and the SG will need to submit proposals under the heading of another institution. If the Group is not in a position to do this, they can contact the GSP for assistance.

Dealing with issues of species in use

Among the thousands of organisms in the purview of Groups, a significant proportion are used in one form or another and more than 30,000 species are involved in current or past commercial trade. The addition of commercial considerations, which may involve millions of dollars, into conservation decisions makes the role of the SG/TF Chair decidedly more complex. More than most other issues, the use of wild species, whether commercial or not, is often an area that elicits polarized views and opinions, sometimes even among close colleagues. In fact, the effects of this reality may permeate every element of SG/TF management, from choosing members (to exclude commercial operators?); to raising money (to accept support from commercial operators or trading nations?); to decision-making, disputes, conflicts of interest and advocacy.

In spite of this, several Chairs (e.g. the African Elephant, Cetacean, Crocodile, and Shark SGs) have successfully managed effective SGs in a challenging and highly-charged environment of divisive debate. Again, while standard responses to such situations are elusive, transparency and regular communication with members, effective management of disputes amongst members, and actively avoiding personal or SG conflicts of interest, perceived or real may be a challenging but necessary responsibility of the SG/TF Chair.

As mentioned above in the section on sharing responsibility within the group, it may be useful for a SG to appoint a focal point for use and trade issues.

Managing succession

As noted in the Terms of Reference for SG/TF Chairs, there are no set rules determining the number of terms for which Chairs can be reappointed. However, all Chairs should be seeking ways to effectively plan successions in a seamless and timely manner. Succession can be facilitated through various options, including: 1) bringing future leadership into senior roles within the Group (e.g., appointing a Deputy Chair); 2) an existing Chair sharing the leadership with a Co-Chair for the duration, or part, of an IUCN quadrennium to foster understanding and learning of the duties and responsibilities of the position; and 3) establishing a working group or task force within the Group to encourage expressions of interest both internally and externally to take on the

future role of Chair. Of course, other models and options may also apply, but a general point is that succession should be planned for in advance.

The One Programme

As noted above, SGs and TFs are but one part of the broader Union of IUCN. This includes five other IUCN Commissions, nearly 40 IUCN Regional and Country Offices, and a number of global thematic programmes, not to mention the more than 1,000 governmental and non-governmental IUCN Members! Coordination on all aspects is crucial. Groups can only stand to gain by ensuring a close and open working relationship with the SSC Chair's Office and GSP, and with the IUCN Regional and Country Offices, strengthened by good communication, transparency and responsiveness. Chairs are encouraged to learn more about IUCN on the [IUCN website](#) which gives more information on many of the aspects of the organization including the 2013-2016 IUCN programme plan, the 2013-2016 Species Strategic Plan, the regional offices, the work of other programmes and Commissions, and IUCN members. Much information specific to the Species Programme and SSC can be found on the [Species website](#).

Useful resources and Publications

A full list of available documents and resources for Chairs (including a contact guide for persons in IUCN) can be found here:

http://cms.iucn.org/about/work/programmes/species/who_we_are/about_the_species_survival_commission/ssc_members_area/members_resources/