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I filled out the survey. Attached are a few tools 1) an aquatic monitoring protocol for permitting requirement, **2) strategic plans**, and 3) branding guidelines.



**Trout Unlimited
Strategic Plan
2015 – 2020
Adopted Feb. 6, 2015**

Mission: To conserve, protect and restore North America's coldwater fisheries and their watersheds.

Vision: By the next generation, Trout Unlimited will ensure that robust populations of native and wild coldwater fish once again thrive within their North American range, so that our children can enjoy healthy fisheries in their home waters.

Statement of Intent

Conserve and restore important lands and waters so that we realize our generational vision of wild and native fish conservation. We will accomplish this by:

- Building a high level of awareness for the TU brand—a brand that stands for engaging more anglers and others in the TU mission;
- Growing and diversifying our membership, staffing and organizational capabilities;
- Raising sufficient funds to protect, reconnect, and restore important lands and waters, and to sustain these efforts over time; and
- Working in collaboration and engaging in advocacy with other conservationists, agencies, and partners.

Core Values

We are driven by our mission, and all levels of the organization—members, staff, chapters, councils, NLC, and board—work together toward a common vision.

We work to find solutions to problems rather than simply treating symptoms.

We base our decisions on sound science and share our science to help guide other partners.

We operate through collaboration and partnership.

We are innovative and entrepreneurial.

We are committed to excellence and to providing best in class service to our members, leaders, staff, and supporters.

We are non-partisan.

We believe that educated and informed anglers make good stewards.

We are optimists and believe in a better future.

Strategic Plan Goals

Protect high quality habitat for native and wild coldwater fish.

Reconnect fragmented fish populations and habitats by improving instream flows and removing fish passage barriers.

Restore watersheds by working in collaboration with others.

Sustain our conservation efforts by inspiring and training present and future generations of conservation stewards.

Strategic Opportunities

Strategic opportunities reflect areas that we will emphasize through integrated fundraising, marketing, conservation, and science campaigns over the next five years, and will include new initiatives around youth education, climate change, wild steelhead, southwestern trout, and citizen science.

Conservation Strategies: Protect

Secure federal legislative and administrative land designations to protect high quality trout and salmon habitat on public lands

Protect high quality wild and native trout, salmon, and steelhead habitats on public and private land by working in partnership with state and local agencies and the land trust community, and through mechanisms available under state laws, regulations, policies, and through charitable activities.

Ensure that traditional land and water uses such as energy development and transmission, water withdrawal and storage projects, shipping, and mining are done in a way that does not harm trout and salmon and the watersheds that upon which they depend.

Prevent harm to native and wild trout, salmon and steelhead from poor hatchery and harvest management policies practices.

Conservation Strategies: Reconnect

Secure stronger water leasing and acquisition authorities in state laws.

Preserve current funding and acquire increased funding from federal state, and private sources for reconnect/restore work on public and private lands.

Reconnect rivers and streams by enhancing stream-flows and removing or creating passage through culverts, diversions, and dams.

Secure federal legislation or resources for large scale dam removal and restoration in river basins such as the Klamath and Penobscot.

Conservation Strategies: Restore

Work in partnership with state and federal agencies, private industry, local communities, and others to leverage scarce resources to help restore degraded wild and native fish populations in strategic watersheds around the country.

Sustain Strategies: Engagement and Communications

Improve upon the member value proposition to increase engagement and grow membership.

Build stronger chapters inside and out to better engage members and more effectively deliver on the mission locally.

Expand event and activity opportunities for member engagement through a focus on *Conservation – Community – Fishing*.

Engage the fly fishing and outdoor industries in our conservation and membership development work.

Increase member acquisition and diversify the member composition in terms of age, race and gender to reflect the overall demographics of the fly-fishing community.

Strengthen TU communications to enhance our relationship with members and the public in order to improve advocacy, giving, and engagement. A major focus will be the development of an online community to promote engagement and membership.

Sustain Strategies: Fundraising

Develop integrated fundraising campaigns to support strategic opportunities: youth education (science, technology, recreation, engineering, arts, and math); Wild Steelhead; Southwest native trout; Citizen Science; and climate preparedness/response.

Raise funds to support a bigger, better and more engaged TU, including specifically growing support for Embrace-A-Stream.

Invest in planned giving to help grow the endowment.

Evolve the Coldwater Conservation Fund's mission and structure to fit the modern TU context, including a robust major donor recognition society and better engagement opportunities for its volunteers.

Maximize recruitment of experienced and philanthropic trustees.

Sustain Strategies: Organizational Strength

Ensure that TU operations promote accountability, diversity, openness, and integration across the organization ("One TU").



Ensure that Trout Unlimited remains an employer of choice in the conservation community.

Plan Outcomes

Protect:

- 21.8M acres of protective designations and management prescriptions;
- 2,260 miles of Wild and Scenic river protection;
- 86M acres of improved Off Highway Vehicle management;
- 41M acres of protection from or responsible development of energy;
- 21.5K acres, 130 stream miles, and 12 lakes protected through easements and acquisitions in collaboration with private landowners;
- Improved wild steelhead management; and
- Improved western water policy to allow more flexibility to provide flows and water levels fish need.

Reconnect

- 4,700 miles of reconnected habitat.

Restore

- 1,300 miles of restored rivers and streams; and
- 4,500 acres of restored habitat.

Sustain

- Grow the number of anglers who are TU members, donors and supporters to reflect the diversity of the fly angling community;
- Annual volunteer hours increase from five to seven per member;
- 15 percent increase in chapter activities;
- 15 percent increase in chapters/councils with leadership succession plans;
- Double the number of corporate partners and increase TU Businesses from 300 to 500;
- Track and report on lands and waters protected, reconnected, and restored at all levels of the organization on an annual basis;
- Increase science capacity;
- Major donor fundraising doubles from \$6-12 million per year; and
- Double the number of known and recorded planned gifts to TU that are recognized publicly by membership in the Stream Guardian Society from 100 to 200.



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TU Chapter Strategic Planning Resources and Templates February 2015

Developing a strategic plan for your chapter can sound intimidating, but simply getting ideas down on paper and setting some simple goals and commitments for the next three to five years can make a substantial difference in the effectiveness and directedness of your chapter. An effective strategic plan can also help your chapter establish an annual budget and build a well-rounded calendar of events and projects to keep your members engaged year-round. Below, you'll find some general guidelines for developing your chapter's first strategic plan and a few examples of how a simple strategic plan can lay the groundwork for your chapter's efforts.

Instructions:

1. *Convene a small workgroup or committee of the chapter board. Not all strategic planning committee members need to be current board members, i.e. a past president would be a great person to tap for this.*
2. *Collect feedback from your members, partners, and regionally based staff about the top local strategic issue or opportunities the chapter should focus on in the next few years. Online surveys can be a great way of doing this. For tips on surveying your membership, see our resources in [the online Tacklebox](#).*
3. *Keep in mind that it's important to build on your chapter's strengths and the resources available in your community. Some chapters are well suited for culvert removal or large-scale restoration projects, some chapters excel at Trout in the Classroom and youth education, and some chapters are excellent at fundraising and building community. Your chapter doesn't need a large-scale, shovels in the ground project to be successful at creating a conservation-minded community in your area.*
4. *The below template divides your strategic plan into five parts: Conservation, Communications, Engagement, Fundraising, and Chapter Development. Addressing all five of these areas ensures your chapter will remain strong and resilient as leadership changes.*
5. *Be sure to list Chapter Contact and rough income and expenditure estimates for each element of your plan (where applicable). By doing so, you'll not only create a strategic roadmap for your chapter, but also a rough annual budget and a calendar of events.*
6. *Look to the [sample strategic plan in the online Tacklebox](#) for guidance on structure of your plan and ideas for events, activities, and projects your chapter can use to attract new members, keep existing members engaged, and build your chapter's strength and resiliency over time.*

Chapter: _____

Effective Plan Dates: _____

Planning Workgroup Members: _____

TU Vision:

By the next generation, Trout Unlimited will ensure that robust populations of native and wild coldwater fish once again thrive within their North American range, so that our children can enjoy healthy fisheries in their home waters.

TU Mission:

To conserve, protect, and restore North America's coldwater fisheries and their watersheds.



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Conservation

Trout Unlimited's conservation approach includes efforts to Protect, Reconnect, and Restore coldwater fisheries throughout the United States. By categorizing your chapter's conservation efforts along these guidelines, you will help strengthen the cohesion of TU's projects across the country and will help ensure your efforts are coordinated with neighboring chapters, your state council, and TU national staff. TU professionals have expertise in all facets of coldwater fisheries conservation and restoration, so when you're planning your next project, don't hesitate to reach out to staff from [Eastern Conservation](#) or [Western Restoration](#), [Science Program](#), or [other TU national efforts](#). When hosting a work day, try not to overwork your members (keep work days to less than four hours) and whenever possible, feed folks when the day is done – a post-project barbecue is a great way to spend time thanking and building relationships with these volunteers and encouraging them to get more involved in your chapter's leadership.

- **Protect-** Advocacy efforts, action alerts, working with local land trusts to assist in conservation easements, etc.
- **Reconnect-** Culvert or dam removal projects, or other efforts that connect existing fish habitats to previously unreachable areas.
- **Restore-** Riparian plantings, in-stream habitat projects, stream cleanups, etc.

Communications

How does your chapter communicate with your existing membership and the broader community in your area? We all know the saying "if a tree falls in the forest and no one is there to hear it..." The same principle applies to your chapter's conservation and engagement work! The ecological benefits your work has for fish is just part of the overall equation of Protect, Restore, Reconnect, and Sustain! Communicating your work to your members and to your local community will help ensure the long-term impacts of your projects remain well after the work is done, and a robust communications platform will help your chapter recruit and retain members for current and future efforts.

- **Website-** A strong, up-to-date chapter website is an essential tool in providing your members with meeting location and time information, updates on chapter projects, and a source for general information on your chapter for your community. Chapters can setup and create their own free, unique website through the TU national website – To get started, [review the guide for setting up a free chapter website](#) and then contact Doug Agee, Technical Customer Specialist, at dagee@tu.org
- **Newsletters** – Whether your chapter sends regular print newsletters, or chooses to send e-mail newsletters, be sure that your communications with your members provide updates on ongoing conservation efforts, invitations to participate in specific volunteer opportunities and connects them to the chapter events and activities that will help you build your local community. TU offers a free bulk email tool in the Leaders Only Tools section of www.tu.org that chapter leaders can use to send email communications and newsletters to their members. [Watch a training video on how to use the free bulk email tool.](#)
- **Newspapers and Local Press** – *TU chapters often overlook the great, free press they can get from their local community newspapers, radio stations, television networks and more. Every time your chapter is hosting an event or activity, be sure to send an event announcement or calendar listing to the local media at least three weeks in advance of the event so they can help you promote your event in the community and increase attendance – especially of non-TU members. At the volunteer projects and other events, be sure to take photographs and send a follow-up press release to local media to raise awareness of the important work your chapter is doing. [Watch a training video on improving your chapter publicity.](#)*



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- **Local Community Advertising-** The TU Event Printshop, is an online tool that allows your chapter or council to print appealing, high-quality and affordable posters, flyers, postcards, tickets and other print materials that can be valuable tools when trying to promote your chapter's events. The posters and postcards are particularly effective for hanging on local community bulletin boards, such as at local libraries, or for leaving at area fly shops to advertise your coming events to the general public. [Watch the training and view the guide to using the TU Event Printshop](#) or simply head straight to the tool at <http://tu.ticketprinting.com> and start designing and printing your chapter's promotional products now.
- **Social Media** – Social media can be a great way for your chapter to amplify its message and engage new and often younger audiences. There are a range of social media tools and sites available. Some of the most common are:
 - **Facebook-** Particularly effective for engaging younger generations, Facebook is the go-to social media platform for building an online community for your chapter. Administrators for your page as well as your members can post photos, links to news stories, or comments about anything related to your chapter, TU's mission and fishing. Much like your website, Facebook is also a good resource for communicating meeting times and locations, project updates, and chapter news.
 - **Twitter-** A great resource for keeping your members up-to-date on chapter news.
 - **Instagram-** An easy-to-use site for posting photos of chapter projects, meetings, or events.
 - **Pinterest-** Useful for gaining project ideas and for sharing your chapter's project or merchandise ideas with the broader community.

Member Engagement

To attract a broad and diverse audience to your chapter, your engagement strategies need to be broad and diverse as well. Some events, such as a monthly chapter meeting, are well tailored to building community within your existing membership, while other outward-facing events are great for attracting new members to your chapter and to TU. When hosting events, keep in mind that public spaces like restaurants, fly shops, or other businesses may be less intimidating for first-time attendees than more private-oriented locations. Less formal events are a great way to get new members in the door and introduced to what your chapter is about, while more involved events like might be better-suited to members who are already familiar with your chapter.

When developing your engagement events, remember to plan for a well-rounded calendar that offers opportunities for members to be involved year-round. Holding one or more events per season will help build engagement with your members, so consider dividing your events by season into Winter, Summer, Spring and Fall, recognizing that some events such as fishing trips and river cleanups may be best for the Spring or Fall; youth and family events are ideal for Summer when school is out; and fly tying and skill building classes can be great Winter activities.

Some example member engagement events are:

Community Building Events:

- Film screenings, such as the [Fly Fishing Film Tour \(F3T\)](#)
 - [Watch Fly Fishing Film Tour training video](#)
 - [Download Fly Fishing Film Tour guidance document](#)
- Chapter barbecues and picnics
- Happy hour social events
- Fundraising banquets
- Youth and family activities
 - View the [Headwaters Youth Program guides and resources](#)
- Veterans programs and activities
 - View the [Veteran Services Partnership guides and resources](#)



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Conservation Oriented Events:

- River cleanup or stream buffer planting events
 - [Watch a training video on engaging volunteers in stream projects](#)
- Stream monitoring volunteer programs
 - [View the full suite of Angler Science training guides](#)

Fishing Events and Activities:

- Chapter fishing trips to local rivers
- Casting clinics and family fishing days
- Fly tying lessons and classes

Fundraising

Every chapter needs resources to host events, fund restoration projects, purchase supplies, mail newsletters, and advertise activities. Chapter fundraisers can be the highlight of your year and should be both fun and profitable. While annual banquets are a proven means for generating chapter income, other events have also helped many chapters raise much-needed revenue, including:

- Hosting the Fly Fishing Film Tour
- Holding a fishing/casting tournament
- Selling chapter t-shirts and stickers

When planning fundraising events, keep in mind your target audience and consider diversifying your events to appeal to different members of your chapter and the community at large.

A suite of fundraising tips and guides is [available in the online Tacklebox](#).

Chapter Development

Often the success of a chapter is driven by the personalities and skills of a handful of determined, passionate leaders. No matter how great, no one TU member can serve as a volunteer chapter leader forever. In order to minimize difficulties and loss of momentum during transition periods, it's critical that your chapter have strong leadership development initiatives and a well-defined succession plan for when a key chapter volunteer moves on.

Planning for leadership transitions is one of the most important things your chapter can do to ensure the long-term stability of the organization. Chapter leaders develop relationships with key local partners, learn the intricacies and techniques for hosting successful events, and come to know how a chapter operates more intimately than any other member of the group. If that chapter leader leaves, that knowledge can be lost if your chapter doesn't address succession planning early and often. Although each chapter's approach to succession planning will be unique, there are a few common strategies any chapter can employ to get started on a leadership development plan. Here are some ideas:

Evaluate your recruitment criteria. Make sure your nominating committee is bringing in new board members with leadership experience. And be sure to let the candidates know they are encouraged to take on officer responsibilities.

Designate someone on your board to watch for the up-and-coming natural leaders in your chapter. There will certainly be some people who articulate and pursue TU's and your chapter's goals with noticeably more energy and success. Other chapter members listen to them, and they are obviously highly motivated. Encourage these budding leaders to assume leadership roles and work with you and other officers on



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chapter management. Try to identify what leadership roles suit these members, then ask for and encourage their participation.

Delegate. The whole objective of delegation in a chapter or council is to cultivate relationships and train people for positions of increasing responsibility—depending on their talents and interests.

Build Strong Committees. Committees are one of the best ways to cultivate new board leaders for your chapter! Service on a committee can transition members into taking responsibility for particular tasks for your chapter and can increase in importance and workload over time, until the member is ready and willing to step up for a board position. Conservation, events, education, and membership committees are often the most popular and valuable committees formed by chapters and are also a good vehicle for spreading workloads across multiple volunteers and helping to avoid burnout.

Evaluate your training, orientation and leadership development opportunities. Help willing candidates learn and obtain the tools they need to take on added duties. As new chapter leaders come on board, pass on your valuable knowledge of the chapter's specific situation: its relationships (internal and external), needs, abilities, and limitations. Give them the secrets that you have had passed to you (or wish you had) and that you have discovered. Service as a TU grassroots leader can be a challenging and multi-faceted endeavor. Learning the ways in which TU operates on both the national and grassroots levels can take time and should receive careful attention from your chapter.

Online Training and Webinars

Online trainings and webinars by TU staff and volunteer leaders are a great way to dive deep into a specific topic. A list of coming online trainings is included in the [Lines to Leaders email](#) each month, posted [online in the Tacklebox](#) and available on the [TU National Events Page](#). If you are looking for training on a specific topic, chances are it may be available as a [video recording here in the online Tacklebox](#).

Regional Meetings

Regional meetings offer the opportunity for TU leaders to meet other grassroots volunteers from their area, gain ideas for chapter events, and receive training from TU national staff on volunteer engagement and leadership best practices. For a full list of times and locations for TU Regional Meetings, head to the [TU National Events Page](#).

For more information, see [the chapter on succession planning in the Leadership Manual](#).