



TROUT UNLIMITED

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](#).