

## **Operating Procedures for Trout Unlimited Chapter Development Concept**

One important task for Trout Unlimited's (TU's) Councils and Chapters is the cultivation of new chapters, particularly in underserved geographic areas where current chapter members reside. While TU members are generally assigned to the chapter nearest to them, in some cases the event locations of a member's assigned chapter can require extensive travel time under sometimes-uncertain weather and road conditions. Ideally, chapters should be in locations that best serve nearby members.

While the cultivation and formation of chapters is an important undertaking for the health of the TU organization, it is not always the easiest task to undertake and requires a strong supporting foundation of both an adequate number of active members and sufficient start-up funding to succeed. These are probably the most significant hurdles facing a new chapter, and weakness in these areas often leads to a short lifespan for what began as a good idea. It is also of great value to have a strong mentor in the form of another chapter or, where a chapter is not located reasonably nearby, a council, to help a new chapter along during the formative stages.

One potential solution to these issues would be the establishment of a new chapter exploratory committee (hereinafter "new chapter group") comprised of members with an interest in and connection to a local area, combined with the support and guidance of an existing "parent chapter" or "parent council". The structure of the new chapter group would include official representation within the parent chapter or council in the form of the chair of the new chapter exploratory committee and, if consistent with the bylaws of the parent chapter or council, a board position. The new chapter group could then take the time to identify members for leadership positions, increase active membership, raise funds, manage revenue and expenses under the parent chapter's umbrella, and establish a healthy operation on sound footing prior to submitting a request for recognition as a chartered chapter of TU.

Once a new chapter group meets a set of minimal requirements mutually determined by the new chapter group and the parent chapter or council and once there is mutual confidence in the new chapter group's ability to succeed, the new chapter group should submit an application to the state council and the Board of Trustees for chartering. The new chapter group must apply for chartered-chapter status within two-years of the establishment of the new chapter group. If additional time is necessary, the parent chapter may ask TU's Vice President for Volunteer Operations for an extension of time, and the Vice President may allow the new chapter group an additional two years in which to apply for chartered-chapter status.

Until they become chartered chapters, the new chapter groups must work within the structure of the parent chapter or council to assure compliance with TU's bylaws and its 501(c)(3) non-profit status and to assure that the activities of the new chapter group and its members are covered under TU's insurance policies.

The new chapter groups and their parent chapters and councils must comply with the following procedures to assure that their operations are within the structure of the parent chapter or council:

- A new chapter group shall be organized as a committee of the board of directors of a chartered TU chapter or council, pursuant to a duly enacted resolution of the board of that chapter or council.
- The new chapter group shall at all times operate in accordance with the bylaws of the parent chapter and Trout Unlimited.
- A new chapter group shall not undertake any action or incur any obligation on behalf of the new chapter group, the parent chapter or council, or any other branch of TU, without the express authorization of the board of the parent chapter or council.
- With the approval of the board of directors of the parent chapter or council, a new chapter group may establish a checking account, or other financial account, under the

- name and tax identification number of the parent chapter or council for purposes directly related to the new chapter group.
- All financial activities shall occur under the supervision of, and with the approval of, the treasurer and the board of directors of the parent chapter or council.
  - The parent chapter or council is responsible for all required financial reporting.
  - Upon the new chapter group's becoming a chartered chapter, the funds in any account established for the new chapter group shall be transferred from the parent chapter or council to the new chapter.
  - If the new chapter group chooses to identify itself with a name other than that of its parent chapter or council, that name must always be used in conjunction with the name of the parent chapter or council for all communications and activities, including newsletters, websites, advertising, fundraising events, conservation activities, and business cards. Individual names such as 'XYZ,' a Committee of 'ABC Parent Chapter' or 'XYZ' Watershed Group, a Committee of 'ABC Parent Chapter' are acceptable individual names.
  - New chapter groups shall have a committee chair, a committee vice-chair and such activity chairs as deemed advisable by the new chapter group and the parent chapter or council. Ideally, these committee officials should be people likely to be the future chapter leaders once the new chapter group becomes a chartered chapter.
  - Any TU sanctioned or sponsored activities, such as banquets, field events or Trout In the Classroom projects, must be advertised with the parent chapter's or council's name.
  - New members signed up by a new chapter group will be assigned to the parent chapter or council, and any member rebates will be paid to the parent chapter or parent council as existing practice dictates.
  - Funds from items such as new member rebates may be redistributed to the new chapter group at the discretion of the parent chapter or council.
  - With the authorization from the parent chapter president or parent council chair, new chapter groups may use TU's internal communication platforms, such as Action Alerts or the bulk email tool.
  - A new chapter group may not independently provide official TU comments on an issue, sign on to letters with other organizations, enter into litigation, make statements to the media, enter into contracts, or obligate TU in a binding manner. These types of activities must be carried out and approved by the parent chapter or council and must be in compliance with TU's bylaws and policies.
  - A new chapter group must use the approved TU logo in all forms of communication, and it must adhere to all TU guidelines and policies.
  - With the authorization of the parent chapter president or council chair, designated leaders and members of a new chapter group may have access to the Leaders Only Section of the TU website and to the roster of members.