



Trout Unlimited Chapter Effectiveness Index Scoring Instructions

Trout Unlimited's Chapter Effectiveness Index is a tool chapters and councils can use to measure their progress over time in the areas critical to TU's mission. The scores are not used to rate, rank or categorize chapters in any way, and are simply a tool to help volunteers in each chapter gauge where they stand, where they have been and set goals for where they would like to be in the future. The goal is not to "score a perfect 100" but to use the index to determine where your chapter is strong, where it can grow and to set priorities. The average score across all chapters is in the 60-65 range.

To use the scoring sheet below, you will need information from your chapter's annual financial report, chapter effectiveness index – and additional information (such as how many youth were engaged in multi-day or multi-event activities etc.)

Annual Conservation Activity

Conservation + Advocacy Hours - Add Conservation and Advocacy hours. Divide by 45.
Round up to the next whole number.
Maximum score is fifteen.

Conservation Projects - The first project earns five points, the second project earns four more, the third project earns three more, etc...
Maximum score is ten.

Conservation Project Bonus - If any single conservation project involves more than \$50,000 (including matched funding) or 500 volunteer hours, add 10 points to the Conservation Projects box above.
Maximum combined score of the Conservation Project box is ten.

Conservation Subtotal

Annual Education Activity

Education Hours - Divide Youth Education & Outreach hours 19. Round up to the next whole number.
Maximum score is fifteen.

Education Projects - The first project earns five points, the second project earns four more, the third project earns three more, etc...
Maximum score is ten.

Education Project Bonus - If any single education project involves the same students for five or more classes or events (such as a multi-day youth camp or weekly class) or more than 250 volunteer hours, add five points to the box above.
Maximum combined score of the Education Projects box is ten.

Education Subtotal

Annual Membership Outreach & Engagement Activity

Chapter Meetings - Each chapter meeting is worth one half of one point.
Maximum score is five.

Meeting Attendance – Divide your average chapter meeting attendance by 10.
Maximum score is five.

Membership & Outreach - Each membership and outreach function is worth one point. A membership and outreach event is an activity, other than a chapter meeting, aimed at increasing chapter membership and/or increasing current membership participation and camaraderie. A membership or outreach function might include a casting clinic, a fishing outing, a chapter picnic.
Maximum score is four.

Alternative Engagement Bonus - Alternative engagement opportunities. Add two points to the box above if your chapter engages in non-traditional events to encourage membership. A non-traditional membership effort might include events such as volunteering at other charitable events such as Habitat for Humanity, or hosting events at non-fishing related venues such as coffee houses or universities. Chapters should determine what is non-traditional versus their existing activity, and use their discretion in awarding themselves these points.
Maximum combined score of Membership & Outreach is four.

Membership Chair - Add one point if your chapter has a Membership Chair, an individual tasked with leading practices aimed at increasing membership, increasing membership participation, and/or retaining expiring memberships.

Membership Retention - Add one point if your chapter engages in practices aimed at retaining expiring members, such as sending out renewal postcards, emails, etc.

Veterans Events - Each veterans program is worth 1 point. Examples: taking veterans fishing, fly tying classes for military members and veterans, food and gear drives for overseas soldiers, food drives with military groups, or involvement in other veterans service programs.
Maximum score is four.

Diversity Bonus – Add one point if your chapter organizes events geared towards women or minorities. Examples: women-specific clinics or classes, or events with minority youth centers.

Member Recruitment – Determine your chapter's membership recruitment score by determining the percentage of members recruited. (Divide number of recruited members by total chapter membership). Receive one point for every 5% recruited.
Example: If your chapter recruits 50 new members and has a total membership of 500, your recruitment total is 50 divided by 500 – or 10% - and you would add two points to the box at right.
Maximum score is three.

Membership Outreach & Engagement Subtotal

Communications Activity

Chapter Newsletters - Each chapter newsletter, including email newsletters, is worth one half of one point. Maximum score is four.

Chapter Website – Is your chapter website regularly updated? Zero points for no website, one point if your website hasn't been updated in over a year, two points if your website is only updated once or twice a year, three points if your website is updated monthly or more. Maximum score is three.

Social Media – Add one point if your chapter has a social media presence.

Communications Subtotal

Business Practices

Leadership Diversity - Add one point if your chapter's leadership includes women or minorities.

Strategic Plan – Does your chapter have a strategic plan? Zero points for no plan, one point for a plan that is not reviewed regularly, two points for a plan that is reviewed semi-annually. Maximum score is two.

Chapter Budget – Does your chapter have a budget? Zero points for no budget, one point for a budget that is not reviewed regularly, two points for a budget reviewed quarterly. Maximum score is two.

Active Leaders – Divide the number of active chapter leaders by four. Maximum score is three.

Council Participation – Does your chapter participate in the state council? Zero points for no chapter representation at any meetings, one point for chapter representation at half of meetings, two points for chapter representation at all meetings. Max score is two.

Council Leader – Add one point for a chapter member who is a council officer.

Business Practices Subtotal

Fundraising Addition

Fundraising – Total revenue, subtract rebates from TU national or council, subtract total fundraising expenses, divide by chapter membership total, divide by eight.
Maximum score is seven.

Fundraising Subtotal

Chapter Effectiveness Index Total
(Add all subtotals from above.)