



Chapter and Council Strategic Planning Template

Instructions:

1. When formulating objectives be as specific as possible about what your chapter or council hopes to achieve. If the outcomes are measurable in terms of miles of habitat restored, numbers of fish populations impacted, people influenced, etc... include those targets.
2. When formulating strategies consider what needs to be influenced or changed, who can make those decisions, who are the other important audiences, what are the best ways to reach those audiences, which partners need to be engaged, which opponents need to be diffused or countered, and what resources need to be garnered.

Chapter or Council: _____

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.

Strategic Objectives	Tactics	Budget	Outcomes/ Impact
<p>Protect Strategy (Examples include, securing long-term protections for important public lands, working with land trusts to protect private land vital for trout or salmon, protecting key watersheds from development that damages habitat, working with state agencies to protect the genetic integrity of native fish (e.g., hatchery reform, invasive species management,) etc...)</p>			
<p>Protect Objective #1:</p>			
<p>Protect Objective #2:</p>			

Strategic Objectives	Tactics	Budget	Outcomes/ Impact
<p>Protect Objective #3:</p>			
<p>Reconnect Strategy (Examples include, removing dams and culverts or building fish ladders and bypass channels to allow upstream and downstream migration of fish, campaigns to promote water conservation and adequate river flows for fish passage, etc...)</p>			
<p>Reconnect Objective #1:</p>			
<p>Reconnect Objective #2:</p>			
<p>Reconnect Objective #3:</p>			
<p>Restore Strategy (Examples include, watershed restoration projects such as stream cleanups, riparian buffer plantings of native plant species, in-stream habitat construction projects, etc...)</p>			
<p>Restore Objective #1:</p>			
<p>Restore Objective #2:</p>			
<p>Restore Objective #3:</p>			
<p>Sustain: Engagement Strategy (Examples include, fishing events like women's fly fishing clinics, fly tying demonstrations, or youth events or camps; or community events like setting up a booth at a local festival or giving a presentation to a local organization like a Kiwanis Club or Garden Club, hosting the Fly Fishing Film tour, a member social function, or a family day, etc...)</p>			

Strategic Objectives	Tactics	Budget	Outcomes/ Impact
<p>Sustain Engagement Objective #1:</p> <p>Sustain Engagement Objective #2:</p> <p>Sustain Engagement Objective #3:</p>			
<p>Sustain: Communications Strategy <i>(Examples include, creating a new website, refreshing newsletters, engaging with social media, building a local press presence, etc...)</i></p>			
<p>Sustain Communications Objective #1:</p> <p>Sustain Communications Objective #2:</p> <p>Sustain Communications Objective #3:</p>			
<p>Sustain: Fundraising Strategy <i>(Examples include building a donor acknowledgement program, diversifying fundraising sources, applying for an Embrace-a-Stream grant, growing your annual banquet, etc...)</i></p>			
<p>Sustain Fundraising Objective #1:</p> <p>Sustain Fundraising Objective #2:</p> <p>Sustain Fundraising Objective #3:</p>			

Sustain: Organizational Strength/ Capacity Strategy *(Examples include building a leadership succession plan, creating a robust board nomination process, developing a mentor program, stream monitoring, fish population monitoring and other citizen science activities, etc....)*

Sustain Organizational Capacity Objective #1:

Sustain Organizational Capacity Objective #2:

Sustain Organizational Capacity Objective #3:

Strategic Issues and Opportunities Evaluation Matrix

It is not uncommon for strategic plans to include a component that calls out a few critical or urgent opportunities. The TU national strategic plan identifies five strategic opportunities, as an example. As you go through your strategic planning process, you may find it useful to laundry list some of those ideas here, and then evaluate them on the criteria provided here such that your list reflects the priorities of the chapter yet is manageable and achievable.

Strategic issues or opportunities	P, RC, RS, or S (Circle one)	Connection to TU national program, issue, or initiative Y/N If "yes," which one?	Urgency Score 1-5	Significance to mission/alignment with core values Score 1-5	Achievable Score 1-5	Appeal to current and new members Score 1-5	Identified leadership Score 1-5	Funding and partnership potential Score 1-5
	P RC RS S	Y/N						
	P RC RS S	Y/N						
	P RC RS S	Y/N						
	P RC RS S	Y/N						
	P RC RS S	Y/N						

Key:

Scoring based on one through five with five being highest.

Issues and Opportunities – What significant challenges or opportunities for coldwater conservation or education exist in your area?

P, RC, RS, or S – Which strategy does this issue or opportunity best relate to – Protect, Reconnect, Restore, or Sustain?

TU National – Y/N – Does this complement an ongoing staff supported TU national project? If "yes," please note which one.

Urgency – What happens if no action is taken this year?

Significance to mission – How important is this in terms of accomplishing TU's mission?

Achievable – Can we achieve success with current human and financial resources?

Appeal to current and new members – What is the prospect that this will engage current members and appeal to new members?

Identified leadership – Who will lead this project to completion, and do the leaders have the required skills to be successful?

Funding and partnership potential – Can we raise funds and attract partners necessary for this project?