



New Leader Orientation

Lisa Beranek

Leadership Development Manager

Nick Halle

Volunteer Operations Coordinator

Session Goals



In today's session, we will:

- Review Trout Unlimited history
- Introduce support network
- Share resources
- Discuss potential next steps
- Questions

“Leadership and learning are indispensable to each other.” - John Fitzgerald Kennedy

Introductions



- 🐟 Name
- 🐟 Chapter or Council
- 🐟 Role
- 🐟 One thing you'd like to get out of this session



Who am I?

Lisa Beranek

*Trout Unlimited
Leadership Development
Manager
Volunteer Operations*



Who am I?

Nick Halle

*Trout Unlimited
Volunteer Operations
Coordinator
Volunteer Operations*

TU History



- ✦ TU was founded in 1959 in Michigan
- ✦ Built on a volunteer chapter structure with their own operations independent of national operations
- ✦ National operations did not go much beyond creating and distributing TROUT magazine until 1992
- ✦ \$2 million operating budget and 55,000 members in 1992



- ✦ 220+ staff in 22 states
- ✦ \$50 million operating budget
- ✦ In FY18, TU's 388 chapters and 36 councils reported:
 - 731,000+ volunteer hours toward our mission
 - 1,038+ conservation projects
 - A total of 1,595 youth education programs
 - 604 veterans programs and events
 - 2,971+ local chapter meetings and 1,744 community outreach events
 - \$10.3+ million raised and spent by chapters and councils for conservation and education efforts

Mission & Vision



- 🐟 **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.

TU's Strategic Plan



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

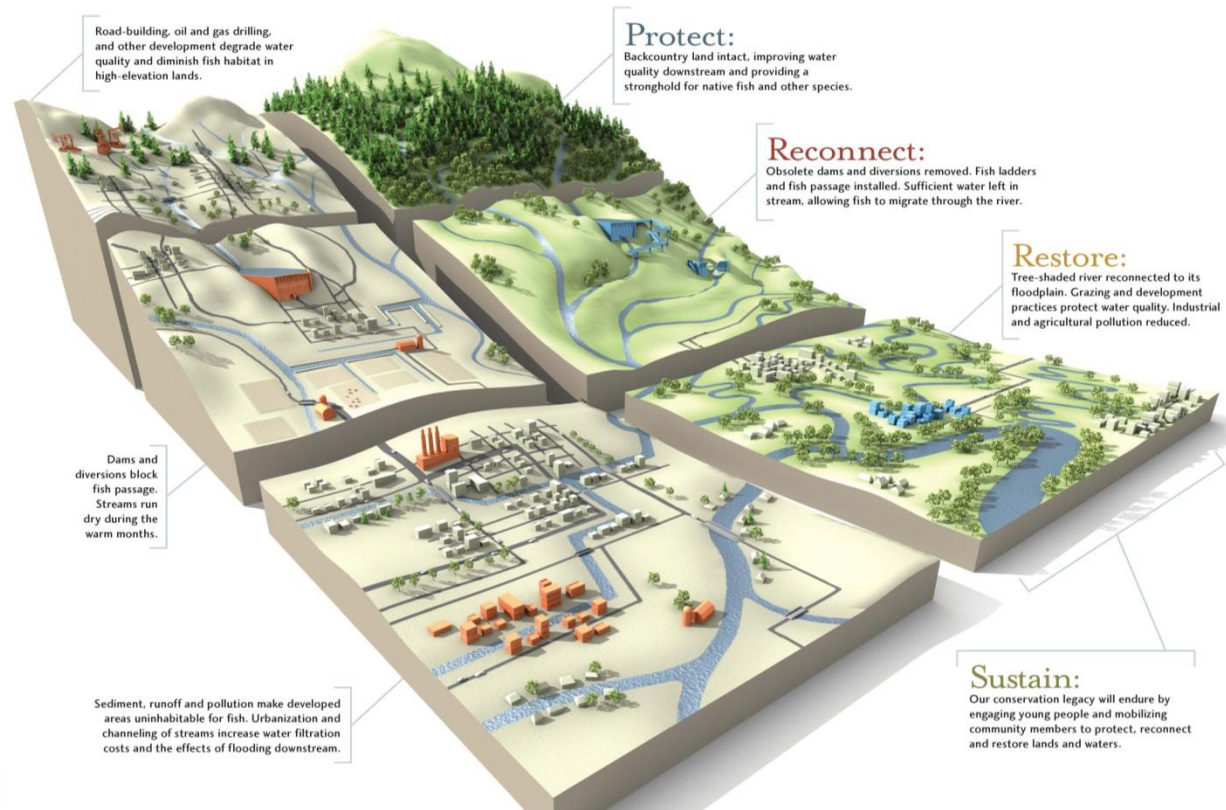
We are driven by our mission, and all levels of the organization—members, staff, chapters, councils, NLC, and board—work together toward a common vision.

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

Strategic Opportunities

1. Youth Education
2. Flood Resiliency/ Climate Change
3. Southwest Native Trout
4. Wild Steelhead Initiative
5. Citizen Science

TU's Approach to Conservation: A Landscape-Scale Model



Protect



Reconnect



Restore

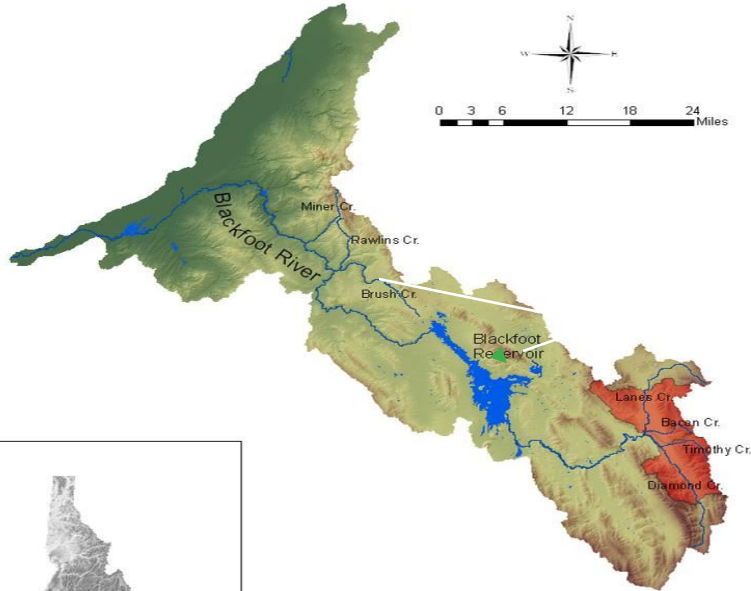


Sustain

Example Basin-Scale Integrated Campaign



Blackfoot River Watershed

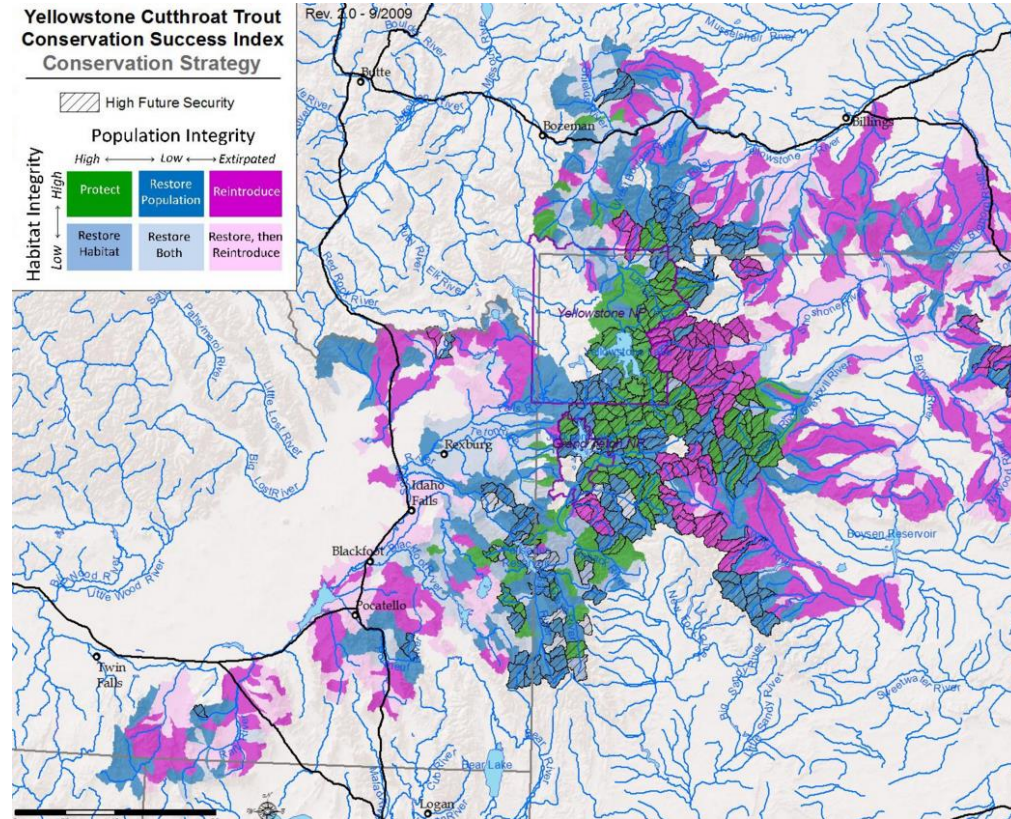


- **PROTECT** – prevent mining and OHV degradation in headwaters
- **RECONNECT** – upgrade irrigation diversions to improve fish passage and increase flow; change dam releases to increase flow
- **RESTORE** – fence cattle out of riparian zones and restore streamside vegetation
- **SUSTAIN** – TU chapter engaged in restoration project work and mining/OHV advocacy

Science



- Evaluates status and trends
- Determines conservation priorities
- Maximizes return on conservation investment
- Measures progress over time



What is One TU?

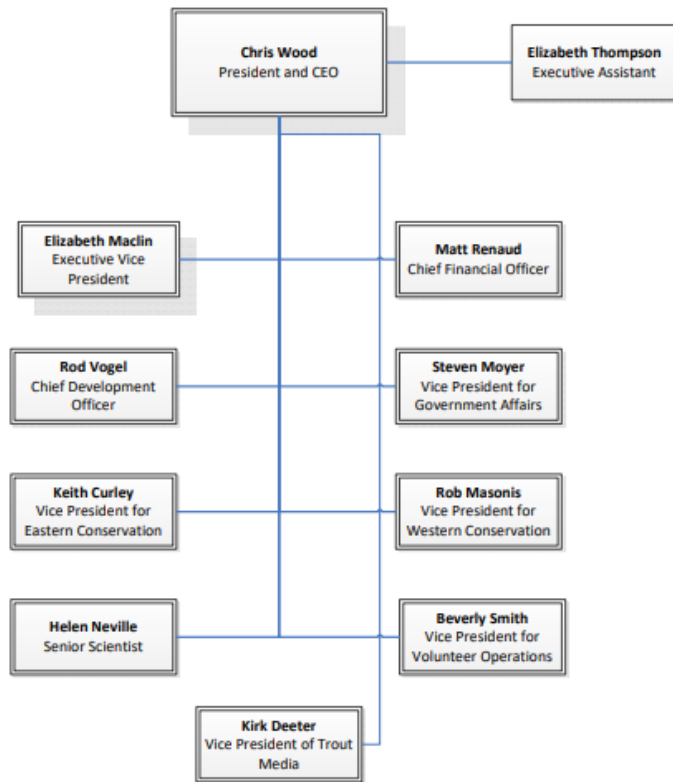


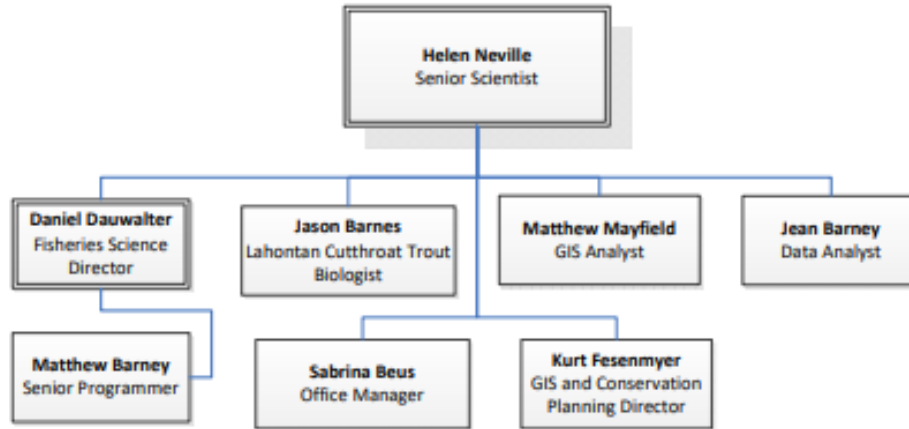
- ❧ One TU is the concept that asks of each of us – staff and volunteer – to pull on the same rope with a common purpose.
- ❧ We know that only by working together will we achieve our organizational vision; therefore, One TU is foundational to our success.

TU Structure and Organization

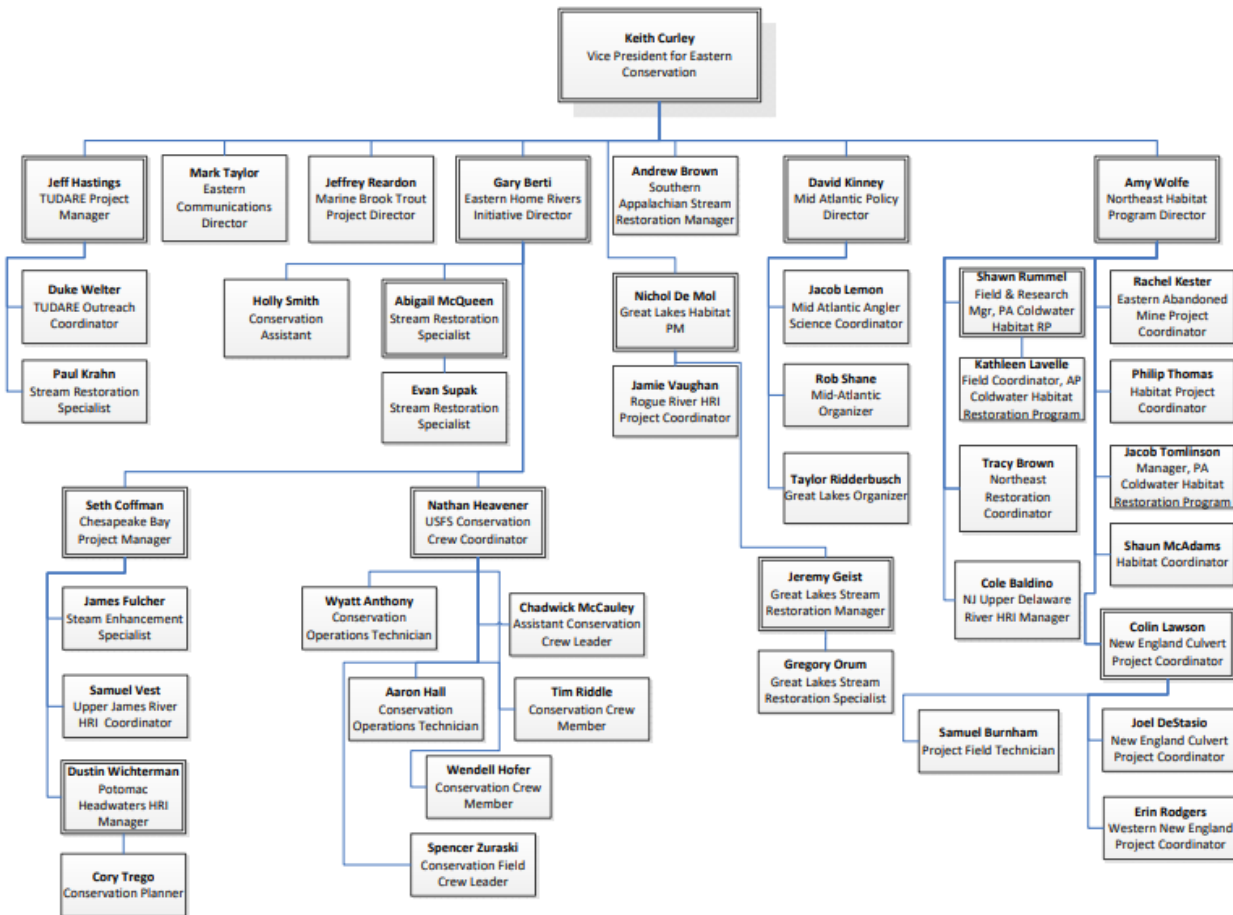


Senior Staff

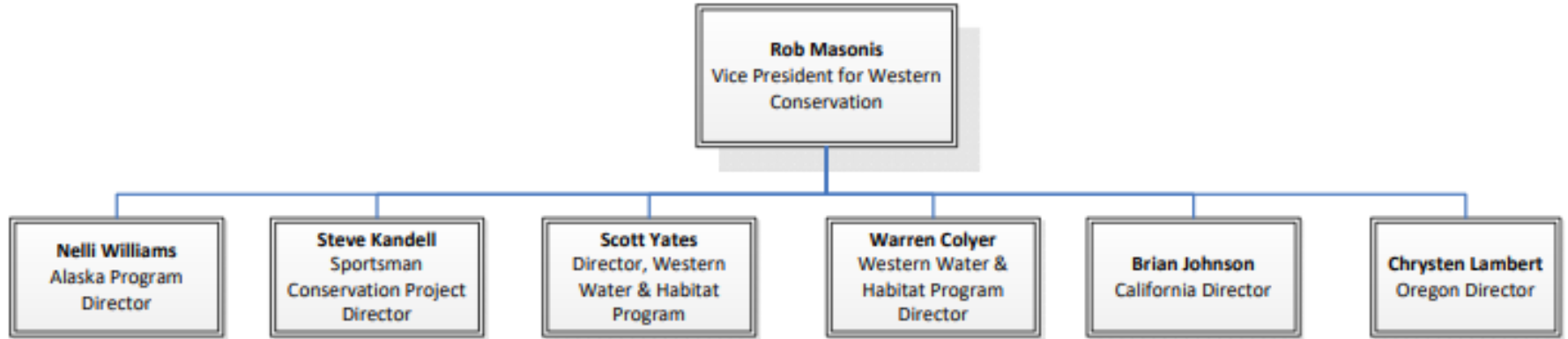




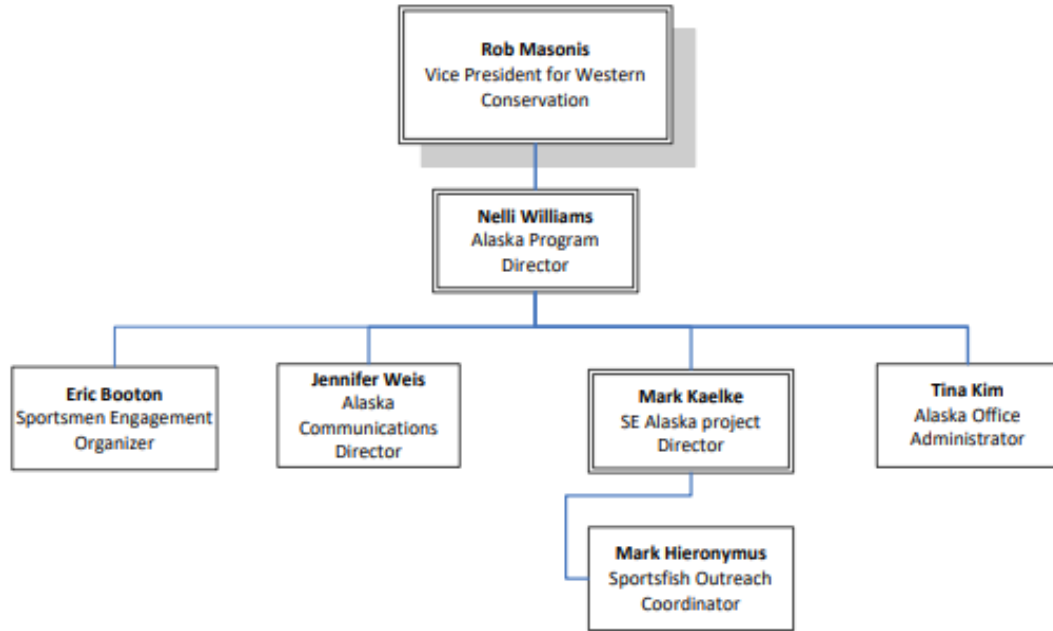
Eastern Conservation



Western Conservation



Western Conservation: Alaska

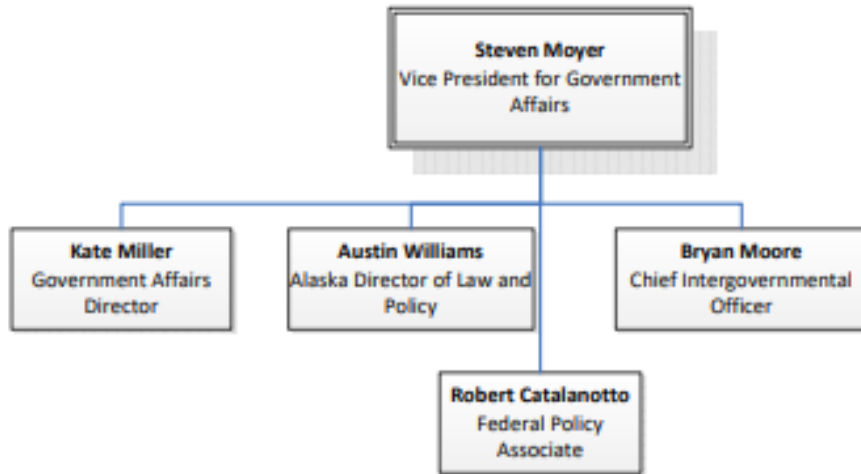


SALMON OR GOLD? THE CHOICE IS UP TO US.

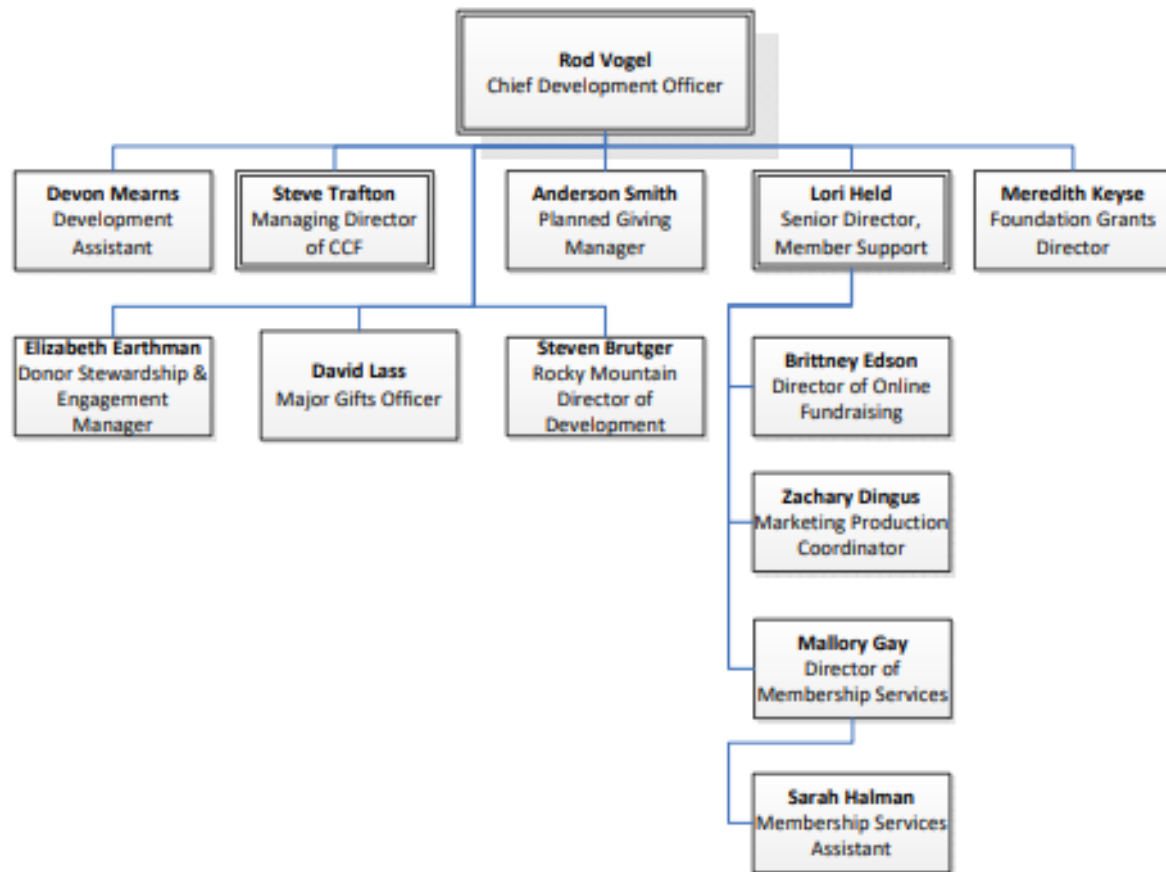


**NO
PEBBLE
MINE**

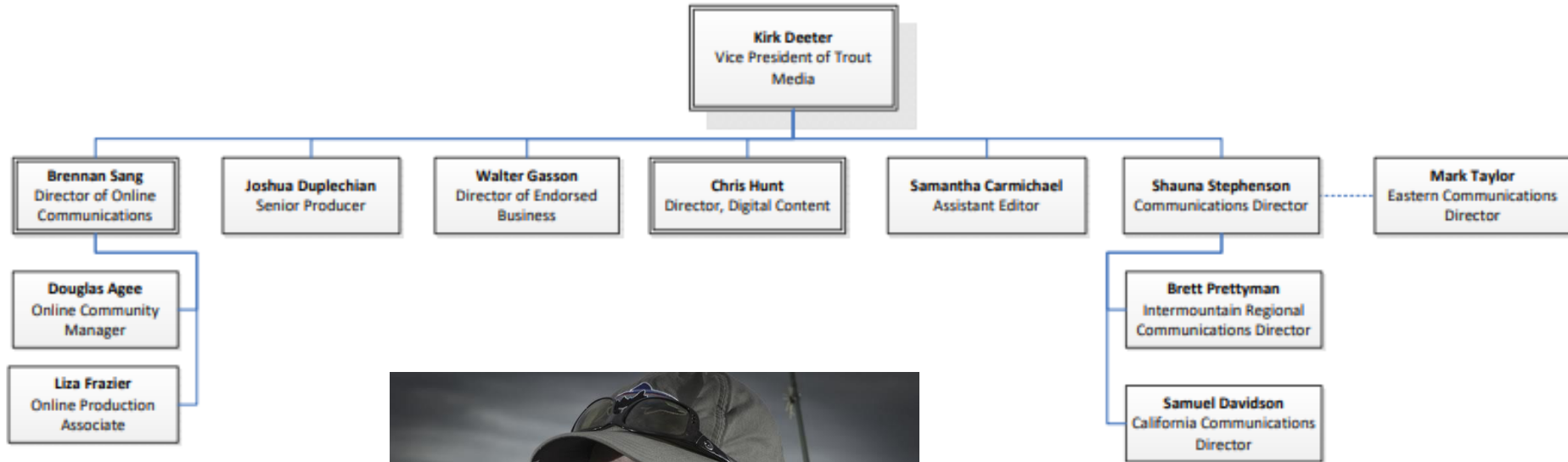
Government Affairs



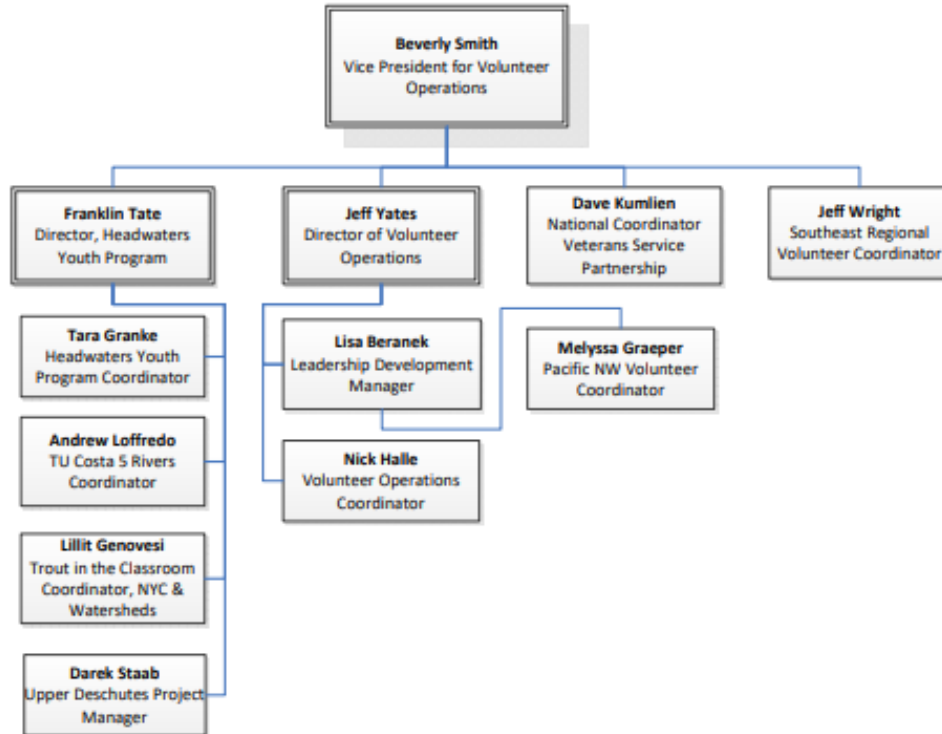
Development



Marketing & Communications



Volunteer Operations



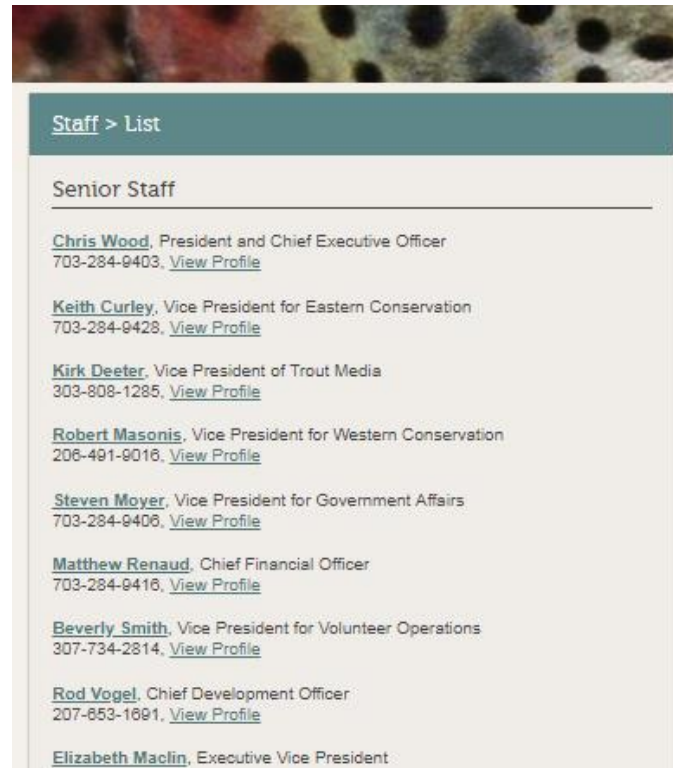
Council Staff & Other Contacts



Some councils have staff that report to the respective council executive committees.

For additional staff contact information, contact Volunteer Operations staff.

Staff list can be found at www.tu.org/staff/list



Board of Trustees (BOT)

8 Grassroots Trustees
22 At Large Trustees
1 NLC Chair
1 NLC Secretary

National Leadership Council (NLC)

1 Elected Chair
1 Elected Secretary
36 NLC Representatives

Councils

36 Councils, each with a Chair
Chairs have no collective elected representatives

Chapters

Organized into Councils

Membership

Organized into Chapters

TU Chapters



A group of members in a local area given a charter by TU's Board of Trustees in order to carry on the mission locally.

TU chapters are financially independent of the national organization – raising in aggregate ~ \$10 million dollars annually






Chapter's communicate directly to members

Each TU chapter is unique based on its resources, geography, membership and history and range in size and scope.



Chapter Composition



-  **President**
-  **Vice President**
-  **Treasurer**
-  **Secretary**
-  **Committee Chairs**

Chapter Composition



Promising volunteers are asked to assume longer-term responsibility

Promising volunteers are chosen to assume responsibility for the whole organization as it carries outreach its mission

Short-term, defined, enjoyable tasks allow volunteers to try out TU and share in accomplishing the mission

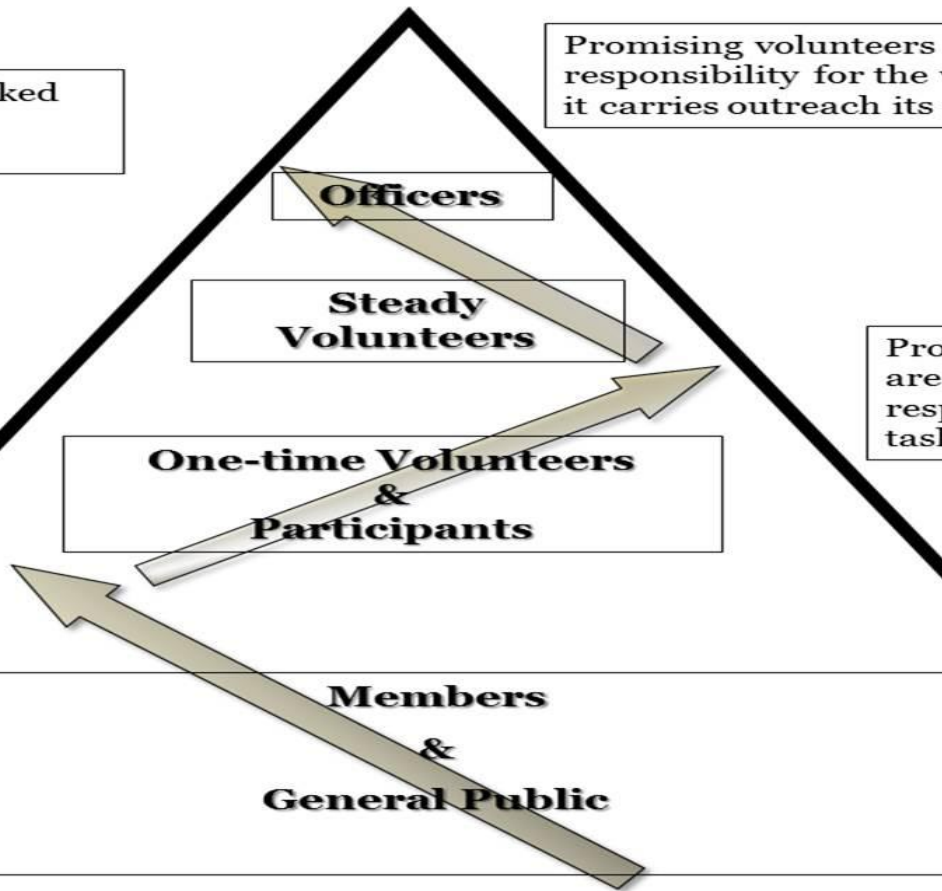
Promising participants are asked to take responsibility for larger tasks they can perform

Officers

**Steady
Volunteers**

**One-time Volunteers
&
Participants**

**Members
&
General Public**



TU's State Councils



- ✧ Councils serve as umbrella organizations for their chapters, state-wide.
- ✧ Council officers are elected by chapter representatives.

- ✧ Like a TU chapter, councils raise and spend funds and file their own tax forms with the IRS.
- ✧ TU sends a rebate to councils of \$2.50/ member annually.
- ✧ Councils play a critical role in state-level communications, chapter support and advocacy.

Council Composition



- ✦ **Council Chair:** This person is the chief executive officer for the council.
- ✦ **Vice Chair:** This person should support the council chair and be prepared to succeed the chair when their term is up.
- ✦ **Treasurer:** This person is responsible for the fiscal health of the council -- from maintaining a budget to filing the AFR and the IRS 990N – and ensuring chapters are also compliant and up-to-date.
- ✦ **Secretary:** This person is responsible for records retention, meeting minutes, the slate of board nominees, preparing the notice of the membership mtg., communicating council meeting dates and business to chapter leaders, etc...
- ✦ **NLC Representative:** This person serves as the conduit between the state council and TU national and also serve on organizational and conservation workgroups.

The National Leadership Council



- ✧ The NLC is made up of one representative from each council.
- ✧ The chair and secretary of the NLC serve on the Board of Trustees.
- ✧ The NLC sets the national conservation agenda.
- ✧ Each NLC rep is asked to serve on two workgroups.
- ✧ The NLC nominates grassroots trustees.
- ✧ The NLC (or a proxy) is required to attend the Annual Meeting.



Leader Resources



Leadership resources include:

- 🐟 TU Leadership Manual
- 🐟 Leaders Only Tools
- 🐟 Tacklebox
- 🐟 Leaders Forum
- 🐟 Lines to Leaders e-newsletter
- 🐟 Chapter & Council
- 🐟 Staff
- 🐟 And more!



Volunteer Operations Tools and Resources

[Tacklebox](#) [TU.org >> My TU Button >> Leaders Only Tools >> Other Recourses: Tacklebox]

**Described in detail below*

Business Practices

- Leadership Manual*
- National Leadership Council Information
- Financial Reporting Requirements
- Risk Management*
- Strategic Planning Resources
- Model Chapter and Council Bylaws
- Chapter Focus Project

Fundraising for Chapters and Councils

- TU's Fundraising Program*
- TU Guide to Fundraising
- Creative Fundraising Ideas for Chapters and Councils
- A Strategic Approach to Fund Development
- Banquet Guide and Planner
- Example Printed Banquet Programs
- Embrace-a-Stream information*
- TU Event Printshop

Conservation Resources

- Recordings of Numerous Online Trainings
- Angler Science Activities
- Embrace-a-Stream
- Advocacy Documents
- Restoration Documents
- Land Protection Resources

Youth Education

- Trout in the Classroom Documents
- One TU Youth Education Report
- Five Rivers (College Chapter) Guide
- Youth Conservation and Fishing Camps
- Stream Explorers Website and Information
- Boy Scout Fly Fishing Merit Badge Program
- First Cast Curriculum
- Planning a Meaningful Youth Education Event Guide

Membership Tools

- Membership Memo*
- Surveying Resources
- Membership Acquisition Forms/ Brochures
- New Member Welcome Letter
- Style Guide: TU Graphic Standards & Logos
- Archives of Annual and Regional Mtg. Presentations
- Archives of Lines to Leaders*
- Veterans Services Program Documents
- Update Chapter Member's Information Spreadsheet
- Chapter Recharter Due Date Spreadsheet
- Volunteer Mentors Spreadsheet
- Women's Initiative Documents
- Resources for New Volunteer Leaders*

Important TU Policies

- Contract Guidance for TU Chapters and Councils
- Grassroots Trustee Nomination Form/ Job Description
- Resolution on Stocking Over Native Trout/ Q&A Doc.
- Memo & Questionnaire on Fishing Access Agreements
- Policy on Ownership of Real Property/ Definition of Terms/ Checklist
- National Conservation Agenda
- Resolution on the Prohibition of Holding Conservation Easements
- Operating Procedures for Early Chapter Development
- Bylaws and Policies Resolution
- Land Ownership Resolution
- TU Privacy Policy
- Logo and Brand Policy
- TU Litigation Policy
- Policy on Pesticide Use
- Stream Access Policy
- North American Salmonid Policy

Leaders Only Tools Section [TU.org >> My TU Button >> Drop-Down Menu "Leader Only Tools"]

**Only Leaders that are listed as such in the Update Chapter/Council Leaders page will see this option.*

- **Council/Chapter Rosters and Labels** – Displays all active and 6 month suspended members in your council or chapter. The spreadsheet report is in .csv format and member information is displayed in alpha order by last name. The spreadsheet includes information such as member name, address, phone, e-mail, expiration date, and much more... The label version displays same information in .rtf format and member information is displayed in alpha order by last name.
- **Membership Changes Reports** – Various membership reports that can be viewed online or exported. Leaders can also sign up to receive these membership reports via an automatic monthly or weekly email.
- **Update Council/Chapter Information** – This page allows you to edit point-of-contact information and web content that displays for your council/chapter when conducting a Council/Chapter Search on www.tu.org.
- **Update Council/Chapter Leaders** – Leaders may edit chapter leader roles. Leaders listed here will have access to the tools described here and will also receive the monthly e-newsletter, *Lines to Leaders*.
- **E-Document Uploading** – A new functionality that allows volunteers the ability to easily upload, store and share chapter or council strategic plans and/or bylaws.

Leadership Manual



The Leadership Manual includes:

- ✍ Organizational overview
- ✍ Position description summaries
- ✍ Code of Ethics
- ✍ Liability Mitigation
- ✍ Chapter & Council Effectiveness
- ✍ Important Policies
- ✍ Fundraising information
- ✍ And more!



TU's Volunteer Leadership Manual

June 2017 edition

You are probably reading this manual because you have taken on the exciting and rewarding responsibility of playing an active role in a Trout Unlimited (TU) council or chapter. As a volunteer leader, you join a long tradition of forward-thinking anglers and conservationists who have led the fight to conserve, protect, and restore North America's trout and salmon fisheries and their watersheds. Volunteer leaders like you have been at the forefront of protecting trout and salmon waters throughout America, from little-known local streams like the Nissitissit in Massachusetts to world-famous rivers like the Big Blackfoot in Montana. Leadership in TU is challenging, and, depending on your position, could involve arranging projects, organizing trips, recruiting new members, coordinating youth education programs, fundraising, and acting as a spokesperson to media, elected officials, and the general public.

The objective of this manual is to provide guidelines and resources to help you run your TU chapter or council and participate in national-level activities. If you have additional questions or require assistance, please reach out to [your volunteer operations staff](#). Congratulations on your role as a TU volunteer leader. The time and energy you commit to TU is crucial to the conservation of our nation's coldwater resources.

Table of Contents

[Chapter 1: A Short TU History](#)

[Chapter 2: TU's Organizational Structure](#)

Membership
Chapters
Councils
National Leadership Council
Board of Trustees
National Staff

[Chapter 3: TU's Strategic Plan](#)

TU Mission
TU Vision
Elements of the Strategic Plan
Statement of Intent
Standard Operating Procedures
Council and Chapter Strategic Plans: "One TU"

[Chapter 4: Chapter Focus](#)

The Chapter Focus Project
Chapter Conservation
Chapter Youth Education
Chapter Veterans Services Partnership Programs
Chapter Service to Members/ Communications
Chapter Cash Management and Internal Controls
Chapter Bylaws
Chapter Volunteer Leader Position Descriptions

- Chapter President
- Chapter Vice President
- Chapter Secretary

Leaders Only Tools



The Leaders Only Tools includes:

- ✍ Membership Roster
- ✍ Electronic Documents
- ✍ Annual Financial Reports
- ✍ Membership Reports
- ✍ Bulk Email Tool
- ✍ Leadership Roster
- ✍ Membership Contact Info Update
- ✍ And more!

Electronic Document Storage - 484 - Klickitat

CURRENT CHAPTER BYLAWS:

Click to view: [484 - Klickitat Bylaws \(PDF / 196KB\)](#)

Uploaded on 10/11/2018 at 03:08PM ET by Lisa Beranek

Upload new bylaws document: No file chosen



CURRENT CHAPTER STRATEGIC PLANS:

Click to view: [484 - Klickitat strategic plans \(PDF / 1559KB\)](#)

Uploaded on 03/23/2018 at 07:31PM ET by Lisa Beranek

Upload new strategic plan document: No file chosen



CHAPTER CERTIFICATES OF ACCIDENT INSURANCE:

Click to view: [484 - Klickitat insurance certificate 10/15/2018 \(PDF / 244KB\)](#)

Uploaded on 10/15/2018 at 02:29PM ET by Nick Halle

Click to view: [484 - Klickitat insurance certificate 04/11/2018 \(PDF / 244KB\)](#)

Uploaded on 04/11/2018 at 12:58PM ET by Lisa Beranek

Click to view: [484 - Klickitat insurance certificate 02/11/2018 \(PDF / 274KB\)](#)

Uploaded on 02/11/2018 at 12:13PM ET by Robert Shane

Click to view: [484 - Klickitat insurance certificate 11/20/2014 \(PDF / 45KB\)](#)

Uploaded on 11/20/2014 at 10:27AM ET

Click to view: [484 - Klickitat insurance certificate 12/12/2013 \(PDF / 175KB\)](#)

Uploaded on 12/12/2013 at 05:38PM ET

Upload new certificate of accident insurance: No file chosen



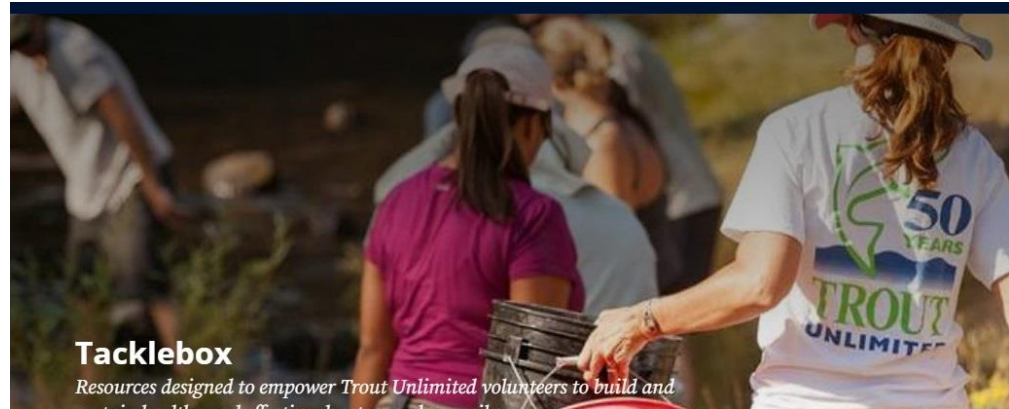
CHAPTER CERTIFICATES OF LIABILITY INSURANCE:

Tacklebox



The Tacklebox includes:

- 🐟 Important Policies
- 🐟 Membership Tools
- 🐟 Youth Engagement Information
- 🐟 Diversity Templates
- 🐟 Event Print Shop
- 🐟 And more!



INSURANCE
FORMS

FUNDRAISING
RESOURCES

MEMBERSHIP
RECRUITMENT

FISCAL YEAR
CHANGE FAQ

REGIONAL
RENDEZVOUS

CHAPTER
LEADERSHIP
RESOURCES

YOUTH
EDUCATION
RESOURCES

DIVERSITY
INITIATIVE
RESOURCES

VETERANS
SERVICES
RESOURCES

NATIONAL
LEADERSHIP
COUNCIL

Leaders Forum



The TU Online Community offers a Leaders Forum where leaders can pose questions and provide insight on tried and true efforts.

Consider joining the conservation conversation today at community.tu.org!

Leaders Forum

1 to 50 of 244 threads (2.5K total posts)

Most Recently Updated | Posts in my communities | 50 per page | POST NEW MESSAGE

Thread Subject	Replies	Last Post
QUESTION OF THE WEEK - HOLIDAY MEETING FORMAT CHAPTER MANAGEMENT	2	2 hours ago by DALE SMITH Original post by DOUG AGEE
INTEGRATING YOUTH IN PLANNING AND LEADERSHIP	5	3 hours ago by DOUG AGEE
BEST DAY FOR A FUND RAISER EVENT CHAPTER MANAGEMENT	14	22 hours ago by LISA BERANEK Original post by HARRIS KLEIN
HOW TO RECORD VOLUNTEER HOURS CHAPTER MANAGEMENT	10	4 days ago by DOUG AGEE
TU LEADER TRAINING CALENDAR 2018 CHAPTER MANAGEMENT	11	7 days ago by ROBERT BOHNER Original post by JEFF YATES
CONTACTING NEW MEMBERS CHAPTER MANAGEMENT	14	7 days ago by DENIS RANSMEIER Original post by ROBERT BOHNER

Lines to Leaders



The e-newsletter includes:

- ✦ Training Opportunities
- ✦ Membership Tools
- ✦ Youth Engagement Information
- ✦ Diversity Updates
- ✦ Special Opportunities
- ✦ Grassroots Highlights
- ✦ And more!



Dear %First Name%,

Since 1975, TU's Embrace A Stream matching grant program has funded more than 1,050 chapter projects across the country with more than \$4.6 million in direct cash grants!

It's our oldest and largest program to support your local work and thanks to you, your chapters and councils, and great corporate partners like Orvis, SweetWater Brewing and RepYourWater – the critical program continues to grow.

This year, we have received over 30 applications for project funding from volunteers like you. In chapters from Massachusetts to Montana and beyond. Our all-volunteer Embrace A Stream committee will be reviewing these grant applications and deciding which projects to fund – and at what level – at our annual meeting in California.

Thank you for asking all of you, as members, volunteers and chapter and council leaders, to help us ensure this year's Embrace A Stream grants continue to make a difference by supporting this important program in one of the following ways:

Make a donation to support the Embrace A Stream program – Whether you give as an individual, or donate as a chapter or council, your support will help chapters like you restore and improve the home waters they care about as much as you care for your local streams. Purchase TU brand gear from the SweetWater Brewing Company – You can choose from a great Simms fishing shirt, a Wingo belt, or a Klean Kanteen pint glass and more, and know that 20% of the purchase price is coming back to TU's Embrace A Stream program. What's more, SweetWater will also be matching Embrace A Stream donations with a \$20,000 matching grant to the program this year!

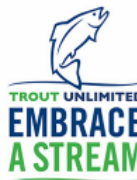
Make a donation to the Orvis / TU Embrace A Stream Challenge from Nov. 5-11 – Thanks to a donation of \$25,000 from Orvis, we will again be hosting an online competition among the chapters that receive grants where they can win a share of \$50,000 in prizes by getting members and supporters to donate to their project. You can see last year's projects, donations and prizes at www.embraceastream.org and save the date to head back there on Nov. 5 to see which chapter projects you'd like to support.

As we continue to grow and improve the Embrace A Stream program, I also hope that you and your chapter or council will consider applying for a grant in future years to help fund a local conservation or education project. Next year's grant application process will begin in March with a special training, so stay tuned.

Your local work is critically important and the effort you and your fellow volunteers put in to restoring rivers, engaging communities and educating youth are always inspiring. Never hesitate to reach out to myself or other members of your Volunteer Operations Staff to talk through ideas you have for growing your chapter or council, questions you might have, or to discuss ways to help fund your great local work!

Sincerely,

Sa Beranek
Leadership Development Manager



TU ANNUAL MEETING

CALENDAR

Chapter & Council



Chapter and Council leaders offer a breadth of insight.

Consider connecting with leaders in the following ways:

- ✦ Council meetings
- ✦ Role specific trainings
- ✦ Regional meetings
- ✦ One-on-one Mentorship
- ✦ Leaders Forum
- ✦ And more!





Questions?



Thank You!

Lisa Beranek

Lisa.Beranek@tu.org

Nick Halle

Nick.Halle@tu.org