



## Tacklebox

*Resources designed to empower Trout Unlimited volunteers to build and sustain healthy and effective chapters and councils.*

## “It’s in the (new) Tacklebox!”

**Tools & Resources for Volunteers – [www.tu.org/tacklebox](http://www.tu.org/tacklebox)**

### Council Leaders Resources

- National Leadership Council
- Council Officer Resources
  - Officer Role Descriptions
  - Running A Council
  - Chapter Support
  - Council Leadership Development
  - Council Strategic Planning
- Council Board & Committee Resources

### Chapter Leader Resources

- Chapter Officer Role Descriptions
- Running a Chapter
- Chapter Leadership Development
- Chapter Strategic Planning
- Chapter Committee Resources

### Conservation & Science Resources

- Conservation Resources
  - Volunteer Restoration Projects
  - Building Conservation Partnerships
  - Land Protection Resources
- Science Resources
  - Angler Science Guides & Tools
  - Interactive Mapping Tools

### Diversity, Youth & Veterans Services Resources

- Diversity & Inclusion Resources
  - Women’s Initiative Resources
  - Diversity & Inclusion Partners
- Youth Education Resources
  - Planning a Meaningful Youth Education Event
  - Trout in the Classroom
  - STREAM Girls
  - TU Costa 5 Rivers College Program
  - Guidelines for Volunteers Working with Youth
- Veterans Services Partnership Resources
  - Veterans Service Partnership Program Guide

### Membership Recruitment & Engagement

- Membership Recruitment
  - Membership Memo
  - Membership Applications
  - New Member Welcome Letter
- Membership Engagement
  - Chapter Meetings
  - Chapter Fishing Trips
  - Chapter Social Events
  - Membership Surveys
- Membership Management
  - Leaders Only Reports & Trainings

### Fundraising Resources

- Fundraising Strategy
- Fundraising Events
  - Fundraising Discount Program
  - Banquet Guide & Planner
  - Film Tour Event Guide
  - Hosting Friendraisers
- Grants & Corporate Fundraising
- Fundraising Appeals

### Communications Resources

- Website Development
- Email Communications
- Social Media
- Media Resources & Press Release Templates
- Print Communications
- TU Brand & Messaging
  - TU Logo Downloads

### Volunteer Trainings & Events

- Training Calendar & Recorded Trainings
- Annual & Regional Events
  - Annual Meeting Information
  - Regional Meeting Information

## Risk Management & Financial Controls Resources

- Financial Controls & Reporting
  - Financial & Property Controls Policy
  - Personal Property Inventory Sample Spreadsheet
  - Fiscal Year Change Process Information
  - Filing TU's Annual Financial Report
  - Securely Processing Credit Cards
  - Federal Tax Filing Requirements
  - State Filing Requirements
- Requirements Dictated by TU's 501(c)3
  - Lobbying Restrictions
  - Prohibition on Electoral Politics
  - Donating to non 501(c)3s
  - Scholarships
- Liability & Risk Management
  - Real Property Liability
  - Liquor Liability
  - Youth Camps & Other Youth Projects
  - Stream Restoration Liability
  - Liability Waivers
  - Boating Liability
  - Contractual Liability
  - Insurance
- Important TU Policies
  - TU Code of Ethics
  - Property Related Policies
  - Communications Related Policies
  - Conservation Related Policies
  - Risk Management / Board Operations Policies

## Short Links & Shortcuts to Get You to the Right Tacklebox Resource Faster

The following links will get you directly to the places you need to go faster – bookmark them on your browser for one-click access!

- [www.tu.org/tacklebox](http://www.tu.org/tacklebox) – Tacklebox homepage.
- [www.tu.org/chaptersearch](http://www.tu.org/chaptersearch) – Map of all chapters with local volunteer contact information
- [www.tu.org/insurance](http://www.tu.org/insurance) – Fill out an insurance request form, buy supplemental medical insurance, and learn about our insurance coverage for chapters and councils
- [www.tu.org/fundraising](http://www.tu.org/fundraising) – Fundraising discount program, fundraiser ideas and strategies, and more here
- [www.tu.org/eas](http://www.tu.org/eas) – Embrace A Stream grant information
- [www.tu.org/training](http://www.tu.org/training) – All recorded trainings and a calendar of coming training webinars and events
- [www.tu.org/regionals](http://www.tu.org/regionals) – Regional rendezvous calendar and meeting resources and presentations
- [www.tu.org/annualmeeting](http://www.tu.org/annualmeeting) – Annual Meeting info, go to [www.tu.org/awards](http://www.tu.org/awards) to nominate a deserving volunteer for a national award at the Annual Meeting,
- [www.tu.org/nlc](http://www.tu.org/nlc) – National Leadership Council info, workgroup lists, contacts and resources
- [www.tu.org/headwaters](http://www.tu.org/headwaters) – Youth education resources, go to [www.tu.org/tic](http://www.tu.org/tic) for Trout in the Classroom, [www.tu.org/streamgirls](http://www.tu.org/streamgirls) for Girl Scouts partnership, [www.tu.org/5rivers](http://www.tu.org/5rivers) for our college program, or [www.tu.org/camps](http://www.tu.org/camps) for our summer camp program
- [www.tu.org/veterans](http://www.tu.org/veterans) – Veterans Services Partnership program resources and list of partner nonprofits
- [www.tu.org/diversity](http://www.tu.org/diversity) – Diversity initiative resources, go to [www.tu.org/women](http://www.tu.org/women) for the women's initiative
- [www.tu.org/tu-event-printshop](http://www.tu.org/tu-event-printshop) – Order business cards, mail postcards, posters, tickets and more
- [www.tu.org/riskmanagement](http://www.tu.org/riskmanagement) – All resources related to minimizing risk at the chapter or council
- [www.tu.org/policies](http://www.tu.org/policies) – All TU national policies
- [www.tu.org/financialreporting](http://www.tu.org/financialreporting) – Filing a financial report, following financial controls requirements, the fiscal year change, and more

## TU Volunteer Operations Staff – Here to Help You When You Can't Find What You Need

Your Volunteer Operations Staff is here for you to talk through an idea, problem solve a solution, or just find the right resource!

**Nick Halle**, Volunteer Operations Coordinator – [nhalle@tu.org](mailto:nhalle@tu.org) (703) 284-9425

Contact Nick for:

- Volunteer Leader Login Issues
- Insurance Requests / Questions
- Fundraising Program & Support
- Membership Recruitment Tools
- Letter of Good Standing / 501(c)3 Documents
- L.L. Bean Rod Donations

**Lisa Beranek**, Volunteer Operations Leadership Development Manager – [lberanek@tu.org](mailto:lberanek@tu.org) (907) 205-0974

Contact Lisa for:

- Leadership Recruitment & Development
- Embrace A Stream Grants Program
- Strategic Planning Support
- Diversity Event Planning

**Jeff Yates**, Director of Volunteer Operations – [jyates@tu.org](mailto:jyates@tu.org) (203) 216-7078

Contact Jeff for:

- Communications Strategy & Tactics
- IRS Issues / Filing / Revocation
- Corporate & Grant Funding
- Chapter / Council Logo Design

**Tara Granke**, Headwaters Youth Program Coordinator – [tgranke@tu.org](mailto:tgranke@tu.org) (828) 552-3798

**Franklin Tate**, Director, Headwaters Youth Program – [ftate@tu.org](mailto:ftate@tu.org) (828) 398-0177

**Dave Kumlien**, Veterans Services Program Coordinator – [dkumlien@tu.org](mailto:dkumlien@tu.org) (406) 570-0023

**Doug Agee**, Online Community Manager – [dagee@tu.org](mailto:dagee@tu.org) (435) 633-1359

**Beverly Smith**, Vice President for Volunteer Operations and Program Development – [bsmith@tu.org](mailto:bsmith@tu.org) (307) 734-2814