



# Membership Memo

November 2022

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# Membership Memo

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This Membership Memo serves as a tool to help educate chapter leaders and members about TU's policy and process regarding various membership matters. This memo addresses various topics, such as joining TU and renewing your membership, why and when you receive renewal notices, how a member is assigned to a chapter, and the rebate programs.

## **TU STAFF:**

### **Volunteer Operations**

Please visit TU's Volunteer Operations staff list [HERE](#) for contact information

### **Membership Services**

Please visit [TU's staff directory](#) for specific Membership Services staff, or send an email to [tumembership@tu.org](mailto:tumembership@tu.org) for membership inquiries.

#### **Need to change your address/e-mail/chapter?**

- 1) Login at [www.tu.org/login](http://www.tu.org/login) and edit your member profile
- 2) Email the request to [trout@tu.org](mailto:trout@tu.org)
- 3) Call (800) 834-2419



## Membership Chair Duties

Many chapters and councils appoint a Membership Chair whose duties include [leading the Membership Committee](#) tracking the membership of the chapter or council, developing recruitment goals and strategies for the chapter, ensuring new members are welcomed to the chapter and more. The Membership Chair performs a key role by helping current members resolve membership issues, maintaining member's contact information, and communicating issues with member records to TU staff. The roster and membership changes reports found in the Leaders Only section provides the information needed to fulfill this role.

### *When taking over as Membership Chair:*

- Receive and review records from past Membership Chair. Ask the past chair for lessons learned and a full review of the prior year's duties/activities.
- Review [TU's Leadership Manual](#)
- Ensure your Chapter President enters you as the new Membership Chair in the Leaders Only section (so that you have access to the rosters, membership changes report, etc...)
- Login to the Leaders Only section and explore. Reach out to TU Volunteer Operations staff if you have any questions.

### *Suggested ongoing tasks:*

- Serve on Executive Committee
- Report on status of chapter/ council membership at each chapter/ council (and ExComm) meeting including total membership, change from last meeting, new members, etc. This information is available from the membership changes report in the Leaders Only section
- Welcome new members to chapter/ council by letter, e-mail or phone, and encourage their involvement.
- Remind and encourage expired members to renew.
- Assist chapter members with TU membership questions and problems.
- Ongoing quality control of the chapter/ council roster.



## Recruiting New Members

There are millions of trout and salmon anglers in America and millions more that care about clean, cold water. The greatest challenge is finding ways to gain their support by joining TU and becoming engaged participants within the chapter. TU recruits and retains the largest number of members in two ways:

- Grassroots efforts by chapters and councils
- Direct marketing efforts conducted by the office

## Local Chapter/Council Recruitment

Chapters and councils play a very important role in acquiring new members. Studies report that most new members join organizations like TU because:

- They were asked by a member to get involved.
- They know about the group because family or friends are involved.
- They enjoyed participating in an activity that was sponsored by the group.
- They are concerned with their local home waters.

Chapter-acquired members renew at a higher rate than other members and are more likely to become active members that attend chapter meetings, come to workdays, and serve as chapter leaders. To encourage and help local chapters to recruit members, a new member rebate is given to chapters who recruit new members via the hidden link [www.tu.org/intro](http://www.tu.org/intro). To receive proper credit for this rebate, the new member must select your chapter when joining online at [www.tu.org/intro](http://www.tu.org/intro), utilize a branded new member brochure for your chapter, or your chapter's 3-digit chapter # must be designated when the new member's dues are sent to process. This rebate is not for individuals who renew their annual membership to TU.

The chapter will receive a \$15 rebate at the end of the fiscal year if new member who joins at the \$17.50 introductory rate (using [www.tu.org/intro](http://www.tu.org/intro), chapter add brochure or the spreadsheet). If a new member joins at a higher membership level, the higher the rebate. For example, the family level of \$55 will give back at \$20 rebate to the chapter. A sponsor level of \$100 will give back \$30 to the chapter. More information on rebates is below in this document.

## Resources for Recruiting Chapter Members

### Online Recruitment

The website [www.tu.org/intro](http://www.tu.org/intro) is a special URL and is not accessible from the main website of [www.tu.org](http://www.tu.org). If chapters have their own website, and have links for prospective members to join their chapter, their website link must point to this URL <http://www.tu.org/intro>. This ensures your chapter is being credited appropriately for the new member rebate.



# Membership Memo

## Chapter Add Spreadsheet

Chapters may fill out the [Special Introductory membership for Chapter Use Spreadsheet](#) with new member contact information\*. This information along with a check for all new memberships must be typed with all and mailed to:

Trout Unlimited  
PO Box 98166  
Washington DC, 20090

\*This spreadsheet should not be used for renewing chapter members, only processing new memberships.

## TU Chapter Recruitment brochure

Chapters recruiting new members should consider doing so with TU's [Chapter Recruitment Brochure](#) which can be customized online with your chapter name, contact information a local photo and description of your local work in the [TU Print Shop](#). The brochure is a comprehensive piece to help introduce people to our organization who don't know anything about TU. It explains the benefits of membership – and it is a great recruiting tool for new members.

Chapters need only to add their 3-digit chapter code onto the application in the space indicated.

## Always send any membership renewals or donations to national fundraising campaigns to:

Trout Unlimited  
PO Box 98166  
Washington DC, 20090



Please detach and return completed form with your tax-deductible membership dues gift in the attached envelope. Thank you!

Please print clearly to ensure accurate processing!

NAME

ADDRESS

CITY  STATE

ZIP

EMAIL ADDRESS

(By providing your email address, you are opting to receive Trout Unlimited communications, including chapter and council emails, in accordance with the organization's privacy policy which can be found at [tu.org/privacy-policy](#).)

**Please check membership level:**

SPECIAL Half-Priced Introductory Rate for new members only - \$17.50

Stream Explorer (12 and younger) - \$12

TU Teen (ages 13-18) - \$14

Regular - \$35

Family - \$55

Guide - \$79

Business - \$295

Life Membership - \$1,000 one-time (no refund price)

Griffith Circle - \$1,000

**Chapter Code:**

(Enter here the 3-digit number of the recruiting chapter.)

**Payment Method:**

My check, payable to Trout Unlimited, is enclosed.

Please charge my credit card as follows:

Visa  MasterCard  American Express  Discover

NAME AS IT APPEARS ON CARD

CARD NUMBER

EXPIRATION DATE

SIGNATURE  AMOUNT

OR JOIN ONLINE AT [WWW.TU.ORG/INTRO](#)

Mall to: Trout Unlimited, P.O. Box 7400, Woolly Bugger, WV 25438-7400. The attached reply envelope has been provided for your convenience. 1-800-834-2419. Thank you for your support!



## TU National Recruitment

TU divides its direct marketing programs into membership acquisition and membership retention or renewals. Direct mail membership acquisition efforts consist of three or four major mailings and up to 12 emails each year to various lists of potential TU members (e.g., The Orvis Catalog, Fly Fisherman Magazine, other selected fishing lists available to the public, and other conservation organizations).

TU will offer special new membership promotions or gifts with various partners (e.g., Orvis). These offers are for new members only and, where discounts of membership dues are involved, the expectation is to renew members at regular dues levels.

### **New Members vs. Existing Members (Joining and Renewing)**

#### ***New Member***

New members join TU through a variety of avenues – website, direct mail acquisition campaigns, youth camps, etc. **New members are the only members that should be using the \$17.50 special introductory rate or a trial membership.** These are used to bring new people in, introduce them to TU, and get them involved with a chapter.

Please ensure all new memberships are mailed to the following address for processing:

Trout Unlimited  
PO Box 98166  
Washington DC, 20090

If your chapter is recruiting new members at a chapter banquet or event, it is preferred that you refer them to the website to sign up: [www.tu.org/intro](http://www.tu.org/intro). If you are supplying new membership application forms, these should be handed to new members to fill out and give back to you with a personal check (made payable to Trout Unlimited,) or credit card # written on the application. **Chapters/councils should not be depositing checks made out to Trout Unlimited.**

#### ***Existing Members***

Existing members should renew their membership to TU by any of the following methods:

- **WEB:** Online at [www.tu.org/renew](http://www.tu.org/renew)
- **PHONE:** Calling (800) 834-2419. Please have your member ID ready (if possible).
- **MAIL:** Using the Membership Renewal Statement mailed to the member.

**Auto-Pay Membership:** Our members are incredibly loyal and dedicated to TU's mission, and many want to reduce the cost of servicing their membership – while receiving fewer notices and appeals – by signing up for our [membership autopay service](#).

This can be done by going to [www.tu.org/autopay](http://www.tu.org/autopay) and scheduling automatic membership charges to a credit card or calling (800) 834-2419.



## Chapter Assignments

When a new member joins TU, their local chapter is assigned based on their zip code. All chapters have a list of zip codes that pertain to their respective chapter's geographic region. The exception to the chapter assignment is when someone joins TU online at [www.tu.org/intro](http://www.tu.org/intro). Then, the member is assigned to the specific chapter they select. If a member moves out of the originally assigned chapter into a zip code that is assigned to a different chapter, their chapter will be updated to reflect this. Should a member wish to stay in a specific chapter, they may request to not be moved.

## Changing Chapter Assignment/Requesting Permanent Assignment

If a member wants to change their chapter, they can do so the following ways:

- 1) Login at [www.tu.org/login](http://www.tu.org/login) and edit your member profile
- 2) Email the request to [trout@tu.org](mailto:trout@tu.org)
- 3) Call (800) 834-2419

## Chapter Zip Code Reshuffle (Redefining Chapter Boundaries)

Sometimes chapters want to redefine the zip codes in their geographic region – either add to or take away from and give to another chapter. State Councils must approve any zip code reassignment. Please contact your council leaders and have them reach out to [Volunteer Operations staff](#) for an Excel spreadsheet with a current zip code assignment for your state from which you can make changes.

Councils are responsible for communicating the zip code changes to Volunteer Operations staff. We need to know the following information (and please send to us in an Excel spreadsheet):

- Zip codes being affected
- Current chapter of zip code
- New chapter of zip code

Once TU staff has the excel spreadsheet and approval from the council, we can move forward with programming the necessary changes. This takes about a week to process. Upon completion, those who requested the change are sent a file showing which members were affected with the zip code reassignment. It is the responsibility of the chapter leaders to notify these members that their chapter has changed.

Important: If a member has previously indicated to TU staff that they wish to stay a member of a certain chapter, a chapter override flag is placed in their record, permanently assigning these members to the chapter until the flag is taken off. Because of this, these members will not be affected by the reassignment process.



## Membership Rebate Programs

TU's rebate programs coincide with our fiscal year, which runs April 1 through March 31. Both new member rebates and year end rebates are issued once a year around January/February. Funds are delivered via Electronic Funds Transfer (EFT) to chapter and council bank accounts. If your chapter or council bank routing information is not on file with TU, please contact [Volunteer Operations staff](#). If a chapter doesn't have EFT information on file with TU, Volunteer Operations staff will try and contact chapter leaders to get this information for a two week period of time. After that point, the rebate will be sent to the chapter's council.

Rebates are paid out only to chapters and councils that have filed their annual activity report with Trout Unlimited through the Leaders Only section. The deadline for filing is May 15 each year.

In addition, the rebate is not paid for members in dormant chapters, i.e. those that file less than \$50 in revenue, less than \$50 in expenses and less than 50 volunteer hours. It is up to the council to disseminate year end rebate to their local chapters, if the council so chooses.

## New Member Rebate Program

The New Member Rebate is given to chapters who recruit new members via [www.tu.org/intro](http://www.tu.org/intro), [Chapter Recruitment Brochure](#), or the [Special Introductory Membership spreadsheet](#). This is how TU knows a member was actively recruited by a chapter. This rebate is not for lapsed or expired members who rejoin/renew to TU.

If a new member joins at \$17.50 introductory rate, the chapter receives \$15 for new member rebate. TU now offers the option for newly chapter recruited members to receive a TU new member premium – typically a hat, DVD or other TU branded item. The cost for this is \$27.50 and the chapter rebate is \$15.

If a new member joins at a higher membership level, the New Member Rebate will be higher. For example, the Family level of \$55 will receive a \$20 rebate to the chapter. A Sponsor level of \$100 will receive a \$30 rebate.

### Membership Levels & Benefits

Member Type	Annual Donation*	Additional Benefits
Trial	Free	
Stream Explorer (12 and under)	\$12	Stream Explorers magazine (quarterly) in place of TROUT magazine, Stream Explorers sticker.
TU Teen (13-18)	\$14	TU Teen Stickers, invitations to teen summer activities, TROUT magazine
Senior (62+)	\$25	
Regular	35**	
Contributor	\$50	
Family	\$55	Stream Explorers magazine (For family members 12 & under who have a child linked to the parent with the membership)
TU Guide	\$79	TU guide gear, TU decals
Sponsor	\$100	
Conservator	\$250	
TU Business	\$295	Listing in TROUT magazine and tu.org, complimentary TU memberships for clients and customers, TU Business decals, features in TU social media
Stewardship	\$500	
Life	\$1,500 (one time)	
Family Life	\$1,600 (one time)	





# Membership Memo

## **Year End Rebate Program**

The Year End Rebate was designed to help councils and chapter pay for the costs of servicing their members with quality, local communications. TU provides this annual rebate to councils based on total active membership at the end of TU's fiscal year, contingent on the council and all its active chapters filing the annual activity report by May 15. In addition, the rebate is not paid for members in dormant chapters, i.e. those that file less than \$50 in revenue, less than \$50 in expenses and less than 50 volunteer hours.

TU defines active members as those dues paying members that have an expiration date of March 31 or later of that particular year. Trial members do not count as active. And rebates are not paid out for Stream Explorer (youth) members. When the rebates have been calculated (after the close of the fiscal year,) the council chair will receive a spreadsheet showing the break-down of membership by chapter. Each active council will receive \$2.50 per active member in an active chapter. Councils with at-large chapters will receive \$1.50 for these active members.

While most councils retain the full rebate to fund statewide operations, some councils choose to split the revenue with the chapters, keeping \$1.50 per member for the council and sending \$1 per member back to the chapters. It is up to the council to determine what works best for each state.

\*\*TU's youth memberships, Stream Explorers and TU teen, are excluded from the new member rebate program as well as trial memberships.



## **TU National Fundraising**

We're making some changes to TU's direct marketing program that we hope will improve the Trout Unlimited membership experience. These changes were prompted by member feedback.

Member support of TU's mission is critical to the organization's success, and we appreciate and respect that support. We've heard from many members that our renewal requests and fundraising appeals can at times seem repetitive and overdone. In response to this feedback we've taken steps to reduce the overall amount of mail and email that we use for TU's renewal reminders and fundraising appeals.

Some of you may not notice this reduction immediately; others may see noticeable changes right away. The experience will vary based on how you've typically renewed and responded to our appeals in the past. For everyone, we hope this change contributes to a more positive membership experience while continuing to generate the member renewals and contributions necessary to keep TU thriving. We will be keeping a close eye on all of the direct marketing changes we're implementing, and we'll make additional adjustments and changes as necessary. We welcome your reactions and responses.

We are also continuing to move forward with long-term plans to launch a self-service portal that will allow members to customize how and how often we communicate with them. Until that is in place, individuals can call 1-800-834-2419 or email [trout@tu.org](mailto:trout@tu.org) to customize direct mail and email preferences. Individuals can also stop renewal reminders completely by signing up for our auto-pay program and automatically renewing your membership annually.

## **Membership Renewal Notices**

TU renewal notices are mailed out around the 8th of the month.

**Renewing Early:** The majority of TU members renew with their first or second renewal notice. It is a great benefit both to you and TU if you renew early. It saves you the headache of continuing to receive renewal notices and prevents TU from having to mail one to you. Help us save paper and renew early. Or, become an autopay member at [www.tu.org/autopay](http://www.tu.org/autopay) and renew automatically, avoiding renewal mailings altogether.

## **Re-Activating Members**

From time to time, TU will try various new acquisition campaigns to reactivate segments of our archived membership.

When a member renews their expiration date is extended from their original expire date. Renewing early will never result in a member "losing" a few months of their membership.

## **TU Refunds**

Any members who request a refund of membership dues or a fundraising gift will be processed on a case-by-case basis. Please direct any inquires to the Membership Services department.



## Leaders Only Tools

The Leaders Only section of the TU website offers a wealth of information for council and chapter leaders related to managing their members. To access these tools, ensure you have been listed as a leader by your Chapter President or Council Chair and go to [www.tu.org/login](http://www.tu.org/login).

## Chapter/Council Roster

The chapter/council roster can be downloaded from the Leaders Only section of the TU website. It shows all members currently assigned to that chapter (both active and suspended members – those whose membership lapsed up to six months prior).

## Membership Types

Below is a listing of current membership types offered by Trout Unlimited:

Abbr	Description
TR*	Trial membership (free)
RE	Regular (\$17.50, \$35, or other promotion)
SE	Stream Explorer (children aged 1-18) (\$12 or \$24)
TU Teen	TU Teen (\$14 or \$28)
SR	Senior (\$25)
FA	Family/Contributor (\$55)
TUG	TU Guide (\$79)
SP	Sponsor (\$100)
CN	Conservator (\$250)
BU/TUB	TU Business (\$295)
STEW	Stewardship Council (\$500)
GC	Griffith Circle (1,000+)
LI	Life (\$1,500)
FL	Family Life (\$1,600)

\* Each member type can have an associated Trial membership (IE Trial TUEB, Trial Stream Explorers, and Trial TU Teen, etc).

## Access Rights for Membership Rosters

Membership Rosters are confidential TU information and are not to be sold or distributed to outside parties for any reason.



## Membership Changes Reports

The membership changes report within Leaders Only Tools section is a great tool to manage and analyze changes in your chapter or council membership. The current reports available include:

- Comprehensive
- New Members
- Renewed/Contributed
- Soon to Expire
- Expired (1-3 Months)
- Transferred In/Out (90 days prior)
- Address Changes (90 days prior)
- Bad Addresses (90 days prior)
- Deceased (90 days prior)
- Recruited (by fiscal year)

A detail of each report can be found to the right of each report you highlight.

Each report can be generated and viewed online, or you have the option of downloading each report to your computer. Please take some time to look at each report. There is a wealth of information at your fingertips and these reports provide invaluable information to help you reach out and contact your local membership.

## Training Videos

TU has compiled a large number of training videos for our Volunteer Leaders covering topics such as

- Volunteer Leadership
- Conservation & Angler Science
- Youth Education
- Fundraising
- Membership & Community Building
- Communications

These can be found in our Vimeo channel at <https://vimeo.com/channels/tuvolunteer>