



STRATEGIC PLANNING

Building A Roadmap for Growth



SAVING THE WORLD
Working With Your Friends
To Take Care of Local Rivers

Strategic Planning: Remembering Don Haynes



Strategic Planning: Four Key Questions



Where Are We Now?

- Annual Activity Report
- Membership Survey
- Stakeholder Interviews



Where Are We Going?

- TU National Plan Goals
 - Priority Waters
 - Diversity, Equity & Inclusion
 - Chapter Capacity
- Home Waters Conservation Goals
- Community Engagement Goals
- Leadership Development Goals



How Will We Get There

- 'One TU' Conservation Strategies
- Outreach & Engagement Strategies
- Resource Development Strategies



Did We Make It?

- Active Measurement & Monitoring
- Year-Over-Year Metrics
- Progress Against Goals



Strategic Planning: Fit It On One Page



An Unused Plan is No Use

- ✍ Write Tight & Be Feasible
- ✍ Set S.M.A.R.T Goals
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time Limited
- ✍ Don't Hesitate to Revise & Re-Envision
- ✍ Hold Your Board Accountable for Implementation



Strategic Planning: Local Lens to Our Mission



No One Knows Your Community Like You

- ✍ How Is Each Element of TU's Strategic Plan Relevant to Your Community?
- ✍ What Resources Do You Have Available to Achieve TU's Goals Locally?
- ✍ What Resources Do You Need to Achieve TU's Goals on Priority & Home Waters?
- ✍ Do You Have the Right Skills on Board?
- ✍ Do You Have Blind Spots?



Strategic Planning: SWOT Analysis



Let's Get Honest & Self-Reflective

- ✦ Disappointment = Expectations - Reality
- ✦ It's more important to have a realistic plan that is feasible to execute than a plan which demands more than a volunteer leadership team can provide. Asking questions like these can help:
 - Do we have the knowledge and resources to conduct large-scale restoration projects?
 - Do we have the ability and time to invest in a comprehensive youth education program?
 - Do we have access to significant fundraising opportunities to scale up our work?
 - Do we have the right perspectives and voices at the table helping design this plan?



Strategic Planning: Visioning The Future



Don't Hold Yourself Back

- ✧ It's equally as important that a strategic plan stretches your chapter's current abilities
- ✧ Large, multi-year goals can seem daunting when viewed through the lens of current capacity
- ✧ In these discussions, the comments sound like:
 - “We don't have enough money to do that...”
 - “We don't have enough volunteers to do that..”
 - “We don't have the knowledge to do that...”
- ✧ Instead of allowing current perceived constraints to drive planning decisions, ask this:
 - **“What would it take to do that...?”**



Strategic Planning: Work The Process



“It’s Simple, That Doesn’t Mean It’s Easy”

- ✍ Use the Tools Available in the Tacklebox
- ✍ Make Sure Your Plan Rolls Up to the Council and to the TU National Plan Goals
- ✍ Base Your Plan on Local Feedback, Board Vision & Volunteer Passion
- ✍ Rank Your Opportunities and Challenge Each Other in Defending Those Rankings
- ✍ Create, Share, Promote, Review, Discuss and Track Your Progress Towards Goals

Local Opportunities Evaluation Matrix

It is not uncommon for chapter strategic plans to include a component that calls out a few critical or urgent local conservation opportunities above and beyond your engagement in state or regional priority waters. 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	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
	Y/N						
	Y/N						
	Y/N						
	Y/N						
	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?
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?

Strategic Planning: Spoiler Alert



Your Chapter Doesn't Actually Have a Strategic Plan

- ✎ There is Only One TU Strategic Plan
- ✎ The TU Vision, Mission & Goals are the Organization's and Therefore Your Goals
- ✎ Your Chapter Has An Operating Plan
- ✎ Your Council Also Has An Operating Plan
- ✎ TU Departments Have Operating Plans
- ✎ We Are All "One TU"



Strategic Planning: The TU Strategic Plan



OUR VISION OF SUCCESS

Our vision is for communities across America to engage in the work of repairing and renewing the rivers, streams, and other waters on which we all depend.

OUR MISSION

Our mission is to bring together diverse interests to care for and recover rivers and streams so our children can experience the joy of wild and native trout and salmon.

Strategic Planning: The TU Strategic Plan



OUR GOALS

To harness the collective power of TU more fully over the next five years, we commit to the following three organizational goals:

1. Identify a national network of shared priority waters for native and wild trout and salmon, and take strategic action to care for and recover them.
2. Inspire a diverse corps of staff, volunteers, and partners to advocate for and participate in the care and recovery of our lands and waters.
3. Invest in systems and people — staff, volunteers, and partners — so we have the tools, technology, training, and resources necessary to achieve our shared goals.

Strategic Planning: The TU Strategic Plan



OUR KEY STRATEGIES

Goal 1: Identify a national network of shared priority waters for native and wild trout and salmon, and take strategic action to care for and recover them.

Desired Outcomes:

- The blueprint of priority waters is a shared conservation agenda for TU and our partners and constituents.
- Our corps of TU staff, volunteers, partners, and supporters are inspired and actively engaged in executing the goals of the shared agenda.

Key Strategies:

1. Develop priority waters criteria and sites in collaboration with councils, chapters, and partners.
2. Align TU resources and investments behind the shared conservation goal and metrics.

Strategic Planning: The TU Strategic Plan



OUR KEY STRATEGIES

Goal 2: Inspire a diverse corps of staff, volunteers, and partners to advocate for and participate in the care and recovery of our lands and waters.

Desired Outcomes:

- TU's community represents a larger, more diverse constituency of staff, volunteers, partners, and supporters taking action to advance the conservation goal.
- TU's culture and approach are viewed as inclusive, equitable, and respectful of the diverse voices and interests of our staff, board, volunteers, partners, and the communities in which we work.

Key Strategies:

- Develop a new engagement model that expands the corps of volunteers, partners, supporters, and advocates taking action to care for and recover our lands and waters.
- Renew TU's brand strategy and message and establish a multi-year marketing communications plan to advance TU's goals.

Strategic Planning: The TU Strategic Plan



OUR KEY STRATEGIES

Goal 3: Invest in systems and people – staff, volunteers, and partners –so we have the tools, technology, training, and resources necessary to achieve our shared goals.

Desired Outcomes:

- TU is the employer of choice in the conservation community.
- TU has the necessary resources to execute our five-year strategic plan.
- Technology fosters collaboration across all levels of the organization.

Key Strategies:

- Improve and implement the necessary systems and processes, supported by the appropriate, integrated technology.
- Design and launch a comprehensive capital campaign to fund our organizational strategy.
- Operationalize our DEI strategy, ensuring training and integration at all levels of the organization.

Strategic Planning: The VolOps Operating Plan



GOAL 2 KEY STRATEGIES & ACTIONS

- ✦ Develop the new TU engagement model within TU to expand the corps of volunteers, partners, supporters, and advocates taking action to care for and recover priority and home waters.
 - Track current GRASSROOTS engagement metrics and report to TU for aggregation.
 - Set goal for engagement growth targets and identify TU programs (STREAM Girls, Angler Science, Plant For Our Future etc...) to deploy through each GRASSROOTS community.
 - Build a network of national partners and resources to support GRASSROOTS implementation of these strategies.
 - Support GRASSROOTS in reporting data regularly to allow for TU assessments.



The Volunteer Guide

An exploration of your watershed!

Strategic Planning: The Council Operating Plan



GOAL 2 KEY STRATEGIES & ACTIONS

- ✦ Deploy the new TU engagement model in STATE to expand the corps of volunteers, partners, supporters, and advocates taking action to care for and recover priority and home waters in STATE.
 - Track current engagement metrics in STATE and report to TU VOLOPS for aggregation.
 - Set STATE goal for engagement growth targets and identify TU programs (STREAM Girls, Angler Science, Plant For Our Future etc...) to deploy through each chapter community.
 - Build a network of statewide partners and resources to support chapter implementation of these strategies.
 - Support chapters in reporting data regularly to allow for STATE performance assessments.



Strategic Planning: The Chapter Operating Plan



GOAL 2 KEY STRATEGIES & ACTIONS

- ✦ Deploy the new TU engagement model in CHAPTER to expand the corps of volunteers, partners, supporters, and advocates taking action to care for and recover priority and home waters in CHAPTER.
 - Track current engagement metrics and report to the STATE for aggregation.
 - Develop local plan to meet STATE goal for engagement growth targets and launch TU programs (STREAM Keepers, Angler Science, Plant For Our Future etc...) in the community.
 - Build a network of local partners and resources to implement these strategies.
 - Regularly report to STATE and assess local performance against key metrics and goals.

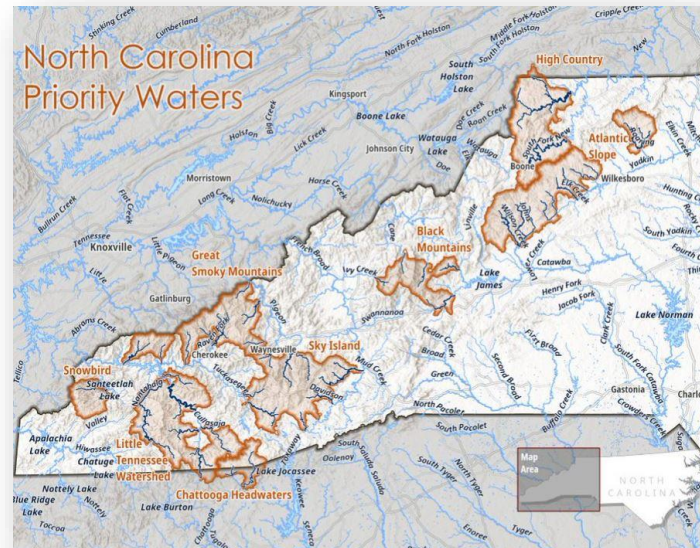


Strategic Planning: The Conservation Operating Plan



GOAL 2 KEY STRATEGIES & ACTIONS

- ✎ Connect the new TU engagement model to expand the corps of volunteers, partners, supporters, and advocates taking action to care for and recover priority waters.
 - Track current CONSERVATION engagement metrics and report to TU for aggregation.
 - Set goal for engagement growth targets and identify TU priority waters to connect with the GRASSROOTS community.
 - Build a network of priority waters partners and resources to support implementation of these strategies.
 - Regularly report data to TU for aggregation.



Strategic Planning: But Wait, There's More!



Participating as 'One TU' Does Not Mean Losing 'Your TU'

- ✍ The heart of TU is our grassroots community and the work you do to carry out our mission
- ✍ “Conservation is most durable when it is local.” – Chris Wood, TU President & CEO
- ✍ Your chapter community should be lifted up and strengthened by the new strategic plan, not held back or diluted by it
- ✍ In turn, your chapter should lift up and strengthen the TU mission in your community, not hold it back or dilute it



Discussion

