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
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?

WHERE CHAPTER STRATEGIC PLANS ARE MADE

TU MISSION

LOCAL COMMUNITY NEEDS

RESOURCES AVAILABLE

www.tu.org/tacklebox
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?
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
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.
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