



# Membership Memo

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# Membership Memo

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](#) for contact information.

Your Volunteer Operations staff are here to support your chapter or council in developing membership recruitment, retention and engagement plans as well as in using the tools we have created to make those tasks faster and easier to accomplish.

### **Headwaters Youth Education Program**

Our [Headwaters Youth Education Program](#) offers specialized support for youth education programs, including our Trout in the Classroom, STREAM Kids, summer camp and 5 Rivers College Club programs among many others.

Each of these programs offer unique and specialized membership opportunities for youth and teens.

### **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/email/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 Coordinator Duties

Many chapters and councils appoint a Membership Coordinator 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 Coordinator performs a key role by helping current members resolve membership issues, maintaining members' contact information, and communicating issues with member records to TU staff. The roster and membership changes reports found in the Leaders Only Section of tu.org provides the information needed to fulfill this role.

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

- Receive records, procedures and advice on lessons learned from past Membership Coordinator.
- Review the [Chapter Leader Resources](#), including the leadership manual, the [online Tacklebox](#).
- Ensure your chapter/council enters you as the new Membership Coordinator in the Leaders Only section (so you have access to the rosters, membership changes report, etc...).
- Login to the Leaders Only Section and explore.
- Connect with Council Membership Coordinator to learn about state membership goals and resources.
- Reach out to TU Volunteer Operations staff if you have any questions.

### *Suggested ongoing tasks:*

- Report on status of chapter/ council membership at each chapter/ council board meeting including total membership, change from last meeting, new members, number of recruited members, etc. This information is available from the membership changes report in the Leaders Only Section
- Welcome new members by letter, email, 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 through national mail and email acquisition campaigns and through local, grassroots, in-person recruitment methods.

## 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, volunteer at 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.

To receive proper credit for this rebate, the new member must come through one of the three following ways:

- 1) **Use your chapter-specific, custom recruitment link**, which makes it fast and easy to share on your chapter website, in emails, texts or messages to friends and anglers you meet on the stream and more. Your chapter's unique link will follow the following format [www.tu.org/join123ChapterName](http://www.tu.org/join123ChapterName) (Example: [www.tu.org/join309CandlewoodValley](http://www.tu.org/join309CandlewoodValley)) and a full list of all chapter links can be found in the library in the Leaders Forum online community, or by contacting your [Volunteer Operations staff](#).
- 2) **Have new members use the print membership brochure**, which you can [order and customize here in the TU Printshop](#). (Be sure your chapter number is printed on the form.)
- 3) **Send a spreadsheet of recruited members and payment to TU** using this special [New Member Recruitment Spreadsheet](#). (Be sure to include your chapter number on the sheet.)

The chapter will receive a \$15 rebate at the end of the fiscal year for each new member who joins at the \$17.50 introductory rate. If a new member joins at a higher membership level, the higher the rebate. For example, the family level of \$55 will give back a \$20 rebate to the chapter. A sponsor level of \$100 will give back \$30 to the chapter. New members who join in other ways will not be eligible for a rebate. A chapter's total new member rebate must be at least \$50.00 to be disbursed in a given year.

*(Note: The prior recruitment link of [www.tu.org/intro](http://www.tu.org/intro) will continue to work, but no longer allows a new members to select their chapter – they will be placed in the chapter where their zip code is located and will not be coded as a chapter-recruited member eligible for the rebate.)*



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## Chapter Add Spreadsheet

Chapters may fill out the [New Member Recruitment Spreadsheet](#) with new member contact information. This information along with a check for all new memberships must be typed 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.

This brochure is also [available in a Spanish language version](#) – and additional resources are also available in Spanish. Contact your [Volunteer Operations Staff](#) for more information on multi-lingual resources.

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](http://WWW.TU.ORG/INTRO)

Mail to: Trout Unlimited, P.O. Box 7400, Woolly Bugger, WV 25418-7400. 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., 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, you should refer them to your chapter-specific online link. If you are supplying new membership application forms, these should be handed to new members to fill out and mail in 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 chapter assignment being premised on ZIP code is when someone joins TU online through the chapter-specific recruitment form online, in which case the member is assigned to that specific chapter. 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.

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

## Changing Chapter Assignment/Requesting Permanent Assignment

If a member wants to change their chapter, or permanently lock their membership in a chapter despite their zip code 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

## Redefining Chapter Boundaries & Zip Codes

Sometimes chapters want to redefine the ZIP codes in their geographic region. This process is most typically done when a new chapter is chartered or a chapter is dechartered. 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.



## 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 mid-August. 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 or has changed since the prior year, 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 when issuing rebates. If no response is received, the rebate will be disbursed via check mailed to the chapter or council's address on file.

**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 your council's decision whether to distribute year end rebate to their local chapters or retain the amount.

## New Member Rebate Program

The New Member Rebate is given to chapters who recruit new members via their unique chapter recruitment link, the [Chapter Recruitment Brochure](#), or the [Special Introductory Membership spreadsheet](#). This is how TU tracks whether 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 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. New member rebates are only sent out to chapters if the disbursement to that chapter is at least \$50.00 - approximately four or more recruited members in a given fiscal year.

If a new member joins at a higher membership level, the New Member Rebate will be higher.



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### **Year End Rebate Program**

The Year End Rebate was designed to help councils and chapters pay for the costs of servicing their members with quality, local communications. TU provides this annual rebate to councils (and chapters in states without a council) based on total active membership at the end of TU's fiscal year, contingent on the council and all of their local chapters filing the Annual Activity Report by May 15. 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, or those chapters that fail to file an Annual Activity Report by the May 15 deadline.

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) and TU Teen members. When the rebates have been calculated (after the close of the fiscal year,) the council officers 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 generally receive \$1.25 for these active members. If you'd like to add ZIP codes currently assigned to at-large chapters to a different, active chapter in your state, please reach out to your VolOps staff who can assist you with that process.

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 the council's choice to determine what works best for each state.



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## **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.

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.



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## 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

- TR = Trial (free)
- RE = Regular
- SE = Stream Explorer
- TU Teen = TU Teen
- SR = Senior
- FA = Family
- SP = Sponsor
- CN = Conservator
- GC = Griffith Circle
- LI = Life
- FL = Family Life

\*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. All chapter and council leaders are required to adhere to [TU's Privacy Policy](#).



## Membership Changes Reports

The membership changes report within Leaders Only 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>