



Volunteer Operations

Tools and Resources

Tacklebox [TU.org >> Member Login >> left panel "Tacklebox"]

**Described in detail below*

Business Practices

- Leadership Manual*
- Financial Reporting Requirements
- Risk Management*
- Strategic Planning Resources
- Model Chapter and Council Bylaws
- Best Practices for New Volunteer Leaders

Important TU Policies

- Bylaws and Policies Resolution
- Land Ownership Resolution
- TU Privacy Policy
- Logo and Brand Policy
- TU Litigation Policy
- TU Policy on Piscicide Use for Conserving Native Trout & Salmon
- Stream Access Policy North American Salmonid Policy

Fundraising for Chapters and Councils

- TU's Fundraising Program*
- TU Guide to Fundraising from the Leadership Manual
- Shared Best Practices from Chapters/Councils
- Embrace-a-Stream information*

Membership Services

- Membership Memo*
- Membership Acquisition Forms/ Brochures
- Style Guide: TU Graphic Standards & Logos
- Archives of Annual and Regional Mtg. Presentations
- Archives of *Lines to Leaders**
- Veterans Services Program Documents

Conservation Resources

- Recordings of Numerous Online Trainings
- Advocacy Documents
- Restoration Documents
- Land Protection Resources

Youth Education

- Trout in the Classroom Documents
- Youth Conservation and Fishing Camps
- Stream Explorers Website and Information
- Boy Scout Fly Fishing Merit Badge Program
- First Cast Curriculum
- Headwaters Youth Education Initiative
- Youth Education General Documents

Leaders Only Tools Section [TU.org >> Member Login >> left panel "Leader Only Tools"]

**Only Leaders that are listed as such in the Update Chapter/Council Leaders page will see this option.*

- **Council/Chapter Rosters and Labels** – Displays all active and 6 month suspended members in your council or chapter. The spreadsheet report is in .csv format and member information is displayed in alpha order by last name. The spreadsheet includes information such as member name, address, phone, e-mail, expiration date, and much more... The label version displays same information in .rtf format and member information is displayed in alpha order by last name.
- **Membership Changes Reports** – Various membership reports that can be viewed online or exported to a .csv spreadsheet. Reports include a comprehensive report, new members, and expired members to name a few.
- **Update Council/ Chapter Information** – This page allows you to edit point-of-contact information and web content that displays for your council/chapter when conducting a Council/Chapter Search on www.tu.org.
- **Update Council/ Chapter Leaders** – Leaders may edit chapter leader roles. Leaders listed here will have access to the tools described here and will also receive the monthly e-newsletter, *Lines to Leaders*.
- **E-Document Uploading** – A new functionality that allows volunteers the ability to easily upload, store and share chapter or council strategic plans and/or bylaws.
- **Annual Financial Report** – This is where chapters and councils will go to file their financial and volunteer data from the previous fiscal year. This is a requirement for all chapters and councils and is filed each year from October 1 - November 15 each year.
- **Bulk E-mail Tool** – A tool that allows volunteer leaders the ability to easily email your council/chapter membership with the utmost regard for a member's privacy and preferred communication preferences. This tool is designed as a way for you to communicate important information to your membership without concern for C-SPAM violations or for the costs associated with outside e-mailing vendors.
- **Digital Storefront** – This is where volunteers may order TU letterhead, envelopes and business cards online. Options include: 1) Standard Paper Products which provides generic TU letterhead and envelopes, and 2) Custom Paper Products which allow customized letterhead and envelopes for your chapter or council. Chapter Login: chapter's 3-digit number [ex: 066.] Council Login: State abbreviation plus 'CL' [ex: GACL.] The password for all logins: password.

Leadership Manual [TU.org >> Member Login >> Tacklebox >> Business Practices >> Leadership Manual]

The recently revised Leadership Manual is the basic reference for TU volunteer leaders at the chapter, council and national level. This is a must read for every TU volunteer leader as it provides essential guidelines and resources, from the history of the organization to requirements of our 501(c)3 tax exemption. It is available for reference or for download in the Tacklebox.

Membership Memo [TU.org >> Member Login >> Tacklebox >> Membership Services >> Membership Memo]

This memo addresses various topics, such as chapter membership recruitment, a detailed explanation of your chapter or council roster, why and when you receive renewal notices, how a member is assigned to a chapter, the rebate programs, and much more...

Risk Management [TU.org >> Member Login >> Tacklebox >> Business Practices >> Risk Management]

In this area of the website, you will find information on how to reduce risk for your chapter and council, including FAQs on TU's insurance policy, liability waivers, a form to request a certificate of liability insurance and information on TU's new supplemental accident insurance.

Embrace-A-Stream [TU.org/eas]

EAS is the Flagship grant program for funding TU grassroots conservation efforts. Chapters apply annually for grants of \$10,000 or less to support their chapter-led projects connected to coldwater conservation, education, research and capacity building initiatives. Contact Rob Roberts [rroberts@tu.org] for more information.

Lines to Leaders

Lines to Leaders is a monthly e-newsletter sent the 1st of every month to the volunteer leaders that are listed in the Leaders Only Tools section. It contains information directly targeted to volunteers of timely importance, like deadlines, upcoming events and regional meetings, new requirements or opportunities, etc... If you are not receiving this e-newsletter but would like to, please contact Beverly Smith [bsmith@tu.org.]

Fundraising Program [TU.org >> Member Login >> Fundraising Program]

The Fundraising Program is an online catalogue of vendors providing substantial discounts to chapters and councils for fundraising purposes. Contact Rob Keith [rkeith@tu.org] for more information.

TU General Brochure: A New Member Recruiting Tool for Chapters and Councils



TU's General Brochure is designed to introduce people to our organization who don't know anything about TU. It explains who we are, what we do, where and how we work. It also was created for chapters to use as a recruiting tool for new members. Chapters need to print an address label with their chapter information (chapter name, number, website, point-of-contact information, etc.) and place it on the back panel of the brochure in the space provided. Please be sure to use www.tu.org/intro on the label to drive potential members to sign up online. When the potential members visits this hidden site, they are offered the \$17.50 special introductory rate, \$15 of which will be rebated to your chapter at the end of the year.

To request copies of the brochure, please contact 1-800-834-2419 or email trout@tu.org.

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Need to change your address/e-mail/chapter? Call 1-800-834-2419 or email trout@tu.org.