

**TROUT UNLIMITED
STRATEGIC PLAN FRAMEWORK**

In 2003, Trout Unlimited (TU) initiated a strategic plan that helped us to develop more effective metrics for setting priorities, and assisted in the significant growth of the organization. Even with that growth, we realized we were not on a trajectory to achieve our organizational vision. Specifically, the problem was that the rate of decline of trout and salmon habitat due to development pressures and climate change was outstripping the good work that TU and others are doing to conserve and restore habitat. To address the challenge, in 2007, the Board of Trustees appointed a strategic planning committee comprised of members of the Board, grassroots, and staff with the charge of developing a plan that would place us on a trajectory to achieve the TU vision.

The attached is a Framework of that plan. It has undergone the most significant review and input process of any TU strategic plan. Staff and volunteers will continue to develop the multi-year tactics, business plans, cost models, and work plans so that we can begin to implement the plan in FY 2009. Staff and volunteers will also work with several states during this period to develop state specific Protect-Reconnect-Restore-Sustain implementation plans.

The Framework below differs from previous TU strategic plans in the following ways:

Previous Plans	New Framework
TU National, councils, and chapters operate from different and sometimes competing plans	One TU
Emphasis on being entrepreneurial and nimble	Emphasis on a focused and integrated multi-year strategy
Funding secured annually	Comprehensive campaign
Programmatic conservation strategy	Landscape conservation strategy: Protect, Reconnect, Restore, Sustain (P,R,R,S)
One National plan. State/chapter plans	National plan tiers to state Protect, Reconnect, Restore, Sustain priorities
Opportunistic projects	Strategic projects (driven by CSI)
Previous plans heavy emphasis on tactical detail led to quick obsolescence	Allows for tactical adjustment while preserving core strategy and goals

The strategic plan framework builds off of 50 years of TU experience and success in working to protect and restore wild and native trout and the habitats on which they depend. The framework defines the biological imperative of our work as protecting the highest quality habitat for wild and native fish, and reconnecting that and other habitat to other areas through restoration. The framework's social imperative is to ensure that our efforts endure, and are sustained over time.

TU Mission

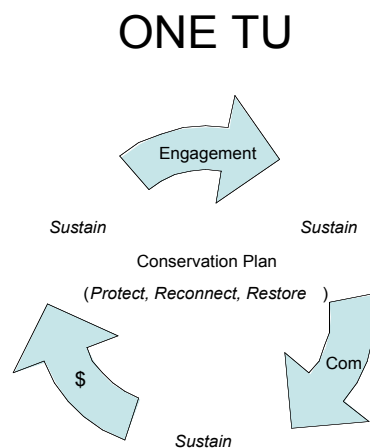
To conserve, protect, and restore North America's coldwater fisheries and their watersheds.

TU Vision

By the next generation, Trout Unlimited will ensure that robust populations of native and wild coldwater fish once again thrive within their North American range, so that our children can enjoy healthy fisheries in their home waters.

Elements of the Strategic Plan

- Conservation
- Engagement
- Communications
- Funding



Statement of Intent

Conserve important lands and waters so that we realize our generational vision of wild and native fish conservation. We will accomplish this by:

- Building a high level of awareness for the TU brand—a brand that stands for engaging more anglers in the TU mission of working to protect and restore North America’s trout and salmon fisheries for people to use and enjoy;
- Working in collaboration with members and other conservationists; and
- Raising sufficient funds to protect, reconnect, and restore important lands and waters and to sustain those efforts over time.

Standard Operating Procedures

We operate through:

- Collaboration and partnership
- Sound science
- Leveraging resources
- Advocacy
- On the ground work in communities
- Grassroots engagement

CONSERVATION

Conservation Goals

- Protect high quality habitat for native and wild coldwater fish.
- Reconnect fragmented fish populations and habitats by maintaining river flows and free flowing rivers.
- Restore watersheds by working in collaboration with others.
- Use the Conservation Success Index to help develop conservation priorities.

Conservation Strategies: Protect

- Work with sportsmen-conservationists to protect important public lands.
- Work with land trust community and others to protect important private land.
- Protect key watersheds from unwise development.
- Work with state and federal agencies and others to protect the genetic integrity of native fish (e.g., hatchery reform, invasive species management).
- Promote “trout friendly” development practices.
- Engage in important national and international efforts to protect imperiled native and wild salmonids.

Conservation Strategies: Reconnect

- Lead state-based campaigns to promote new options for water conservation and healthy river flows.
- Use existing rules to maximize instream flows, water conservation and wise groundwater use.
- Remove, re-operate, or re-tool dams and culverts to recover coldwater fisheries.

Conservation Strategies: Restore

- Implement watershed restoration in strategically important areas.
- Promote legal, regulatory, and financial incentives for restoration of trout and salmon habitat.
- Increase funding and build capacity for restoration throughout the organization.
- Address regional and trans-boundary problems that impact watershed health.
- Rebuild resiliency into aquatic systems to counter the effects of climate change.
- Improve hatchery management so that hatcheries do no harm to wild and native coldwater stocks.

ENGAGEMENT

Engagement Goals

- Build volunteer capacity to execute projects that support the conservation plan.
- Increase member participation and fundraising to help achieve TU's vision.
- Invest in youth to create a sustaining constituency to ensure the durability of TU's mission and work through future generations.

Engagement Strategies: Capacity

- Develop and integrate a "social contract" that defines national, council, and chapter responsibilities to implement the conservation plan.
- Facilitate development of state council and chapter conservation plans that tie to the strategic plan.
- Help build the capacity of chapters and councils to successfully implement conservation projects.
- Significantly increase funding for grassroots conservation projects through Embrace-A-Stream, agency partners, and private sources.

Engagement Strategies: Participation

- Increase chapter and council volunteer engagement in projects and programs by >10% per capita annually as measured by annual financial reporting over current levels.
- Implement a voluntary access program to help secure and create additional angling opportunities and to engage more anglers in conservation activities.
- Increase number of donor-members that donate money more than once per year by >15%.
- Provide fundraising training and support to chapters and councils to increase the quality and quantity of conservation projects.
- Increase opportunities for members to get engaged in conservation in straightforward ways such as contacting a legislator, signing a petition, or donating to a specific project or campaigns.

Engagement Strategies: Youth

- Build the capacity of chapters, councils, and staff to successfully implement youth education projects with conservation content.
- Expand and consolidate youth education programs.

COMMUNICATIONS

Specific Goals

- Reorient TU communications to build a web-based community that attracts and engages members and anglers and helps achieve our conservation goals.
- Continue to refine TU brand among target audiences identified in the conservation, funding and member engagement plans.
- Effectively communicate new strategy to appropriate audiences.

Communication Strategies: Systems

- Develop a website that attracts and engages members and other anglers (e.g., communicates the TU brand through the web; maximizes fundraising; ensures effective communication with members, and other anglers; and uses the web to achieve cost savings efficiencies).
- Create an internal structure that facilitates consistent dissemination of messages across all communication vehicles (web, magazine, newsletters, earned media, intranet).
- Create resources (materials, internet forums, etc.) that help chapters and councils build capacity to participate in conservation projects and engage members.
- Conduct media training for staff and volunteer leaders.

Communication Strategies: Brand

- Identify the most important audiences in the conservation, fundraising and member engagement plans.
- Conduct annual membership-stakeholder research and analysis. Understand and, if necessary, correct any brand equity gaps.
- Understand and articulate the value proposition of TU to target audiences.
- Develop targeted messages for important audiences based on research findings.

Communication Strategies: Delivery

- Emphasize marketing, branding, and corporate partnership opportunities afforded by the 50th Anniversary.
- Communicate key messages clearly and consistently across TU and throughout all parts of the organization to ensure understanding and support for key goals.
- Use brand to develop and implement a corporate fundraising strategy for general and program support (in conjunction with funding plan).
- Reinforce brand image at all levels of TU.
- Ensure coverage of TU messages in relevant national and local media.

FUNDING

Funding Goals

The funding plan sets out strategies and goals for securing unrestricted, temporarily restricted, and permanently restricted funding to meet the Conservation, Communications, and Engagement plan goals.

- **Unrestricted Funding**

Goal: Increase unrestricted revenue from \$8.6 million (2008) to \$13.6 million (2012)

Strategies:

- Design and implement a Comprehensive Campaign that defines and facilitates a five year fundraising effort to meet TU's funding needs at all levels. Primary unrestricted support will come from individuals and corporations
 - Individual donors will form the foundation of the capital campaign and the funding plan. Those donors will come from the following sources:
 - TU Board and CCF.
 - Direct mail/email/web – Ensure that these fundraising programs complement each other and leverage investments in marketing and technology to maximize net revenues while strengthening the TU brand and member engagement.
 - Events – use national events to raise unrestricted revenues, expand the high-dollar donor base, and recognize supporters.
 - Planned giving – use planned gifts to build the TU unrestricted operating reserve and the endowment.
 - Support leveraged from projects – dovetail unrestricted fundraising around TU projects, especially where those projects have given TU heightened credibility in an area.
 - Indirect costs from restricted grants – to the extent possible, ensure that all restricted project grants contain some funding to cover the unrestricted costs associated with running that project.
 - Corporations. Identify and solicit corporate partners that can support TU and its programs and help increase public awareness about TU.
 - Achieve 100% participation from fly fishing equipment manufacturers in TU and its programs
 - Research and identify appropriate other corporate partners based on industry-type and mission fit
 - Develop corporate marketing tie-ins to events (including the 50th Anniversary), TV, Web, TROUT, chapter activities, etc.
 - Develop partnerships that combine unrestricted with restricted funding

- **Temporarily Restricted Funding**

Goal – Increase temporarily restricted funding from \$12 million (2008) to \$27.7 million (2012)

Strategies:

- Design and implement a Comprehensive Campaign that defines and facilitates a five year fundraising effort to meet TU's funding needs at all levels. Primary unrestricted support will come from individuals, foundations, state and federal grants, and TU's chapter/council network.
- **Permanently Restricted Funding**
 - Goals:** Grow endowment from \$6 million (2008) to \$15 million (2012)
 - Build general TU/CCF and project-specific endowments
 - Grow Stewardship Fund from \$2 million (2008) to \$4 million+ (2012)
 - Strategy -- Identify and Solicit:**
 - Individual donors
 - Foundations for challenge grants
 - Individuals for planned gifts
- **Budget and Infrastructure:** Build internal capacity to meet budget goals
 - Determine staffing and other (e.g. database screening) capacity needs
 - Secure lead campaign gifts that help fund infrastructure needs