



Tacklebox

Resources designed to empower Trout Unlimited volunteers to build and sustain healthy and effective chapters and councils.

“It’s in the (new) Tacklebox!”

Tools & Resources for Volunteers – www.tu.org/tacklebox

Council Leaders Resources

- National Leadership Council
- Council Officer Resources
 - Officer Role Descriptions
 - Running A Council
 - Chapter Support
 - Council Leadership Development
 - Council Strategic Planning
- Council Board & Committee Resources

Chapter Leader Resources

- Chapter Officer Role Descriptions
- Running a Chapter
- Chapter Leadership Development
- Chapter Strategic Planning
- Chapter Committee Resources

Conservation & Science Resources

- Conservation Resources
 - Volunteer Restoration Projects
 - Building Conservation Partnerships
 - Land Protection Resources
- Science Resources
 - Angler Science Guides & Tools
 - Interactive Mapping Tools

Diversity, Youth & Veterans Services Resources

- Diversity & Inclusion Resources
 - Women’s Initiative Resources
 - Diversity & Inclusion Partners
- Youth Education Resources
 - Planning a Meaningful Youth Education Event
 - Trout in the Classroom
 - STREAM Girls
 - TU Costa 5 Rivers College Program
 - Guidelines for Volunteers Working with Youth
- Veterans Services Partnership Resources
 - Veterans Service Partnership Program Guide

Membership Recruitment & Engagement

- Membership Recruitment
 - Membership Memo
 - Membership Applications
 - New Member Welcome Letter
- Membership Engagement
 - Chapter Meetings
 - Chapter Fishing Trips
 - Chapter Social Events
 - Membership Surveys
- Membership Management
 - Leaders Only Reports & Trainings

Fundraising Resources

- Fundraising Strategy
- Fundraising Events
 - Fundraising Discount Program
 - Banquet Guide & Planner
 - Film Tour Event Guide
 - Hosting Friendraisers
- Grants & Corporate Fundraising
- Fundraising Appeals

Communications Resources

- Website Development
- Email Communications
- Social Media
- Media Resources & Press Release Templates
- Print Communications
- TU Brand & Messaging
 - TU Logo Downloads

Volunteer Trainings & Events

- Training Calendar & Recorded Trainings
- Annual & Regional Events
 - Annual Meeting Information
 - Regional Meeting Information

Risk Management & Financial Controls Resources

- Financial Controls & Reporting
 - Financial & Property Controls Policy
 - Personal Property Inventory Sample Spreadsheet
 - Fiscal Year Change Process Information
 - Filing TU's Annual Financial Report
 - Securely Processing Credit Cards
 - Federal Tax Filing Requirements
 - State Filing Requirements
- Requirements Dictated by TU's 501(c)3
 - Lobbying Restrictions
 - Prohibition on Electoral Politics
 - Donating to non 501(c)3s
 - Scholarships
- Liability & Risk Management
 - Real Property Liability
 - Liquor Liability
 - Youth Camps & Other Youth Projects
 - Stream Restoration Liability
 - Liability Waivers
 - Boating Liability
 - Contractual Liability
 - Insurance
- Important TU Policies
 - TU Code of Ethics
 - Property Related Policies
 - Communications Related Policies
 - Conservation Related Policies
 - Risk Management / Board Operations Policies

Short Links & Shortcuts to Get You to the Right Tacklebox Resource Faster

The following links will get you directly to the places you need to go faster – bookmark them on your browser for one-click access!

- www.tu.org/tacklebox – Takes you directly to the Tacklebox homepage.
- www.tu.org/chaptersearch – Gets you to a map of all chapters to help you find the right volunteer contact information.
- www.tu.org/insurance – Brings you to the page where you can fill out an insurance request form, buy supplemental medical insurance, and learn about our insurance coverage for chapters and councils.
- www.tu.org/fundraising – Find our fundraising discount program, fundraiser ideas and strategies, and more here.
- www.tu.org/eas – Go here to learn about applying for an Embrace A Stream grant.
- www.tu.org/training – All of our recorded training webinars live here, as well as the calendar of coming training events.
- www.tu.org/regionals – Looking for your regional rendezvous information? That all lives right here on this page.
- www.tu.org/annualmeeting – The Annual Meeting information lives here, and go to www.tu.org/awards to nominate a deserving volunteer for a national award at the Annual Meeting.
- www.tu.org/nlc – Want to read up on the National Leadership Council? Click this link.
- www.tu.org/headwaters – This is your home for our youth education resources. You can also go to www.tu.org/tic for the Trout in the Classroom program, www.tu.org/streamgirls for our Girl Scouts partnership, www.tu.org/5rivers for our college program, or www.tu.org/camps for our summer camp program.
- www.tu.org/veterans – The national Veterans Services Partnership program resources are found at this link.
- www.tu.org/diversity – Gets you right to our diversity initiative, and www.tu.org/women takes you to the women's initiative resources.
- www.tu.org/tu-event-printshop – Takes you to the portal to order business cards, postcards, posters, tickets and more.
- www.tu.org/riskmanagement – Covers the ins-and-outs of everything related to minimizing risk in your activities.
- www.tu.org/policies – Gets you straight to all the TU policies on a range of topics.
- www.tu.org/financialreporting – Provides all the information on filing a financial report, following financial controls requirements, the fiscal year change, and much more.

TU Volunteer Operations Staff – Here to Help You When You Can't Find What You Need

Your Volunteer Operations Staff is here for you to talk through an idea, problem solve a solution, or just find the right resource!

Nick Halle, Volunteer Operations Coordinator – nhalle@tu.org (703) 284-9425

Contact Nick for:

- Volunteer Leader Login Issues
- Insurance Requests
- Fundraising Program & Support
- Membership Recruitment Tools
- IRS Determination / Letter of Good Standing

Maggie Heumann Manager of Volunteer Operations – maggie.heumann@tu.org (256) 996-2241

Contact Maggie for:

- Volunteer leadership development
- Strategic planning support
- Member growth & engagement training
- Partnership and affinity group support

Quentin "Q" Collins Volunteer Governance & Reporting Manager – q.collins@tu.org (317) 956-9111

Contact Q for:

- Risk management & policy compliance
- Insurance & liability questions
- Annual Activity Reports & 990-related questions
- Questions related to tax exemption

Jeff Yates, Director of Volunteer Operations – jyates@tu.org (203) 216-7078

Cliff Watson, TU Costa Youth Fly Fishing Programs Manager – clifford.watson@tu.org (414) 698-0967

Cecily Nordstrom, STREAM Education Manager – cecily.nordstrom@tu.org (952) 412-7103

Doug Agee, Online Community Manager – dagee@tu.org (435) 633-1359

Beverly Smith, Vice President for Volunteer Operations and Program Development – bsmith@tu.org (307) 734-2814