



THE TU LEADERSHIP MANUAL ON CHAPTER FUNDRAISING

Fundraising is one of the core functions of chapters. The basic building blocks of a successful fundraising event are:

- Commitment
- Goals and timetables
- A theme or message
- Creativity
- Rewards

Chapter leaders are finding it more important than ever to raise funds for work on their home waters. The national office is trying to meet this demand for funding by providing increased fundraising support and funding alternatives for the entire organization's important work. The national office of TU also has development professionals who, on a very limited basis, can assist chapters in identifying local grants. Some fundraising activities are detailed below.

BANQUETS AND SPECIAL EVENTS

Many chapters raise money by hosting an annual fundraising banquet or other type of special event. These events usually involve an auction and/or raffle of fishing tackle and other products. The average chapter raises approximately \$5,000 through these events. Holding a banquet or special event is one way your chapter can recruit new members, receive recognition for its work, and raise money for its operations. TU provides a list of resources to help chapters purchase auction/raffle items at discounted prices. Items from this list are available for order online in the Tacklebox (www.tu.org/Tacklebox) at any time of year. If you have any questions, please contact the volunteer operations department.

EMBRACE-A-STREAM

Embrace-A-Stream (EAS) is the flagship grant program for funding Trout Unlimited's grassroots conservation efforts that advance TU's mission of conserving, protecting, and restoring coldwater fisheries and their watersheds. Since 1976, EAS has raised nearly \$4 million dollars from its members and that has been matched by more than \$13 million in cash and in-kind services to over 960 EAS funded programs. This grant program, administered by TU national, awards TU chapters and councils grants of up to \$10,000 to TU-led conservation projects. Conservation projects have been defined broadly to include restoration, education and advocacy. Projects that build the capacity of chapters and councils are also eligible for up to \$3,500 in funding, as long as the project is tied to a chapter or council's conservation objectives. All grants must be matched by cash contributions, in-kind donations, and/or volunteer hours. Starting in 2010, grant application forms are emailed each September to all chapter presidents and council chairs with grants being awarded in March. For more information, visit the Embrace-A-Stream page of TU's website: www.tu.org/eas.

INSTITUTIONAL GRANTS

Applying for corporate, foundation, and government grants requires developing a good project and budget; identifying funders whose missions are consistent with your project; and preparing a grant application. Most corporations and foundations can provide you with written materials describing their philanthropic mission, grant making history, and grant application criteria and procedures. It is essential to review this information and, in many cases, submit a letter of inquiry to determine if your project is a good fit with the funder's priorities. It is generally not a good idea to submit a formal grant proposal without contacting the funder beforehand. If you are targeting any national funders, please first contact TU national's development department in order to avoid duplicate or competing grant requests.

The following is a partial list of grant writing reference books and their publishers:

- *The Grant Making Basics* (Council of Foundations)
- *Grant seeking: How to Find a Funder and Write a Winning Proposal* (Community Collaborators)

- *Proposal Writer's Guide* (D.A.T.A.)
- *Program Planning&Proposal Writing, Introductory Version* (The Grantsmanship Center)

Please also contact TU's development department if you would like suggestions on other grant writing resources.

FEDERAL GRANTS

There are numerous sources of government funding. For information about federal funding programs, check the following reference materials:

- www.grants.gov -- the on-line central clearinghouse for federal grants.
- Catalog of Federal Domestic Assistance—the major reference source on federal funding programs, this catalog is available in many public and university libraries and federal and state government offices.
- Federal Register—a list of federal funding opportunities and the rules and regulations governing them. The Federal Register is published on weekdays by the National Archives and Records Service, General Services Administration and should be available at local law libraries and government offices.
- Two grant programs administered by the Environmental Protection Agency that chapters might be interested in investigating are:
 - Clean Water Act/Section 319. For information about other funding opportunities available through the Clean Water Act, please contact your state water quality or lead non-point source control agency.
 - The EPA's Environmental Education Grants. To request a solicitation notice and a list of past grants awarded, write to: Environmental Education Grants, USEPA (A-107), 401 M Street, SW, Washington, D.C., 20460.
- View the document Potential Grant and Government Sources for TU Chapter Conservation Projects, which outlines many of the major federal, state and private grant sources.

LOCAL DONATIONS

Local organizations often will support TU projects and activities that take place in their communities. Chapters might try approaching banks, civic organizations like the Rotary and Kiwanis Clubs, teacher's associations, and community foundations. When researching large national companies, identify those that have operating divisions in your community and approach the local divisions. Many organizations also will provide donations of goods and services including equipment for stream restoration projects, paper and printing for chapter newsletters, computer equipment, technical and legal expertise, and advertising. When approaching local organizations, emphasize the broader benefits of your project, including greater public involvement, outreach to schoolchildren, and economic benefits. Chapters and councils might also propose ways for involving employees and members of community organizations in the project.

INDIVIDUAL DONATIONS

The largest source of charitable giving in the United States, private individuals, is not tapped to its fullest potential. Personal appeals are often the best way to solicit funds from an individual. An appeal might take the form of a letter, a personal meeting, or a formal presentation. TU volunteers should be able to answer the following questions before soliciting potential donors:

- What is the individual's specific interest in TU?
- Does the prospective donor contribute to any other causes?
- Who should approach the prospect for a gift and how much should be requested?

The following is a partial list of reference materials on raising funds from individuals (publishers are noted in parentheses):

- *The Art of Asking* (The Taft Group)
- *How to Ask for Money Face-to-Face* (KHM Inc.)

- *Take the Fear Out of Asking for Major Gifts* (Donovan Management)

When recognizing your donors—whether they are individuals or institutions—tailor the acknowledgment to the donor. Some funders may request anonymity; others will want to be recognized publicly. Always send a written thank-you letter promptly and be sure to get permission before making any formal announcements. Remember to keep precise financial records and honor grant reporting requirements.

REBATES

TU currently has two programs that rebate membership money back to chapters and councils. The timing of both programs corresponds to TU's fiscal year, which runs October 1 through September 30. New Member Rebates and End-of-Year Rebates are issued once a year via electronic fund transfer (EFT). These rebate programs were developed to encourage chapters/councils to actively recruit new members and retain current members.

NEW MEMBER REBATE PROGRAM

The new member rebate is given to chapters/councils who recruit new members to join Trout Unlimited. New members may join TU by calling 1 (800) 834-2419 and requesting to join at the introductory rate of \$17.50 for first-year membership, or by joining online using the web page www.tu.org/intro. To receive proper credit, the new member should know the name and three-digit chapter number. Existing or expired members may not use this to renew their membership.

For each member recruited through this program, the chapter and/or council receives the entire amount back in rebates—\$15 for new member rebate, and \$2.50 for end-of-year rebate. If a new member joins at a higher membership level, the higher the chapter rebate. For example, the family/contributor level of \$50 will give back at \$20 rebate to the chapter. A Sponsor level of \$100 will give back \$30 to the chapter. Please note that in order for a new member to be considered eligible for the new member rebate, he or she cannot have been a member at any time in the past—even if they joined TU for free. Also please be aware that new members who join this way do not receive any premiums or promotional items that are advertised online or via mailings—even life memberships.

The new member rebate is calculated once a year, after the end of the fiscal year:

- Oct. 1 through Sept. 30 = new member rebate mailed in January/February

Any new member a chapter recruits during this time is reflected in this rebate. Please remember that this is for **NEW MEMBERS ONLY**. No new member rebate is given to existing or expired members who accidentally use this program to renew.

END-OF-YEAR REBATE PROGRAM

TU national also provides an annual \$2.50/member rebate to chapters and councils based on membership, contingent on those chapters and councils filing their Annual Financial Report statements on time with TU national. National counts the number of active, paying members (i.e. not suspended members or free/trial members) on September 30 of each year (the end of the fiscal year). For each chapter that sends in an Annual Financial Report on time (due by November 15), the council receives \$2.50/member. Furthermore, councils will receive \$1.50/member for all active members in an At-large chapter. In some cases, the councils have broken the rebate further into \$1.50/member for the council and \$1.00/member for the chapter. The chapters of each council jointly decide on this policy. Councils receive their rebates via electronic fund transfer (EFT) with a copy of the spreadsheet breaking down the membership by chapter at the end of each fiscal year.

Further information on the membership rebate programs can be found online at www.tu.org by logging in to the Leaders Only Tools section and accessing the "New Membership/Rebate FAQ" in the Leaders Library. You may also want to review the Membership Services Memo in the Tacklebox (www.tu.org/Tacklebox).