

**TROUT UNLIMITED**  
**Zane Grey Chapter**  
**Strategic Plan 2022-25**



FEBRUARY 2022

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# Zane Grey President's Message



Over the course of several months, the Zane Grey Chapter of Trout Unlimited (ZGTU) planning team developed this Strategic Action Plan aligning our many diverse activities and helping better define our mission and align our organization for the next several years.

Our focus, in formulating this plan, are the key factors that drive the Zane Grey Chapter as an organization: conservation; membership outreach; external outreach; chapter sustainability and leadership development; and fundraising. The ZGTU strategic plan is a dynamic document covering a period of three-years and created as a map for the future of ZGTU with the intention of implementing and updating often.

The plan development process, led by ZGTU Board Member Rod Buchanan, included multiple one-to-two-hour planning discussions both live and through video conference. Additional discussions included one-to-one interviews with various key players. These actions culminated in an afternoon team-building session. During the process, seven-key strategies emerged from five-key focus areas driving ZGTU:

- Membership Engagement;
- Conservation;
- External Outreach;
- Chapter Sustainability and Leadership Development; and,
- Funding Development.

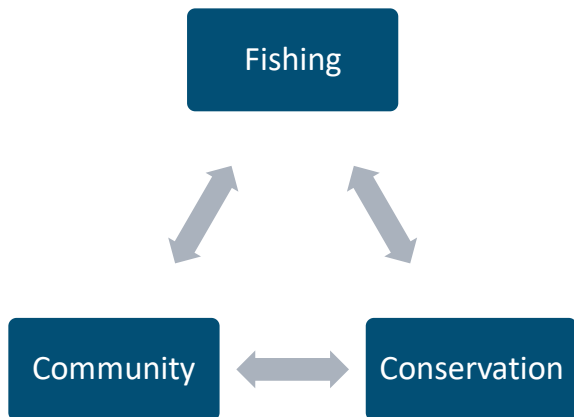
The ZGTU board and its members will use these strategic focus areas as the compass for our future, as they implement these plans. Significantly, this planning process helped the board see its many strengths, and opportunities, while identifying some weaknesses and threats.

A special thanks to Rod Buchanan for leading this effort and the many hours he invested in creating this strategic plan. Thanks too to the members of the planning team: Doyle Gaines, Susan Geer, Tom Goodwin, Michael Hachey, Tom Osterday, and Ron Stearns.

A handwritten signature in black ink, appearing to read "Alan Davis".

**Alan Davis**

**February 2022**



**Trout Unlimited National  
Mission:**

***“To bring together diverse  
interests to care for and  
recover rivers and streams  
so our children can  
experience the joy of wild  
and native trout and  
salmon.”***





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## Who We Are

Zane Grey Trout Unlimited (ZGTU) is a non-profit conservation organization established to protect, enhance and restore cold-water fishing resources in Arizona. Established in 1985, ZGTU was named in honor of Zane Grey honoring the renowned author who resided in Arizona during part of his life. He wrote prolifically on the variety of fishing and the outdoors he enjoyed. The Zane Grey chapter is a part of Trout Unlimited, a 300,000-member conservation organization based in Arlington, VA.

ZGTU's mission is to conserve, protect and restore Arizona's trout fisheries and their watersheds. ZGTU accomplishes this mission through the efforts of dedicated volunteers on local and state levels, along with other TU chapters and conservation organizations.



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# About Zane Grey Chapter

## **Zane Grey Mission:**

To bring together diverse interests to protect, reconnect, restore and sustain rivers, streams and other waters so future generations can experience the joy of wild and native trout in Arizona.

In the late 1970s, Phoenix had two active Federation of Fly Fishers (“FFF”) chapters: The Arizona Flycasters Club (meeting in Phoenix) and the Desert Fly Casters Club (meeting in Mesa). These groups were primarily devoted to promoting the sport of flyfishing. Each group had a segment of its membership which was concerned about the natural resources on which the sport depends. But while each group had its own “conservation committee,” some members felt that those committees were not effective enough to meet the needs of Arizona and its limited cold-water resources.

Being members of the national FFF organization, these local members were also aware of Trout Unlimited (“TU”), an international conservation organization which had been founded in 1959 in Michigan and which was growing in strength and influence as a credible environmental force. TU members were primarily fly fishermen, but the organization was not a “fishing club”: It was formed with a mission to preserve, protect and enhance trout and salmonid species and the cold-water resources on which they depend. Around 1979, the Phoenix area FFF members held public meetings to attempt to form a local TU chapter.

The attraction of a TU chapter was the possibility of working in an organization of volunteers dedicated to: 1) Enlightened fishing regulations, such as “catch and release / no kill” rules, which would promote wild trout reproduction and reduce reliance upon hatchery trout, where feasible; and 2) Environmental and conservation activities to protect Arizona’s limited cold-water fish habitat and its two native trout species. The chapter struggled initially. The “fun” aspects of flyfishing were well-covered by the FFF groups, and the “work” aspects of the sport were not attractive to large numbers of fishermen. But the chapter persisted. Since around 1979, it has been active in projects such as Canyon Creek improvement, and in regulation discussions with the Game and Fish Department and Commission.

In the early years, the Chapter had been known simply as “Trout Unlimited” and it continued informally. But another TU chapter had begun forming in Tucson as an outgrowth of the original Phoenix group. It is now known as the Old Pueblo chapter; the Phoenix chapter needed its own name. Phoenix anglers who frequented the small lakes and streams of the Mogollon Rim area were familiar with the name and legacy of Zane Grey, a famous writer and angler who had a cabin in the Rim area. The chapter had several outings and meetings at the Zane Grey cabin near Tonto Creek. The name of Zane Grey seemed to be a perfect fit, and was adopted without much controversy. In 1987 the chapter was officially incorporated as the Zane Grey Chapter of Trout Unlimited. We hope that Zane Grey would be pleased.

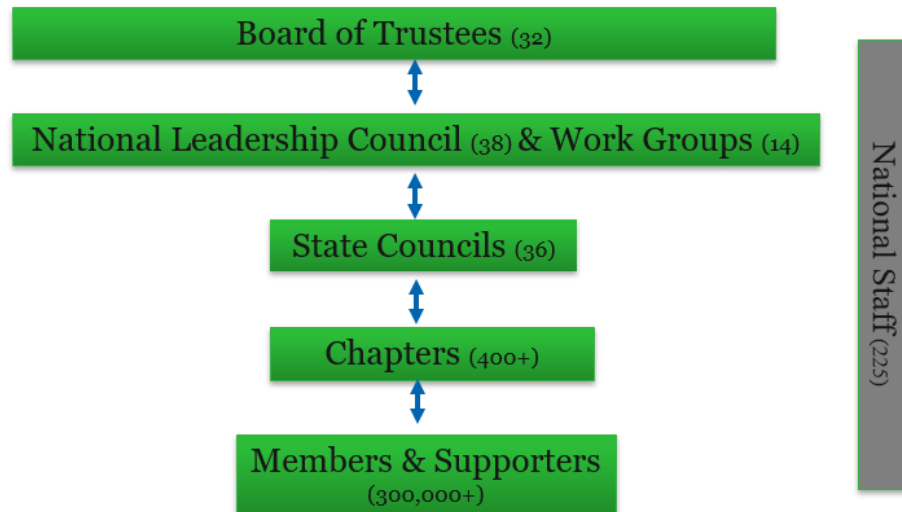
## **Zane Grey Vision:**

Collaborate with communities in order to engage in the work of repairing and renewing the rivers, streams and other waters in Arizona on which we all depend.

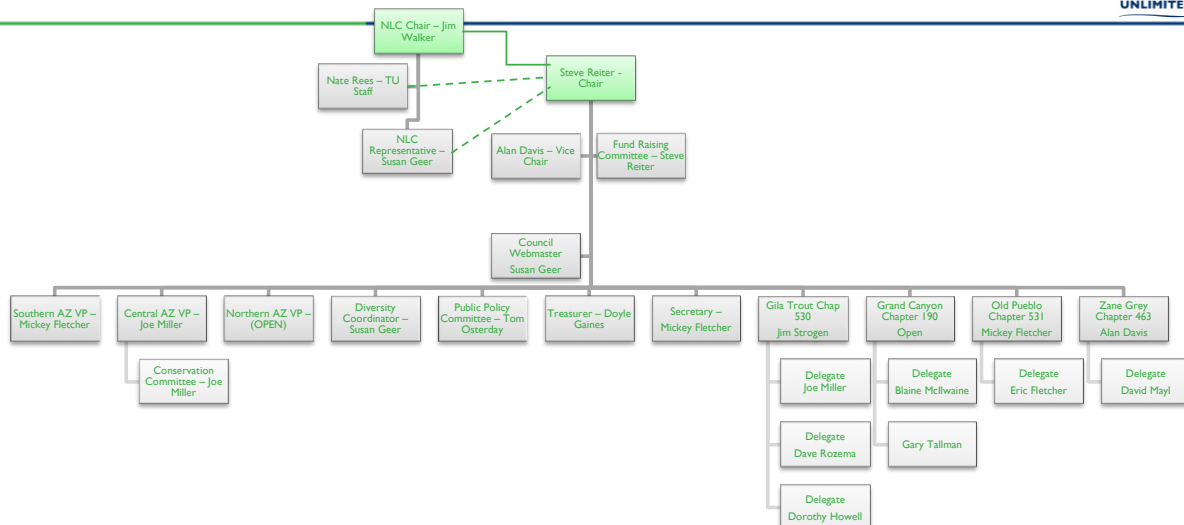
Carm R. Moehle, founding member, ZGTU

# Current Organizational Charts

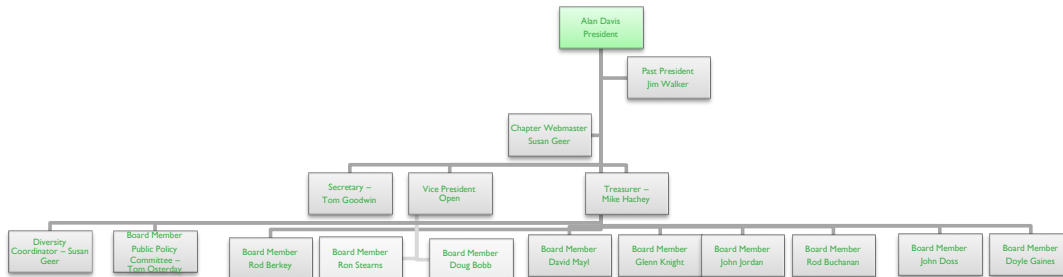
## TU Governance Structure



## Arizona Council of Trout Unlimited



# Zane Grey Chapter Trout Unlimited



## Strategic Focus Areas

1. • Membership Engagement
2. • Conservation
3. • External Outreach
4. • Chapter Sustainability / Board (leadership) Development
5. • Funding Development



# Strategic Focus Area I:

## Membership Engagement

**Goal:** Attract, retain and educate a diverse and inclusive membership that is engaged and motivated to assist the chapter in reaching its goals.

**Interests:** Increase members understanding of Zane Grey; motivate chapter members; enhance communication; attract and retain diverse members; determine chapter uniqueness; deal with pandemic setbacks; leverage social media; spread the workload; enhance board's relationship with membership; and have enough varied activities in pipeline.

### Strategy 1: Retain current members through engagement efforts

**Objective 1:** Determine retention rate of membership (turnover)

**Objective 2:** Create and present general meetings, include topics that are of interest to membership, obtain interesting presenters (reference local fishing clubs meeting structure)

**Objective 3:** Determine events and projects that allow members to be directly involved

### Strategy 2: Attract new members while focusing on increasing diversity of Zane Grey Membership

**Objective 1:** Quantify current membership demographics, Trout Unlimited & Zane Grey membership statistics and fishing club affiliations

**Objective 2:** Complete analysis on membership make-up and dynamics



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**Objective 3:** Define strategies to recruit new members including outreach

### **Strategy 3: Provide educational opportunities to increase the knowledge base of members in planned topics**

**Objective 1:** Differentiate local fishing club educational topics versus Zane Grey Trout Unlimited

**Objective 2:** Determine topics to focus education efforts

**Objective 3:** Deliver education and track effectiveness

#### Measurable Outcomes:

- Review and revise a member “thank you for joining”, “sorry to see you go” and “welcome to the chapter” letters that the membership chair will send monthly on behalf of president
- Increase ZGTU diverse membership by 20%
- Create new member roster by anniversary, institute a member exit survey and keep a record of member participation
- Track number of ZGTU members who participate in scheduled events: educational, conservation, etc.





## Strategic Focus Area II:

### Conservation

Goal: Specifically define, prioritize and develop plans, including funding, for chapter conservation efforts.

Interests: have substantial activities; develop justifications for funding; secure funding sources; evaluate environmental factors that could affect planned or ongoing efforts; focus on priority waters, and adopt Tonto Forest as a potential future goal.

#### **Strategy 1: Define and coordinate current conservation activities/tasks/projects between council and chapter**

**Objective 1:** Identify current conservation efforts/activities of Zane Grey and Council including roles, leads and status, etc.

**Objective 2:** Determine which current projects are still valid to continue with council efforts including Zane Grey scope and projected resources/time needed



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## Strategy 2: Develop structure, process and resources necessary to complete Conservation projects

**Objective 1:** Develop tools necessary for project completion

**Objective 2:** Document projects including successes and challenges

## Strategy 3: Develop vetting process to identify, prioritize and build a plan for new projects

**Objective 1:** Establish a structure for facilitating consideration of new conservation projects

## Strategy 4: Develop a multi-year conservation plan for Zane Grey

**Objective 1:** Perform research on current initiatives and needs to develop a list of potential new projects

### Measurable outcomes:

- Create a set of tasks and assignments for R-C Pond projects
- Document conservation efforts, prioritize top 3, identify core teams and schedule periodic reviews
- Determine two key projects and put a person in charge of each that will seek funding and volunteers, and create an action plan for completion
- List all planned activities by the Council and other Chapters, keep a record of comments from members for proposed projects, prepare estimates, by project, of necessary money and volunteer hours
- Document number of volunteer hours spent on conservation projects
- Have an additional pool of ten members we can count on to lead projects





## Strategic Focus Area III:

### External Outreach

Goal: Identify and develop relationships with aligned organizations in order to leverage efforts and pursue mutual goals.

Interests: Develop alignments with other conservation-oriented organizations, specifically personal relationships for added effectiveness; establish lines of communication with media outlets; “fight above our weight” to leverage our efforts and/or to influence others; and ensure efforts are targeted.

#### Strategy 1: Identify current outreach efforts and connections

**Objective 1:** Define our current aligned organizations and assess health of relationship

**Objective 2:** Determine leverage opportunities to optimize relationships

#### Strategy 2: Identify new outreach opportunities

**Objective 1:** Explore cooperative opportunities with new organizations



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### Strategy 3: Develop materials/messaging to support Zane Grey efforts

**Objective 1:** Inventory current materials and messaging that is on hand

**Objective 2:** Develop specific materials and messaging for intended efforts and organization (audience)

Measurable outcomes:

- Continue engaging with existing external partners
- Document current external partnerships, focus areas, and key contacts
- Establish active partnerships with three non-fishing related organizations
- List all current partnership entities, list all entities with similar interests, record all interactions with other amenities
- List Zane Grey Trout Unlimited liaisons to priority partnership organizations.



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## Strategic Focus Area IV:

### Chapter Sustainability / Board (leadership) Development

Goal: Develop a sustainable and motivated chapter leadership through accountability, establishment of governance materials, and a structure for knowledge transfer and consistency in order to achieve meaningful short- and long-term goals.

Interests: succession planning; capturing institutional knowledge; leadership development; mentorship; and governance: establishing applicable Committees per bylaws, etc. such as the Conservation Committee.

#### **Strategy 1: Ensure structure of the board/committees matches the desired defined goals**

**Objective 1:** Evaluate current active committees for effectiveness and appropriateness

**Objective 2:** Determine and activate committees that may be needed to fulfill goals

#### **Strategy 2: Develop and implement administrative procedures to support Chapter operations**

**Objective 1:** Develop an annual budget and financial policies/procedures

**Objective 2:** Develop an acronym list

**Objective 3:** Develop a Succession Plan

#### **Strategy 3: Assess and define growth and development opportunities**

**Objective 1:** Determine growth and development gaps of current board

**Objective 2:** Develop a mentorship program/onboarding process

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## Strategy 4: Have a process to capture institutional knowledge

**Objective 1:** Inventory current documents

**Objective 2:** Determine future documents to be captured

### Measurable outcomes:

- Working with existing TU materials, create a position training program similar to Kiwanis, Rotary, etc., that outlines the duties and responsibilities of officers and directors
- Create brief, written job descriptions of each board position to ensure that each person voted onto the board knows their job description and expectations
- Document current board members and committee chairs, term expiration and list of interested succession members (ideally more than one per position)
- Invite new members to be on the board for a specific purpose
- Create a mentorship program
- Ensure selected board member interests match ZGTU goals, mentor proposed candidates for board/committees, record activity attendance for future candidates, solicit comments from current Board/Committee members for future candidates
- Create a list of current board members with their term expiration date and a list of pipeline board members, and a documented succession plan for all offices and committee chairs with a timeline of term expiration dates and invitations for new office holders/committee chairs



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# Strategic Focus Area V:

## Funding Development

Goal: Identify and prioritize chapter projects that require funding, and develop relevant project elements and strategies in order to achieve successful completion.

Interests: funding for positions, needs and capital projects; communicate and celebrate project milestones; define projects, justifications, dollar amounts, sponsorships, capital campaigns, transparency, honoring contributors; better definition of projects, objectives, clearly defined and communicated; establish a list of potential projects/events that are realistic, and develop a plan around them

### **Strategy 1: Identify current prioritized projects/needs and assess if necessary resources/funding is reliably available**

**Objective 1:** Assess current projects/needs including status, existing gaps and needed resources

### **Strategy 2: Develop process to fund future projects/events/needs etc.**

**Objective 1:** Develop annual operating and project budget projections

### **Strategy 3: Explore and secure revenue generation/ fund development opportunities**

**Objective 1:** Conduct fundraising

**Objective 2:** Explore new fund-raising methods

#### Measurable outcomes:

- Raise \$10,000 annually through the current fund-raising committee
- Identify potential funding opportunities (i.e. grants), documentation required, timing for submission
- Develop dynamic and engaging presentations, and appoint a board position solely responsible for assembling a Speakers Bureau that includes a group of speakers and a calendar of a minimum of 8 presentations per year
- Create a list of projects by priority and resources, including a list of all funding sources and prepare financial reports by source classification
- Develop a comprehensive budget that includes Income, operating expenses and project expenses