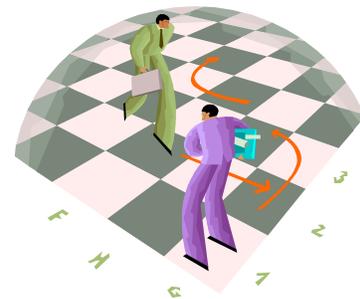


Strategic Planning – Building a District Identity

What is Strategic Planning?

- It is a process whereby you dissect your organization to determine its strengths and weaknesses.
- Strategic planning has been described as a soul-searching exercise for your organization
- During this process, you set your organization's mission, goals, and objectives.
- You answer questions like:
 - Why does my organization exist?
 - What does my organization do?
 - How does my organization do what it does?
 - How do we measure organizational success?



Why Do Strategic Planning for My Conservation District?

- There are many natural resource conservation-oriented organizations. Does your district know exactly what its unique role is? If not, strategic planning can help distinguish the District's focus from the many complementary focuses of similar organizations.
- Does your district have a plan to acquire the financial, human, and knowledge resources required to effectively achieve its natural resource goals? If not strategically planning your future can help obtain and align appropriate resources.
- Is your district financially sound? Your district's financial health and stability depends on the Board strategically planning the future of the District. If your district is not financially sound and stable, it is time to go back to the drawing board and strategically plan how the Board is going to ensure the District's future.
- Each board member and staff member should know what the mission of the district is and be able to answer the above questions. Without knowing these answers, you don't have a functional district.

Strategic Plan –vs- Long Range Program (LRP)

- While districts are familiar with the LRP required by the CSCB every three years they are not typically familiar with Strategic planning.
- Strategic plans provide the overall direction as well as organizational strategies for financial health and stability of the District's "business" including the business administration.
 - This is an internal process in which the Board must engage. The Manager can assist but it is the Board's role and responsibility.
- The LRP focuses on the natural resource issues.
 - This is an external and internal process. The external portion is centered in the local workgroup where the District gathers information from the landowners and various agencies.
 - The internal process begins with the Board taking the information gathered at the local workgroup and determining what their priorities will be and how they will accomplish their set goals.
 - The development of a LRP aimed at addressing 3-year natural resource issues can be easier and more effective when a strategic plan is in place and the District knows the answers to the key questions above
- LRPs that are aligned with the clear direction of a strategic plan are more likely to achieve the desired results. Districts are encouraged to enlist a facilitator in both of these activities but most importantly in the strategic planning process to keep the Board on task and work through any difficult discussions.

Defining the Conservation District Mission

Your mission statement should answer three key questions:

- What do we do?
- For whom do we do it?
- How do we do it?

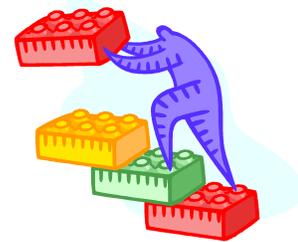
A mission statement **SHOULD**:

- Define who you are, whom you serve and how you serve them.
- Be clear enough to serve as a test of every action made by the district at any time.
- Be short, no more than two sentences. If it is too long, people cannot remember it.
- Be a brief answer to the question, "Well, what exactly does the Conservation District do?"

Developing a Mission Statement

Use the answers to the following questions as a guide for drafting an appropriate mission statement for your conservation district:

1. What do you hope to accomplish as a result of your efforts?
2. How do you plan to accomplish these goals?
3. For whose benefit does your district exist?



Weave together your responses from these questions into a single statement:
The mission of our district is:

Evaluate your statement:	Yes	No	Somewhat
a. The statement is realistic			
b. The statement is clear and concise			
c. The statement reflects our values and beliefs			
d. The statement demonstrates a commitment to serving the public good			
e. The statement clearly separates the mission of our district from other organizations			
f. The statement is powerful			

Based on your evaluation of the statement, jot down possible changes you can make.

Now, rewrite your mission statement based on those changes.

Share this draft with three people outside your organization for their comments. Be sure to include at least one person who may not be at all familiar with your issues.

After reviewing their comments, write your final mission statement.

Tools to Build Identity

Assuming your district's mission statement involves serving the landowners' needs, the local workgroup, long range plan, annual plan of work, budget, and annual meeting are great tools for building your positive identity. Let's explore each of them.



- Local Work Group – Step 1
 - How do you know what your landowners need and/or want in regards to the natural resources? Ask! This is your opportunity to show your landowners that you are here to serve their natural resource needs.
 - Set the date and time which will meet most landowners' schedules. Consider farming and ranching activities, work days, etc. You may find it necessary to host more than one meeting to accommodate various sectors of your community.
 - It is not enough to put an ad in the paper, send invitations, put an announcement on the radio, etc. to get people to attend your meeting.
 - People will begin to realize the value of attending if each district board member will call 10 to 20 people they know and personally invite them to the meeting. This will get a good turnout. While on the phone with them you will want to explain to them what the district is, why you want their input, and what you will do with that input. They will be honored to attend and give direction to the district.
 - It always helps to provide a meal with the meeting.
- Long Range Program - Step 2
 - Utilizing the information your landowners provided in the local work group, the Board develops the Long Range Program (LRP).
 - The LRP provides a roadmap for the District over the next three years.
 - It can be amended if necessary.
 - The LRP then becomes a marketing tool to develop a positive identity.
 - Use it in your annual report to show your accomplishments and plans for the next year.
 - Use it in your report to the County Commissioners.
 - Share it with partners and funders as you search for financial and technical assistance on projects.
- Annual Plan of Work (APW) – Step 3
 - The APW is developed off of the LRP. Revisit the LRP for this particular year and develop more detailed plans for reaching each specific resource goal. Identify who is responsible for each activity.
 - Again, use this as a tool to communicate your goals and activities to your partners and funders.
 - Send it out in your district's newsletter to convey your plans for serving the landowners this year.
 - Review the previous year's plan and the upcoming year's plan at the district's annual meeting.
- Budget - Step 4
 - All district funds are considered public funds.

- Show your landowners that you are accountable by providing them a copy of your budget and financials at the annual meeting.
- Annual Meeting – Step 5
 - Here is your opportunity!
 - If your District has not had good turnouts for previous annual meetings, each board member should call 10 to 20 people and invite them. Ensure each landowner that attended the local workgroup is personally invited with a phone call so they can see what the district has done to address their specific concerns.
 - Report on what the district has done to address the concerns expressed by the landowners at the local workgroup. This shows your accountability and will develop a positive identity for the district.
 - Present your plans for the upcoming year and ask for input from the attendees. Again this builds trust and involvement by the landowners.
 - Provide a meal and celebrate your accomplishments at the annual meeting with a PowerPoint presentation and pictures. Pictures ARE worth a 1,000 words.
 - Recognize a landowner for the conservation work they have done. Again, use a presentation that shows the improvements with pictures.

If your district hears the landowners' issues and concerns, develops their long range plan to address those issues, implements the annual plan of work by taking action on the issues, and reports back to the landowners regarding the progress at the Annual Meeting, you are on your way to a positive identity. Of course you will need to create visibility (see [District Visibility – Public Relations Chapter](#)) each step of the way so others become aware of your successes.

Long Range Program (LRP) Development Plan or Program?

Districts engage in Long Range Program (LRP) development every three years. This plan is their roadmap for the next three years and should guide the activities of the District. It can (and should) be amended if circumstances warrant the amendment. The LRP is one of the forms/reports required by CSCB.

The [LRP Instructions](#) provide excellent directions and guidance for developing the LRP. For detailed information and [LRP Form](#), click on the hot links.

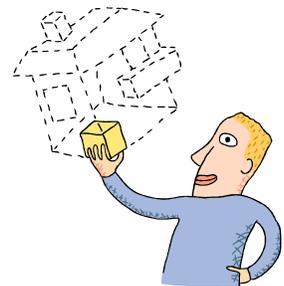
The planning process for each district should look similar to the following.

- Review of previous LRP
- Host a local workgroup or initiate a survey to gather input from your landowners (every three years)
- Develop the LRP based on the input gathered from the local workgroup or survey (every three years)
- The CSCB Regional Conservation Specialists are available to assist the Districts with the facilitation of LRP development sessions

LRPs are due into the CSCB office by January 1st of each year in which the current district's LRP expires

At a minimum, Long-Range Plans typically:

- Identify the prioritized natural resource issues within the district.
- Identify how success will be measured for addressing the issue (three year goals).
- Identify the major milestones (annual objectives) in year 1, 2, and 3 that need to be accomplished in order to make progress toward the goals.



- Identify which cooperating agencies or groups can assist the district in achieving particular annual objectives
- Identify the time and funding needed to successfully reach each annual objective.
- Establish the context and the basis for the development of an Annual Plan of Work which will identify priorities and provide guidance for your District Manager.



A well-developed LRP and APW are excellent marketing tools to provide your partners and potential funders.

Annual Plan of Work (APW)

The APW provides a more detailed and comprehensive look at what needs to be done in the coming year. It is typically focused on the natural resource issues of the district and how you will address them. It is one of the Board's communication tools that guides the employees and others for the upcoming year.

While identifying multiple natural resource issues and concerns, it is important to recognize the District has limited funding and personnel. Therefore, in reality you may identify resource issues that your partners will be the lead in addressing. This is okay, just be sure to approach it realistically and use the APW to identify the District's role in partner projects. By doing this, your District recognizes the importance and value of that issue, but also how valuable your partners are in assisting your constituents (landowners).

Your APW should specifically identify what the District is planning to accomplish over the next year. For example, while NRCS may provide cost-share and technical assistance in water quality and quantity, the District may plan to conduct demonstrations and encourage landowners to sign up for NRCS programs. The District may even host a tour of the projects implemented last year as an opportunity to inform other landowners or legislators of what is available to address water quality and quantity.

Annual Plans of Work are only as good and successful as the commitment to implement them. Several small, yet practical, steps can be taken to build the District commitment to follow the action steps identified in the APW.

- Identifying an individual board member as the lead person responsible for each major work item.
- Consider establishing a committee to assist the lead individual.
- In some fashion, review the APW at each regular board meeting.
- Have lead individuals provide an update and identify needed assistance with upcoming projects at regular meetings.
- Acknowledge when a APW item has been completed and provide appropriate feedback to lead and supporting individuals.



The APW is due into the CSCB office by January 1st of each year.

Budget

- As with all successful businesses/organization, it is important to develop an annual budget for the year
- The budget should support the Annual Plan of Work so there are no surprises throughout the year as you implement it.
- As a Special District, the Department of Local Affairs requires you to submit last year's actual financials, the current year's estimates, and your budget for next year. CSCB

provides a basic form for the Districts' convenience, which is found on the CSCB web page under forms.

Annual Report & Evaluation

- As with any successful business, it is important to look back and evaluate the past year's performance. It is important to know how well you performed in order to make adjustments to improve for the upcoming year.
- The Districts' APW form has this step incorporated into it and is referred to as the Progress Report. This allows the district manager to track progress throughout the year and easily report it at year-end.
- Capturing the progress and results of APW work items provides the district with an opportunity to critically evaluate its programs and projects and to analyze the District's best use of limited personnel and financial resources.

