

# **DIY STRATEGIC PLANNING**

March 2024



**Montana Association of Conservation Districts  
Sage 4 Success Nonprofit Consulting, LLC**

Terry Profota, MNM  
[tlprofota@gmail.com](mailto:tlprofota@gmail.com)  
406-570-7109

# Contents

- DIY – STRATEGIC PLANNING DISCUSSION QUESTIONS ..... 3**
- STEP 1. GATHER INFORMATION AND ANALYZE WHAT YOU ARE DOING ..... 3
- Gather information:..... 3
- Identify what you are currently doing. .... 3
- Collecting feedback from stakeholders. .... 3
- Questions to ask:..... 3
- STEP 2. ARTICULATE YOUR CONSERVATION DISTRICT’S FRAMEWORK ..... 4
- Create a long-term vision statement..... 4
- Articulate what you do in the simplest of terms to create a mission statement:..... 4
- Identify the “ground rules” for action and behavior: ..... 4
- STEP 3. VISION THE FUTURE. Creating your Three-Five Year Strategic Vision..... 4
- STEP 4. CRAFT YOUR PLAN. Putting it all together. .... 5
- SAMPLE DIY STRATEGIC PLANNING TEMPLATE ..... 8**

## DIY – STRATEGIC PLANNING DISCUSSION QUESTIONS FOR MONTANA CONSERVATION DISTRICTS

The purpose of this discussion is to provide direction and/or a starting point to identify the content for your strategic planning document. The following is a sample process and questions your Conservation District (CD) may want to use during your strategic planning process.

The following information does not include all questions you may want to ask; each CD is different and will have to decide where to focus their time and discussion. Pick the questions and path that resonates with your district and will help guide your planning discussions.

### STEP 1. GATHER INFORMATION AND ANALYZE WHAT YOU ARE DOING

#### Gather information:

The goal of this first step is to gather information on your current operations and feedback from supervisors, staff, and other designated stakeholders to inform your planning discussion and final document. (Note: you will want to give the public an opportunity to give feedback by putting in on the board agenda when the final copy goes to supervisors for approval.) Your CD will have to decide how much information it would like to assemble, from where, and how. Obviously, the more you gather, the more informed your decision-making will be; but this step can be extremely time-consuming so be sure to consider your manpower resources.

#### Identify what you are currently doing.

At the very least your planning team should collect any previous strategic and work plans, complete (if not already done) the DNRC-CDB Accountability Assessment, and document current programs, services, educational activities, and partners. Data collected from working group meetings is also a good source on information to include. Also outline what your CD is currently doing to communicate externally with local producers, partners, and your community. This will give you a summary of current activities and act as the baseline for planning discussions.

#### Collecting feedback from stakeholders.

Collecting feedback is extremely helpful and lets you get a sense of what everyone is thinking. It is also a great strategy for focusing planning participants to give some concentrated thought to your CD's future before sitting down to group discussions. There are many ways you can go about this task; choose a method (or combo of methods) that works for your CD.

1. **Survey or Questionnaire.** Develop a questionnaire or survey and send to participants either through a Survey Monkey-type tool, directly via email, or other methods preferred by your participants. This questionnaire can be returned to the planning coordinator and compiled into one document for reference during discussions.
2. **DNRC/CDB Strategic Planning Worksheet.** Instead of crafting your own survey or questionnaire, use the DNRC/CDB Strategic Planning Worksheet that is included with DIY Strategic Planning resources. This worksheet can be returned to your CD planning coordinator and compiled into one document for reference during discussions.
3. **Group discussion during a work session.** Rather than have participants complete the survey and submit, have individuals bring their completed questionnaires to the planning workshop for a more thoughtful and meaningful conversation. Take notes and use the compilation document, or flip charts, as planning references.

#### Questions to ask:

Planning questionnaires typically follow a SWOT (strength, weaknesses, opportunities, threats) format focusing on what an organization is doing, what is going on around them, and what the future should look like. Sample questions for you to choose from follow.

- What are we currently doing that is working? (You want to make sure you keep doing these things.)
- What are we doing that we can do better or expand?

- Based on the DNRC/CDB Accountability Assessment, what do we need to do to be compliant with MT law and regulations?
- What are we doing that is not working and needs improvement or to be stopped?
- What expansion can we undertake when increased funding becomes available through the CD Trust Fund?
- Are there any trends, positive opportunities, or external threats that we need to be aware of and craft goals to take advantage of or mitigate?
- Identify four values (ways of acting with each other) that should guide how we operate, individually and as a group.

## **STEP 2. ARTICULATE YOUR CONSERVATION DISTRICT'S FRAMEWORK**

Use the information gathered in Step 1 to guide your discussions in each area below.

### **Create a long-term vision statement.**

This is a statement of the long-term outcome your organization wants to achieve. Typically, this statement articulates the “why” your district exists.

Questions to ask include:

- Why do we exist?
- What do we ultimately want to accomplish by our work?
- What long-term impact will we have in our area because of our CD's work?

### **Articulate what you do in the simplest of terms to create a mission statement.**

This is a short and concise statement that tells “what” your organization does and “how” it does its work. This statement is used internally to guide decision-making and externally as a communication tool.

Questions to ask include:

- How are we going to go about making our vision become a reality?
- What will we be doing?
- What are our main activities or areas of focus?

### **Identify the “ground rules” for action and behavior.**

Values are a set of shared beliefs, norms, and ways of behavior that your conservation district identifies and establishes as your standards for operations.

Questions to ask include:

- What “ways of acting” do we want to be core to how we work?
- How do we want to treat each other and be treated?
- What do we want the community and our partners to say about us?

## **STEP 3. VISION THE FUTURE. Creating your Three-Five Year Strategic Vision.**

A strategic vision statement sums up where your conservation district would like to be at the end of the strategic planning time period; it is the destination point in for your plan.

These questions will help you articulate your plan for the future.

- What is the timeframe for this plan? Typically, strategic plans are for three-five years' time.
- How will we expand our capacity and programming based on the influx of money in the near future?
- What priority areas do we need to focus on during the planning timeline? (See DIY Strategic Plan Template for common Conservation District Priorities.)
- What are our strategies? Statements that generally articulate the outcomes we want to achieve in each Priority area. (See DIY Strategic Plan Template for common Conservation District Strategies.)

#### **STEP 4. CRAFT YOUR PLAN. Putting it all together.**

Use the DIYDIY template and the strategic planning outline in these materials to organize your planning decisions as agreed upon in Step 3. Remember this is your plan, so feel free to modify/change/edit the templates that are provided.

After you have documented your vision, mission, values, priorities, and strategies it is time to dig deeper into goal-setting. Goals are specific, measurable, and realistic (based on resources) actions your CD will to commit to reach its vision.

For each strategy, ask questions about how you will accomplish your desired outcome. Review the information you gathered and discussed in Steps 1 & 2 about what is working and what is not to assist in identifying goals or action steps. The following are some “standard questions” that may be appropriate for discussion.

#### **PRIORITY #1. BUILDING A STRONG AND COHESIVE TEAM**

##### **Strategy- Supervisor Board**

- What outcome do we want for this strategy? What do we want to accomplish?

##### *Goal Development Questions:*

- How can we improve supervisor engagement?
- What could supervisors do that would help the administrator with programming?
- What can we do to better prepare for supervisor succession?
- How can we make it easier for new supervisors to understand their scope of work?
- What education does our board want or need?
- What can we do to capture historical knowledge?
- What must we be compliant with regulations?
- How can we improve the evaluation process for our administrator?

##### **Strategy- Staffing**

- What outcome do we want for this strategy? What do we want to accomplish?

##### *Goal Development Questions:*

- What staff positions do we need to create/have in order to accomplish our strategic vision?
- Do we have a written, up-to-date Employee Manual?
- Do we have a written grievance procedure?
- Do we have operational procedures in writing?
- Are our job descriptions current?
- Do we have documented processes, based on a workplan and goals, for administrator and staff evaluations.

##### **Strategy – Volunteers**

- What outcome do we want for this strategy? What do we want to accomplish?

##### *Goal Development Questions:*

- Where could we use volunteer help and expand our capacity?
- What would they be doing?
- How would we go about recruiting and training volunteers?
- Who would manage volunteers?

## **PRIORITY #2. PROGRAMMING, EDUCATION, SERVICES, AND OUTREACH**

Look back on your strategic vision and strategies. For each programming/service/educational strategy ask the following:

- What outcome do we want for each strategy? What do we want to accomplish?  
*Goal Development Questions for each Strategy:*
- How do we improve existing programs and projects?
- What do we need to do to launch a new strategy?
- Who will be our “consumers” and who do we need to work with?
- What resources (people and funds) do we need and how will we get them?

## **PRIORITY #3. ORGANIZATIONAL STRENGTH AND SUSTAINABILITY.**

### **Strategy 1 – Infrastructure**

- What outcome do we want for this strategy? What do we want to accomplish?  
*Goal Development Questions:*
- What actions do we need to take to be compliant with regulations?
- What systems and “things in writing” do we need to create or document to strengthen our operations?

### **Strategy 2 - Financial Management**

- What outcome do we want for this strategy? What do we want to accomplish?  
*Goal Development Questions for each Strategy:*
- What are our current financial checks and balances? And how do we strengthen financial oversight?
- Do we have a finance committee or is oversight details left to one person-the treasurer?
- How do we plan for succession within our financial management protocol?
- Should we hire a contracted bookkeeper?

### **Strategy 3 – Fund Development**

- What outcome do we want for this strategy? What do we want to accomplish?  
*Goal Development Questions:*
- Based on our Priority #2 discussion; are there programs that may qualify for grant funding?
- Do we have any partners we could plan and collaborate with for funding or fundraising efforts?
- Do we have relationships with any private foundations that may fund programming?
- Do we want to develop a public/community fundraising program and plan? If so, what would its elements include?
- What manpower do we need to organize and developing this area?

## **PRIORITY #4. PARTNERSHIPS AND COMMUNITY RELATIONSHIPS.**

### **Strategy 1 –Government Agency Relationships.**

- What outcome do we want for this strategy? What do we want to accomplish?  
*Goal Development Questions:*
- Who are our current partners?
- What can we do to strengthen these partnerships?
- Who else should/could we create relationships with?

## **Strategy 2 – Conservation Districts and Non-Profit Organizations Relations.**

- What outcome do we want for this strategy? What do we want to accomplish?

### *Goal Development Questions:*

- Who are our current partners?
- What can we do to strengthen these partnerships?
- Who else should/could we create relationships with?
- What would be areas for collaboration with these partners?

## **Strategy 3 –Communication and Messaging**

- What outcome do we want for this strategy? What do we want to accomplish?

### *Goal Development Questions:*

- How often and to whom do we communicate regularly (typically this is to producers, partners, other CDs, and the public).
- How do we want to communicate? —brochures, social media, newsletter....
- How are we currently communicating with partners, producers, and the public?
- How could we improve our communications with each group listed above?
- When was the last time we reviewed and updated our website?
- Do we have written “talking points” to promote what we do in a consistent and coordinated manner?
- What materials do we have (brochures?) and how do we distribute them?

## **PRIORITY #5. PUBLIC POLICY EDUCATION AND SUPPORT.**

### **Strategy 1 – Networking.**

- What outcome do we want for this strategy? What do we want to accomplish?

### *Goal Development Questions:*

- Who are the legislators in our area?
- How can we best go about establishing/building a relationship with them?
- How can we increase our support for MACD legislative efforts?
- Do we have a database and plan for educating and notifying area producers of legislation during session? Does that system need to be reviewed and updated?
- What else can we do to educate and build relationships with local representatives?

### **Strategy 2 – Testify and Advocate.**

- What outcome do we want for this strategy? What do we want to accomplish?

### *Goal Development Questions:*

- Do we have a list of producers who are willing to testify during session on areas of expertise? If not, should we compile this list?
- How can we improve our support during legislative sessions?

## SAMPLE DIY STRATEGIC PLANNING TEMPLATE

### DOGOOD CONSERVATION DISTRICT (DGCD) STRATEGIC PLAN. 2024-2028

#### VISION/PURPOSE. Why does your CD exist? What is the impact or outcome of your work?

*Samples:*

Our vision is clean and abundant water, healthy and productive soil, and a strong and vibrant agricultural community through the widespread sharing and implementation of proven farming, ranching and conservation practices.

To be the leader in our area for soil, water, and conservation efforts.

#### MISSION. How does your CD work? What are the big areas of your work?

*Sample*

Our mission is to support land and water conservation through technical assistance, model programming, producer and community education, strategic collaborations, and support for agriculture-related public policies.

#### VALUES. How will you operate?

DoGood Conservation District (DGCD) believes that value-driven operations are crucial to successfully fulfilling our mission. Our values are (the following are some samples to get your organization thinking):

*Taken from MACD's values.*

- ✓ **Teamwork and Engagement:** Promote an environment where we work together and support one another in a solution-oriented manner, incorporating flexible and innovative approaches.
- ✓ **Transparency:** Conduct activities with integrity and honesty through open communications and accountability.
- ✓ **Respect:** Forge mutual respect among DGCD, districts, partners, and public officials.
- ✓ **Excellence in Stewardship:** Foster responsible, efficient, and thoughtful use of all resources – financial, human, and natural

*Taken from Central and Eastern Montana Invasive Species Team (CEMIST).*

- ✓ **Collaboration** - We value collaboration and a team approach to work resulting in unified efforts and a larger impact.
- ✓ **Responsibility** - We value being responsible in all we do, delivering reliable data-driven information, being fully invested in strong partnerships, and following through on our commitments.
- ✓ **Transparency** - We value transparency, being open and honest regarding what we do, how we do it, and the management of our finances.

#### STRATEGIC VISION FOR DATE OF END OF PLANNING CYCLE

In five-years DoGood Conservation Districts' vision is that has increased its impact on water and soil health in DoGood County. We have accomplished this by:

- ✓ Building a strong and cohesive team of supervisors, staff and volunteers.
- ✓ Strengthening and expanding our current projects and programs as well identifying and implementing additional programs, services, and training to support local producers.
- ✓ Creating organizational capacity and sustainability by documenting policies and procedures for governance, operations and financial management and expanding our ability to secure funding from grants and private sources.
- ✓ Expanding and fostering strategic partnerships, collaborations, and support between DGCD and key government agencies, nonprofit organizations, the public, and our community.



- ✓ Nurturing relationships and educating local legislators on conservation issues and solutions faced by districts throughout Montana.

## **PRIORITIES, STRATEGIES, AND GOALS**

### **PRIORITY #1. Building a Strong and Cohesive Team.**

**Strategy 1 – Supervisor Board.** Have an active, engaged, and knowledgeable board of supervisors.

Goals for accomplishing this are:

- ✓ Create an “expectation of engagement” document for supervisors.
- ✓ Develop and use an Annual Board Governance Calendar to ensure that supervisors are meeting regulatory requirements.
- ✓ Organize and deliver a new supervisor training or mentorship program to all new supervisors.
- ✓ Adopt a consent agenda meeting format.
- ✓ Create a succession process that included capturing the history and knowledge of long-term supervisors.

**Strategy 2 – Staffing.** Build capacity to attract and retain competent staff by offering competitive pay and creating a workplace that supports effectiveness and employee well-being.

Goals for accomplishing this are:

- ✓ Develop and/or update job descriptions to ensure manageable workloads.
- ✓ Prioritize securing additional funding to be able to offer competitive salaries.
- ✓ Identify new staffing positions to support expanded programming due to increased state funding.
- ✓ Review and update our Employee Manual, ensuring it includes a grievance, harassment, and other legally required policies and procedures.
- ✓ Create a goal-based annual employee evaluation system. (Supervisors should be evaluating the administrator and administrator evaluating any other employees.)
- ✓ Organize a centralized and secure place for storing all personnel related materials and documents.
- ✓ Create a staff succession plan.

**Strategy 3 – Volunteers.** Expand our ability to meet our mission by engaging our community in meaningful, helpful, and thoughtful volunteer tasks.

Goals for accomplishing this are:

- ✓ Identify volunteer needs, create a spreadsheet of opportunities, and craft simple job descriptions for each position.
- ✓ Review and strengthen the current process for recruiting and engaging volunteers, including a page on your website posting volunteer needs.
- ✓ Build a robust volunteer recognition and thank-you system.

**PRIORITY #2. PROGRAMMING, EDUCATION, SERVICES, AND OUTREACH.** This section needs customization for your CD. Each strategy should be focused on an area of your current and projected education, programming and/or services. The following are some ideas.

**Strategy 1 – Farmer and Rancher Education.** Facilitate production and soil and water health by providing information, education, and technical support.

Goals for accomplishing this are:

- ✓ Review our current materials and educational offerings and update and organize as needed.
- ✓ Identify and prioritize local trade shows, events, and other opportunities for to meet and educate local producers.
- ✓ Create a resource page on our website with direct links to other CDs or agency resources as well as including links to DGCD materials and programming.
- ✓ Create a mentorship program to support and advise the upcoming generation of farmers and ranchers.

- ✓ Develop an outreach program of volunteers who will circulate through our district meeting with and informing local farmers and ranchers with key information.

**Strategy 2 – Youth Education.** Plan, coordinate, and host educational opportunities for the community youth, ages 6-12.

Goals for accomplishing this are:

- ✓ Create an educational resources pack to use in the classroom.
- ✓ Create a volunteer group to speak at schools.

**Strategy 3 – General Education.** Educate the general public regarding the importance of conservation, conservation strategies and projects, and the impact our Conservation District has on the environment and local economic well-being.

Goals for accomplishing this are:

- ✓ Contact our local radio and provide a monthly “water/soil” conservation show.
- ✓ Create a series of radio PSAs to rotate throughout the year.
- ✓ Develop a list of email addresses and publish a short news blast six times a year.

### **PRIORITY #3. ORGANIZATIONAL STRENGTH AND SUSTAINABILITY.**

**Strategy 1 – Infrastructure.** Develop internal structures for conservation district consistency and growth.

Goals for accomplishing this are:

- ✓ Review the results from the DNRC/CDB Accountability Assessment and develop a compliance plan.
- ✓ Review, update, and/or develop written policies to ensure clear lines of authority, accountability, and consistency in action.
- ✓ Create a general operating policy manual.
- ✓ Organize a central, easy access point for policy and document storage.

**Strategy 2 - Financial Management.** Strengthen our financial recordkeeping, oversight, budgeting, and management reporting systems.

Goals for accomplishing this are:

- ✓ Create a finance committee consisting of the treasurer and at least one other supervisor.
- ✓ Develop a financial policies and procedures manual, that ensures checks and balances throughout your system.
- ✓ Hire a contracted bookkeeper.
- ✓ Develop and use a fiscal sponsorship agreement template.

**Strategy 3 – Fund Development.** Support expanded programming and staffing through diversifying funding sources.

Goals for accomplishing this are:

- ✓ Identify projects and/or programs for fundraising efforts.
- ✓ Identify at least one potential private funding source (grant or individual) or nonprofit for collaboration each year.
- ✓ Build relations with funding sources and submit at least one funding requests annually.

### **PRIORITY #4. PARTNERSHIPS AND COMMUNITY RELATIONSHIPS.**

**Strategy 1 – Government Agency Relationships.** Identify, expand, and strengthen our state and federal agency partnership relations.

Goals for accomplishing this are:

- ✓ Identify key agencies and contacts, then develop a customized plan for building and maintaining relationships.
- ✓ Invite agencies to quarterly DGCD meetings with time allocated for them to update on their work and impact.
- ✓ Develop a plan and calendar to have supervisors regularly attend partner meetings.

**Strategy 2 – Conservation Districts and Non-Profit Organizations Relations.** Identify and cultivate working relationships with local conservation districts and nonprofit organizations to mutually expand and enhance everyone’s work and impact.

Goals for accomplishing this are:

- ✓ Identify strategic nonprofits and conservation districts for relationship development.
- ✓ Identify and contact key people and discuss how to best work together.
- ✓ Determine if there are opportunities at partner events to promote our work, services, and programs.
- ✓ Invite key partners to participate in two board meetings per year.
- ✓ Develop a plan to attend key partner meetings on a regular basis.

**Strategy 3 –Community and General Public.** Increase community understanding of what conservation districts do and their importance to local environmental and economic health through a coordinated approach to external communications.

Goals for accomplishing this are:

- ✓ Develop a talking points document that outlines what we do, how we do it and the impact we have on water and soil health for use by supervisors and volunteers.
- ✓ Develop a PowerPoint presentation and engage volunteers to present at local service organizations’ meetings.
- ✓ Create an E-blast newsletter template and send to the community four times a year.
- ✓ Develop an annual communications calendar and topics for community correspondence.
- ✓ Construct and distribute a brochure outlining the why our CD is important to the area and the impact it has on community economics and well-being.
- ✓ Develop a plan for regular review and updates to our website.
- ✓ Develop an annual communications calendar for community correspondence.

**PRIORITY #5. PUBLIC POLICY EDUCATION AND SUPPORT.**

**Strategy 1 – Networking.** Build relationships and educate key state legislators on current and emerging local conservation issues and how they may be mitigated or supported through funding and policy development.

- ✓ Coordinate with MACD on key legislative initiatives.
- ✓ Identify and attend other partner-opportunities to meet and greet state legislators.
- ✓ Build relationships by identifying and annually meeting with area legislators.
- ✓ Develop an electronic database of area producers to communicate with during legislative sessions.

**Strategy 2 – Testify and Advocate.** Be prepared to quickly respond to bills with expert testimony during legislative sessions.

Goals for accomplishing this are:

- ✓ Stay updated on key bills and share bill information, including scheduling of testimony, with DGCD volunteers and supervisors.
- ✓ Identify area experts who could be called upon to testify as needed.
- ✓ Collaborate with MACD to develop talking points for use during legislative session.