

# CONSERVATION DISTRICTS BUREAU

## STRATEGIC PLANNING FAQ



Strategic planning is a critical responsibility of a conservation district's (CD) leadership team. A strategic plan outlines direction for action and is the foundation for accountability. A well-crafted strategic plan is flexible, vibrant and engaging. This series of questions and answers outlines basic concepts and ideas associated with planning and provides a foundation for your board to move forward in planning for your district.

**Why be strategic?** Many organizations don't have a strategic plan. Some do, but never look at it again once it is completed. So why is it important for your CD to be strategic? Because your CD, and all CDs for that matter, face many recurring and new natural resource issues; determining and prioritizing your focus and work is important. Without a plan your district may be running in circles, getting caught in personality disputes and drama, and generally being a lot less effective than it could be. In addition to operational effectiveness, securing funding often rests on having a succinct plan that can be clearly articulated to funders; whether foundations, individual donors, legislators, or the public (think mill levies).

A written strategic plan, that is developed into an annual operational work plan, is the bedrock for meeting your mission through effective, cohesive, and consistent operations; thus, ensuring that everyone, including your employees, are informed about your CD's future direction.

**What is a strategic plan?** A strategic plan is long-term, big-picture thinking that creates a roadmap for a successful, proactive future.

**Is there only one way to develop a strategic plan?** There are numerous ways to craft a strategic plan. These range from a simple, do-it-yourself version, to a more extensive, facilitated version. The larger and more complex your district operations, the more in-depth your planning process will be.

**How often should planning be done?** Planning is an ongoing priority process where your board and staff (and others) put aside time to come together and talk, brainstorm, and come to agreement on priorities and the direction of your district.

Strategic planning refers to longer-term planning, typically for periods of three-five years. Annual planning is just that, done each year to review the strategic plan, modify as needed, and identify goals and annual objectives, or action steps, for the upcoming year.

**Who organizes planning?** Making sure planning happens is a shared responsibility of your board and your administrator. The details of arranging a planning time usually fall to your administrator, but ultimately it is your board's responsibility to make sure it happens (and to participate). Because planning is a priority activity, enough time should be allocated to move through the process. Typically, a strategic planning session is a day-long commitment, annual plan review can be accomplished in about an hour, often during a regular board meeting. In addition to allocation of time, financial resources should be budgeted for the planning process.

**Who is included in planning?** The answer to this question depends on the size and complexity of your district. For some districts it can be as simple as gathering feedback from administrators, staff, and supervisors; for other districts it may include community members, partners, legislators, or other stakeholders in your area. There are

many ways to gather input to help form your plan, including surveys, focus groups, telephone calls, or interviews.

**How important is it to hire a facilitator?** One thing is for sure, a professional planning facilitator will help your CD make the best use of your strategic planning process and time. A facilitator can help you design the best approach for your planning session, facilitate all aspects of gathering input, facilitate your meeting, keep everyone focused and on track, provide objectivity, ask the tough questions, and makes sure everyone is heard. When hiring a strategic planning facilitator, make sure they are well-versed and experienced in helping agencies/organizations/nonprofits craft strategic plans; this is an investment in your CD's future and will repay many times over.

### **What do all the planning terms mean?**

You can read 1,000 books and get 1,000 different planning processes, viewpoints and definitions of terms. There is no "one right way" to organize a plan or to use most terms. The commonality between term usage is a hierarchy of steps, moving your CD from the big-picture to more detailed action steps.

The following is "dictionary" of commonly used terms, but if you hire a facilitator be sure to discuss what terms they will use when developing your plan so everyone can be on the same page.

**Strategic Plan:** Term used to identify the three to five-year plan.

**Vision:** Long-term outcome an organization wants to achieve. Typically, this statement articulates the "why" your district exists. A common vision statement for conservation districts is something like, "Our vision is for our conservation district to be the leader in our area for soil, water, and plant conservation efforts."

**Mission:** 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. The CDB's mission statement is, "Empowering Montana's Conservation Districts to meet their mission through legal and operational support, financial assistance, and professional development."

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

**Strategic Vision:** A statement that 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.

**Priorities:** Key operational, funding, and programming areas which your conservation district must focus on to achieve the strategic vision outlined above.

**Strategies:** Statements that generally articulate how your CD plans to make progress in each designated Priority. Each Priority may have several strategy statements.

**Goals/Tasks:** Specific and measurable statements of action for each identified strategy.

**What are the steps involved in strategic planning?** Every process is a little different, but essentially, it goes like this:

1. **Analyze.** Analyze your CD's current state of operations, both internally within your district and externally in your area; a common approach for organizing this information is to use a S.W.O.T (strengths, weaknesses, opportunities, and threats). This step is important for two reasons. First, it provides multiple perspectives into what your CD is doing well, areas for improvement, and elements to consider in your planning. Second, it strengthens relations, supports understanding of your districts impact on conservation, and creates extended "buy-in" to your strategic plan.
2. **Set Direction.** Develop or review your vision statement, mission, and your ways of operating (values).
3. **Identify and craft plan.** Identify your CD's key priorities, strategies, and goals.

4. **Board approval.** Once the strategic plan is consolidated into a written document, your board will review and approve the plan.
5. **Develop and approve an annual operational work plan.** Put your plan into action by developing and using an annual operational work plan.
6. **Monitor your progress, at least quarterly.** Set up a system for your board to monitor and approve annual operational plan progress at least quarterly.
7. **Review and plan for the upcoming year.** Each year, dedicate time to review, discuss, and modify your strategic plan and talk through goals for the upcoming year.

#### **Are we done after the strategic plan is approved?**

Once you have completed your CD's strategic planning, you are done, right? The answer is no. Strategic planning is an ongoing, never-ending process. The reason that strategic plans are only good for 3-5 years is simply because things change. This is especially true in the CD world, where past natural resource issues may no longer be a priority and where new issues arise frequently. Another good reason to engage in strategic planning every several years is because of turnover at the CDs. New supervisors and employees can benefit immensely from the process itself, and this can result in greater engagement, performance, and effectiveness.

#### **What is an annual operations work plan and why is it important?**

Although your CD's strategic plan is the guiding framework for what your CD want to accomplish over the next several years, it does not consist of the nuts and bolts of how to get there. Instead, that is the purpose of an annual operational work plan. The annual operational work plan flows directly from the strategic plan. If work plan item is not related to the strategic plan, it should either be dismissed or a conversation about revising the strategic plan needs to take place.

This work plan is developed mostly by your administrator and staff, with the exception of Priorities and/or Strategies having to do with board development and engagement - these are developed by your board.

#### **How does the board monitor the plan?**

Because a plan is only as good as its implementation, the value of your districts time and resources spent in the process is equal only to your commitment to allocating resources for accomplishing your goals, monitoring progress, and holding your board, staff, and others accountable.

Annual operational work plans should be reviewed by responsible parties weekly to assess their progress. The board should review progress on the operational plan at least quarterly and receive urgent (good or bad) updates as they happen. The administrator's job is to continually monitor work in relationship to the plan and suggest modifications to the board as needed. A well-constructed plan is a compass, not an inflexible blueprint for action.

#### **How can a strategic plan be used externally?**

Strategic plans are internal documents that guide action; but they are also excellent external documents to promote the good work of your CD and solicit funds. Use them as such, include strategic plans on the CD's web site, hand them out to public officials and others interested in the cause, include your plan in fundraising information and grant proposals. Your strategic plan is your best tool for communicating your CD's work, its impact, and why it's work should be supported.

The old saying says, "If you don't know where you are going don't be surprised if you get there." The strategic planning saying says, "Know where you are going and you will be surprised how quickly you get there!"