



Our Land • Our Heritage • Our Future

To: All Conservation District Directors and Staff  
From: Trey Lam, Executive Director  
Date: November 1, 2018  
RE: FY2020-2024 Long Range Planning Process

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As a Conservation District Director or Staff Member can you answer the following questions:

1. What is the main purpose for the Conservation District's existence?
2. What is my role in helping the District meet their goals?
3. What is the District's most significant Natural Resource accomplishment in the past year?

Do your answers reflect the true picture of the work being done in your District? Are your answers consistent with the answers of other board members? If you are having trouble answering these questions perhaps it is time to re-evaluate.

It is time to begin preparing the Conservation District Long Range Plan for Fiscal Years 2020 – 2024. A draft of the plan must be submitted to the Commission for review on or before **May 1, 2019**. Additional information will be provided regarding format after the OACD Area meetings this fall.

The following is a description of a process you should use to assist you in developing the district's plan. I would encourage you to set a timeline for each of the phases so that you may complete your plan by the deadline.

The planning process should integrate a visioning process by district directors and staff as well as involvement of key stakeholders interested in conservation throughout the District. The plan should involve the following stages (defined in the next section).

### **BENEFITS: Why Build a Plan?**

- ✓ To stimulate forward thinking and clarify future direction.
- ✓ To create a structure for evaluating and improving performance.
- ✓ To solve major organizational problems.
- ✓ To survive – even flourish with less.

- ✓ To build relationships, particularly with external stakeholders and customers.
- ✓ To build team work and expertise.
- ✓ To influence rather than be influenced.
- ✓ To meet funders' requirements.
- ✓ To set and meet attainable goals.

- Phase One: Initial Planning Process
- Phase Two: Mission & Vision Statement
- Phase Three: Inventory of Renewable Natural Resources & Update of social, economic, and demographic data
- Phase Four: Needs Assessment, Resource Trends, and Organizational Assessment
- Phase Five: Long-Term Goals
- Phase Six: Performance Measures (Objectives)
- Phase Seven: Actions & Strategies
- Phase Eight: Public Comment

## **PROCESS:**

### **Phase One – Initial Planning Process**

The plan should not be completed in a vacuum. The district should seek input from all interested individuals, groups, entities, or agencies (local, state, or federal). The district may consider hosting a meeting for local “opinion leaders”. Local opinion leaders might include, but are not limited to, community leaders, county commissioners, school district board members, ministers, farm organization representatives, environmental organization representatives, or other agency personnel. Make a list and provide to the Commission who was invited to participate in the planning process.

Information can also be gathered from the local work group or locally-led and outreach meetings.

### **Phase Two - Review of the Mission & Vision Development**

A review of the districts mission: what it does, how it does it and for whom. The mission statement defines:

1. The underlying reason for existence.
2. The business we are in – what we tell people we do.

3. Represents the present.

The vision will answer the question: “For what significant contribution to the quality of life in Oklahoma does the \_\_\_\_\_ Conservation District want to be known for in the coming five (5) years?”

The vision defines:

1. The future we want to create.
2. What we want people to see when they look at the district, our programs, and activities 3 – 5 years from now.
3. Represents the future.

**Phase Three – *Inventory of renewable natural resources and Update of social, economic, and demographic data***

A thorough yet concise description of the renewable natural resources within the district should be included in the plan. This information, along with the social, economic, and demographic data should be relevant and current to the subject. When maps, charts, graphs, and tables are used they should be up-to-date and of good quality with the source of information referenced appropriately.

Contact Shellie Willoughby with the Information-Technology Division if you need assistance in generating district maps. Some of the maps that can be generated include (but are not limited to): roads, streams, upstream flood control sites, school districts, general census data, and general land forms.

**Phase Four – *Organizational and Needs assessments, resource trends, and current issues***

To prepare the organizational assessment, analyze the organization’s strengths (what’s working well?) and weaknesses (what’s working poorly?). Review resource trends and current issues to determine if they are:

- Likely to have impact on the district’s ability to carry out its mission;
- Ones to which the district must respond to in an orderly fashion through the use of human and financial resources;
- Ones over which the district may reasonably expect to exert some influence.

Assess the makeup of the Board. Determine if there are representation gaps and develop a plan for addressing those gaps. From the information gathered above you will then begin to determine what the needs of the district are and will become the basis for establishing your long-term goals.

### **Phase Five – Long Term Goals**

The district will develop the “declarative statements that define outcomes or results to be achieved at some point in the future”. Goals are definitions of conditions that are different from what currently exists. They are the general areas where things will be made to happen in order to direct the district toward a vision. Goal are ideas or concepts that will serve as benchmarks, or landmarks, from which the district may judge its work and its health.

### **Phase Six – Performance Measures (a.k.a. Objectives)**

Phase Five efforts will be directed toward developing quantifiable statements that describe the specific work that will be performed in an effort to meet the long term goals identified in the previous phase. Performance Measures, or objectives, are achievable – all things being equal – and shall be used to determine what progress the district is making toward meeting its goals. For example, % of acres / # of producers who apply conservation practices; % of clients reached through outreach activities; # of conservation plans; a measurable unit of public awareness of the conservation district.

### **Phase Seven – Actions & Strategies**

Actions and Strategies take into consideration the Goals and Performance Measures of the district, and prioritize them, through scheduling and budgeting processes, to meet the needs of the district. The “who” is going to do “what” by “when” and “how” type of statement is often the format used in writing strategies. The actions/strategies may change from one planning cycle to another and should have a direct tie to the Joint Plan of Operations.

### **Phase Eight – Public Comment**

Once you have received your draft plan back from the Commission review, the district must hold a public hearing on the plan draft. Refer to the “Public Meeting” handout on further instructions for conducting the public meeting.

## **PLAN REQUIREMENTS:**

1. Identify one (1) major project that will be accomplished within the FY2020 Joint Annual Plan. Spell out in detail the staff, director and partner involvement. Identify the customers to be reached. Develop a timeline and budget. Describe how this meets one of your long term goals.
2. Assess how district staff and directors spend time. Explain how this meets the identified goals of the district.
3. Develop a list of Top 10 Ways a Conservation District can help their customers (see example)
4. Develop a recruitment / succession plan for conservation district directors.

**SUMMARY:**

An investment of time and participation by the district directors and staff in this process is an integral part of its successful achievement. The district needs to be committed to planning for the fulfillment of the organization's fundamental purposes. This includes:

- Establishing and clarifying purpose;
- Deciding on goals, and strategies whose attainment will help fulfill purpose; and
- Determining the major means and pathways to pursuing goals and strategies.

We hope that you will make the plan a real working document. This plan will serve multiple purposes; one of which could be the development of a contract between OCC and the district for future funding of personnel and operating funds.

Enclosed is a suggested time frame for completing the long range plan. If you need assistance in plan development in specific areas, please call upon the appropriate Commission staff. Do not overlook local and state NRCS personnel as a valuable resource in developing your plan. If you have any questions concerning the long-range plan please contact me.

## **Recommended Time Frame for Completing the Long Range Plan Fiscal Years 2020 to 2024**

Dec. 2018 / Jan. 2019 – Gather & update natural resource inventory data. Develop needs assessment identifying top 5 natural resource concerns. Identify trends impacting natural resources and strategies to address trends.

Feb. / March 2019 – Develop/review/modify Mission & Vision. Develop core values.

April 2019 – Develop Natural Resource Priorities & Goals  
Develop Information – Education Priorities & Goals

May 1, 2019 – Final day to submit LRP draft to Commission for Review

May / June 2019 - Development of Joint Annual Plan (Actions & Strategies to meet goals of Long Range Plan)

May 15, 2019 – Receive comment on LRP back from Commission

May 15 – 30, 2019 – Incorporate recommendations from Commission Review of LRP

June 1 – 15, 2019 – Conduct Public Hearing on LRP

June 15 – 30, 2019 – Incorporate public comments into LRP

June 30, 2019 – Distribute LRP and submit final LRP to Commission

June 30, 2019 – Final day to submit Joint Annual Plan (annual plan) to Commission

July 1, 2019 – New LRP in place for 5 years

Long Range Plan encompass 5 fiscal years

FY 2020 – July 1, 2019 to June 30, 2020

FY 2021 – July 1, 2020 to June 30, 2021

FY 2022 – July 1, 2021 to June 30, 2022

FY 2023 – July 1, 2022 to June 30, 2023

FY 2024 – July 1, 2023 to June 30, 2024

## LONG RANGE PLAN PUBLIC MEETING PROCESS

### **Due Notice of Public Meeting**

Notice of public meeting must be printed as a legal notice in a newspaper of general circulation twice with an interval of seven days between each publication. Use Form OCC-2D, *Notice of Public Meeting for Review of Long Range Plan*. Each notice must run for one day. At least 20 days must elapse between the first publication and the date of the public hearing.

A copy of the newspaper proof of publication must be forwarded to the Commission.

### **Public Meeting Procedure**

- Call the meeting to order.
- Introduce district board members who are in attendance.
- Announce the purpose of the meeting.
- Ask those present if they would like to identify themselves. The district personnel must record the attendance of each person identified.
- Distribute copies of the district's LRP to those present.
- Give a concise summary of the LRP proposed by the district.
- Call for comments and questions. The district board and/or employees should answer the questions to the best of their knowledge.
- Request that all comments and questions introduced during the meeting be forwarded to the district office in written form or handed in at the conclusion of the meeting.
- Adjourn the meeting.

The directors should give careful consideration to all comments and suggestions received during the public meeting and decide if they should be adopted as part of the LRP. If there are no changes to be made in the LRP it is ready for printing. If there are changes to be made in the LRP a final copy with the changes incorporated should be sent to the Commission office.

**NOTICE OF PUBLIC MEETING  
FOR REVIEW OF LONG RANGE PLAN**

**TO ALL PERSONS INTERESTED:**

Notice is hereby given that a public meeting will be held by the \_\_\_\_\_  
Conservation District on the \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_  
beginning at \_\_\_\_\_ (am/pm) located at \_\_\_\_\_  
to review the Long Range Plan of said conservation district. All residents of the district are  
invited to attend.

\_\_\_\_\_  
Chairman, Board of Directors

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ATTEST: District Secretary