

How & Why Employee Session Notes, compiled
OACD State Meeting
02/27/2023 & 02/28/2023

Long Range Plan (LRP)

What: 5-year plan to lay out future projects and goals; provides a current picture of district plus the future plans for the district; due June 30 every 5 years

Tips:

1. Know resource concerns and how to address those
2. Ask for assistance from NRCS & partners; talk to them!
3. Get directors involved as much as possible
4. Start early/start now

Joint Plan of Operations (JPO)

What: Goals, objectives, “how-to” for projects for the next 18 months with input from directors and NRCS, works towards LRP goals; due June 30 each year

Tips:

1. Look at/review LRP; use as a starting point
2. Involve directors – start during board meeting, sit down, and go over things
3. Involve partners (NRCS, FSA, etc.)
4. Use locally led surveys to know resource concerns
5. Be realistic; attainable goals
6. Don't wait until the last minute
7. Remember to include outreach (get board input on that)
8. Brainstorm – not everything will be a winning idea, but that is okay!
9. Ask for help

Annual Report

What: Recap of accomplishments during the last FY; district' "brag book," excellent outreach and education tool; include a copy of the JPO w/ updates added; Due September 1 each year

Tips:

1. Include pictures, lots of pictures
2. Use as a newsletter/outreach tool
3. Include photo of each director + bios so people can learn who those people are
4. Highlight new directors & employees
5. Work on monthly; highlight achievements/goals each month
6. Have fun with it!
7. Example is available on OCC website (district forms page under "Checklists and General Information"

District Deliverables Assessment

What: Fondly known as the "report card," summary/assessment of district performance on required items; impacts district operating expense; Received from OCC in early July at the start of a new FY – part of the allocation report

Tips:

1. Use a checklist
2. Send everything in early
3. Check the "send-to" list on the OCC website
4. Make notes about submissions (sticky notes, emails, etc.)
5. Ask OCC if there is something on the assessment that doesn't reflect what you submitted; ask them to investigate, but be prepared to provide documentation
6. Keep notes of dates of items that don't have changing due dates
7. Read emails from OCC – mark due dates on calendar, in phone, etc.
8. Keep an excel spreadsheet of deadlines; track dates submitted as well as due dates

Allocations

What: State appropriated funds for district operations (salaries, operating expense, copier), cost-share allocations; district must track what has been expended; sent by OCC at the start of each FY or, in the case of cost-share, at the start of each PY

Tips:

1. Keep track of what you expend off your allocation using an allocation register
2. Ask OCC if a correction needs to be made (i.e., you show you have operating expense remaining, but OCC says you don't); be prepared to provide documentation
3. Make sure your board sees the entire allocation packet and review all the parts of the allocation
 - a. Deliverable assessment (report card), salaries, policies
4. Spend what you receive!

Director appointments & elections

What: Occurs every year; 1 appointment and 1 elected term expire on June 30 each year; OCC sends out instructions and timelines each year in February; first due date for each election cycle is publishing the Notice of Filing Period in April; election occurs the first Tuesday in June

Tips:

1. Start the process when you receive information
2. Use the first two weeks in April to publish your filing period notice in case of paper error
3. Use the OK Voter Portal to verify registrations
4. Prepare in advance
5. Take care of appointments early
6. Read the instructions from OCC and mark your calendar for due dates
7. Check newspapers to verify Notice of Filing Period is being published correctly