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To: All Conservation District Directors and Staff
From: Trey Lam, Executive Director
Date: November 1, 2023
RE: FY2025-2029 Long Range Plan & July 1, 2024 – September 30,
2025 Joint Plan of Operations Planning Process

It is time to begin preparing the Conservation District Long Range Plan (LRP) for Fiscal Years 2025 – 2029 and the accompanying first 18-month Joint Plan of Operations (JPO). A draft of the long range plan must be submitted to the Commission for review on or before **April 30, 2024**. A draft of the JPO must be submitted to the Commission for review on or before **June 14, 2024**.

The planning process cannot be completed in a vacuum. Particularly in the early stages, the process must include input from staff and directors, as well as partners and other key stakeholders. An investment of time and participation by district directors and staff is critical in this process and 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 objectives whose attainment will help fulfill the established purpose
- Determining the major means and pathways to pursuing goals and objectives

Time should be taken at each month's board meeting, beginning now through the completion of the planning process, to discuss each month's tasks and items for completion. The meeting minutes should reflect these discussions and record the actions taken to complete each item.

The following is a description of the process directors and staff should use to assist in developing the district's LRP and JPO. I encourage all district directors and staff to follow the suggested timeline included with this document and to meet the milestone dates so that your district will be able to complete both plans by the June 30, 2024 deadline.

Information was shared and training was conducted during the OACD Area meetings; all resources and information are also available on the OCC website.

Included as part of this memo are:

- The what, why, and how of the planning process
- A suggested monthly breakdown of tasks and items to complete, including due dates
- An overview of the plan requirements and tips for successful completion

Also included with this document are:

- The recommended timeline for on-time completion of both the LRP and JPO
- A copy of the combined Long Range Plan and Joint Plan of Operations template that is required to be used; the template is available electronically on the OCC website
- The information for the public meeting process and the public meeting notice language
- A list of terms and definitions used in the planning documents.

WHAT:

The Long Range Plan is the district's 5-year strategic plan that tells **what** the district is going to do to achieve future goals; it encompasses five fiscal years.

The Joint Plan of Operations is the district's 18-month action plan that tells **how** the district is going to work toward achieving established LRP goals.

Both an LRP and JPO will be completed this year. The plans should be a cohesive unit with the LRP providing a significant amount of content for the JPO.

WHY:

Each district is required under [Oklahoma Statute 27A](#) to complete a Long Range Plan every five years and a Joint Plan of Operation every year.

Aside from being required, planning:

- Defines the district's future state and provides the track for obtaining that state no matter what changes in directors or personnel may occur.
- Provides an opportunity to re-evaluate regularly what the district's purpose is, what needs are required to achieve those purposes, and to celebrate past accomplishments and identify how to build upon those successes.
- Stimulates forward thinking and clarifies future direction.
- Creates a structure for evaluating and improving performance.
- Solves major organizational problems.
- Plans for survival and even flourishing with less.
- Builds relationships, particularly with external stakeholders and customers

- Builds teamwork and expertise.
- Creates influence rather than being influenced.
- Meet funders' requirements.
- Sets and outlines achievement steps for attainable goals.

HOW:

A set of resources, including a template and suggested timeframe, have been provided for completing the Long Range Plan and Joint Plan of Operations. All resources are available on the OCC website. The template is required to be used. It is **vital** that the suggested timeframe be followed and the milestone dates be achieved. Failing to adhere to the timeframe will result in your district's plans not being completed on time. Below is more information for each month in the planning process.

November 2023 – Information Gathering

Long Range Plan and Joint Plan of Operations information has been distributed and is available on the OCC website. Staff and directors should be reviewing all the plan information and resources and be seeking input from interested parties. Information should be gathered from the locally led process, outreach meetings, and from staff and partner knowledge. Review the current LRP and consider what items have changed. Keep notes of everything that is discussed – this is the time to brainstorm and consider all suggestions.

Particularly, consider trends, issues, and concerns that:

- Are likely to have an impact on the district's ability to carry out its mission
- The district must respond to in an orderly fashion using human and financial resources
- The district may reasonably expect to be able to influence

December 2023 – Information Gathering Continues; Begin completing the plan: District Information

Staff and directors should continue focusing on gathering information for the trends, concerns, and strategies for the plan. Begin considering the priority and applicability of suggestions; this is the time to start identifying what is truly impactful to the mission of the district and determining if the district can have influence in that area. Additionally, the following sections of the plan should be completed this month:

- **Organization:** background summary/history of the district and its location
- **Function:** explain why the district exists
- **Who We Serve & Why:** identify who the district serves and why

- **Mission:** explain what the district does, how it does it, and for whom; should represent the present, give the underlying reason for existence
- **Vision:** define the future the district wants to create; what people will see when they look at the district in the future 5 or more years from now; represents the future

The district likely already has past responses and information for these items, but it is crucial to take time to review and assess if the statements are still accurate. It may be time to update and revise the mission and vision of the district to better reflect the current state and future ideal.

January 2024 – Continue completing the plan: Concerns & Impacts

Time to look at the information that was gathered in November and December and determine what items will be listed in the plan as current and future concerns and impacts. These impacts and concerns will likely be general in nature (i.e., a public, overarching viewpoint); bringing a district focus to priority concerns will occur next month. Complete the following sections of the plan this month:

- **Nature & Natural Resources:** provide a basic description of the land in the district and provide a list of renewable natural resources in the district; this section may also include socio-economic data and infrastructure
- **Locally-Led Process:** explain the district's implementation of the locally-led process and its use to determine priorities
- **Current Concerns and Impacts:** list in descending priority order the identified current concerns and impacts
- **Future Concerns and Impacts:** list in descending priority order the identified future concerns and impacts

February 2024 – Continue completing the plan: Priority Concerns

Look at the concerns and trends identified last month; of those listed, determine the Natural Resource Concerns and Education, Information, and Operation Concerns of greatest priority to the district. Concerns in these sections should be written to reflect the concern from the district's viewpoint – not necessarily the public viewpoint. Complete the following sections of the plan this month:

- **Priority Natural Resource (NR) Concerns:** list at least 5 NR concerns in descending order of priority
- **Priority Education, Information, & District Operation (EIO) Concerns:** list at least 5 EIO concerns in descending order of priority

March 2024 – Continue completing the plan: 5-Year Goals for Priority Natural Resource Concerns

Now that the district's priority Natural Resource Concerns have been identified and focused, it is time to develop the 5-year goal and the associated 1-year goals for each.

Each 5-year goal should outline what will be changed from the current condition and include a specific unit of measurement and an anticipated completion date. From the 5-year goal, 1-year goals should be developed. Essentially, each 1-year goal will be a stepping stone to achieving the 5-year goal.

Each 1-year goal should also identify what other parties and/or partners will be involved in its completion. The "Completed" column in the template should be left blank until the goal is reached, then the completion date should be entered.

April 2024 – Continue completing the plan: 5-Year Goals for Priority Education, Information, and District Operation Concerns; Plan draft due

Now that the district's priority Education, Information, and District Operation Concerns have been identified and focused, it is time to develop the 5-year goal and the associated 1-year goals for each.

Each 5-year goal should outline what will be changed from the current condition and include a specific unit of measurement and an anticipated completion date. From the 5-year goal, 1-year goals should be developed. Essentially, each 1-year goal will be a stepping stone to achieving the 5-year goal.

Each 1-year goal should also identify what other parties and/or partners will be involved in its completion. The "Completed" column in the template should be left blank until the goal is reached, then the completion date should be entered.

This is also the time to add any additional optional components to the LRP that the district feels are important. This could include a calendar of activities, staffing needs, budget needs, and/or a listing of key decision makers.

A complete draft of the LRP should be submitted to the Commission for initial review no later than April 30. The board of directors will be involved throughout the drafting process; the draft may be submitted to the Commission for review without formal board approval. However, the board must take formal action during a board meeting to approve the final version of the LRP.

District boards will also need to act this month during the April board meeting to establish a public meeting date and the publication location and dates of the public meeting notices.

May 2024 – Develop the Joint Plan of Operations (JPO)

Based on the information contained in the LRP, it is time to draft the JPO. The JPO is the working document that directs the day-to-day programs and activities of the district and NRCS field office. It provides the objectives and actions needed to meet the goals and address the priorities of the LRP. The JPO encompasses both the state and federal fiscal years; the JPO that will accompany this year's LRP will capture the 18 months from July 1, 2024 – September 30, 2025.

The LRP should serve as the backbone of the JPO – information in the LRP funnels down to the JPO and is expanded on with the development of objectives, funding, and timelines.

The objectives in the JPO should be achievable with some “stretch.” They must include a specific unit of measurement that serves to help determine the district's progress toward the objective and the goal.

This is also when the district will receive Commission feedback on the LRP draft. Revisions based on the feedback should be incorporated and the LRP should be well on its way to being a final document.

The notice of the public meeting for the LRP should be published this month as well. The publication requirements for the notices are that it must be published in one newspaper of general circulation in the district, twice with a seven-day break with at least 20 days elapsing from the time of the first publication to the date of the meeting. The notices must be published as legal ads.

June 2024 – Finalize the LRP & JPO; hold public meeting

This month should bring the end to the current planning process but will be busy with multiple items.

The district must conduct the public meeting this month. Once the public meeting is finished, any comments should be reviewed and, where warranted, changes incorporated into the LRP. The LRP should be finalized by June 30.

A complete draft of the JPO should be submitted to the Commission by June 14 for review. Revisions should be made to the JPO based on Commission feedback and the JPO finalized by June 30.

The final PDF versions of both the JPO and the LRP should be submitted to the Commission by close of business June 30.

The LRP should be distributed to interested parties and the proof of publication for the LRP meeting notices should be submitted to the Commission.

July 2024 – Rejoice!

The new LRP and JPO should be final and in place. Enjoy the feeling of having completed the planning process! Begin keeping notes on the JPO regarding progress on completing objectives.

PLAN REQUIREMENTS:

1. The Long Range Plan and the Joint Plan of Operations must utilize the provided template.
2. All required items in the templates must be completed.
3. The minimum required items for the Long Range Plan and the Joint Plan of Operations must be district-focused and district-driven. NRCS should provide information and assistance for the inclusion of any items required for their planning processes.
4. Use position titles, not specific names for responsible parties.
5. Due dates and deliverables as outlined in the recommended timeframe must be met.
6. The final LRP and JPO are due in PDF format to the Commission no later than June 30, 2024.

TIPS:

1. Start now and involve others; planning is not meant to be a solo project.
2. Remember – these plans are professional documents, make sure the plans put the district's best image forward. Do not just regurgitate information from past documents.
3. Refer to the guidance and information in this packet to stay on track and on task.
4. Do not skimp! The LRP should have enough potential to carry the district for 5 years unless some unprecedented and completely unforeseen event occurs. You should not feel like the JPO must be built from scratch each year.
5. Make sure the logo on the plans is for YOUR district.

The LRP and JPO plans should always be working documents and present a true picture of the work being done currently and the future work to be done in your district. They serve multiple purposes including being reviewed for consideration of operating expense and personnel needs.

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 let us know.