

STRATEGIC PLANNING FAQ

Strategic planning is a critical function and responsibility of a Conservation District's (CD) Board of Supervisors. A strategic plan outlines direction for action and is the foundation for accountability. A well-crafted strategic plan is flexible, dynamic, and engaging. This series of questions and answers introduces basic concepts and ideas related to planning and provides a foundation for your board to move forward in planning for your district.



WHY BE STRATEGIC?

Many organizations do not have a strategic plan, and many that do rarely look at it once it is finished. So why is it important for your CD to be strategic? CDs, like all organizations, face recurring and emerging natural resource issues, and determining and prioritizing your focus is essential, especially when capacity is limited.

Without a plan, your district may end up running in circles, getting bogged down in daily activities and distractions, and operating far below its potential. Beyond improving day-to-day effectiveness, a clear, succinct strategic plan is often critical for securing funding, allowing you to clearly articulate your goals and priorities to your constituents, stakeholders, and funders.

A written strategic plan that is translated into an annual operational work plan forms the bedrock for fulfilling your mission through effective, cohesive, and consistent operations, ensuring that everyone—supervisors and staff—is 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 by clarifying your mission and vision, setting clear priorities, and aligning people, resources, and decisions around shared goals.

STRATEGIC PLANNING FAQ



STRATEGIC PLANNING APPROACHES

There are numerous ways to craft a strategic plan. These range from a simple, do-it-yourself version to a more extensive, facilitated process that involves outside support. The approach you choose should match your district's capacity, culture, and needs. 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, high-priority process where board and staff, constituents, and other key partners intentionally set aside time to come together, discuss, brainstorm, and agree on the priorities and overall direction of your district.

Strategic planning focuses on longer-term direction, typically covering a three- to five-year period. Annual planning happens each year to review the strategic plan, make any needed adjustments, and set specific goals and action steps for the upcoming year.

WHO ORGANIZES PLANNING?

Ensuring that planning happens is a shared responsibility of your board and staff. While staff typically handle the logistics of scheduling and organizing planning sessions, the board is ultimately responsible for making sure the process occurs and for actively participating. Because planning is a priority activity, sufficient time should be allocated to move through it thoughtfully; strategic planning sessions often require a full day. Annual plan reviews, by contrast, can usually be completed in about an hour, often as part of a regular board meeting. In addition to time, financial resources should be intentionally budgeted to support an effective 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 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.

STRATEGIC PLANNING FAQ

HOW IMPORTANT IS IT TO HIRE A FACILITATOR?

A professional planning facilitator can help your CD get the greatest value from its strategic planning process and time. A skilled facilitator can work with you to design an effective approach, guide the collection of input, run the planning session, keep participants focused, offer objective perspective, ask difficult but necessary questions, and ensure all voices are heard. When selecting a facilitator, look for someone with strong experience helping agencies, organizations, and nonprofits develop strategic plans; this is an investment in your CD's future that can yield significant long-term returns.

SPEAKING THE SAME PLANNING LANGUAGE

You could read 1,000 books and encounter 1,000 different planning processes, perspectives, and definitions. There is no single "right" way to structure a plan or use most planning terms. What most approaches have in common is a basic hierarchy that moves your CD from big-picture direction to concrete action steps.

Commonly used planning terms follow. If you hire a facilitator, be sure to clarify what terms they will use and how, so everyone shares a common understanding.

Strategic Plan: A term used to describe an organization's medium- to long-term plan, typically covering three to five years; sometimes also called a long-range plan.

Strategic Vision: A statement that describes where your conservation district wants to be by the end of the strategic planning period; it serves as the destination or endpoint for your plan.

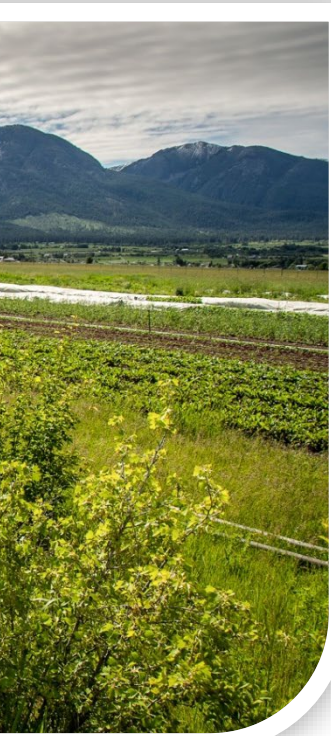
Vision: A concise description of the long-term future state your CD wants to create or contribute to. It paints a picture of what success looks like for your district and the community it serves. For example, a conservation district vision might be: "Our vision is for our conservation district to be the recognized leader in our area for soil, water, and plant conservation efforts."

Mission: A short, clear statement that explains **what** your organization does and **how** it carries out its work. It is used internally to guide decisions and externally to communicate your purpose.

For example, the CD Bureau's mission statement is: "Empowering Montana's Conservation Districts to meet their mission through financial and technical support."



STRATEGIC PLANNING FAQ



Values: The shared beliefs, norms, and behaviors that your conservation district embraces as guiding principles and standards for how it operates.

Priorities: The key operational, funding, and program areas your conservation district will focus on to move toward and achieve its strategic vision.

Strategies: Broad approaches that describe how your CD will make progress on each priority area. Each priority is supported by one or more strategy statements that outline the general path for moving from intent to action.

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

Annual Workplan: An annual operations plan is a one-year, detailed roadmap that translates your strategic plan into specific work for the coming year. It outlines your goals, key activities, timelines, responsibilities, and resources so board and staff know exactly what needs to happen operationally to advance your longer-term strategic priorities.

WHAT ARE THE STEPS INVOLVED IN STRATEGIC PLANNING?

While every organization's planning process varies, it generally follows these steps:

- 1. Analyze.** Analyze your CD's current operations, both internally within the district and externally in your service area; a common way to organize this information is through a S.W.O.T. (strengths, weaknesses, opportunities, and threats) analysis. This step is important for two reasons. First, it offers multiple perspectives on what your CD is doing well, where it can improve, and what factors should be considered in planning. Second, it strengthens relationships, deepens understanding of your district's conservation impact, and builds broader buy-in for your strategic plan.

STRATEGIC PLANNING FAQ

- 2. Set Direction.** *Develop or revisit your vision, mission, and operating values to clearly define where you are headed and how you will conduct your work.*
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- 4. Identify and craft the plan.** Identify your CD's key priorities, strategies, and goals.
- 5. Board approval.** After the strategic plan is compiled into a written document, your board formally discusses and approves it at a regular meeting.
- 6. Develop and approve an annual operational work plan.** Put your plan into action by developing and using an annual operational work plan.
- 7. Monitor your progress, at least quarterly.** Set up a system for your board to monitor and approve annual operational plan progress at least quarterly.
- 8. Review and plan for the upcoming year.** Each year, dedicate time to review, discuss, and modify your strategic plan and identify goals for the upcoming year.

ARE WE DONE AFTER THE STRATEGIC PLAN IS APPROVED?

No. Approving the strategic plan marks the beginning of an ongoing process, not the end. Strategic planning must remain continuous because circumstances, priorities, and resources change over time. This is especially true in the CD world, where natural resource issues shift—some become less urgent while new challenges regularly emerge. Ongoing strategic planning every few years is also important due to turnover in CDs; new supervisors and employees gain valuable understanding and ownership by participating in the process, which in turn strengthens engagement, performance, and overall effectiveness.

WHAT IS AN ANNUAL OPERATIONS PLAN AND WHY IS IT IMPORTANT?

As previously noted, approving the strategic plan is just the beginning of the work. Although your CD's strategic plan provides the overarching framework for what you want to accomplish over the next several years, it does not spell out the day-to-day details of how to get there. That is the role of the annual operational work plan.



STRATEGIC PLANNING FAQ

The annual operational work plan flows directly from the strategic plan, translating broad priorities into specific activities, timelines, and responsibilities. If a work plan item does not clearly connect to the strategic plan, it should either be dropped or prompt a discussion about whether the strategic plan itself needs to be updated. A well-crafted operational plan also supports performance evaluations and accountability by clarifying who is responsible for what.

In most CDs, staff take the lead in developing the work plan, while the board is responsible for setting and approving the overarching priorities and strategies that guide it.

HOW DOES THE BOARD MONITOR THE PLAN?

Because a strategic plan is only as strong as its implementation, the value of the time and resources your district invests in planning depends on your commitment to allocating resources to carry out your goals, monitoring progress, and holding your board, staff, and partners accountable.

Annual operational work plans should be reviewed regularly by the staff and other responsible parties to assess progress and adjust as needed. The board should review progress on the operational plan at least quarterly and receive timely updates when major issues or significant successes arise. The administrator's role is to continually monitor work against the plan and recommend modifications to the board when circumstances change. A well-constructed plan functions as a compass, providing direction while still allowing flexibility, rather than as a rigid blueprint for action.

HOW CAN A STRATEGIC PLAN BE USED EXTERNALLY?

Strategic plans are internal tools that guide action, but they are also powerful external documents for showcasing your CD's work and attracting support. You can share your plan on your CD's website, provide copies to public officials and partners, and include it in fundraising materials and grant proposals to demonstrate clear direction and credibility.

Your strategic plan is one of your best tools for communicating what your CD does, the impact it has, and why its work deserves support. As the old saying goes, "If you don't know where you are going, don't be surprised if you get there." A strategic planning twist on this might be, "When you know where you are going, you may be surprised how quickly—and effectively—you get there."



STRATEGIC PLANNING FAQ

SUMMARY

Strategic planning helps your conservation district clarify its long-term direction, translate that direction into practical annual work plans, and stay focused amid changing conditions and priorities. A good plan defines vision, mission, values, priorities, and strategies, and then connects them to concrete goals, activities, and accountability through an annual operational work plan. Planning is an ongoing, shared responsibility of the board and staff, supported by sufficient time, resources, and periodic review and revision. When implemented well, the strategic plan becomes both an internal compass for decision-making and an external tool for communicating your impact and attracting funding and partners.

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