Blueprint for Locally-Led Conservation

A Strategy for District Success and Sustainability

JULY 2016
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EXECUTIVE SUMMARY

America’s conservation districts and their partners have a laudable history of successes since the soil conservation movement was created in the 1930s. But the job of conservation on private lands is ongoing and ever-changing.

The challenges to do more, do it faster and prove results come from all directions. Among them are the public’s demand for better results from “their money”; minimizing the effects of climate change and severe weather episodes; the need for increased food production for a rapidly-expanding world population; piercing scrutiny from regulators and environmental litigants; compliance with federal and state laws and regulations; the need for farmers, ranchers, and foresters to make a living; and more partners vying for funding. Within this maze, in many locales, other groups are lobbying to replace conservation districts as the “go-to” local entity for getting work done on the ground.

With the changing and increased resource needs on the landscape due to these and a variety of issues, conservation districts must be able to adapt to the needs of their landowners, managers and communities. Many districts are already doing this, while others are struggling through this evolution. NACD and districts can learn from districts that have already adapted and are thriving. People often resist or even fear change, but as conservationists, we’ve learned from the natural world that nothing remains the same. Our districts, and district programs, must evolve to meet current resource needs.

The NACD District Outlook Task Force was given the responsibility of looking into the future and making recommendations to help conservation districts evaluate changing conditions, trends and resource needs and to find new ways to better serve their community and private landowners. Membership on the District Outlook Task Force consisted of 21 district officials and employees, agency partners and business partner advisors who have proven to be leaders in locally led efforts around the nation.

Rather than attempt to predict the future, the Task Force considered the commonalities and differences of districts. They recognized that well-functioning districts will successfully adapt and even create changes for a better future. Therefore, the Task Force focused on the planning, structure and governance of successful districts and how they implemented communications and outreach, funding and training programs. The Task Force clearly identified that successful districts shared such common characteristics as a well-trained, talented, diverse and passionate district officials and staff that understand their roles and responsibilities; are effective in utilizing their skills and managing their time; are quick to adapt to changes in technology; show diversity in programs and opportunities for locally led conservation that far exceeds Farm Bill programs; and actively seek new partners while continuing with current partnerships to carry out their mission.

We are pleased to offer this Blueprint for Conservation as a strategy for fostering district success and sustainability. This report includes the Task Force assumptions on current conditions and challenges faced by conservation districts and offers recommendations for conservation districts, NACD, state associations and state conservation agencies on how to address communications and public outreach, funding, training, improving structure and governance of districts and developing and implementing a business plan to achieve strategic goals and become sustainable.

This document is crafted to be a guidance and reference tool. While it captures many of the challenges, opportunities and risks facing local conservation districts, it is not prescriptive. Rather, it is intended to provide some of the building blocks needed to design a conservation delivery system of the future. The components in this document are offered to guide conservation district leadership in the development of systems that recognize and honor local, state and region variations, while providing consistent programs and services. We offer a “smorgasbord” of possibilities. Choose the options that fit your situation. We ask you to carefully review this document. It has been painstakingly crafted in an effort to fuel the engine of change. Now is the time to be bold!

Note:
The term “district” has been used to represent conservation district, soil conservation district, soil and water conservation district, natural resource district, resource conservation district, tribal district, etc. in this report.
The term “district official” has been used to represent district supervisor, district director, district board member, etc. in this document.
The term “state” has been used to represent state, territory, insular area and tribal associations and conservation agencies in this document.
ASSUMPTIONS

District Operations

- Communication technology, scientific technology and managerial technology require a specific set of skills that need to be addressed in training programs provided.
- Communities are more complex today with populations comprised of urban, rural, gated communities, seasonal visitors and agricultural operations. The needs of farmers have long been the focus for conservation districts. With increased conservation awareness, all citizens recognize the importance of conserving our natural resources, especially water, and are looking for guidance in ways they can contribute as individuals. Training should provide insight into these changing demographics.
- Programs need to be consistently reviewed and updated to meet new challenges and opportunities.
- Following the Great Recession of 2007, fiscal stress, changing public expectations and shifting responsibilities for services have prompted some local and state governments, including conservation districts, to consider restructuring service delivery and outsourcing work.
- There is an increasing need for investment in technology.
- With increased national security issues, scrutiny of public and private data information, and changes related to General Services Administration (GSA) and USDA leasing process, the ability for conservation districts and NRCS to negotiate administrative operations and exchange of information at the local level is more complex.
- With continued emphasis on water quality and quantity, some local, state and federal strategies are leaning toward delivering conservation programs on a watershed or regional basis. These larger scale projects benefit from the involvement of functional specialists and enhanced technology. This type of work often transcends the geographical area, scope, and abilities of individual conservation districts.
- There is a strong correlation between successful conservation districts and effective state conservation agencies/commissions support to address training, technology, standards, operational guidance, funding, program support, accountability and statutory changes.

Funding

- Federal, state and district funding for conservation technical assistance and conservation programs is unstable and fluctuates.
- Some non-traditional conservation and environmental organizations are seeking this same piece of the funding pie.
- Some of these entities are “friendly” and can play an important and effective role in helping districts maintain funding and relevance, however others are competing against districts and are a threat to conservation district fund sources.
- Funders (at all levels) are requiring more accountability and transparency of fund requests.
- There are changes in the policies and procedures by funders.
- Government policies affecting agriculture may dictate funding levels and mandated workload and/or opportunities.
- There are changing priorities of state and federal legislators.

Conservation Districts/District Officials

- There is a paralysis of some districts resulting from “fear”; making themselves vulnerable; starting controversy; being criticized by what is said; being “put on the hot seat”; potentially “insulting” their friends and customers; being misunderstood; being too visible; disappointing supporters and allies; looking bad.
- Inadequacy and variable reliability of district operations often leads to the sporadic delivery of conservation across the county.
- There is a variability in operations and effectiveness of conservation districts.
- Districts have and will continue to vary in structure, mission, goals, capabilities, and resources.
- There are more urban legislators who may not know about conservation districts and/or may not be willing to support districts.
- Urban populations without direct ties to agriculture may not be willing to support districts.
- In the beginning, district officials were predominately focused on agriculture and the impact of farming on the conservation of soil. Today, in some areas of our nation, the emphasis is on water quantity and quality. Training should recognize and address this change.
Training programs should change to meet their needs of new, non-traditional board members and assist them in their focus to continue providing leadership in conservation efforts.

New Generation X and Millennials are motivated by their desire to do meaningful work that enhances the lives of all citizens, while prior generations are similarly motivated, their avenues for achieving their goals have changed drastically.

With larger numbers of conservation district and associated public sector employees eligible for retirement in the next five to ten years, a wealth of institutional knowledge including the intricacies of key client relationships, will be lost unless conservation districts establish a process for the transfer of knowledge.

**Communications**

- We are experiencing a rapid escalation of social media as the primary way certain groups receive and transmit communication.
- There is an escalating use of short, brief, concise, “to-the-point” messages.
- There is a trend in the use of more general and common language (getting away from highly technical languages understood only by peer groups).
- There is a narrower definition of what the public and mass media consider “news.”
- The public and media have a priority in getting on top of “issues” quickly.
- There is an increased emphasis on non-point pollution and water quality monitoring and modeling.
COMMUNICATIONS

Many residents and landowners within conservation districts, including local and state government officials, have little or no agricultural background or interests, limited understanding of natural resource issues, and no understanding of the locally-led conservation programs led and implemented by conservation districts. The nation’s conservation districts can’t afford to be a “best kept secret” any longer.

The survival of conservation districts depends on having a clear identity as a local entity as well as being part of a state and national conservation network and partnership. Conservation districts need to ensure that public officials and community groups recognize them as the “go to” organization leader for working with natural resource conservation issues. Together, we are stronger as part of a local/state/federal partnership network than as individual conservation districts.

The manner in which the public receives information has evolved and requires timely and concise communications. No longer is a quarterly newsletter or occasional article in the newspaper adequate. Successful conservation districts have harnessed the power of email, the Internet and social media to spread the word about their activities and create dialogue with customers. This requires a coordinated effort and planning by the district board and staff.

District officials and staff may fear leaping into developing and implementing a broad communications plan strategy. The planning effort will require training and assistance to achieve a cohesive communications connection, particularly with non-traditional customers. Conservation districts are encouraged to look to outside sources in the community for training and input. Every effort should be part of an overall communications plan which links to community needs, values and concerns.

Districts need to be aware of state and federal laws governing the public’s right to access government data, their obligation to produce such data and data privacy laws. Understanding the various data practices and laws can be complex when state and federal laws conflict. Conservation districts will have to be conscientious of data practice laws while communicating the public value of their efforts, including conservation results and outcomes.

NACD, state associations and state conservation agencies have a vested interest in the communications effort of conservation districts and should be supportive for self-preservation. It is important to note that conservation districts are where the work ultimately gets done. All national and state conservation efforts are useless unless communication and awareness happens at the local level. Members of Congress and state legislatures will only become interested in conservation programs when constituents at the local level express support for locally led conservation through the nation’s 3000 conservation districts.

Recommendations for Districts

Conservation districts need to develop and implement a communications plan that clearly articulates their identity and message consistently across all media while maximizing contacts for the district, its partners, the public and government leaders. A successful communication plan includes these characteristics:

- Clearly identifies activities and projects, goals, budget, time frames and district board and staff responsibilities are clearly identified in the plan
  1. Board members are invested in the communications plan and participate as well as staff.
  2. District officials and staff are trained with all types of media.
  3. Every communications activity reinforces the “District Brand”, the district’s identity and includes your logo as well as the logo of NACD in joint communication with other partners.

- Defines audiences and message
  1. Recognizes the many audiences that the district addresses.
  2. Focuses on building relationships with the audience groups.
  3. Addresses the needs of your audience and provides for a means of collaborating with them in terms they understand.
  4. Listening and responding to your audience is a vital part of a communications plan.
  5. The plan clearly shows how your conservation district is relevant to your citizens in addressing natural resource concerns.
Types of Media
1. Successful, progressive conservation districts utilize all types of media, not just newsletters, newspaper and broadcast media, but also websites, social media, and opportunities through conservation partnership communications.
2. The plan includes interactive media that requires two way communications which are important in building relationships.
3. Successful conservation districts know who will answer questions in a timely fashion and design communications to produce reactions.

Evaluation
1. The communications plan explains how effectiveness will be determined.
2. Conservation districts should review their communication plan at least quarterly and evaluate what is working and what could be more effective and make changes accordingly.

Recommendations for State Associations

Modify NACD Model Communications Template (Perhaps in partnership with state conservation agency)
1. Further refine the NACD Model Communications Template to fit state and local statutes or regulations, as necessary.
2. Develop and provide training for district officials and staff on developing and implementing a Communications and Outreach Plan.

Recommendations for NACD

Model Communications Template
1. A model communications template should be developed.
2. Seek cooperative agreement or grant funding to develop a model communications template; make it available to districts in a user friendly format and readily accessible; and monitor and assess its effectiveness.
3. Assess how well the redesigned logo has, or has not, been accepted.
4. Determine if there needs to be a relaunch or new branding effort that will encourage conservation districts to put the NACD logo next to their district logo to maintain the national identity.
TRAINING

Conservation district supervisors are local public officials that provide leadership and direction to conservation districts within their state. They serve without significant compensation and are either elected or appointed to their position depending on the state's enabling legislation. District boards are comprised of members with diverse backgrounds, education, employment and perspectives. Districts should no longer represent primarily rural communities. They should have broad membership representing rural, suburban and urban conservation interests.

Conservation districts employ an array of district employees to deliver locally-led conservation services. District managers, administrative, educational and technical staff implement state and local soil and water conservation programs and services, conservation education activities and public outreach. District staff also have varied backgrounds and education. To ensure and maintain uniformity and a level of competency in the conservation delivery system, it is important that all employees receive administrative, public outreach, legislative and technical training.

Continuously evolving needs, challenges of our national resource conservation, public scrutiny, technology trends and increased competition for funding have raised the stature, public exposure and demands on conservation districts. To meet these challenges and to provide professional, uniform and transparent services to the public, the training of district supervisors and staff by state associations and the National Association of Conservation Districts has become a fundamental necessity.

Recommendations for Districts

Every conservation district needs to develop and implement a training plan. A successful training plan includes these characteristics:

- Utilizes existing district official training program checklist provided by NACD, state conservation agency, state association and National Conservation District Employees Association to address:
  1. Provides ongoing, flexible training for district supervisors with a variety of options and provides for review and evaluation
  2. Understanding of state’s enabling legislation
  3. Understanding of the history of conservation districts
  4. Understanding of roles, responsibilities and structure of federal, state and local conservation partnerships
  5. Legal and fiscal requirements and responsibilities of district supervisors and staff
  6. Open public meeting and state practices
  7. Parliamentary procedures
  8. Leading a public meeting
  9. Ethics and conflicts of interest
  10. Understanding financial statements, budgets, audit and reporting
  11. Fundraising
  12. State/conservation district policies and procedures
  13. Developing annual, long range and strategic plans
  14. Understanding of federal, state and district conservation programs and services
  15. Management of staff
  16. Leadership training
  17. Communications and public outreach
  18. Working with local media
  19. Establishing and maintaining relationships with lawmakers

- Utilizes existing district staff training programs provided by state conservation agencies, state associations and National Conservation District Employees Association to address:
  1. Provides ongoing training of district staff to address state’s enabling legislation
  2. History of conservation districts
  3. Understanding of roles, responsibilities and structure of federal, state and local conservation partnerships
  4. Legal and fiscal requirements and responsibilities of district supervisors and staff
  5. Fundraising
  6. Grant writing and other fundraising activities
7. Open public meeting and state practices
8. Parliamentary procedures
9. Leading a public meeting
10. Ethics and conflicts of interest
11. Understanding financial statements, budgets, audit and reporting
12. State/conservation district policies and procedures
13. Developing annual, long range and strategic plans
14. Staff roles and responsibilities
15. Required technical training
16. Conservation education programs, techniques and responsibilities
17. Working with local media
18. Establishing and maintaining relationships with lawmakers
19. Provides for review and evaluation to ensure effectiveness

Recommendations for State Associations

To enhance the conservation delivery system, state associations should develop and maintain, in conjunction with their federal and state partners, a revised, long-term strategy to conduct conservation district governance and leadership training.

- **The strategy may:**
  1. Recognize and meet the training needs of the conservation districts in their state.
  2. Provide leadership in working with conservation partners to provide training programs for district supervisors and staff.
  3. Utilize NASCA’s website as a training and certification resource.
  5. Partner with other local, state and regional entities for training.
  6. Provide training opportunities during regional and state meetings.
  7. Provide training on structure, benefits and roles and responsibilities of federal and state conservation partnerships.
  8. Provide educational opportunities explaining changes and updates in conservation legislation, the Farm Bill, USDA-NRCS, etc.
  9. Provide access to leadership training opportunities outside the local conservation district and state association.
  10. Acknowledge district supervisor training with certificates and public recognition.
  11. Encourage funding for training through the legislature.
  12. Provide training in communications and working with the media.
  13. Provide training in establishing and maintaining relationships with legislators.
  14. Encourage district supervisors and district staff to participate in training opportunities at NACD annual meeting.

Recommendations for NACD

- **Commit to a renewed emphasis on District Official and Staff Training.**
  1. Update NACD district official training and develop staff training templates and resources on website.
  2. Update current training guides and resources.
  3. Provide training materials in written and digital formats.
  4. Continue to promote district official training program recognition.

- **Create a National Leadership Academy.**
  1. Provide leadership training academy for NACD Board Members and state association leaders.
  2. Ensure that leadership training offers curriculum on topics including personal, civic, visionary, and organizational leadership.
STRUCTURE AND GOVERNANCE

A healthy conservation district structure requires a balanced approach for addressing district’s funding, governance and authorities outlined in their state’s statutes. District leadership should never be delegated. Each conservation district must assume the lead role in resource assessments and conservation delivery within the district while regularly engaging additional partners in the locally-led process to identify, discuss and assess resource needs of the district. It is essential that districts use their resource assessments to make decisions on the use of limited personnel, program and financial resources.

Some districts do not form or lead local workgroups, and others utilize them only to develop recommendations for Farm Bill programs. Developing and utilizing workgroups regularly provides transparency to the public and brings more partners to the table, thus securing more resources for conservation delivery, including local, state and federal programs. Districts should identify district essential services and capabilities that determine the readiness of districts to plan, identify, and successfully carryout a local district conservation program as defined by local district officials.

Accountability, transparency, ethics and efficiency are in greater demand today than ever before. Districts are well advised to develop programs that allow them to demonstrate their success in each of these categories. For consistency’s sake, this should be done on an area or statewide level. It may prove beneficial to enlist the services of the state conservation agency to create programs specifically identified for district implementation and work with state legislative bodies to incorporate these as part of state statutes and/or appropriations.

New technologies are needed for conservation delivery. Districts need to make ongoing technology investments to assist with how they communicate with the public, service landowners, implement programs, design and install conservation practices, obtain water quality and natural resource data, maintain public records, and more.

Partnering conservation agencies are investing in technology to assist landowners. For example, in 2015, NRCS launched Conservation Client Gateway, a secure online portal that lets individual landowners and land managers track their payments, request assistance, sign documents and request conservation assistance anytime, anywhere. Landowners may expect the same type of technology from districts to streamline services for non-federal conservation programs.

Major demographic shifts include not only the retirement of baby boomers, but the increased turnover of highly skilled midcareer employees and the increased difficulties of recruiting, developing, and retaining younger workers. These demographic shifts, combined with the explosion of technical, scientific, and managerial knowledge in the workplace, indicates that when people leave conservation districts and partnering agencies, they are taking with them knowledge that's critical to the future of conservation district and NRCS field offices. Districts need specialized and trained technical staff. Many districts have limited resources, which make hiring staff and securing resources to implement practices difficult.

As a nonprofit organization, NACD and state associations have political strengths and are in the position to perform advocacy work that government entities cannot. It is critical these associations work on behalf of the core conservation partnership, especially the districts they represent. Like NACD, state associations must have a clear mission and not compromise themselves by entering into situations where they compete with districts. Just as federal agencies, state agencies, and districts each engage in planning exercises to guide their activities, the state association should annually initiate a planning process to guide the joint conservation delivery activities of each of the partners. This planning process identifies each organization’s expectations and establishes benchmarks for conservation delivery. It may even create a basis upon which the partnership can evaluate its annual accomplishments. One example of assessing the partnership includes the 2015 Memorandum of Understanding with the National Conservation Partnership (NASCA, NRCS, NACD, NCDEA, and NARC&DC).

Districts are involved in the legislative process both at the local, state and national levels. To maintain a national voice for conservation, NACD and state associations must provide a leadership role on legislative and public policy issues. It is imperative that NACD provide a national leadership role and that State Associations maintain an annual policy development process initiated by their members to deliver the conservation district message to their respective state legislators, state and federal administrations, and Congress.

Conservation districts operate more effectively when leaders at all levels of the partnership set clear measurable goals aligned to achieving better outcomes. The core of any conservation district also requires a strong local, state, federal intergovernmental partnership.
Recommendations for Districts

District Board Leadership must review their essential services and conduct a self-assessment to determine overall performance. A district may request their state conservation agency, Extension Service and/or other entity to assist with the assessment. Such an assessment should include these areas:

**District Board Leadership**

- Analyze the broad landscape and policy changes that impact water quality.
- Ensure greater specificity and accountability and tie to funding strategies.
- Track program and environmental progress on a regular basis.
- Adapt to new technology and scientific findings.
- Maximize opportunities for stakeholder involvement.
- Reexamine roles and responsibilities of partners periodically.

**District Capacity and Essential Services**

Districts must review their essential services and conduct a self-assessment to determine overall performance. A district may request their state conservation agency/commission, Extension Service and/or other entity to conduct an assessment on the district’s behalf.

Services that are essential to operate a local conservation district program include, but are not limited to:

- **Administration**
  1. Annual work plan
  2. Fiscal accountability
  3. Reporting
  4. Professional development
  5. Management of board and staff
- **Technical**
  1. Skill and ability to perform resource assessments
  2. Survey
  3. Design and construction of conservation practice
  4. Oversight
- **Governance**
  1. Strategic planning
  2. Establishing board policy
  3. Accountability
- **Information, Education and Outreach**
  1. Landowner awareness of district programs and conservation program opportunities to protect and enhance soil and water resources
  2. Media relations
  3. Community relations
- **Regulatory**
  1. Facilitate process for impacted landowner
  2. Regulatory requirements
- **Projects/Programs**
  1. Implementation of local, state and federal programs as required and/or outlined as a district priority
- **Monitoring/Data Collection**
  1. Baseline understanding of resource conditions or trends
- **Technology**
  1. Technology infrastructure that allows for mobile workstations
  2. GIS capability of both software and expertise
  3. Technology to enhance district operations
Workforce Succession Planning and Transfer of Knowledge

- District boards need to make a concerted effort to capture and impart the institutional knowledge within its ranks before board and staff transition.
- District board should provide opportunities for less experienced staff members to be paired up with a veteran staff, staff from other districts, or appropriate partners, to transfer knowledge and provide hands-on experience in working with programs and servicing the public.
- District should provide opportunities for new board members to receive training and support by veteran board members, board members from other districts, or appropriate partners to transfer knowledge, and provide hands-on experience in working with programs and servicing the public.
- Succession strategies for districts include transitional training, job shadowing, exit interviews, mentoring programs and internships.

District Shared Services and Consolidation of Services

- Districts should consider shared services and/or consolidation of services with neighboring districts and partners to invest in local capacity to efficiently accelerate conservation projects and practices. Shared services could be considered for various district operations including financial, staffing, equipment, technology and operational functions of a district. Shared district services could be implemented through various agreements that may require statutory changes.
- Districts should consider examples of sharing services such as districts establishing joint power agreements, MOU agreements, cooperative agreements and contracts.
- Districts should review their statutes to understand the voluntary consolidation process for districts to enhance operations.

District Board Qualifications

- The district board should be composed of highly qualified officials from diverse backgrounds and skills; reflect the changing population and demographics of the district and have the required expertise and skills to provide better district governance.
- The district should identify strengths of current board members and set priorities for qualities and characteristics new board members should possess.
- District should consider the following factors for reviewing board performance:
  1. Community Connections (civic, legislative, landowners, nonprofits, etc.)
  2. Leadership (visionary, commitment to mission, public service, willingness to serve etc.)
  3. Expertise (public relations, public service, strategic planning, management, technology etc.)

Recommendations for State Associations

- State associations should work with state conservation agencies to develop and enhance measures that assist districts with creating, monitoring and reporting results for outcomes related to their programs and operations.
- District statutes should be reviewed on a regular basis and any changes to the statute that reflects evolving conservation delivery needs and governance should be supported.
- Ensure any legislative changes be done in cooperation with the existing districts. This includes supporting review and/or change of statute to streamline voluntary consolidation of districts.

Recommendations for NACD

NACD needs to continue its focus on providing leadership and resources to assist districts and maintain a strong national conservation presence, including:

- Federal Obligations with Conservation District Approval
  1. Make a concerted effort to see that federal funds are obligated only with local acknowledgement and approval of conservation districts.
- **Association Essential Services and Assessment**
  1. Identify state association essential services to improve state performance.
  2. Develop a state association self-assessment tool that reviews operation, goals and objectives as defined by state association boards.

- **National Partnership Assessment**
  1. Ensure the conservation partnership planning process occurs at least once every two years, and the end product improves cooperation between partners and the delivery of conservation services.

- **Partnerships with National Associations Representing Local Government**
  1. Work with national associations that represent similar local government entities and conservation interests. Many of the district structure issues are relevant to local governments including counties, cities and townships. It is beneficial to NACD to work and learn from other national organizations with similar governance issues including the National Association of Counties, since county government in many states is a source of operational funding for districts.
  2. Provide leadership in pursuing options for districts to utilize shared technical and professional services, equipment, office space, training, etc.
BUSINESS PLAN

A business plan is an essential roadmap for a district to be successful. This living document generally projects 3-5 years ahead and outlines the route a district intends to take to reach its goals. A well thought out plan also helps districts to take a step-back and think objectively about the key elements of your operation, programs and services.

The business planning process involves researching the district’s target market, identifying resources needed to provide services, devising an implementation program to create a deliberate, informed plan for growth, impact, and sustainability based on systematic and objective analyses and decisions. The plan is the blueprint to guide organizational or program development and can serve as an important tool to attract interest and investment.

The goal of a business planning effort is to define the direction, programs, and market position based on needs, constituents, and competition. It creates the most appropriate business model based on fundraising or earned income potential/constraints and will often define feasibility or challenges associated with growth and expansion. The business plan also designs the organization to achieve strategic goals and to be sustainable.

A business planning process typically includes these components:

Analysis – Market, Feasibility, Organizational

The analysis defines the external opportunities in the “industry” or sub-sector, the potential markets, the competition, and the district’s capacity. The analysis is typically completed through phone or in-person interviews and a review of relevant materials, reports, and documents. The analysis attempts to discern where market needs and interests overlap with the district’s assets, competencies or products.

The analysis provides a profile of potential markets, an assessment of the “institutional landscape” and completion, and the opportunities or obstacles for success. It becomes the context for decision making. It may address feasibility and costs/benefits of alternative directions, within the context of creating a sustainable and impactful district.

Strategic Decisions

Based on the analysis and potential opportunities, leadership needs to make decisions about the direction that defines the district’s potential for growth and sustainability.

A decision making session typically focuses on key programs, products, or services to attain strategic goals, serve markets, and define the most appropriate and feasible business model. It will also address realistic financial needs and the likelihood of attracting long term investment. It also defines organizational development implications of a select option.

The outcome of the meeting is a strategic focus document representing fundamental business decisions.

The Business Plan

Based on the situation analysis and the decisions, the business model can be defined. This includes creating the most appropriate structure, staffing, or systems to achieve goals and to reach potential markets. Oftentimes, the business model addresses necessary strategic partnerships and funding sources. It also includes a clear focus on strategic priorities and creates realistic timelines with financial projections. The outcome is a business plan with specific recommendations and practical steps for implementation.

- A business plan should have the following components:

  1. Executive Summary – Provide an overview which can be presented to prospective funders.
  2. Table of Contents – Make it easy to find the information.
  3. Introduction – State the purpose and time frame of the plan.
4. **Structure & Governance** – Explain the statutes and authorities under which districts operate, provide a brief history, identify the vision and mission statements, and list the board and staff members and their roles as well as partners.

5. **Long Range (3-5 year) Plan** – Identify the current conditions, critical areas, special needs and trends in the district. List district’s goals to improve conditions and include measurable objectives that take you from Step 1 to 2, etc. Set priorities for each concern.

6. **District Capacities, Needs & Strategies** – List the services provided by district. Are customers asking for other services? Does the district have adequate staff to provide assistance? Does the district have active board members? What type of training is needed to make staff and board members more effective? How does district reach its clients and the public? What financial resources does the district have? Could they be expanded with new partners? What facilities and equipment does the district have and what is needed? How does district measure progress towards its objectives?

7. **Annual Work Plan** – State the district’s goals and objectives for one year based on the long range objectives and other objectives which are not included in the Business Plan but require attention in the next year.

8. **Appendices** – Provide maps, related statutes or other items too long for the plan.

**Recommendations for Districts**

- Establish a local workgroup, and/or a local priority setting process, to address all local resource concerns.
- Utilize locally-led process and resources established by NACD and conservation partners.
- Develop a business plan that allows the district board and staff to map out a multi-year strategy to address natural resource concerns and provides a tool to engage local support for this strategy.
- Develop a long range plan that evaluates the current state of the district and addresses district goals and objectives for the next 3 to 5 years.
- Assess the district’s capacities, needs and strategies to meet the challenges to enhance and improve its natural resources.
- Develop an annual work plan that addresses the objectives and activities of the district for the next year. An annual work plan will allow the board and staff to prioritize and assess their activities.

*NOTE: Contents of a Business Plan is in the Appendix.*

**Recommendations for State Associations**

- Provide training workshops and assist districts in developing these plans.

**Recommendations for NACD**

- Encourage state associations and state conservation agencies to assist districts in developing these plans.
- Develop a recognition plan for states that have a majority of districts with a business plan.
Conservation districts are experiencing the most competition for funding and support in their history. Traditional funding has been reduced or become extremely competitive, with higher expectations from funders and more strings attached. In other cases, traditional county, state and national funding has fallen to the wayside altogether. Sadly, complacency on the part of the district board or staff has led to the weakening of some conservation districts around the country. They have become contented with the status quo and continue to sit back and wait for a “handout.” These districts will be left behind – or worse yet, out of business, if they do not change their operations to meet the changing political and financial environment.

District resources are falling increasingly short of what is needed to address their significant statutory obligations for maintaining and enhancing the quality of soil and water. There are two problems with the funding methods for conservation districts that result in conservation needs not being met. Reliable operational funding needed to support an effective level of conservation is inadequate and does not increase with increasing expenses. The problems of inadequacy and reliability of funding often lead to the cyclical delivery of conservation services across the state.

Districts must fully understand both the natural resource and financial needs of their community. They must also realistically evaluate their own skills, policies and procedures, and district capacity to deliver programs and services. To be a relevant entity, conservation districts must be cognizant of the current political environment, knowledgeable of current financial trends, obstacles and challenges and ready to do the hard work of changing the way they do business.

Conservation districts, as public agencies, are responsible for leading the efforts in meeting the resource needs of their community and providing conservation programs and services. They have moved beyond the status quo of traditional funding to seeking new funding sources to support their operations and conservation programs. They have reached out to both rural and urban landowners and sought new conservation partners and funding sources. Successful conservation districts have adopted a realistic Vision and Mission to guide them in the future. They have invested the time and effort in preparing a Strategic Plan, a Business Plan and adopting Policies and Procedures that address how they do business. Successful conservation districts are guided by a talented and passionate district board and staff with a focused vision for the future. These districts have developed and implemented a funding plan that not only addresses the district’s Vision and Mission, but also focuses on the current and emerging conservation needs of its community and their rural and urban constituents.

**Recommendations for Districts**

Conservation districts need to develop a Funding Plan that includes these characteristics:

**District funding meets resource needs of community**
1. Obtains input from community leaders, landowners and conservation partners in defining their community, recognizing resource needs, identifying demographics and identifying funding sources in the plan.
2. Supports the Vision, Mission and locally-led needs of the conservation district.
3. Meets the resource needs of the community, identifies funding sources, stipulates how funds will be managed and utilized and provides for regular assessment and evaluation.
4. Addresses conservation needs and concerns of rural, suburban and urban landowners.
5. Recognizes that long-term traditional sources of funding may not always be available.

**Funding plan provides policies and procedures to establish transparency and credibility**
1. Recognizes the role of the board and staff in managing public funds.
2. Identified in the district’s Business Plan and Annual Plan of Operation.
3. Includes a Financial Management Manual outlining policies and procedures to guide the board and staff.
4. Establishes a realistic budget.
5. Recognizes current skills of board and staff and provides a source of funding for training needs.
6. Includes a dollar value on donated labor, shared services, materials, equipment and services as in-kind income.
7. Provides for a system of checks and balances through regular evaluation and reporting processes that provide for qualitative and quantitative measurement and assessment of programs and activities.
8. Identifies how funds will be managed and invested.
9. Provides for an annual audit performed by a Certified Public Accountant.
- **Funding plan includes capacity building for conservation district**
  1. Provides for capacity building of district to meet current and emerging resource needs.
  2. The board and staff has identified and evaluated staffing, office, equipment, training and program needs.
  3. Funding addresses operational and programmatic needs of the district.
  4. Identifies funding sources [i.e. county and state funding, public grants, corporate grants and donations, foundation grants, 319 funding, fees for urban soil erosion and sediment control services, watershed planning, mapping services, conservation education programs, demonstration projects, equipment rentals, technical or administrative services, interest income, rental income, fundraising activities, et al].
  5. Provides for sharing of staff services, office space, equipment, vehicles, grant funding, program components, et al with other conservation districts/conservation partners/communities and other organizations.

- **Funding plan includes communication and marketing component**
  2. Indicates how the conservation district managed its public funds to deliver services with integrity, credibility and transparency.
  3. Includes a marketing component to indicate how funds were used to address resource needs and how the services provided by the conservation district benefits the entire community.
  4. Publically recognizes sources of public and private funding.

**Recommendations for State Associations:**

- Expand their representation as the unified voice for conservation districts within the state.
- Pursue dedicated funding sources to promote and sustain conservation district operations and programs.
- Provide and support funding of conservation districts.
- Set standards and provide training to district boards and staff to ensure statewide transparency and credibility.
- Encourage state conservation agencies to hold conservation districts accountable for their operations, financial management and use of resources.

**Recommendations for NACD:**

- Maintain its leadership in speaking as one voice on issues of national significance to conservation districts.
- Utilize its political power to address policy issues and legislative support of conservation efforts at the national level.
- Work with public and private national organizations and agencies to identify long-term funding sources for conservation districts.
APPENDICES

Task Force Members  Appendix A
Training Template  Appendix B
Business Plan  Appendix C
# Appendix A

## NACD District Outlook Task Force Members

### Northeast Region
- **Dan Farrand**  |  Steuben SWCD  |  NY
- **Cal Steuart**  |  Prince George SCD  |  MD

### Southeast Region
- **John Peterson**  |  Northern Virginia CD  |  VA
- **Linda Minton**  |  St. Lucie SWCD  |  FL

### North Central Region
- **Ian Cunningham**  |  Pipestone SWCD  |  MN
- **Ray McCormick**  |  Knox SWCD  |  IN

### South Central Region
- **Charles Glover**  |  Pointsett CD  |  AR
- **Billy Wilson**  |  Haskell County D  |  OK

### Northern Plains Region
- **Jack Majeres**  |  Moody County CD  |  SD
- **LeAnn Harner**  |  Oliver SCD  |  ND

### Southwest Region
- **Karen Berry**  |  Jefferson CD  |  CO

### Pacific Region
- **John McDonald**  |  Tualatin SWCD  |  OR
- **Tom Wehri**  |  Placer County CD  |  CA

### NCDEA
- **Tia Rice**  |  Seneca SWCD  |  OH
- **Jeanette Hale**  |  Pope CD  |  AR

### State Association Staff
- **LeAnn Buck**  |  Executive Director  |  MN

### NASCA
- **Mike Brown**  |  Executive Director  |  DE

### NRCS
- **Karen Woodrich**  |  State Conservationist  |  KY

### NARC&DC
- **James Ferguson**  |  Southwestern NC RC&D  |  NC
- **Lynn Sprague**  |  Southwestern NC RC&D  |  NC

### NACD
- **Earl Garber**  |  Past President  |  LA
- **Lee McDaniel**  |  President  |  MD

### Staff
- **Debra Bogar**  |  Senior Advisor  |  CO
- **Robert Dobbs**  |  Writer  |  DE
# District Official Training Program Review Checklist

## Basic Knowledge

### History of the Conservation Movement - Local, State, and National

- Dust Bowl Era
- Hugh Hammond Bennett
- Soil Erosion Service formation
- Conservation District origins - need for local input for conservation work
- Standard Conservation District Law

- Overview of State Conservation District Law formation
- Local conservation district formation & history
- Conservation District values
- Current information about districts (in state)

### What is a Conservation District?

- Conservation district purpose & function
- Legal definition in district law
- District as government entity
- Board member qualifications

- Overview of board member responsibilities & duties in policy development, planning, governance, district operations, officers & responsibilities, personnel management

### Fiduciary Responsibilities

- Fiduciary duties of district board members
- Available funding mechanisms
- Financial policies and procedures
- Budgeting & allocating resources

- Audit requirements
- Importance of financial planning
- Internal controls
- (see financial training below)

### Legal Responsibilities

- Powers & authorities of conservation districts
- Powers & authorities of board members
- Legal responsibilities of a public official
- Assessing resource needs
- Developing long range and annual plans

- Policy development & recommended policies
- District liability
- Comply with local, state & federal laws, rules, and regulations

### Roles and Responsibilities of Local, State and National Associations and Partners

- Importance of forming partnerships for district program delivery
- Partnership development & group dynamics
- State association history and structure
- Area & regional associations history & structure

- National association history and structure
- Functions of an association
- Specific programs offered by local, state and national associations
- NRCS history, structure & responsibilities
- State conservation agency history, structure, position, and responsibilities

- Other Federal agencies structure & potential partner opportunities
- Local agencies structure & potential partner opportunities
- Other partner organizations history, structure & responsibilities (non-government)
- Memorandums of Understanding and other agreements with specifics about roles and responsibilities
- Acronym listing of existing partnerships
- Examples of successful partnerships
### Ethics

**Recommended training elements:**
- Oath of Office
- Abuse of position
- Employee/supervisor relationships
- Acceptance of gifts
- Conflict of interest
- Diversity
- Nepotism
- Confidentially

### Basic Responsibilities

#### Understand Local, State and Federal Laws, Rules and Regulations Related to CD

**Recommended training elements:**
- Overview of local, state and federal laws, rules & regulations related to the district
- State Conservation District Law
- State & Federal Freedom of Information Acts (FOIA) & compliance procedure
- Other state public records acts & compliance procedure
- State open public meetings act
- State & Federal ethics acts
- USDA requirements for shared office space

#### Employee Training

**Recommended training elements:**
- Implement policies and activities as approved by board
- District personnel policies
- District organizational structure including who reports to whom
- Role of district board members, manager, staff
- Advise board on issues, projects, budgets and other matters
- Reporting to the board, residents, and partners about district activities & programs
- Development of training plans
- Training, certification and mentoring opportunities for district employees
- Working with partner agencies & organizations
- USDA requirements (if shared office location)

#### Financial Training

**Recommended training elements:**
- Available funding mechanisms
- Budgeting & allocating resources
- Importance of financial planning
- Fund raising
- Financial policies & procedures
- Financial statements & accounting methods
- Fiduciary duties of district board members
- State audit & reporting requirements
- Internal controls
- Grant contracts & agreements
- Personnel records and reporting requirements

#### Understanding State and National Resolutions Process

**Recommended training elements:**
- Developing a district policy positions & resolutions
- Flowchart of resolution approval - district to area, to state and national
- Determining the appropriate level of influence for the proposed resolution

#### Awareness of All Available Conservation Programs

**Recommended training elements:**
- Awareness of natural resource needs
- Example of conservation management
- Promoting the ethic of resource stewardship
- Coordination with federal, state and local entities for program delivery
- Education activities
- Review of available federal, state, local and private conservation programs
- Examples of successful programs
- Acronym listing
- Cooperator agreement
- Conservation planning
□ Legislative Process Training

Recommended training elements:
- Effective legislative relations
- Techniques for communicating effectively, credibly & building trust with elected officials
- State & federal bills & budget passage flow chart
- Lobbying restrictions for board members & staff
- Role of associations in legislative relations & lobbying

□ Awareness of Proper Protocol in Conducting Public Meetings

Recommended training elements:
- State open public meetings act requirements & compliance
- Conducting effective board meetings
- Decision making
- Executive and/or closed session rules & regulations
- Public hearings

□ Basic Operations

Recommended training elements:
- Assessment of local natural resource conservation needs & issues
- Techniques for evaluating district program effectiveness
- Stakeholder input to planning
- Importance of long range & annual planning, budgeting money & workload
- Establish goals through strategic, long-range, and annual planning
- Establish operations policies and procedures
- Implement a personnel management system
- Development of reports
- Contracting & bidding
- Agreements with other entities
- Overall district operations
- Leadership skills
- Media relations & public outreach

□ Election Process and Board Member Recruitment

Recommended training elements:
- Characteristics of a successful district board members
- Analyzing the needs in district and desirable qualities and needed skills for board member recruitment
- Board member recruitment techniques
- Creating a more diverse board representative of those served
- Board member election and/or appointment process, procedures, forms, & deadlines
- Orientation systems for new board members
- Board member removal
BUSINESS PLAN CONTENTS

This document identifies the items to be included in a district Business Plan. The word “Contents” suggests the following sequence of items. However, the district should structure and/or arrange the Business Plan to best meet its needs. Districts may choose to present the material in this order, or they may alter the sequence depending on the purpose and audience. Also, the contents may be used in total, or sections may be extracted into a variety of different formats to communicate with different audiences.

EXECUTIVE SUMMARY

The contents here are prescribed by the title. It is written for “executives” (such as county commissioners, governor, legislators, agency directors, partners, media, etc.) assuming:

1. they will not read the total Business Plan;
2. they just want a quick, descriptive overview; and yet
3. they may make decisions based on this summary alone that might affect the district’s future, its funding, its operations, or other critical factors.

Therefore, it needs to be brief, concise, packed with information, and compelling. The length should be one - three pages. Use clear, pictorial language, graphics, and photographs, if useful. The summary should “grab” the reader. Attractive formatting is highly desired. It should be written so that it can “stand alone” apart from the whole Business Plan.

It is a “summary”, so include just the key points and highlights about the district; the current and desired natural resources conditions; the long-range goals and objectives; and what you need in services, personnel, facilities and equipment, monitoring and evaluation, and funding to meet the objectives and move toward the desired resource outcomes. Be sure to state what the district plans to do to acquire what it needs to carry out the Business Plan.

TABLE OF CONTENTS – sections and subsections; lists of maps, exhibits, appendices

INTRODUCTION

A. Explain the purposes of the Business Plan.
B. Define who prepared it and how (very briefly).
C. Identify the entities covered by this plan: district, NRCS, county government, municipalities, watershed association, etc.
D. Cite the intended audience(s).
E. Specify the time frame covered by the plan, for example 2015-2020.
F. Describe the district: key facts: size, population; land use trends; water bodies; ag production, etc.
G. Provide explanations and information necessary to understand and use the Business Plan.
H. Other comments as local preferences or specific purposes dictate.

STRUCTURE AND GOVERNANCE

In this section, give an overview of how the district is structured and describe the statutes and authorities under which it operates. The purposes are to (1) describe who you are and (2) create desired reactions in the reader: e.g., the district is trustworthy and dependable; their work is important; the personnel are competent; the district does good work; their needs are valid.

A. Enabling and Governing Legislation
   1. Conservation district law and enabling statutes
   2. NRCS enabling legislation – P.L. 74-46 - “Soil Conservation and Domestic Allotment Act”
   3. Other related statutes and administrative rules that govern the operations of the district, NRCS, and any other partners in this Business Plan. Short explanation that our being government agencies means we have to comply with rules governing practices such as holding public meetings, public records, personnel management, equal opportunity, contracting, director elections, etc. (If included, put the actual text of the district powers and authorities, NRCS legislation, or the related statutes and rules in an appendix.)
B. History
1. Date of district incorporation
2. Major changes in district name, structure, and/or boundaries
3. History of NRCS and major changes in history
4. Historic relationships: such as districts and NRCS in 1934, NRCS and tribes in 1990, when the district formed watershed groups(s).
5. Significant accomplishments in the field office – list important accomplishments
6. If you wish to give more facts about the history, put them in an appendix.

C. Vision
1. A vision statement is a present tense description of desired future conditions, services, reputation, etc. as judged by our customers, the public, and us. It is a statement of what the district wants to be in 5 years and later.
2. Cite the district vision statement. Include others as appropriate and applicable.
3. If several are used, emphasize the commonalities.

D. Mission
1. The general intent of a mission statement is to describe whom we serve and why. Format: "The mission of XYZ Conservation District is to do (what) for (whom) by (how)."
2. NRCS mission – “To provide leadership in a partnership effort to help people conserve, improve, and sustain our natural resources and environment.”
3. State the “conservation district function” statement (if desired)
4. If several mission statements are used, make sure the differences of the missions are evident, as well as their being complementary.

E. Values and Guiding Principles
1. Identify and explain the values and guiding principles that direct the work of the district. These statements describe the core beliefs, ideals and ethics that the district has set for how it will conduct business, provide services, relate to customers and the public, etc.

F. Leadership
Provide a summary that covers the following topics.
1. District officials, associate/assistant district officials, and district official emeritus
2. Expectations and benefits of being a district official
3. District official qualifications and selection – zone or at-large requirements.
4. Public official responsibilities – voting, public meetings law, ethics, etc.
5. Structure and direction:
   - Districts: district, basin, state/territory association, state/territory agency, NACD region and national office
   - NRCS: field office, basin, state office, regional office, and national headquarters

G. Roles and Relationships
Describe the relationships the District has with the state/territory and national associations; local, state/territory, and federal agencies and other organizations it works with.

H. Planning Process and Partners
Describe the steps you went through and the partners involved to produce this Business Plan.
1. General process used: methods, steps, activities, time frame, etc.
2. Participants involved in preparing the Business Plan.
3. Description of public involvement and input: methods used, people involved.
4. Sources of data – scientific documents, previous plans, assessments, workload analysis, surveys, local knowledge, advisory group input, etc.
5. Use of technical/scientific expertise – technical advisors, consultants, etc.
6. Influence and participation of state/territory and federal employees, rules, laws, and policies. For example, Districts may relate local plans to state/territory and national strategic plans, define performance goal targets, etc. Districts may be involved with land use planning and other implementation processes to help landowners meet government regulations.

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II. NATURAL RESOURCE LONG RANGE PLAN
This section specifies the natural resource concerns to be addressed by the district in the next five years (what are the current and desired conditions?) and establishes goals and objectives of how the district plans to improve resource conditions. The method to prioritize the needs is included.

A. Natural Resource Concerns (problems, issues, needs)
Describe the problems or issues that the Business Plan addresses.
1. Listing of resource concerns and critical problems/issues
2. Description of each resource concern – give enough information so that the reader can clearly visualize what each problem looks like by nature, severity, areas and people affected, impacts on water quality or other natural resources, negative consequences of taking no or insufficient action.
3. Trends – Describe how the problems have changed over time and in which direction they are headed. Cite causes for trends, if known. Describe how these trends were determined.

B. Critical Geographic Areas
Identify particular places in the district with specific problems that need special attention.
1. Description of critical areas – such as water quality limited listed streams, endangered species act listings, ground water limited areas, highly erodible lands, geographic priority areas, flood zones, etc.
2. Provide maps showing the locations of the critical geographic areas.

C. Statements of Intent (Outcomes, Desired Conditions)
Write goals, outcomes, desired condition descriptions for each natural resource concern. Long-range goals may also have sub-goals for shorter time frames.

D. Objectives
Write one or more measurable long-range objectives for each goal. Long-range objectives may also have sub-objectives for shorter time frames.
1. These objectives should identify the progress expected toward the goals in the next five years or longer.
2. The Annual Work Plan’s objectives should be derived from these objectives and show what progress is planned for the next year.

E. Priority Setting
Describe the processes and the criteria used to set the priorities for the resource concerns.
1. Describe the process used, persons involved, and the standards and criteria applied in setting priorities.
2. Use at least the following criteria:
   a. Directly supports the vision and mission
   b. Feasibility and capabilities of the district and partners to address the problems and make changes in the direction of the goals
   c. Community values and expectations
   d. Estimated costs to implement projects, make changes
   e. Influence of legislation and regulations – Explain how laws, rules, or public policy have influenced the choice of resource concerns and their prioritization; such as the Farm Bill; Clean Water Act; Endangered Species Act; Total Maximum Daily Loads; federal and state/territory mandates; federal, state/territory, and local administrative policies and rules; etc.
3. Explain the conclusions reached from an assessment – describe the extent, impacts, and severity of the differences between the current and desired conditions. Why should anyone care? Consequences of no action.

III. DISTRICT CAPACITIES, NEEDS, AND STRATEGIES
Section II concentrates on natural resource concerns: what they are, their current condition, their desired condition, and how far you plan to “close the gap” in the next five years. It describes what changes need to be made, how priorities are determined, and what the goals and objectives are.

Section III turns the attention to the district’s capacities and needs to be able to meet the challenge to enhance and improve natural resources. The contents answer three questions: What does the district have now? What does the district need to be able to achieve the objectives in the next five years? What will the district do to obtain these needed resources? Answers to these questions are given for the following key areas:
A. **Services, Programs, and Customers**
   1. Describe the types of services and programs the district currently provides and to what customers (be specific by type and number). Include the reasons for and procedures to refer individuals to other service providers.
   2. Describe services and programs (current and new) that would be needed to attain the desired outcomes defined in Section II "NATURAL RESOURCE CONCERNS AND OUTCOMES". What kinds of services need to be supplied to what audiences or target groups? Describe these audiences by type and size (number of each).
   3. State the strategies your district plans to use over the next five years to provide the types and amounts of services and programs to the customers identified in III.A.2.

B. **Governance Structure**
   1. Specify district assessment or organizational changes that may be necessary to carry out the program described in Section II (in addition to the items needed as specified in items III.A. to III.I.). These other needed items might include changes to district committees, task forces, partnership representation; statutory authorities and powers; statutory delegation of specific responsibilities; change in board governance; changes in tort protection; or other.
   2. State what strategies your district will use in the next five years to effect the changes desired.

C. **District Officials**
   1. Annually assess the Board’s performance. Each conservation district must have a board made up of highly qualified directors from diverse backgrounds; reflect the changing population and demographics of the district and have the required expertise and skills to promote better district governance. Factors for reviewing board performance include:
      - Community connections (landowners, civic, legislative, non-profits, etc.)
      - Leadership (visionary, commitment to mission, public service, willingness to serve, etc.)
      - Expertise (public relations, public service, strategic planning, management, technology, etc.)
   2. State the strategies your district plans to use over the next five years to recruit, train, and retain district officials, associate district officials identified in item III.C.2.

D. **District Staff/Personnel**
   Create a staffing plan by identifying the personnel and support resources needed to implement the objectives identified in the Business Plan and provide the services and programs explained in III.A.2.
   1. Describe the current employee positions and capabilities. A workload analysis of the resource concerns and objectives section should be completed.
   2. Describe the additional personnel, volunteers, consultants, and other support resources that would be needed to carry out the objectives and programs identified in Section II.
   3. Assess future staffing and personnel resources and state the strategies your district plans to use over the next five years to recruit, train, and retain the employees, partners, and volunteers identified in item III.D.2.

E. **Training**
   1. Utilize the existing district official and employee training programs provided by NACD, your state/territory association, and state/territory agency to address:
      - State’s/territory’s enabling legislation
      - Legal and fiscal requirements and responsibilities
      - Open meeting and state/territory practices
      - Understanding financial statements, budgets, audit, etc.
      - Parliamentary procedures
      - Ethics and conflicts of interest
      - History of conservation districts and enabling statutes
      - People skills
      - Civic engagement and public outreach techniques
      - Leadership skills
   2. Staff training should encompass the items above along with:
      - Roles and responsibilities
      - Required technical training
      - Youth education techniques and responsibilities
• Partner groups structure, roles and responsibilities
• Other topics as needed

3. District officials and employees can network with other professionals (private sector, foundations, Extension, civic groups, etc.) to take advantage of training opportunities outside of the conservation family.

F. Communication/Awareness
1. Create a District logo, preferably incorporating the NACD or your state/territory logo in it, to brand your District as a member of the larger national and/or state/territory associations. Display your district logo and slogan on everything from printed materials and websites to pens, caps, signs, etc.
2. Develop and implement an annual communications plan that articulates your message consistently across all media; maximizing both traditional contacts and social media for both the district and its partners.

G. Finances
1. Identify the money needed to finance the objectives and programs identified in Section II. Be sure to include the funds for both current and new services and programs in III.A.2; personnel in III.D.2; facilities and equipment in III.H.2; and monitoring and evaluation activities in III.I.2. Include a budget summary.
2. Describe the financial resources available to the district and NRCS at the current time. Explain what strategies the district uses to acquire resources, such as project proposals, grant requests, fund raising events, and others.
3. State what strategies your district will use in the next five years to obtain the funds needed to implement the programs and achieve the objectives identified in Section II and III.G.2.

H. Facilities and Equipment
1. Describe the facilities and equipment the district uses for current operations. Include the building, office furnishings and equipment, programs tools (e.g., in focus machines, easels, cameras), and field tools and equipment.
2. Explain the facilities and equipment needed to implement the objectives stated in Section II, provide the services in III.A.2, and support the personnel in III.D.2.
3. Describe the strategies your district plans to use over the next five years to acquire the facilities and equipment identified in item III.H.2.

I. District Program Evaluation
What processes will be used to measure results and progress toward the objectives? Your state/territory may have specific evaluation requirements that will need to be followed.
1. Describe how you currently measure progress. Include methods to measure process efficiency, cost effectiveness, and project/program effectiveness (products produced, completion of objectives, and impacts toward goals). Identify the assumptions or models used to predict progress and impact. Specify methods to monitor progress and performance of action plans.
2. Specify how you would measure progress, impacts, achievements, and success of the objectives in Section II. Include what you would do in addition to what you already do.
3. If possible, identify other influences that might have produced the results in addition to or instead of the direct district actions (environmental or context variables).
4. State the strategies your district plans to use over the next five years to acquire the skills, tools, and resources necessary to conduct the monitoring and evaluation processes outlined in III.I.2.
5. Access other evaluation sources that are available on the internet, as needed.

IV. ANNUAL WORK PLANS
Create a district Annual Work Plan and an NRCS performance plan that lists the objectives and activities each will accomplish in the next respective fiscal years. One or more one-year objectives should be written for each of the long-range objectives in Section II of the Business Plan. Additional objectives may be written for work not addressed in the long-range objectives. Include items such as:

A. Goals (goals or sub-goals from the Business Plan)
B. Objectives for one year (including NRCS performance goals written as objectives) based on the long-range objectives and other objectives which were not included in the Business Plan but require attention in the next year
C. Actions, tasks, or steps needed to accomplish each objective
D. Estimated workload (number of hours or days each employee, district official, associate district official, NRCS employee, volunteer, contractor, or discipline will contribute to each action)

E. Person(s) responsible for each action

F. Due dates or time schedule to complete each action

G. Budget

V. APPENDICES
Include appendices that explain details too long or too complex to be used in the Business Plan. Examples include a list of district officials; employees for the district, NRCS, and watershed group(s) in the district office; glossary of terms and acronyms; additional history details; powers and authorities in laws; related statutes (e.g., public meetings rules, public records); maps; more complicated explanations of resource concerns; etc.

Description and maps of the district: square miles of land; key rivers and streams; population numbers and demography; percentages of land in rural, urban, forest; percentages of land in public vs. private ownership; climate and weather patterns; topography; major crops and commodities; businesses and industries; general economy; number of landowners living along streams; offices of key partners; etc.