



Resource Planning Tips for Conservation Partners

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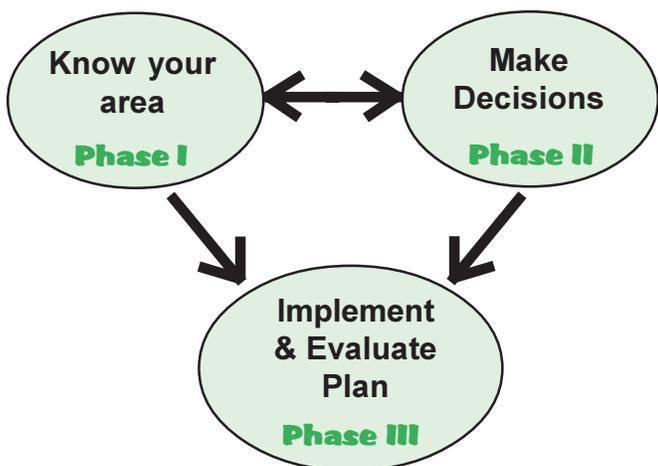
Purpose

This information is for NRCS/SWCD staff and other partners as they facilitate locally-led planning. Included are suggestions for understanding the planning process, working as a team, and successfully interacting with Planning and Technical Advisory Committees.

Understanding the Resource Planning Process

Whether we call it “resource planning,” “watershed planning,” “locally-led conservation planning,” or “area-wide planning”—it all follows the same Three-Phase process outlined in the National Planning Procedures Handbook (NPPH). Review this handbook regularly, and make sure staff understands it.

The NRCS Planning Process



Committees are Key!

Essentially the process involves two committees—a *Planning Committee*, and a *Technical Advisory Committee*. The Planning Committee is a group of stakeholders who identify concerns in the area, develop a management plan to address the concerns, and

coordinate efforts to implement the plan by engaging with community partners. The Technical Advisory Committee inventories the resources and formulates alternative management strategies to solve problems identified by the Planning Committee. Technical advisors may also help implement actions selected by the Planning Committee.

Committees Need a Helping Hand

Throughout the planning process, the Planning Committee will have many questions—how it is done, what assistance NRCS provides, the roles of specific NRCS/SWCD staff, how long it takes, who will do the data gathering, what they can expect to achieve. To help the Planning Committee understand the process, bring in a NRCS Resource Planning Specialist at the beginning to provide an overview of the process. Continually reinforce the message at each step by reviewing what was done at the last meeting, what is going to happen next, and why. Always show how each step will help them meet their goal of addressing resource concerns. Provide written materials such as selections from the Resource Planning Guidebook to augment their understanding. Use maps and other visual aids to facilitate meetings. Share examples of plans written by other committees as models of success. Bring in speakers from other local Planning Committees to share ideas.

Because resource planning takes time (up to 24 months in some cases), Planning Committee members may become discouraged and question the need for a resource plan. Sometimes a few committee members feel they already know the best solutions to the concerns, and are not interested in planning.

Remind the group that resource planning is *consensus planning*—working with stakeholders to identify solutions which are acceptable to all. If consensus already exists in the community about how to solve the problems, then possibly resource planning is not needed.

However, Planning Committees are usually created because the problems are very complex, the community lacks agreement on what actions to take, and the most acceptable solutions are not yet known or are not being implemented. If this is true for their planning area, they will likely benefit from a resource management plan. Although the Planning Committee can modify the process to suit their unique circumstances, they are most likely to succeed if the integrity of the process is generally maintained.

Elements such as involving all stakeholders, using brainstorming techniques to account for all perspectives, forming partnerships and considering multiple resources are critical to developing an acceptable plan that the community is willing to implement.

Further, resource planning helps the community compete for funds to implement resource management strategies. Grant-making agencies often look for evidence of sound, locally-led planning and a completed resource management plan as a criteria for funding.

NRCS/SWCD Role

NRCS and SWCD *facilitate* locally-led resource planning. This means we help communities develop their own plans to address natural resource problems and to implement those plans. During the early stages, Planning Committees typically will need a great deal of assistance in understanding the planning process, developing meeting agendas, and working through the various steps of the process. As the committee develops, they will become less dependent on NRCS/SWCD assistance. Initially, it is probably better to err on the side of being too involved than not providing enough assistance. Communicate to the committee that they are an independent, locally-led group and we are here to help them meet their goal of addressing the resource issues that concern them.

Working as a Team

The SWCD usually formally sponsors the planning project. The field office is the primary point of contact for the Planning and Technical Advisory Committees. The Resource Planning Specialist and other NRCS technical specialists provide on-going support to the field staff throughout the planning effort. All these NRCS-SWCD staff must work as a team to facilitate the locally-led planning effort.

Resource planning can be very challenging. Occasionally staff are new at this kind of planning. Accomplishing the primary goal— helping community members solve their natural resource problems— demands that staff work as a team.

Following the process outlined in the NPPH maximizes the possibility that the project will succeed. Each person should clearly understand their part in this process and be committed to carrying it out.

As new as locally-led planning is to you, you still probably know more about it than the community members with whom you are working. All you need to do is stay one step ahead of them! You can do that by communicating frequently with more experienced NRCS/SWCD planners.

Staff needs to communicate regularly among themselves to ensure consistent messages are conveyed to community members with whom they are working. Once the planning effort has begun, NRCS/SWCD staff who are working on the planning may wish to meet periodically to share ideas, address problems, and make sure everyone understands upcoming steps in the process.

NRCS/SWCD Contact Person

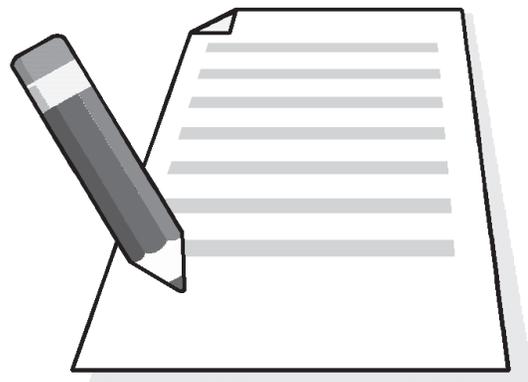
Initially there are a lot of new agency names and faces for the Planning and Technical Advisory Committees to sort out, so consider identifying one person from the field office as the Planning Committee's primary contact person or liason. This gives the Committees a person who they can consistently contact between meetings. The contact person is usually the District Conservationist, the Resource Conservationist, or the Soil Conservationist.

The contact person is responsible for communicating between the Planning and Technical Advisory Committees, the Technical Advisory Committee, and other NRCS/SWCD staff involved in the project. After each Planning Committee meeting, the contact person should follow-up with others as needed to review progress, ask questions, and get feedback.

At meetings with other NRCS/SWCD staff, the contact person should be prepared to review the progress of committee, explain concerns they have raised, seek answers to their questions, and get suggestions for future meeting agendas.

Assisting With Agendas

At first, most Planning Committees will need help determining the items to cover at their meetings. For example, during early meetings they can identify their resource concerns, followed by one or more meetings where they identify their objectives. Later in the



process, the Planning Committee will need much less assistance from NRCS/SWCD. Modify staff involvement as appropriate.

Field staff should work with the Planning Committee to develop tentative agendas for two or three meetings in advance. Always ensure the next step. Encourage the Planning Committee to conclude each meeting by establishing the agenda for the next meeting.

Assisting with Meetings

Field staff—especially the primary contact person—should attend all committee meetings. Initially, the field staff plays a big role in helping the Planning Committee conduct their meetings. This may involve reserving meeting rooms, bringing necessary materials and equipment to meetings, arranging chairs, and inviting and confirming facilitators and speakers. Later on, the Planning Committee usually assumes a larger role in organizing their meetings. SWCD staff might type and distribute committee meeting agendas because the Planning Committee typically does not have the resources to do this.

Arrive early enough to Planning Committee meetings to answer any last minute questions, set up chairs, lend support to facilitators, etc.

Before the meeting:

- Ask facilitators or people giving presentations if they will need special equipment, paper or markers
- Confirm speakers, other invited guests
- Bring copies of revised agenda
- Bring suggestions for next meeting's agenda
- Bring necessary equipment, paper and maps
- Set up the room with chairs and equipment
- Make sure you know your role

After the meeting:

- Update others on progress
- Mail agenda for next meeting
- Reserve meeting room for next meeting

Try to meet in rooms that are sized appropriately for the group. A room that is too large or formal can inhibit group discussion. Field staff should arrive before the meeting to arrange chairs, set up equipment, prepare coffee if desired, etc. Arrange chairs so committee members can face each other to encourage active participation. Seat Technical Advisors and visitors apart from the Planning Committee.

Bring name tags or tent cards if necessary and pass around a sign-up sheet to record attendance. Bring a map of the planning area. Give updated copies of the

Purpose and Responsibility of the Committee:

When a committee is appointed, its purpose and responsibilities should be placed in writing, clearly defined. That is:

- 1) Members should understand why it was set up.
- 2) Members should know its assignments or task(s) to be accomplished.
- 3) Members should know when its assignments (tasks) are due (deadlines).
- 4) The committee should know how and when it is to report.

In addition, the committee should:

- 1) Have a name.
- 2) Be informed of its budget limitation.
- 3) Be informed of its relationship and/or shared responsibilities with other committees.

Source: "Developing Effective and Efficient Local Committees," by Delwyn Dyer and Oscar Williams, Alabama A&M and Auburn Universities and Tuskegee U niv., Cooperating, 1999.

agenda to members if it has been modified after mailing. Write the agenda on a flip chart for people to view throughout the meeting. Make a suggestion that meetings be held on a regular schedule in the same place (for example, 7:00 PM every other Monday or 3:00 PM on the second Wednesday of each month). Reserve the room for each meeting immediately after the previous meeting.

During meetings, staff should be ready to answer questions and to assist in accomplishing agenda items. Before a committee chairperson has been selected, the contact person may need to open the meeting by welcoming the group and initiating introductions. Later, the chairperson will open meetings. Encourage the chairperson to open meetings on time. This promotes timeliness among committee members. Stick to the designated agenda unless the committee decides as a group during the meeting to modify it. Inform participants who are on the agenda how much time is allotted to them. Strive to end the meeting at the designated time. Try to limit meetings to about two hours.