



Management TRACKS

Spring 2016

wildlifeplanners.org

Vol. 30 No. 1

Strategic Planning for Wildlife Conservation

ABOUT THIS ISSUE: The art and skill of strategic planning is an invaluable tool for fish and wildlife management agencies as they tackle environmental challenges with limited resources. These strategic plans require a new way of thinking, as well as the ability to secure feedback and buy-in from a diverse group of stakeholders. This issue is dedicated to providing some best practices, strategies and tools, which can strengthen your ability to plan strategically for your agency.

“Without a strategy, an organization is like a ship without a rudder, going around in circles... it has no place to go.”

Authors Joel Ross and Michael Kami



© CPW

IN THIS ISSUE

STRATEGIC PLANNING FOR WILDLIFE CONSERVATION	1, 3-5
THE PREZ SEZ	2
US FISH AND WILDLIFE SERVICE GETS OWP SUPPORT	6
GO-TO RESOURCES	7
UPCOMING EVENTS	7

Continued on pg. 3 ▶

The Organization of Wildlife Planners

Dedicated to improving the management of fish and wildlife agencies and to supporting the professional lives of people who participate in our organization.



Strategic Planning for Wildlife Conservation *continued from pg. 1*

OWP has long advocated for a systems approach to planning. A system is a dynamic process that tends to self-correct and improve throughout subsequent iterations. This system thinking is circular, and not all information comes directly from a previous step. Thus, strategic planning is one part of the system; successful implementation depends on the other three parts as well!

As Peter Senge writes in *The Fifth Discipline*, “The practice of systems thinking starts with understanding a simple concept called feedback that shows how actions can reinforce or counteract (balance) each other.”



When OWP decided to focus this issue on strategic planning, we did what we always do. We asked our members to share their feedback; in this case, on why some strategic plans tended to work successfully at their agencies, while others worked less effectively. OWP members shared their lessons learned and how they achieved buy-in with their communities and staff. Perhaps not surprisingly we found quite a bit of consistency and overlap on the process and planning of these successful programs, regardless of where they were conducted. Here's what we learned ...

Emphasis on Process

First off, process matters a great deal to wildlife planners in successful strategic planning, even if it means getting extra support.

For instance, when the Wisconsin Department of Natural Resources' Fisheries Management Program developed their 10 year strategic plan (2015-2025), Grants Manager Heidi Nelson recalls, “The emphasis was on the process and it began largely from the bottom up using a facilitated program-wide process like SWOC analysis.”

Along with the SWOC process - which identifies Strengths, Weaknesses, Opportunities and Challenges for strategic planning - the agency participated in several role-playing exercises pertaining to work prioritization in different

scenarios. “The Fisheries Management Board followed a parallel process, but also included visioning sessions and clarification of program direction via facilitated processes,” says Nelson. “The staff and leadership results were then compiled and compared; some trends began to emerge on how the program could better align itself to statewide goals.”

Process also ruled the development and implementation of strategic plans at Michigan Department of Natural Resources, according to Amy Derosier, Wildlife Action Plan Coordinator.

“We had a planning team that developed the process, and then facilitated the staff and stakeholders through it,” she explains. “We also hired two people from Michigan State University to help us work through the process. They helped us think through the planning and learn new tools to support the engagement process.”

Keep in mind that sometimes the strategic planning process can be a bit challenging for participants. That was the findings of a facilitator roundtable hosted by Facilitate Idaho for local businesses, agencies and boards of directors. When Facilitate Idaho asked participants how they felt about strategic planning, the organization received comments such as:

- Exciting, painful, exhausting
- Overcoming visioning struggles is challenging
- Frustration hits when the plan doesn't go anywhere

However, when participants were asked why the strategic planning process mattered, they heard comments including:

- The plan can become a living part of their lives and organizations
- The plan allows greater understanding of core values, and generates an understood purpose
- The plan builds consistency and clear expectations of accountability

OWP's Ten Steps of Strategic Planning

Step 1. Planning to Plan

Step 2. Mandates

Step 3. Values, Mission, and Vision

Step 4. Internal and External Assessment

Step 5. Strategic Issues

Step 6. Goals

Step 7. Outcomes and Outcome Measures

Step 8. Objectives

Step 9. Strategies

Step 10. Monitoring, Evaluation and Continuous Improvement



Strategic Planning for Wildlife Conservation *continued from pg. 3*

“*In the era of doing more with less, strategic direction and priority setting are more important than ever – but the key is who decides those priorities and what criteria or process are used to determine them. When pressured, taking time to reflect and thoughtfully plan may seem impossible. But when you’re so busy doing, you may not realize you’re not doing the most important thing and you’ve lost significant opportunities to make real progress.*

Desperately hanging onto to an old paradigm or way of doing business, while the socio-political and ecological conditions have changed (and continue to change) has no other outcome than a slow painful death spiral.”

—Ann Fortschen, former OWP President, Florida Fish and Wildlife Conservation Commission

Stakeholder Involvement

Achieving active and diverse stakeholder involvement also mattered to different wildlife planners around the nation, as they started developing their strategic plans. Colorado Parks and Wildlife (CPW), for instance, considered public and staff feedback very important during the process, according to Katie Kalinowski, CPW’s Policy and Planning Supervisor. In addition to in-depth workshops for the public and staff across Colorado, the agency used digital polling to better understand the priorities of participants.

“Polling ensured that we understood the full range of perspectives that Colorado residents had about wildlife and what percentage of them held those perspectives,” says Kalinowski. “Our workshops were in conjunction with comment forms for the staff and for the public (also in Spanish). More than 50 percent of agency staff submitted comments, along with approximately 5 thousand citizens.”

In Michigan, stakeholder engagement “was huge,” admits Derosier. “I think it was the most extensive engagement effort we had done in years (maybe ever) for a strategic plan. But based on this engagement, we had very high buy-in for our plan that has provided a lot of political capital for the division. Stakeholders felt engaged, and the staff also felt like the plan was theirs.”

Staff Involvement

Getting excellent feedback from stakeholders is always valuable, but having the staff feel responsible for the plan was also important in Wisconsin on the Fisheries Management Plan. “Even in draft form, nearly every member of the program had read and had some experience applying the plan,” says Nelson. “Everyone in the program also had the opportunity to provide feedback and comments. This helped

make sure that individuals knew how their work contributed to achieving the overall goals for fisheries.”

This wasn’t the way plans were always written. “In the past, plans were typically drafted by an individual or small group and were largely operational in nature,” she admits. “This had the benefit of very tangible outcomes, but it didn’t provide an overall vision or direction. The staff was largely unaware of the plan and how they fit into it.”

The new approach has helped. “We have better buy-in from the staff, as well as an improved understanding of why we do the work that we do,” adds Nelson. “The plan also provides a consistent reminder to leadership to help frame their decisions.”

In Colorado, commissioners were “very engaged” on the agency-wide strategic plan recently adopted.

“Commissioners participated in four strategic planning workshops” says Kalinowski. “The planning process launched with a visioning exercise asking Commissioners to identify high level agency successes looking 10 years in to the future. Later in the process, Commissioners discussed opportunities and challenges, and then helped draft agency goals and objectives.”

Make Plans Tangible

When the strategic plan was approved in Michigan, the staff did several things to solidify the plan’s place in the workings of the division. “First, we tied our coding to the plan,” Derosier recalls. “This let us track our time and expenses by our strategic plan objectives. This forced people to know what plan objectives they worked on, and it made the strategic plan tangible and relevant.”

In Michigan, “we also develop our annual report based on our strategic plan goals,” continues Derosier. “This helps communicate our work to stakeholders and keeps the plan relevant to them.”

Division leadership does a great job of linking the work back to the strategic plan as well. “The Strategic Plan actually gave the division a common language,” she says. “We hadn’t had that common language before. So, the plan became a rallying point for staff. It helped the division feel like we were moving in the same direction, more so than in the past.”

“With a clever strategy, each action is self-reinforcing. Each action creates more options that are mutually beneficial. Each victory is not just for today but for tomorrow.”

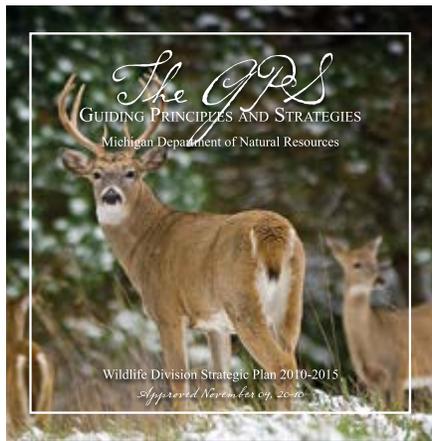
Max McKeown, *The Strategy Book*



Lessons Learned, Tips Shared

When developing strategic plans, keep these tips from OWP members in mind:

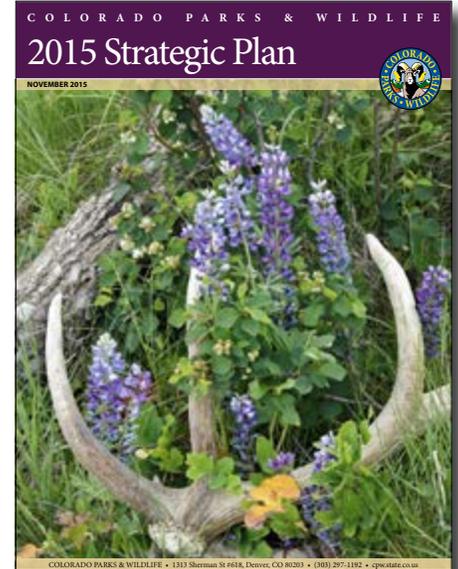
- **Process is critical but don't lose sight of the end point.** Have an adaptive product that provides direction and guidance. "You can create a great document, but a change in policy, budget or environment can render it obsolete tomorrow," reminds Nelson in Wisconsin.
- **Do your homework.** Work to fully understand the drivers and needs of your agency or program. "Then, you can use the plan as a foundation for navigating unforeseen challenges in the future," adds Nelson.
- **Think broadly.** Colorado Parks and Wildlife considered current research and data on changing demographics in the state, as well as trends in outdoor recreational uses and interests for their strategic plan.
- **Secure staff and stakeholder engagement.** "It's critical to get their buy-in," says Derosier in Michigan. "But it takes a lot of work, thought and time."
- **Manage expectations.** "Be careful of setting them too high," warns Derosier. "It's hard to do."
- **Prioritize!** Not everything can be a top priority. You'll need to make some hard decisions, and determine what is really most important to tackle at this time.
- **Leverage and align with existing processes.** In some states, there are state laws and/or policies about strategic planning and performance reporting. Understand these and weave them into your process where possible.
- **Planning is a thinking exercise, not a writing exercise.** Perhaps the most important part of the strategic planning process are the discussions about what are the most important issues, why we think they are important and then crafting alternative solutions to consider. "The value of strategic planning is in creating a common understanding of the direction the organization is heading," says Forstchen. "The plan itself is a map that keeps staff moving in that direction."



© MI DNR

Even after the strategic plan is completed:

- **Stay relevant.** Link everyday business with the plan, once it's completed and approved.
- **Use common language.** Encourage leadership to continue to talk about the plan, and especially about your work in the context of the plan. This reinforces the plan among the staff and stakeholders.
- **Develop an annual report tied to strategic plan.** "It shows transparency as an agency, and confirms how your work supports the plan," adds Derosier.
- **Use metrics tied to plan.** Michigan, for instance, developed one or more metrics for each objective in the plan to track progress. "This helps us think about the outputs and outcomes we are trying to achieve, it helps us report on our PR grants and it provides data for our annual reports," reports Derosier.
- **Remember the plan is a communication tool.** "Consider developing a simplified (less technical) version of the strategic plan for public/management consumption," suggests Nelson. "It will help make it clear what you are working towards."
- **Implementation can be tough!** Be aware of defensive excuses for inaction and reframe as "Let's go! Where is the best place to start?" Be sure you convey the importance of implementation and do your best to build a collective understanding of common pros, cons and roadblocks. Start small and build upon success, and expect SARA along the way: Surprise, Anger, Resentment and Acceptance.



© CPW

As an OWP member, you can network with others, ask for advice or request training for your organization. Go to wildlifeplanners.org.

Interested in presenting a webinar?

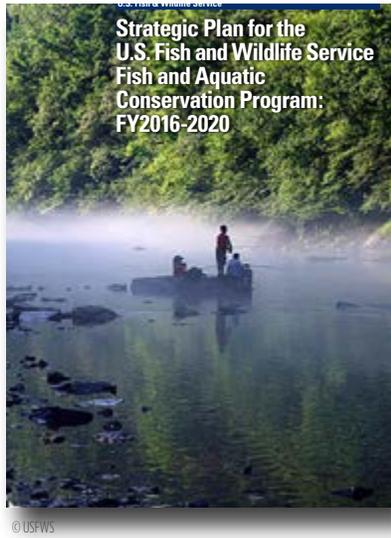
Contact Shawna Wilson at wildlifeplanners@gmail.com



US Fish and Wildlife Service Gets OWP Support

The US Fish and Wildlife Service recently completed a two-year strategic planning process for its Fish and Aquatic Conservation Program. OWP played a key role by supplying Comprehensive Management Systems training to the staff, as well as facilitating the planning process.

“The single most noteworthy aspect of this planning process was internal engagement of



the Service's eight Assistant Regional Directors for Fisheries,” recalls David Hoskins, Assistant Director for Fish and Aquatic Conservation. “For a year and a half, they worked as a team with senior program staff at headquarters to establish the program goals and objectives designed to achieve the program’s vision.”

The process for developing the strategic plan was facilitated by long-time OWP members Mike Fraidenburg and Steve McMullin. “The single greatest difference is the work planning process that is currently being implemented to operationalize the strategic plan,” adds Hoskins. “Implementing the work planning component is a point of departure for the Fisheries Program and it puts some teeth into the accountability aspects of the overall process. It also will provide a much-needed bridge to link the strategic plan with everyday work activities.”

Looking back, Hoskins said that engaging with stakeholders made all the difference. “A stakeholder engagement process provided significant value and authenticity,” he concludes. “This engagement improved the final product and guaranteed meaningful support for the future direction of this program.”

To view a copy of this plan:
[fws.gov/fisheries/pdf_files/FAC_StrategyPlan_2016-2020.pdf](https://www.fws.gov/fisheries/pdf_files/FAC_StrategyPlan_2016-2020.pdf)



Need help for your organization?

OWP provides support with facilitating and developing strategic plans for a wide variety of conservation organizations. OWP also can provide training about strategic planning and comprehensive management systems to your organization. Contact Shawna Wilson at wildlifeplanners@gmail.com.



Go-To Resources

Articles, Books and Journals

Leading Change by John P. Kotter

We Don't Make Widgets: Overcoming the Myths That Keep Government from Radically Improving by Ken Miller

Harvard Business Review

The Strategy Book by Max McKeown

Strategic Planning for Species Conservation: A Handbook - Species Survival Commission

The Empowered Manager and The Answer to How is Yes by Peter Block

Thriving on Chaos by Tom Peters

The Fifth Discipline by Peter Senge

Websites

International Association for Public Participation
www.iap2.org/

Russell Consulting Inc.
russellconsultinginc.com/

Management Excellence by Art Petty (blog)
artpetty.com/blog/

Mindtools
www.mindtools.com

Wisconsin Certified Public Manager Program
(or local university or extension program)
continuingstudies.wisc.edu/certified-public-manager

Colorado Parks and Wildlife Strategic Plan
cpw.state.co.us/aboutus/Pages/StrategicPlan.aspx

Michigan DNR Strategic Plan Draft
www.michigan.gov/documents/dnr/dnr_wildlife_gps_509988_7.pdf

Timmons Group
www.timmonsgis.com

Don't forget to send a request to the OWP listserv!

Upcoming Events

Next Issue: So, you have a strategic plan...now what!?

Implementation can be tough and, frankly, often doesn't happen. Our next issue of Management Tracks will focus on how to implement a strategic plan effectively. This includes how to tie human and fiscal resources to the strategic plan; how to truly prioritize; how to establish accountability; and how to organize "work" into "projects."

Become an OWP member!

Membership in OWP entitles every employee of your organization to participate in our meetings and workshops, take advantage of our online resources and access the expertise of colleagues around the nation. We invite you to become a member of the Organization of Wildlife Planners.

If you were an OWP member, here's how you would have benefited:

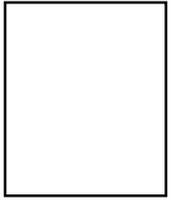
- **Webinars** – Three free webinars last summer, including David Chadwick's talk about communication, Loren Chase's talk about hunter recruitment strategies and Becky Humphries talk about successful partnerships. Organization memberships include free webinars for the entire staff. Non-members are charged \$25 per webinar.
- **Newsletters** – The spring 2015 newsletter focused on dealing effectively with conflict and the fall 2015 newsletter focused on effective communication about wildlife conservation.
- **Annual Workshop** – An annual workshop in Portland, Oregon focused on communications. Sessions included Communication Planning for Results, Drivers of Science-Policy Debate, The Problem with Problems, Social Media Isn't What you Think It's About and Problem Solving in the Modern World.

OWP depends on dues from member agencies and partner organizations to provide support and services. We receive no funding from private foundations or corporations, helping us maintain our independence in support of fish and wildlife agencies.

Please visit wildlifeplanners.org to join today!



Shawna Wilson
13503 Oakland Drive
Burnsville, MN 55379



Management TRACKS

Spring 2016

Vol. 30 No. 1

wildlifeplanners.org



© K. Kennedy Yokoyama