



SCORECARD

ON

CARET'S STRATEGIC PLAN

MARCH 2014

A VOLUNTARY ORGANIZATION OF CITIZENS COOPERATING WITH THE BOARD ON AGRICULTURE ASSEMBLY
OF THE ASSOCIATION OF PUBLIC AND LAND-GRANT UNIVERSITIES

The CARET Executive Committee met in Washington, DC on June 13, 2013 and agreed to prepare a scorecard of the CARET Strategic Plan. The scorecard is to be presented to the Administrative Heads Section and Board on Agriculture Assembly Policy Board of Directors at their meetings during the 2013 A·P·L·U Annual Meeting on November 10-12, 2013.

The coding is as follows:

Blue	Items Completed
Green	Items in Progress
Red	No action taken

CARET Strategic Plan

Adopted March 4, 2008
Amended November 9, 2012

An integrated advocacy approach to increase support for the land-grant system, its national priorities, and to secure necessary funding for research, extension and teaching.

1. Develop, train and support the CARET general membership.

- A. Develop a well-defined advocacy plan for the general membership.
This is an on-going action item that must be developed in conjunction with the BAA Budget and Advocacy Committee, Policy Board of Directors, the individual AHS members of CARET delegates, and Cornerstone Government Affairs. Any plan developed must go well beyond the activities surrounding the annual Joint CARET/AHS Meeting in Washington, DC.

- B. Provide a support structure, including leadership development, training, and advocacy tools to support and sustain effective advocacy efforts.
This is an on-going action item that must be done continuously and in conjunction with the BAA Budget and Advocacy Committee, Policy Board of Directors, the individual AHS members of CARET delegates, the CARET Executive Committee, and Cornerstone Government Affairs. Some training and advocacy tools to support and sustain effective advocacy efforts are provided to CARET and AHS at the annual Joint CARET/AHS Meeting.

Communications from A·P·L·U and Cornerstone Government Affairs facilitate and support the knowledge base for effective advocacy efforts. The CARET *HANDBOOK* and Congressional direc-

tories that are distributed to CARET and AHS annually are resources that provides advocacy tools for CARET and AHS. Cornerstone Government Affairs, in conjunction with the BAA Budget and Advocacy Committee, has created a set of *Best Practices Guides* (<http://www.land-grant.org/guides.html>) that can be used as a continuing guide to support and sustain the an effective advocacy effort. Last but not least, there are the electronic communications from A♦P♦L♦U and Cornerstone Government Affairs that provide information and updates on national legislative issues of concern to CARET and AHS to support the advocacy efforts.

Leadership development of the CARET delegates needs to be supported by every AHS member.

- C. Establish performance standards and a means to measure and evaluate performance.
No action has been taken on this item. This needs to be done in conjunction with the Policy Board of Directors, AHS, and Cornerstone Government Affairs.
- D. Propose supporting recommendations to the BAA Policy Board of Directors. **

Suggestions to accomplish:

- Schedule joint training with CARET, BAAPBD, BAC, AHS and Cornerstone to increase understanding of the advocacy system and the politics on “the Hill”.
This is accomplished (at least in part) by the training sessions provided at the annual Joint CARET/AHS Meetings. It may be that these training sessions need to be made more comprehensive and/or restructured.
- Increase interaction with Administrative Heads.
Meetings between CARET and AHS have been instituted at the annual Joint CARET/AHS Meetings and held in each of the regional summer meetings to foster better communication between the two groups. Even though this has been done to some degree, more communication at the national, regional, and state levels between CARET and the AHS would be useful for all concerned.
- Provide training on budget process and “main” request. Develop a unified message.
This is accomplished during the annual Joint CARET/AHS Meeting held in the Washington, DC area. It may be that

further refinement of the training and unified message is needed to promote a unified message.

- Consider a Leadership Institute, specialized training as a part of existing meeting agendas.
This is accomplished (at least in part) by the training sessions provided at the annual Joint CARET/AHS Meeting. For instance, a training session on using social media was held for CARET delegates and AHS at the 2013 Joint CARET/AHS Meeting. We might want or need to expand such training in future years.
- Create a CARET member mentoring program -- state-to-state, a 2-year understudy program.
A mentoring program has been established for new CARET delegates with mentors being appointed by the CARET Chair. Mentors are selected from the new CARET delegates' region and work with the new CARET delegate through a full cycle of the national and summer regional meetings.
- Refine new CARET delegate orientation training, with more opportunities to learn national issues, become acquainted with regional issues, gain exposure to grassroots issues, and more interaction with administrative heads.
The annual Joint CARET/AHS Meeting and the summer regional meetings have been restructured to facilitate more frequent interaction between CARET and AHS. However, it seems that every region feels that more needs to be done in this area to enhance the dialogue between CARET and AHS.

It is unrealistic to think that the new CARET delegate orientation session at the annual Joint CARET/AHS Meeting can be used to fully train new CARET and AHS members about national and regional issues. To orient the CARET delegate, as well as the AHS member, on national and regional issues, it will take a sustained effort at the annual Joint CARET/AHS Meeting and the summer regional meetings. There must be a commitment on the part of every AHS member to conduct educational activities for their respective CARET delegates and a commitment from the CARET delegates to participate in such activities.
- Build cohesive CARET networks. Conduct regional meetings that bring 2 or more regions together (for instance, Northeast and mid-West).

Building cohesive CARET networks are extremely difficult when the members of CARET see one another face-to-face one or two times a year. If a CARET delegate does not attend the annual Joint CARET/AHS Meeting or the summer regional meetings, they very well may not have any interaction with their fellow CARET delegates unless their Administrative Head arranges for the CARET delegates to be involved at the state level (which does occur in a few of the states).

This has been done on a limited basis. The Northeast and North Central Regions held a joint summer meeting 2012 in Burlington, VT to celebrate the 150th Anniversary of the Morrill Act. Plans are underway for the Northeast and North Central Regions to hold another joint summer meeting in 2014 in Madison, WI.

2. Develop, train and support a targeted advocacy team, including tools to monitor and evaluate success.

- E. Develop a nimble, high impact, relevant, responsive and flexible targeted advocacy plan and team.

This is somewhat underway with efforts from Cornerstone Government Affairs of identifying and matching CARET delegates with key Congressional leaders on the House and Senate Committees on Appropriations and Agriculture. However, the plan probably needs to be more formalized.

- F. Provide a support structure, including leadership development and training for rapid implementation.

No action has been taken on this item. This needs to be done in conjunction with the Policy Board of Directors, AHS, and Cornerstone Government Affairs.

- G. Establish performance standards and a means to measure and evaluate performance.

H. No action has been taken on this item. This needs to be done in conjunction with the Policy Board of Directors, AHS, and Cornerstone Government Affairs.

- I. Propose supporting recommendations to the BAA Policy Board of Directors. **

This has been done when needed and/or appropriate.

3. Establish appropriate partnerships to enhance and strengthen advocacy efforts.

- J. Coordinate and integrate advocacy and education efforts with ESCOP, ECOP, ACOP, etc.

This is done on a limited basis with CARET having liaisons to ACOP, ECOP, ESCOP, and ICOP. The liaisons report to CARET on what is being done by the COPs and report on CARET's activities to the COPs. The Policy Board of Directors should act as the coordinating and integrating entity of the advocacy and education efforts.

One way to have CARET interact more closely with the various COPs would be to have the CARET Executive Committee meet during the annual Joint COPs Meeting. This probably would necessitate eliminating the June CARET Executive Committee Meeting in Washington, DC, so this action would need further discussion and consideration.

- K. Develop strategic partnerships with groups that are sympathetic to the land-grant mission (Farm Bureau, NACo, commodity groups, etc.)
This has been done on a very limited basis. CARET has a designated liaison with the National Association of Counties (NACo) and invites a NACo representative to most of its meetings. Currently, this is the only liaison of its kind.

On more than one occasion, CARET delegates have suggested that the CARET group be used to help build coalitions with other farm groups and natural resource industry organizations on the national level. With CARET members also being members of groups like the Farm Bureau, Soybean Association, National Cattlemen and Beef Association, National Pork Producers, and environmental Groups, bridges of communication could be brokered with a diverse array of entities. A plan to accomplish this goal needs to be developed and implemented.

- L. Develop working advocacy relationship with land-grant "government relations" staff.
This is being done by the various institutions with varying degrees of interaction and success. Some government relations staff at member institutions help train and educate CARET delegates and attend the annual Joint CARET/AHS Meeting, while others have no interaction with the University's government relations staff. This item is something that should be left up to the individual AHS member and the university. However, encouragement for such interaction may be useful.

****RECOMMENDATIONS to be considered that will support CARET, its mission, and strategic plan:**

- Recommend to the BAA Policy Board of Directors that it clarify CARET's purpose, role, and relationships with the BAA, PBD, BAC, Farm Bill Committee, Cornerstone, and AHS.

No action has been taken on this item other than the approval of the CARET Delegate Job Description.

- Recommend to the BAA Policy Board of Directors that it articulate a unified message, clarify national priorities, and request support by all segments of the land-grant family.

This is being attempted through having the recommendations of the BAA's Budget and Advocacy Committee (BAC) and Committee on Legislation and Policy (CLP) come to the Policy Board of Directors for approval and then having all segments of the land-grant family and beyond support the recommendations for a unified message.

- Resolve the issue of advocating for system-wide needs vs. earmarks. Consider formula funding system for operational control?

No action has been taken on this item. Most of this problem was resolved with the elimination of earmarks by Congress.

- Recommend to the BAA Policy Board of Directors ways that the Administrative Heads can more effectively utilize and support their CARET delegates.

This is being done through the completion of this "scorecard" in relation to CARET's Strategic Plan.

- Recommend to the BAA Policy Board of Directors a set of "selection criteria" to be used by Administrative Heads, when appointing CARET delegates. Consider political connections, ability to articulate the message, commitment, and reliability. Consider ways to bring in younger people.

Other than the CARET Delegate Job Description (which can be found at: <https://www.aplu.org/sslpage.aspx?pid=1050>), this has not been done.

There is genuine concern in the CARET membership about the type of individuals being appointed to CARET by AHS.

CARET was established to be a group of people (farmers, ranchers, etc.) who use and benefit from the programs of the land-grant university system. It seems that some in AHS are using CARET to be a "dumping ground" or "reward" for retired university administrators. Even though these individuals have much to offer, their previous employment and university affiliation dilutes the composition, message, and goals of CARET. This expanding practice of appointing individuals as CARET delegates at the end of their careers contradicts the

expressed strategic goal of “consider ways to bring in younger people” into CARET. If younger people are not appointed and retained to participate in CARET, the mission and very future of the organization could be in jeopardy.

Recently, the CARET Executive Director communicated with one AHS member and suggested appointing to CARET a recent agricultural communications graduate who has done several youtube videos celebrating agriculture and farming.

- Recommend to the BAA Policy Board of Directors and to AHS clearly defined CARET expectations and a “job description” for CARET delegates and liaison positions, along with a tool to evaluate and measure effective performance.
A CARET Delegate Job Description (which can be found at: <https://www.aplu.org/sslpage.aspx?pid=1050>) has been developed. The evaluation tool has not been developed.

Recommend to the BAA Policy Board of Directors that every state and territory have a CARET representative.

No action has been taken on this item, but the intent is implicit in the fact that every AHS member receives the information on and materials for appointing CARET delegates on an annual basis. At this point in time, only a few AHS members have declined to appoint any CARET delegate(s).

It may be useful for the Policy Board of Directors’ Chair or AHS colleagues contact those AHS members not appointing CARET delegates and discuss the value of participating in the national CARET organization and national advocacy efforts.

- Recommend to the BAA Policy Board of Directors that states with larger populations have more CARET delegates. Suggestion: Establish two levels of CARET delegates: a) at-large (2 per state), and b) designated legislative districts selected by Cornerstone (total of 10 from states)
No action has been taken on this item.

OTHER SUGGESTIONS:

- Recommend to the AHS and Academic Programs to develop a “feeder system” by encouraging and assisting graduates to secure legislative assignments.
No action has been taken on this item.

- Recommend to JCEP, CARET liaisons, and Extension Directors the need to build awareness, understanding, and support of the Land-Grant System at the local level.

No action has been taken on this item.

ONGOING IMPROVEMENTS/SUGGESTIONS:

- Explore and implement “best practices”.
A set of “best practices” has been developed by Cornerstone Government Affairs for use by CARET and the Board on Agriculture Assembly, and they can be found at:
<http://www.land-grant.org/guides.html>
These “best practices” can be amended as time passes.
- Continue to add “advocacy tips” to the CARET *Handbook*.
No action has been taken on this item. It might be that the *Best Practices* documents developed by Cornerstone Government Affairs could or should be added to the *Handbook* jump drives on an annual basis.
- Develop a reporting form, listing efforts/accomplishments that can be shared with Administrative Heads.
This scorecard on CARET’s Strategic Plan is an attempt at this item.
- Raise awareness about information provided on websites (A·P·L·U, AHS, Cornerstone, etc.).
This is an on-going process due to the frequency in turnover of AHS members and CARET delegates. In addition to awareness of websites, more attention to the expanding social media sites (i.e. Twitter) needs to be paid by CARET and AHS.
- Initiate a CARET newsletter or a periodic letter from the Chairman.
No action has been taken on this item.
- Increase communication with Cornerstone on bill status, failures and opportunities.
This is an on-going process with frequent reports on funding and legislative issues being distributed (via e-mail, first-class mail, and social media) to CARET and AHS by Cornerstone Government Affairs. An improvement in the communication process would be to have a Cornerstone Government Affairs’ representative at every CARET and CARET Executive Committee Meeting in order to hear and evaluate feedback from visits with Members of Congress and their staffs on Capitol Hill and in the states and districts.