

Strategic Plan

# COUNCIL FOR AGRICULTURAL RESEARCH, EXTENSION, AND TEACHING



# Executive Summary

## MISSION

CARET’s mission is to educate and advocate on behalf of the land-grant system (colleges of agriculture) and related national priorities for funding for research, Extension, and teaching. CARET is dedicated to improving national support and understanding of the important role played by land-grant colleges in the food and agricultural systems, as well as the profound consequences of that role for the U.S. food supply and the nation.

## THE PLAN OVERVIEW

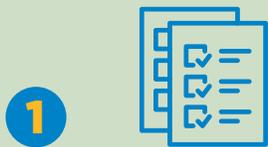
This new plan focuses on four strategic initiatives over the next four years, spanning from 2022–2026:

- ▶ **Coalition-building:** Build relationships and understanding within the LGU system and with external stakeholders.

- ▶ **Communication:** Increase and improve communication and coordination.
- ▶ **Training:** Develop, train, and support the general membership of CARET and the AHS.
- ▶ **Accountability:** Ensure that CARET is engaged and accountable.

For each initiative, strategic plan actions (highlighted later in this Executive Summary) with clear, measurable goals have been developed to provide clarity of direction and promote accountability. These actions and goals are organized around the advocacy calendar for CARET, the Board on Agricultural Assembly’s (BAA) Policy Board of Directors (PBD), and the Administrative Heads Section (AHS).

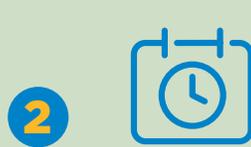
That calendar includes four annual stages of work:



### FALL/EARLY WINTER

**Prepare** the local and national request materials.

**Outline** the local and state argument for federal support of a national system.



### WINTER/SPRING

**Hold** the joint CARET/AHS annual spring meeting.

**Schedule** advocacy and education visits; undertake related follow-up.



### SPRING

**Submit** letters of support for the land-grant university system colleges of agriculture.

**Coordinate** with government relations personnel during official follow-up.



### SUMMER/FALL

**Reiterate** the requests/needs/outcomes during the summer regional meetings and through fall engagement.

**Hold** regional meetings that add context to justifications.

**Undertake** the development of Op Eds.

# Strategic Plan Actions-Highlights

## COALITIONS

Building and sustaining coalitions, internally and externally, requires capable and committed people. The actions in this section focus on both building connections with internal and external stakeholders and guiding the selection of CARET delegates, and their work with AHS and CGA.

### Action highlights

- ▶ Update CARET job description; increase number of CARET; recruit delegates in key districts
- ▶ Identify best practices for AHS/CARET interaction
- ▶ Engage with CGA
- ▶ Engage with external stakeholders (food, agriculture, human services)
- ▶ Encourage events with Members of Congress and staff in district/on-campus; year-round engagement
- ▶ Develop “influencer teams” of CARET/AHS/CGA in key states
- ▶ Develop robust process for Calls to Action (CTA)
- ▶ “Champion-building” to celebrate and build strong connections to our champions with awards and recognitions

## COMMUNICATIONS

Robust and timely communications, both internally and externally, are essential to effectively delivering on our mission of advocacy. Cross-group communication creates meaningful opportunities to help CARET delegates understand and effectively communicate the “Ask.”

### Action highlights

- ▶ Create robust process for development of CTA
- ▶ Coordinate and align communications with BAA advocacy plan and calendar
- ▶ Develop compelling BAA “Ask” documents
- ▶ Develop a quarterly CARET newsletter
- ▶ Support regional governance through a CARET delegate workbook
- ▶ Create short videos for advocacy training

## **TRAINING**

Participation in preparation sessions will help AHS members and CARET delegates understand the advocacy strategy and help create a CARET/AHS/CGA team atmosphere that archives BAA advocacy goals. CARET will develop and disseminate educational materials such as “How to Make the Ask,” “Budget and Advocacy,” “Impacts of the Colleges of Agriculture,” and “Working Effectively with Governmental Affairs”. These will result in better coordinated advocacy due to increased congressional support and new congressional champions.

### **Action Highlights**

- ▶ Hold orientation webinars for CARET/AHS
- ▶ Review and refine mentor program for CARET delegates
- ▶ Conduct relevant in-person training at Joint CARET/AHS meeting
- ▶ Comprehensive communications training for CARET and AHS

## **ACCOUNTABILITY**

Successful implementation of a strategic plan requires commitment and accountability of the participants. Throughout the plan document, there are measures of accountability. This section of the plan provides a framework for overall accountability, recognizing that CARET is rooted in a federation of independent institutions. This plan is a blueprint for a shared commitment to the mission of CARET and the colleges of agriculture by providing the individual and peer leadership necessary to ensure success.

### **Action Highlights**

- ▶ Assess performance measures as outlined in this plan
- ▶ Establish an implementation committee to monitor plan progress and report to the CARET Executive Committee
- ▶ Member institutions provide financial support for CARET delegates

## **REPORTING**

The CARET Executive Committee will prepare an annual report on these actions for review during the November meeting.

## Coalitions – 1.1 Recruit and Retain Connected CARET Members Who Can Serve Long-Term Goals

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. Define the CARET delegate selection criteria (checklist) in an updated job description and provide it to the deans/directors.	Recruitment of enthusiastic and knowledgeable CARET delegates based on their ability to make short- and long- term advocacy efforts.	<ol style="list-style-type: none"> <li>1. CARET ExDir updates the CARET job description and provides it to deans/directors before the selection process.</li> <li>2. Deans/directors select CARET delegate using the description.</li> </ol>	<ol style="list-style-type: none"> <li>1. Completion of updated job description.</li> <li>2. Dean/director assessment report indicating that the delegate meets the selection criteria; include in mid-year survey.</li> </ol>	Executive Committee Meeting in October/ November.
B. Define responsibilities and best practices for AHS interaction with CARET.	AHS understanding of responsibilities regarding CARET delegates' interactions.	<ol style="list-style-type: none"> <li>1. AHS liaisons and CARET ExDir define AHS (CARET) responsibilities and best practices; AHS EC reviews.</li> <li>2. AHS members enact best practices.</li> </ol>	<ol style="list-style-type: none"> <li>1. Dean/director assessment report indicating that the AHS member interacts with CARET; include in mid- year survey.</li> </ol>	Executive Committee Meeting in October/ November.
C. Map and coordinate CARET delegate recruitment and engagement in key districts and states to assemble a team of key influencer's.	Assurance of alignment and targeted CARET support to promote increases in federal funding for capacity programs.	<ol style="list-style-type: none"> <li>1. CARET ExDir identifies key states and individuals according to committee membership/ champion potential.</li> <li>2. AHS deans recruit CARET delegates.</li> <li>3. CARET ExDir works with Food, Agriculture and Natural Resources (FANR VP) to cultivate influencer teams in key states/districts.</li> <li>4. CARET ExDir works with CGA.</li> </ol>	<ol style="list-style-type: none"> <li>1. The Sr. Associate will monitor the roster of CARETs, taking note of those who reside in key states.</li> <li>2. AHS/CARET report on meetings and activities related to the national 'Ask'.</li> </ol>	Executive Committee Meeting in October/ November.

## Coalitions – 1.2 Building External Connections: Meeting with Stakeholders and Policymakers

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. CARET/AHS/CGA (Influencer Teams) conduct meetings in March with their members of Congress and staff.	March meetings help members of Congress and their staff understand the 'Ask' of the BAA's federated system prior to the member request deadlines for the upcoming fiscal year appropriations debates.	<ol style="list-style-type: none"> <li>1. AHS/CGA are responsible for setting up and facilitating visits.</li> <li>2. FANR and LBA are responsible for providing CARET/AHS with information about the requests well in advance of the meetings.</li> <li>3. CARET is responsible for conducting timely follow-up that summarize the importance of the funding for that state/district. AHS/CGA is responsible for filling out appropriations forms.</li> </ol>	A meeting survey will be provided to all CARET after the Joint Meeting in March. This survey will ask respondents to fill out how many meetings they had with their delegations and to summarize the response to the requests.	Executive Committee Meeting at JCOPs (July).
B. Conduct state and national agriculture and food stakeholder meeting to socialize 'Ask' and garner sponsorships.	Grow the network of support for BAA priorities and the land-grant university system; garner co-sponsorship.	<ol style="list-style-type: none"> <li>1. The CARET Executive Committee identifies key groups to engage with each year (at JCOPs, the July in-person meeting) at the national and regional levels.</li> <li>2. FANR, CARET/AHS Leadership, and regional association leadership conduct meetings.</li> </ol>	FANR staff, national and regional chairs report on engagement and levels of support.	Executive Committee Meeting at JCOPs (July).
C. #Championbuilding – Cultivate influencer teams to foster congressional champions for national advocacy priorities.	This makes congressional Dear Colleagues (DCs) letters in support of BAA goals possible. The result is increased funding for BAA priorities.	<ol style="list-style-type: none"> <li>1. CARET ExDir is on point, along with the FANR VP and consultants, to work with influencer teams during the budget and approps process.</li> <li>2. CARET delegates ask members to sign on to DCs during the March visit (if possible).</li> <li>3. Influencer teams meet with appropriations/ authorization members as appropriate and possible.</li> </ol>	<ol style="list-style-type: none"> <li>1. Recordings of congressional meetings with key committee members/staff.</li> <li>2. A count of the number of member signatures on Dear Colleague letters.</li> <li>3. Funding increases for BAA priorities.</li> </ol>	CARET EC meetings.
D. Celebrate our champions with awards and other recognitions.	Stronger connections to champions.	CARET ExDir, CARET EC, AHS, CGA, and FANR VP.	Hosting of events where members attend and provide comments during reception.	Executive Committee meeting at JCOP's (July).
E. Encourage CARET delegates to be guest speakers on campus.	CARET delegates become local spokespeople on LGU.	CARET delegates and AHS members.	Mid-year self-assessment.	Executive Committee Meeting in October/ November.
F. Hold events with members of Congress and their staff on-campus and/or in the state/district.	Members of Congress are more supportive of LGU system; see results/needs.	<ol style="list-style-type: none"> <li>1. AHS, CGA and CARET work together to develop programs and coordinate events.</li> <li>2. The national CARET assists with key states/districts to support the national campaign, when possible.</li> </ol>	<ol style="list-style-type: none"> <li>1. CARET ExDir reports event metrics during a national strategy presentation in coordination with consultants.</li> <li>2. AHS and CARET report their mid-year self-assessment.</li> </ol>	Executive Committee Meeting in October/ November.
G. Promote year-round engagement of CARET with members of Congress.	Develop and strengthen CARET relationship and connection with members of Congress; enhance prospects for increased funding.	Each CARET and AHS member.	Annual self-assessment of activity.	Executive Committee Meeting in October/ November.

## Coalitions - 1.3 Building internal Connections

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. Provide a Spring Joint Meeting update on the BAA Advocacy Plan outlining roles and responsibilities.	All CARET, AHS, and CGA members understand the advocacy strategy and roles. Forms are submitted by appropriate party.	<ol style="list-style-type: none"> <li>1. FANR VP, ExDir, and consultants work with the BAA BAC to develop the plan.</li> <li>2. The plan is presented at the Joint CARET/ AHS Spring Meeting.</li> </ol>	Post-meeting assessment outlining whether attendees understood goals, roles, and timeline for advocacy.	Executive Committee Meeting in October/ November.
B. Within a <b>BAA Advocacy Plan</b> , undertake tactical advocacy via calls to action (CTA), outside witness testimony (OWT), public comment, and coordinated op ed communications.*	Tactical advocacy and communications mechanisms enable CARET delegates, stakeholders in the state, and the overall CARET organization to provide Congress with evidence of support for BAA priorities.	<ol style="list-style-type: none"> <li>1. CARET ExDir circulates example follow-up correspondences, CTAs, and OWT supporting BAA priorities to CARET delegates/leadership.</li> <li>2. FANR Communications assists with op-eds and special public-facing communications.</li> </ol>	A count of the number of letters, opinion editorials and articles, public comment, and CTA may be reported by the ExDir.	CARET EC meetings.
C. Develop in-person training for Joint CARET/AHS Spring Meeting.	CARET understanding of the "Ask", the justifications for the ask, and of the roles of the team (AHS/ CGA).	<ol style="list-style-type: none"> <li>1. CARET ExDir, consultants, CGA Ag Teams, CARET leadership, and BAC leadership outline the structure of the training. The CARET planning committee considers it for the meeting.</li> </ol>	Ask about impact in the post-meeting survey.	Executive Committee Meeting in October/ November.
D. Pre-plan appropriations advocacy CTAs to provide an ample timeline for member institution protocols/ clearance. All CTAs include talking points and clear direction for action.	<ol style="list-style-type: none"> <li>1. Ample time allows for coordinated responses across the influencer teams at each institution.</li> <li>2. Better participation in CTAs resulting in increased federal funding.</li> </ol>	<ol style="list-style-type: none"> <li>1. CARET ExDir coordinates with consulting group, CGA, and AHS, ensuring that CTAs are vetted.</li> <li>2. CTAs are sent a week in advance of a deadline for action.</li> <li>3. February - Group letter (see example) CTA, March - Visit follow-up/thank-you and possible Dear Colleague CTA, September - Op Ed CTAs.</li> </ol>	Track CTA activity in post-event survey and list Dear Colleague letter signatures/ members in EC report.	Executive Committee Meeting in October/ November.
E. Support successful regional meetings by organizing regional meeting agendas for CARET/AHS and section interactions. The Sr. Associate will provide guidance in the workbook and coordinate with regional chairs.	<ol style="list-style-type: none"> <li>1. Regional leadership build confidence and comradery at the regional association level to support national advocacy efforts.</li> <li>2. Regional meetings that use CARET time effectively and build regional participation.</li> </ol>	CARET ExDir, Sr. Associate, regional chairs, and CARET EC reviews the workbook on an annual basis at the fall meeting.	Informal feedback to CARET chair from regional chairs.	Executive Committee Meeting in October/ November.
F. Improve regional association governance procedures are improved via electronic ballots and a "minutes" library.	Strengthening of regional governance and administration.	<ol style="list-style-type: none"> <li>1. Sr. Associate is responsible for providing a ballot and reporting on responses.</li> <li>2. Sr. Associate sends electronic ballot process to regions.</li> </ol>	Implementation of minutes library with timely updates.	Executive Committee Meeting in October/ November.
G. Invite CGAers to serve on regional planning committees and attend meetings.	Greater engagement/ inclusion of the CGA.	Regional planning committees for CARET meetings.	<ol style="list-style-type: none"> <li>1. Regional organizations provide list of individuals on planning committees. CGA participates on committees and attends meetings.</li> </ol>	Process update.
H. Nominate a CGAer to participate in CARET/ AHS Annual Meeting Planning Committee.	CGA perspective can be heard in Joint CARET/ AHS Planning Committee Meetings.	CARET/AHS Planning Committee Chair invites up to two CGA members to serve (with a vote).	Participation in planning committee meetings.	Process update.

\* The BAA Advocacy Plan is the coordinated advocacy calendar/timeline and strategy outlining the advocacy phases, CARET/AHS roles and responsibilities, and tactical advocacy actions.

## Communications

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. Develop, design, and release compelling BAA "Ask" documents (leave behind, elevator pitch, and talking points) and release well before the March meeting (January or February).	Better advocacy, resulting in increased support by Congressional staff and members.	In coordination with FANR VP/ AVP for Communications, the lobbying firm, CARET ExDir, and BAC develop materials by the end of January.	Post-meeting survey on reception to documents and elevator pitch training.	Executive Committee Meeting at JCOPs (July).
B. Share CARET advocacy materials (via website).	Better coordination of information.	In coordination with FANR VP/ AVP for Communications, the lobbying firm, CARET ExDir, and BAC develop materials by the end of January.	An up-to-date website.	Process update.
C. Develop a CARET quarterly newsletter.	Communication and teambuilding for CARET at the national level.	CARET ExDir and the Sr. Associate send out newsletter, quarterly.	Evaluate number of opens and clicks.	Executive Committee meeting at JCOPs (July).

## Training

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. Train Influencer Teams (CARET/AHS/CGA) on 1) BAA alphabet soup/ structure, 2) how to make the 'Ask', and 3) strategic communications - op-eds, elevator speech, LinkedIn posts. Let CARET/AHS/CGA teams know why action matters.	Better meetings, advocacy, and public communications about the incredible land-grant university system.	CARET ExDir, consultant, and FANR AVP for Communications work with CARET/AHS to accomplish this.	<ol style="list-style-type: none"> <li>1. Positive media engagement, member office engagement, and positive growth of the advocacy 'Asks'.</li> <li>2. CARET EC and FANR AVP do a self-assessment.</li> </ol>	Executive Committee Meeting in October/ November.
B. Review and refine process for CARET mentor and orientation programs.	CARET members who understand their role and are prepared to be effective at making requests.	<ol style="list-style-type: none"> <li>1. Chair matches new delegates to "influencers" who have been successful at securing support for requests.</li> </ol>	<ol style="list-style-type: none"> <li>1. Names provided by AHS deans.</li> <li>2. Assignments made by CARET chair before November meeting.</li> </ol>	Executive Committee Meeting in October/ November.
C. Create a library with short videos.	CARET understanding of BAA, approps process, strategy, and teamwork.	This is a long-term goal for ExDir and others.	Completion of video library.	2023

## Accountability – 4.1 Advocacy Strategy

Action	Outcome/Goal	Responsible Party(ies)	Measurement	Target Date
What are we doing?	What does it achieve?	Who is responsible/ accountable?	How do we assess performance?	When do we assess?
A. Select and register CARET members in the database prior to releasing March meeting information.	A full and current list of engaged/ appointed CARET delegates.	CARET ExDir and Sr. Associate send CARET delegate renewal (1 year or multi-year) to AHS starting September 15. Deadline: Oct 31.	How many AHS respond with one-year appointments or multi-year appointments.	Executive Committee Meeting in November.
B. Member institutions provide financial support for CARET delegate activities.	CARET volunteer time is not compromised by lack of support.	AHS members provide support for CARET delegate attendance to national meetings.	Attendance at meetings sponsored by member institutions.	Executive Committee Meeting in November.
C. Assess performance measures as outlined on this plan.	Achieve performance measures as outlined on this plan.	CARET/AHS members as more specifically outlined in this plan.	Reporting mechanisms as outlined in this plan.	March
D. Establish an implementation committee to monitor progress on the SAIP and report to the CARET Executive Committee.	Ensure oversight of plan activities; broaden engagement of CARET with the plan.	Committee appointed by CARET EC.	1. Committee appointment. 2. Committee report to CARET EC.	Executive Committee Meeting in November.
E. Encourage a fall engagement/ planning meeting prior to March's Joint Meeting for cohesive messaging.	This creates a CARET/ AHS/CGA team atmosphere that supports effective advocacy.	AHS and CGA at individual universities.	Self-assessment.	Executive Committee Meeting in November.



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