CARET/AHS
Strategic Plan Implementation
Committee Report

2023
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Background

The Council for Agricultural Research, Extension, and Teaching (CARET) is a national grassroots organization of volunteers created in 1982 by the Board on Agricultural Assembly of the Association of Public and Land-grant Universities (APLU). CARET seeks to enhance national support and understanding of the land-grant university system’s food and agricultural extramural research, Cooperative Extension, and teaching programs that enhance the quality of life for all people.

The Board on Agricultural Assembly’s Administrative Heads Section (AHS) and CARET Executive Committee published the revised CARET Strategic Plan in November 2022. The plan focuses on four strategic initiatives:

▶ Coalitions  ▶ Training  ▶ Communications  ▶ Accountability

The strategic plan implementation actions were developed by CARET delegates, APLU BAA Administrative Heads Section members, APLU Council on Governmental Affairs (CGA) Agricultural Authorization and Appropriations Team members, and APLU BAA Committee on Marketing and Communications (CMC) representatives. The strategic plan implementation actions build out an actionable and accountable strategy for awareness building, engagement, and advocacy to increase funding for public colleges of agriculture over the tenure of the three/four-year plan. The associated actions are organized around the congressional calendar and the advocacy calendar of CARET, the Council on Governmental Affairs, the Board on Agricultural Assembly, and the Policy Board of Directors (PBD).

Who are CARET delegates?

CARET delegates are agribusiness leaders, agricultural producers, commodity and specialty crop organization principals, conservation advisers, influential consumers, members of agricultural advisory boards, state and local officials, and young or beginning farmers. The CARET delegate membership includes members with a variety of ages, cultures, and political affiliations that reflect the diversity of the United States of America’s agricultural and food economy. The deadline to appoint new CARET delegates is at the end of November each year. The delegate term is two years.
What are CARET’s advocacy goals?

Farm Bill

► $5 billion in mandatory funding for the Research Facilities Act in the next five-year Farm Bill

Appropriations

► Increased funding, according to the annual discretionary appropriations requests outlined by the APLU Board on Agriculture Assembly’s Budget and Advocacy Committee (BAC) for the following authorized accounts:
  - Hatch of 1887
  - Evans-Allen of 1977
  - 1994 Research
  - McIntire-Stennis
  - Agriculture and Food Research Initiative (AFRI)
  - Smith Lever Section 3(b) and (c)
  - Extension Services at 1890 Institutions
  - Tribal College Extension Grants Program (TCEP)
  - Smith Lever 3(d) Programs
  - Women and Minorities in STEM
  - 1994 Institutions Equity Payment
  - International Capacity and Competitive Grants –
  - Research Facilities Act – $500 million in funding for the Research Facilities Act in annual discretionary appropriations. *(Note that the Farm Bill request is mandatory, which means that, if successful, funding would not be dependent on annual appropriations.)*
Accountability in coalition building

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

Recruit and retain connected CARET members who can serve long-term goals

Provide a CARET delegate job description.
An updated job description (two-year terms, with reappointment at the discretion of the AHS) is available in the CARET handbook drafted and developed by the CARET Team in 2022. See page 9.

Define responsibilities and best practices for AHS/CARET interaction.
The CARET handbook also includes a best practices checklist and the AHS Calendar of activities. See page 10.

Map and coordinate CARET delegate recruitment.
Out of the 50 states, there are ___ states with CARET delegates. ___ states have more than one CARET delegate in the state. The region with the most CARET delegates is ___. See the map below for more information.

Building external connections—Meet with stakeholders and policymakers

CARET/AHS/CGAers and others conduct meetings in February/March.
In response to the release of the Gordian Report and a USDA Economic Research Service (ERS) report, the APLU Board on Agriculture Assembly (BAA) has worked through the Committee on Legislation and Policy (CLP) and in partnership with the APLU Council on Governmental Affairs (CGA) and the Council for Agricultural Research, Extension, and Teaching (CARET) to provide Hill offices with information on the deterioration of agricultural research, Extension, and teaching facilities. This effort launched at the 2023 Joint CARET/AHS Meeting in Washington, DC, which focused on the APLU BAA Farm Bill request for $5 billion in mandatory funding for the Research Facilities Act (RFA) to upgrade research facilities at public colleges of agriculture.

- The 300 CARET/AHS meeting participants who attended the CARET/AHS meeting in March 2023 emphasized the deterioration of agricultural research facilities and the importance of mandatory facilities funding in research title of the 2023 Farm Bill when conducting Hill visits.
- The Budget and Advocacy Chairman and Maryland CARET/AHS teams (College Park and Eastern Shore) met with House Appropriations Committee and Agriculture Subcommittee majority clerks.
The Budget and Advocacy Chairman and the New Mexico CARET/AHS team met with Senate Appropriations Committee and Agriculture Subcommittee majority and minority clerks.

Council on Governmental Affairs (CGA) representatives from Pennsylvania, California, and Ohio and the CARET Executive Director made follow-up visits to the House Speaker’s office and the House Agriculture Committee staff.

- Over the course of the year, CARET delegates worked with APLU to engage Washington, Hawaii, Kansas, and Oklahoma congressional offices to reinforce support for the Research Facilities Act in the Farm Bill.
- As a result of this stakeholder engagement and in coordination with the Council on Governmental Affairs, two amendments for $2 million each—one in the House and one in the Senate—were submitted during each chamber’s appropriations process, respectively.

**Conduct national agriculture and food stakeholder meetings.**
Socialize the “Ask” and garner “Washington Conference” sponsorships.

- In January 2023, the CARET and Administrative Heads Section (AHS) Chairs visited with the following key national stakeholder organizations to socialize the Farm Bill request in alignment with the Strategic Plan.
  - American Farm Bureau Federation
  - International Fresh Produce Association
  - National Association of State Departments of Agriculture
  - Farm Credit Council
  - National Council of Farmer Cooperatives

- In partnership with the Council on Governmental Affairs, CARET and AHS circulated an influential stakeholder sign-on letter that garnered 340+ non-university organizational signatures. CARET delegates were an important part of garnering support for this letter.
  - Subsequently, the RFA request was mentioned throughout the year in committee hearings, listening sessions, and statements made by key Members of Congress.
  - Congressional champions in Hawaii, Kansas, and Washington introduced two marker bills for mandatory funding in the next Farm Bill shortly after its submission to the House and Senate Agriculture Committees.

- The Sr. Associate developed a sponsorship prospectus for tailgate and Hill reception.

- In October 2023, in accordance with the 2023 CARET travel plan, the CARET Executive Committee held its fall meeting in DC for the purpose of connecting with key national stakeholder organizations to further discuss the Farm Bill request and to develop partnerships for advancing capacity funding. Meetings were conducted with the following associations:
  - American Soybean Association
  - National Association of Wheat Growers
  - American Farm Bureau Federation
  - National Coalition for Food and Agricultural Research
  - National Cattleman Beef Association
  - American Farm Bureau Federation
  - International Fresh Produce Association
  - National Association of State Departments of Agriculture
A meeting with Ranking Member Boozman (R-AR) and Hoeven (R-ND) was held in partnership with NASDA and NCBA shortly after the stakeholder meetings as a follow-up. Additionally, APLU and NASDA have worked on and released a co-branded leave-behind to support funding for the Research Facilities Act in the next Farm Bill.

#Championbuilding
Cultivate influencer teams to foster congressional champions for national advocacy priorities.

Representatives Mann (R-KS 1st District) and Schrier (D-WA 8th District) introduced the AG RESEARCH Act, HR 4135, with $1B in mandatory funding for RFA, and Senator Hirono (D-HI) introduced a Senate version of the AG RESEARCH Act, S. 2589, which included $5B mandatory funding for the RFA.

Celebrate our champions with awards and other recognitions.
During Farm Bill negotiations, BAA decided not to provide any awards.

Encourage CARET delegates to be guest speakers on campus or at a state meeting.
CARET delegates do not have any national level materials that would be appropriate to present on campus from our coalition work at this time. However, the BAA Vision project, the climate-smart agriculture publication, and the capacity awareness campaign will provide them with high quality materials moving forward. Importantly, this should not limit vice presidents/chancellors, deans, or directors from bringing CARET delegates to speak on campus in the meantime about the importance of public-private partnerships and how the colleges of agriculture, forestry and natural resources, veterinarian science, and human sciences meet the needs of society.
Hold events with members of Congress and their staff on campus or in the state/district.

Given that it was a Farm Bill development year, the House Agriculture Committee Chairman and the Senate Committee on Agriculture, Nutrition & Forestry Chair and Ranking Member held numerous listening sessions across the country. Many of these sessions took place on the campuses of public colleges of agriculture. Additionally, CARET members attended several sessions that were hosted by Members of Congress themselves. There is an opportunity to support engagement in the future via on-site visits with Members of Congress and/or their staff to achieve engagement goals.

Promote year-round engagement of CARET with Members of Congress.

Many CARET delegates have personal relationships with Members of Congress. Several CARET delegates hosted fundraisers for Members who were not affiliated with National CARET. Additionally, CARET is a member of many national, regional, and local organizations that CARET are a part of work with CARET delegates to host local tours and informational sessions on specific crops, enterprises, or issues that are important to the organization and the Member.

Building internal coalitions

Provide a Spring Joint Meeting update on the BAA Advocacy Plan.

As the BAA has onboarded and engaged a new advocacy firm, Lewis-Burke Associates, it has become more important for an advocacy plan, as well as roles and responsibilities, to be developed for clear and effective team management. Doug Steele, Vice President, Food, Agriculture, & Natural Resources (FANR); Wendy Fink, Associate Vice President, FANR; Caron Gala, Director of Governmental Affairs and Executive Director of CARET; Flannery Bethel, Senior Associate for CARET; and the Lewis-Burke Associates advocacy firm are all working together on coalition building, Hill engagement/advocacy, Administration advocacy, and regulatory monitoring. The team is called the FANR/LBA Advocacy Team.

Within the BAA Advocacy Plan, undertake tactical advocacy.

The BAA Budget and Advocacy Committee and the Committee on Legislation and Policy met in November 2023 to outline a BAA Advocacy Plan and Vision strategy. The Joint Business Meeting of CARET and the Administrative Heads Section at the 2024 Washington conference will feature a draft report on the development of the vision document and its related goals, objectives, and milestones. The final report will be presented at the Joint Committees on Organizational Policy (Joint COP) meeting in the summer of 2024.

Develop in-person training for the joint CARET/AHS spring meeting.

The last session of the 2023 Washington Conference featured a scenario session where the FANR/Lewis-Burke Associates Advocacy Team provided the audience with specific scenarios on how an effective advocacy team works. An example meeting script, talking points, and materials assisted participants in conducting effective meetings. For the 2024 meeting, explanatory white board animation videos will help participants describe the role of capacity funding in supporting the federal network on agricultural and forestry research and Cooperative Extension.
Pre-plan appropriations advocacy calls to action.
A pre- and post-meeting call to action were sent to all CARET and AHS members before the March conference in 2023. The call to action included talking points, materials, and other information helpful for CARET and government relations officials to coordinate on submission of the appropriations forms.

Support successful regional meetings.
The CARET Executive Committee identified a Regional Governance Committee that developed a recommended approach for regional governance that aligned with the updates to the CARET national rules of operation (ROO). These recommendations have been incorporated into the CARET ROO, which will be adopted at the 2024 Washington Conference.

Improve regional association governance procedures and record-keeping.
The regional associations now have a website that includes a list of members, up-to-date minutes, and any information on governance and regional rules of operation that they need to undertake their business.

CGAers serve on regional planning committees and attend meetings.
This has not yet been identified as a priority for action.

Nominate a CGAer to participate in CARET/AHS annual meeting planning.
The updated rules of operation outline that a member of the Council on Governmental Affairs Agriculture Teams (CGA Ag Team) should serve as a member of the CARET/BAA Washington Conference Planning Committee. Jennifer Yezak of Texas A&M is a part of the committee for 2023 and 2024.

Accountability in communications
Develop, design, and release compelling BAA “Ask” documents.
High quality materials beget high quality attention and garner support. This year, CARET materials included essential information for filling out forms and engaging with Members of Congress and staff, as well as providing justification for ongoing support for the capacity and competitive programs that support land-grant university research and Extension. Materials were developed and distributed in a timely manner to support the FY2024 appropriations and the 2023 Farm Bill request. The Gordian Report was also redesigned for easy reading and comprehension.
B. Share CARET advocacy materials via website.

In the effort to strengthen access to CARET information and advocacy materials, CARET staff worked with the FANR communications team to develop a new CARET site on land-grant.org where CARET delegates can easily view materials and impacts, governance information, training videos, and meeting details. The CARET site includes the primary CARET page, where anyone can view information in the listed tabs as well as the Executive leadership lists. It also includes the “CARET Delegate Portal,” in which delegates can access more detailed and sensitive information and resources, such as minutes from regional meetings, webinars, and advocacy training videos (coming in 2024). Access the CARET Delegate Portal by entering the password CARET1982.

C. Develop the CARET quarterly newsletter.

This year, CARET staff developed quarterly newsletters that were sent to all CARET delegates and Administrative Heads members. Each newsletter uses the below outline as a foundation for what is included in each issue, and other relevant or timely information is shared as needed. In 2023, there was an average of 68% engagement of the approximately 250 recipients.

1. Report/update from CARET Executive Director and/or National Chair
2. Washington Update (may be included in the above update)
3. Calls to Action
4. Meeting Information
5. Impacts/Resources/Community Newsletters
6. Upcoming Events
Accountability in training


CARET hosted three pre-meeting webinars:

▶ All about the “Ask” – This webinar featured members of the Budget and Advocacy Committee who were instrumental in developing and providing justification for the annual appropriations requests. This webinar is archived on the website. It occurred one month prior to the meeting. Attendees received links to the request materials as well as the draft meeting program.

▶ CARET/AHS Orientation – The CARET Orientation webinar occurred in 2022, but it was in support of the 2023 meeting and activities. The webinar is archived on the website in the delegate portal. The webinar included information on the newly released Handbook for CARET delegates.

▶ Farm Bill Webinar on the Research Facilities Act – The Farm Bill webinar took place in 2022 in preparation for the advocacy needed to prepare for the development of the next Farm Bill.

The CARET Handbook is an invaluable resource because it contains information on best practices, the appropriations and Farm Bill requests and justifications, as well as the congressional timeline. Finally, it celebrates the leadership of CARET delegates and AHS leaders at the national and regional levels.

Review and refine CARET mentor process.

The CARET mentoring program is outlined in the CARET handbook. More work can be done to organize CARET mentors/mentees. While initial communications should occur prior to the Washington Conference, discussions at the regional meetings revealed that summer meetings may be the best time for mentors/mentees to meet with each other in person to develop a relationship.

Create a video library.

A 2024 project.

Governance and CARET/AHS coordination

Not listed in the Strategic Plan, but essential to proper function of CARET.

Rules of operation

The CARET Executive Committee has undergone a process to update its rules of operation.

A. Revision of the CARET term to two years
B. Inclusion of terms for Executive Officers and assumed succession
C. Updating of the number of Executive Committee members
D. Updating of the role of Executive Officers
E. Listing of the Joint Planning Committee leadership and membership make up
F. Updating of the list of Liaison organizations
G. Guidance for regional caucuses
H. Interaction and engagement with AHS Chair and Executive Committee
I. Addition of three voting AHS members: CLP, BAC, and AHS appointees
CARET/AHS chair meetings
The CARET Chair, AHS Chair, VP of FANR, and the CARET Executive Director hold quarterly planning meetings.

Liaison responsibilities (page 23 of the CARET Handbook)
All liaisons should:
▶ Visit with the CARET Chair and previous section liaison, whenever possible, about the expectations, responsibilities, activities, and schedule of the respective section or group prior to accepting any liaison position.
▶ Attend all CARET Executive Committee meetings by virtue of their appointment as liaisons.
▶ Serve as the communication to and from the section or other respective group and CARET by providing a written liaison report of recent activities and issues prior to each CARET Executive Committee meeting and a verbal report at each CARET Executive Committee meeting.
▶ Present an oral report containing the highlights/action items from the respective COP or group to the CARET membership during the CARET Business Meeting at the CARET/AHS Meeting.
▶ Attend the orientation session for new CARET delegates and AHS members at the Joint CARET/AHS Meeting to be introduced and provide a brief explanation about their respective COP or group.
▶ Attend and participate in meetings/activities of the COP section, including the Joint COP’s Meeting held during the third week of July.

CARET Executive Committee Travel (page 27 of the CARET Handbook)

Regional Governance (page 25 of the CARET Handbook)
**Survey for AHS/CARET teams**

How impactful is your advocacy and engagement team in building awareness of and support for the federal part of the system-wide agriculture research and Extension (Hatch, Smith-Lever 3(b) and (c), Evans-Allen, 1890s Extension, McIntire-Stennis, 1994 programs, RFA, and AFRI)? This survey is completely anonymous.

The team consists of the Administrative Head(s) and any additional contacts at the university who they deem appropriate for the purposes of successful engagement and advocacy. Council on Governmental Affairs (institutional government affairs representatives) and Communications staff are strategic members of any team.

▶ A strong working relationship between CARET delegates and AHS is important for success.

- Did your team attend this year’s Washington Conference? How many Members of Congress (or their staff) did you meet with? R or D? Are they on an appropriations/authorizing committee for agriculture?
- Did your CARET delegate host a Member of Congress in the District or State?
- Did you review the delegate and AHS checklists and calendars as a team?
- Did you talk together about federal engagement this calendar year outside of the CARET/BAA Washington Conference?
- What are best practices that you can share that effectively build the CARET/AHS and institutional partnership?
- Are there opportunities for CARET/AHS engagement and advocacy that you have not yet explored? Example: op eds, etc. If so, what are they?
- How many years have you been working with your CARET delegate? How many years have you been attending these meetings? Do you regularly engage throughout the year to discuss the college and its goals?

▶ CARET delegate advocacy coordination with institutional lobbyists/government relations professionals is essential for clear and efficient communications with Hill contacts.

- Are CARET/AHS teams connected with institutional lobbyists/government relations professionals?
- Does the CARET or GR contact submit part, or all of the Board on Agricultural Assembly’s annual discretionary appropriations request to Members of Congress? If so, how does this happen?
- Approximately how many Members of Congress from your delegation receive the request? Do the CARETs advocate for the college with regional partners and other institutions? Do the CARETs advocate for the college with state governing bodies?

▶ An effective national coalition requires clear and effective federal advocacy materials, in addition to institutional-level advocacy materials. Both are important for funding system-wide priorities.

- Did national CARET provide your CARET/AHS team with useful national coalition advocacy materials? If yes, what should we do more of? If not, how can we improve?
- Did you provide local-level impacts and justifications that reinforce the institutional value of federal investments?

Engagement of outside stakeholders, beyond CARET delegates, is important for effective state-level coalition building. There may be opportunities throughout the year where these stakeholders may also be able to simply support federal, system-wide investment in research and Extension.

- How many groups within the state are aware of the importance of the federal state partnership that underpins the system of extramural research and Cooperative Extension?
- Are your stakeholders supporting the federal funding that underpins the national research and Extension system?