



# AGRICULTURAL RESEARCH INSTITUTE

## STRATEGIC PLAN 2022-2027

Facilitated By: Nuffer, Smith, Tucker





**Dr. David W. Still**  
Executive Director

## ARI Stakeholders:

In 2022, the Agricultural Research Institute (ARI) again embarked on a strategic planning process designed to build on the previous plan and refine the roadmap for future success of the organization. A similar planning effort was conducted in 2018, and – as we all know – the world has changed substantially since then, creating a need to take another strategic look at ARI and its future.

At its core, strategic planning is about answering four basic questions: Where are we now? Where do we want to be? How do we get there? And how do we know when we've arrived?

With the help of our strategic planning partner – Nuffer, Smith, Tucker – we brought together a planning team to align on a plan that will take the organization to the next level of effectiveness and reach. You can learn more about the process and read the entire plan in the following pages.

The planning team reaffirmed some of the previous strategic direction set in 2018 – but that does not mean everything is status quo. In fact, some thoughtful and important decisions were made during the most recent planning process. First, the planning team decided to include “industry collaboration” into the mission of ARI. While working with industry has always been central to who we are, the updated mission showcases the importance of working with industry and meeting their needs. The planning team also made the decision to ramp up ARI staffing to ensure we have the appropriate resources to raise visibility among and build relationships with industry, elected officials, state agencies and other stakeholders.

ARI also adopted a new vision that reflects the desired future for all of California agriculture. In doing so, we are grounding our work in something bigger and more purposeful than the research alone and instead focusing on the impact the research will have to California agriculture and other stakeholders.

Lastly, the planning team decided to hone in on priority areas for research as a way to ensure research makes a difference. In fact, demonstrating impact was an overall theme from the strategic planning process and something that will help guide the organization toward achieving its new vision of having California agriculture, food systems and natural resources lead the world.

Together, through the power of the California State University System, industry collaboration and a deeper bench of ARI staff, we look forward to putting this plan into action.

A handwritten signature in black ink that reads "David Still". The signature is written in a cursive, slightly slanted style.

**David Still**  
Executive Director, Agricultural Research Institute

# Strategic Planning Process

A comprehensive strategic planning process, facilitated by Nuffer, Smith, Tucker (NST), was used to develop the plan. The planning process included:

- One-on-one interviews with the strategic planning team — The planning team included the Board of Governors and Deans' Council, which were interviewed to gather input on strengths and weaknesses of the ARI as well as external threats and opportunities. Input was also garnered on mission, vision, values and areas of focus to achieve the vision.
- Logistics group roundtable discussion — As implementers and end-users of the ARI program, a roundtable discussion was held with members of the Logistics Team. Input was solicited on similar topic areas as those discussed during one-on-one interviews.
- Strategic planning meeting and development of draft plan — Information from the interviews and roundtable discussion was used as the foundation for a strategic planning meeting held in August 2022. At the meeting, the group came to consensus on key areas of the plan and key actions.
- Refinement of strategic plan — Following the strategic planning session, NST worked closely with ARI leadership and engaged the Board of Governors as needed to refine the plan based on direction at the strategic planning meeting.
- Approval of final plan by Board of Governors — The plan was formally presented and approved by the Board of Governors in December 2022.



# Strategic Planning Team

Members of the strategic planning team were carefully chosen by the ARI to represent each ARI campus\* and obtain perspectives at each level of the organization, defined below. Planning team members included:

## Board of Governors

JEFF ARMSTRONG, President — Cal Poly, San Luis Obispo

SORAYA COLEY, President — Cal Poly, Pomona

GLENDA HUMISTON, Vice President — University of California Division of Agriculture and Natural Resources

GAYLE HUTCHINSON, President — California State University, Chico

TOM JACKSON, JR., President — Cal Poly, Humboldt

A.G. KAWAMURA, Grower/Shipper — Orange County Produce

GREGG KELLEY, President and CEO — California Olive Ranch, Inc.

EDUARDO OCHOA, President — California State University, Monterey Bay

WILLIAM S. SMITTCAMP, President — Wawona Frozen Foods

DONN ZEA, Executive Director — California Dried Plum Board

## ARI Staff

DAVID STILL, Executive Director — Agricultural Research Institute

LAUREN YOUNG, Administrative Analyst — Agricultural Research Institute

## Deans' Council and Logistics Group

PATRICK DOYLE, Campus Coordinator and Interim Associate Dean for the College of Agriculture — California State University, Chico

ANDREW LAWSON, Campus Coordinator and Dean for the College of Science — California State University, Monterey Bay

DENNIS NEF, Dean for the Jordan College of Agricultural Sciences and Technology — California State University, Fresno

JIM PRINCE, Campus Coordinator and Associate Dean for the College of Agriculture, Food and Environmental Sciences — Cal Poly, San Luis Obispo

ERIC RIGGS, Dean for the College of Natural Resources and Sciences — Cal Poly, Humboldt

MARTIN SANCHO-MADRIZ, Interim Dean for the Don B. Huntley College of Agriculture — Cal Poly, Pomona

PATRICIA STOCK, Dean for the College of Agriculture — California State University, Chico

ANDREW J. THULIN, Dean for the College of Agriculture, Food and Environmental Sciences — Cal Poly, San Luis Obispo

## Other Stakeholders

KAREY DEBARDELEBEN, Administrative Assistant for the Department of Electrical and Computer Engineering — California State University, Fresno

KAREN HANSEN, Senior Sponsored Program Analyst for Chico State Enterprises — California State University, Chico

*\*The Power of the CSU system: While this plan draws heavily from the input from ARI supported campuses, it is the intention of ARI to engage the full CSU system both in research and in driving the organization toward achieving its vision.*

## ARI Governance & Organizational Structure

### Board of Governors

Consists of four CSU presidents and an industry representative from the ARI Member campuses (Cal Poly Pomona, Cal Poly SLO and Chico State, Fresno State), two presidents from ARI Associate Member campuses (Cal Poly Humboldt and Cal State Monterey Bay) and the University of California Vice President for the Division of Agriculture and Natural Resources.

### Deans' Council

The Council consists of the deans of the four ARI Member colleges of agriculture and the deans from Associate Member campuses, College of Natural Resources & Sciences at Cal Poly Humboldt and the College of Science at Cal State Monterey Bay.

### Logistics Group

Consists of Campus Coordinators who are responsible for campus daily administration and research project oversight for ARI.

# Strategic Plan At A Glance

Key elements of the plan include updated mission and vision statements and setting S.M.A.R.T.\* strategic priorities.

## Mission

Drive applied research — through the power of the California State University (CSU) system and industry collaboration — to positively impact California agriculture, natural resources and food systems, while cultivating the next generation of leaders in these fields.

## Vision

California agriculture, food systems and natural resources lead the world.

## Values

ARI values reflect an emphasis on innovation, collaboration, engagement, scientific integrity, accountability, and diversity and inclusion.

## Strategic Priorities

1. **Research:** Fund research that matters to agriculture, natural resources and food systems.
2. **Visibility & Funding:** Raise visibility of and build demand for ARI among industry and the legislature through marketing and advocacy to support growth in funding.
3. **Build Capacity & Strengthen Operations:** Attract students and faculty to ARI, build the staff and board bench strength and ease the process of partnering with ARI.

*\* S.M.A.R.T. Objectives and Assessments: The ARI believes strongly in measuring success via S.M.A.R.T objectives — specific, measurable, achievable, relevant and time-bound measures of success.*

### IMPORTANT DEFINITIONS

**Mission:** The organization's core business

**Vision:** Destination we are working toward

**Values:** Principles to drive decisions

**Strategic Priorities:** Areas of focus to achieve the vision

**Actions:** Activities that will be completed annually

### USING THE PLAN

The strategic plan is designed to provide direction, and activities of ARI should be measured against this plan. Mission, vision, values and strategic priorities are intended to span from 2022–2027, while actions and assessments/ S.M.A.R.T. objectives should be reviewed annually.



## Mission: The organization's core business

Drive applied research — through the power of the California State University (CSU) system and industry collaboration — to positively impact California agriculture, natural resources and food systems, while cultivating the next generation of leaders in these fields.

## Vision: Destination we are working toward

California agriculture, food systems and natural resources lead the world.

## Values: Principles to drive decisions

- **Innovation:** We seek knowledge breakthroughs through innovative thinking, ideas and approaches.
- **Collaboration:** We work with a variety of partners who share our commitment to making California's agriculture and food systems more resilient and sustainable.
- **Engagement:** We involve students, faculty and various stakeholders in dialogue and solution creation.
- **Scientific Integrity:** We fund sound, peer-reviewed science held to the highest standards of ethical conduct, transparency and best practices.
- **Accountability:** We are responsible and efficient stewards of public funds and trust.
- **Diversity and Inclusion:** We are inclusive of various ideas, disciplines and backgrounds, and harness the power of a diverse student and faculty base to serve the diverse needs of California.

## Strategic Priorities:

1. **Research:** Fund research that matters to agriculture, natural resources and food systems.
2. **Visibility & Funding:** Raise visibility of and build demand for ARI among industry and the legislature through marketing and advocacy to support growth in funding.
3. **Build Capacity & Strengthen Operations:** Attract students and faculty to ARI, build the staff and board bench strength and ease the process of partnering with ARI.



A photograph of a cow in a metal stall in a barn. The cow is white with black spots and has a yellow tag with the number '15' on its ear. A man wearing a red cap, a grey t-shirt, and brown overalls stands to the right of the stall, smiling. The barn has a corrugated metal roof and walls. The text 'STRATEGIC PRIORITIES' is overlaid in the center in a white, serif font, flanked by two horizontal white lines.

# STRATEGIC PRIORITIES

# Strategic Priority #1: Research

*Fund research that matters to agriculture, natural resources and food systems.*

- Define priority areas for research by:
  - Conducting industry outreach (see Strategic Priority 2) to determine their research needs and priorities. Look for areas of synergy between commodities and groups.
  - Working with CDFA and other California agencies such as EPA, State Water Resources Control Board, Natural Resources Agency, Department of Water Resources and more to determine their priority areas for research. Consider leveraging the direction in Ag Vision, a plan developed by the California State Board of Food and Agriculture and CDFA to define the future of California ag.
  - Marrying the above information with the capabilities and expertise within the CSU system.
    - Develop a report and recommendations for the Board of Governors on research priority areas. Note: Priorities should be specific enough to demonstrate relevancy and impact but not to a level of specificity that they are overly prescriptive.
- After research priorities are identified, integrate those priorities into ARI processes (proposal, review and de-brief process) to ensure alignment with the research needs identified, and the mission, vision and values of the organization.
- Strengthen review process and post-award efforts to ensure research is in accordance with best practices, in alignment with industry needs and includes accountability; emphasize impact.

## SMART Objectives:

- Determine research focus areas for future tracking of the percentage of ARI funded projects that align with those focus areas; future goal to increase the percentage of research funded that aligns with established focus areas over time.
- Conduct a baseline study with industry members, including current and prospective research partners, to determine their perspective on:
  - The extent to which ARI addresses their research focus areas.
  - The level of impact of ARI research.
  - The return on investment.
  - The ease of implementing a project.
  - Overall satisfaction of working with the ARI.



# Strategic Priority 2: Expand Visibility With Industry and Legislature & Grow Funding

*Raise visibility of and build demand for ARI among industry and the legislature through marketing and advocacy to support growth in funding.*

## Visibility

- Refine and enhance positioning and messaging to reflect future direction and value of ARI with an emphasis on demonstrating impact. Tailor approach for various audience types, providing clear calls to action and clarifying the ways in which various stakeholders can work with ARI.
- Update materials with enhanced positioning and messaging. Leverage the third-party credibility of industry, which should be called upon to lend testimonials that demonstrate impact.
- Develop an ongoing and comprehensive outreach strategy to industry that demonstrates impact and includes various touch points such as:
  - Annual industry roundtables or forums to hear from them about their research needs and discuss hot topics.
  - Annual one-on-one meetings/briefing sessions with commodity boards.
  - Direct engagement of trade groups such as Western Growers and the International Fresh Produce Association.
  - Digital outreach, including quarterly industry newsletters to showcase the impact of work funded through ARI.
- Equip and empower various stakeholder groups (Board of Governors, Dean's Council, Logistics Group, campus coordinators and industry board liaisons) to serve as ambassadors of ARI. Provide them with relevant background and message/advocacy training. Note: Campus coordinators are a conduit to building faculty and student capacity, as identified in Strategic Priority 3.
- Educate relevant state agencies and departments, legislators, elected officials and their staffs about the value of ARI. Build on relationship with CDFA. Focus additional outreach on areas adjacent to ARI campuses. Utilize campus-level contacts and farmer and rancher partners in the outreach when possible.
- Develop a comprehensive social media strategy for ARI. This should include an evaluation of social media channels for prioritization based on greatest ability to reach audiences. Develop quarterly content calendars, and track metrics so that social strategy can be continually evolved and improved upon.

## Funding

- Aggressively pursue securing grants in which ARI is well suited. These could include opportunities around STEM and student involvement, which are often prioritized by grantors.
- Evaluate possibility for creating an endowment over the long haul. NOTE: Growing visibility is a critical first step before an endowment can be truly activated. As such, this action item focuses on gaining a better understanding of how ARI may create an endowment well into the future.

## SMART Objectives:

- Engage a minimum of 12 industry groups, companies or trade associations annually.
- Distribute a minimum of four industry specific communications annually.
- Grow state funding from \$4 million today to \$6 million annually by 2024.
- Secure three grants between January 2023 and December 2027 for a total funding of at least \$5 million.

# Strategic Priority 3: Build Capacity & Strengthen Operations

*Attract students and faculty to ARI, build the staff and board bench strength and ease the process of partnering with ARI.*

## **Build Capacity**

- Pursue added ARI resources – staff and/or consultants — for three key areas:
  - Industry outreach and engagement.
  - Education of elected officials and state agencies.
  - Grant writing.
- Grow the network of faculty and students involved in ARI projects through outreach via campus coordinators.
  - Implement internal, campus-level outreach campaigns to introduce opportunities and challenges within agriculture to other disciplines; spark interest and excitement around collaborations.
- Pursue additional industry involvement with the board and/or consider an industry advisory board, which could serve as an extension of Strategic Priority #2.

## **Ease Process of Working with ARI**

- Audit the process by which faculty work with ARI. Consider the end user experience when applying for grants, reporting on research activity and interacting with ARI. Review all forms for areas where they could be streamlined.
- Review match requirements for possible enhancement; communicate how the match works to add clarity and ease the process for faculty.
- Provide training and tools to faculty on how best to work with ARI. This could include a set of guidelines and checklists for what to include in proposals to streamline the process.
- Encourage collaboration throughout the CSU and with the UC by evaluating the criteria by which research projects are funded. Consider adding extra points for or prioritizing projects that utilize collaborative models. Consider setting aside money specifically for collaborative partnerships with UCANR.
- Formalize the process by which ARI assists faculty with industry matchmaking. This could include strengthening the database to allow industry to better identify and connect with possible industry funders.

## **SMART Objective:**

- In 2022, in conjunction with the PI meeting, conduct a survey of faculty to gauge how easy they think it is to work with ARI; set a benchmark for improvement and measure for change again at the end of 2027.

