

Adaptive Strategic Planning for a Multi-institutional Center During Tumultuous Times

FSLI Project Cohort 19

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Background on CEFS

For more than 30 years, the Center for Environmental Farming Systems (CEFS, <https://cefs.ncsu.edu/>) has been a partnership among North Carolina State University (NC State), the North Carolina Agricultural and Technical State University (NCA&T), and the North Carolina Department of Agriculture and Consumer Services (NCDAC&S) that are focused on sustainable agriculture and food systems research, education and extension or outreach. We have a large, multidisciplinary faculty and staff team with over 60 individuals across two universities that lead large, collaborative research, education, and extension projects with over \$50Mill in funding since we began. We work collaboratively with diverse stakeholders across our food system, from farmers, researchers, food businesses, government agencies, and non-profits to serve all farmers and develop sustainable solutions for the critical food and agricultural challenges in our state, region, and nation.

We function both as a “place” with a team of NC State and NCA&T faculty and staff leading sustainable agriculture research and extension programs at a 2,000-acre research facility, Cherry Research Farm, run and operated by NCDAC&S staff. It is one of the largest facilities in the region dedicated to sustainable agriculture research and extension, spanning diverse disciplines from pasture-based beef and dairy production, small fruits and vegetables, organic commodities, agroforestry, and long-term agroecosystem research, where we invested in cutting-edge technology for automated sampling of greenhouse gas production from agricultural production.

Our food system research and extension programs span the state, engaging diverse communities and partners in various farm-to-local market and education programs (farm-to-school, farm-to-early care and education, farm-to-senior services), farmer business support for market development of local food and food sovereignty in with diverse communities, supply chain support for local pasture-raised meat, and education and advocacy with through food policy councils and addressing structural racism in the food systems. Lastly, our education and training programs help train future food systems leaders and grow new farmers through various community-based and research internships to beginning farmer training programs.

Challenges We Face at CEFS and My FSLI Project

As a three-institutional partnership with many diverse programs and people, we have our challenges described below that gave root to my FSLI project.

- **Communication challenges and conflicts.** Because we are separated across the state and work under three different institutional cultures, we do not work together physically, and much of our communication is over email. This has led to various misunderstandings, especially between food system staff and administrative staff and among institutional leadership.
 - As a way to address this, I led an Intentional Workplace Retreat (fall 2023) among all employees across the 3 institutions to unearth some of the challenges and collectively understand how to address them. I also began bimonthly 'department' meetings among my larger team (40+ people) at NC State. I also began monthly Directors meetings among NCA&T and NCAD leadership to develop relationships and trust among leadership.
- **Leadership transition.** While I have been at CEFS as a faculty member for more than 20 years, I stepped into this leadership role as Director in the last two years after our founding director of more than 20 years retired. Change is hard for all and our food system staff, all who had close relationships with the previous director, I know, found this transition difficult. All our food system staff are all soft-funded through grants so also worried if I would change direction or deemphasize the food system work. I have not and have focused a lot of time learning from them.
- **Lack of transparency and understanding of institutional policies**
 - I began NCSU CEFS ('department) meetings among staff and faculty, created CEFS operating procedures for questions that came up (e.g., How do I receive a raise? Promotion? How can I be supported by the institution in HR challenges?), and shared financials
- **Silos, separated in space, lack of awareness across CEFS programs, food systems and agriculture, faculty and staff**
- **Programs acting independently, lacking engagement and contributions to overall CEFS vision and future**
- **Lack of awareness of all of CEFS with external partners and stakeholders**

All of these challenges together focused me to develop my FSLI Project into leading an Adaptive Strategic Planning project for CEFS.

Adaptive Strategic Planning

While we discussed adaptive leadership in FSLI, I worked together with our CEFS leadership and facilitator team to apply this to our strategic planning process. Adaptive strategies equip organizations to thrive in complex, dynamic environments. With so much financial and policy uncertainty that was *already* impacting our research, education, and extension work in sustainable agriculture and food systems, adaptive strategic planning with the following characteristics, seemed like the only viable way to engage our team.

Adaptive Strategic Planning has the following characteristics:

- Flexible and Responsive
- Involves Partners and Focused on Collaboration, not Just “Selling” and “Telling”
- Iterative Planning and Execution, Which Means You Need to Revisit it Frequently
- Embraces Uncertainty
- While Strategic Focus Areas can be Longer Term, Objectives and Activities are Short Term (1-2 years)
- Grounded in the Organization’s Mission, Vision, and Values

Efforts and Progress

The following figure depicts the development of the CEFS Adaptive Strategic Plan I led and our progress from August 2024 through where we will be in a year. I began by bringing together a small team of leaders in CEFS, “CEFS Leaders+” that represented a leader from every field research unit at our Cherry Research Farm, a leader from each of our food system programs, and the institutional leadership from the three partner institutions.

It was critical for me to have a diverse group of faculty and staff representing every facet of our organization. I was clear to them what their commitment would be in meeting times and effort over the year, and together we decided our purpose, outcomes, process, and where we needed help from an outside facilitator. The outside facilitator helped us identify our diverse stakeholders and develop a survey tool for these stakeholders and our team internal to CEFS, to understand our strengths and challenges ahead. We gathered all CEFS faculty, staff, and students together (“ALL CEFS”) in two retreat dates led by our outside facilitator to collectively review these survey results, review and revise our mission, values, and vision, and ideas on our vision for the future and how we would get there. The CEFS Leaders+ group reviewed and refined those in our strategic pillars, objectives, and activities that we are bringing back to our whole internal team for feedback through “Listening Sessions” currently

happening now. We will meet as a whole team again in August 2025 to operationalize our Adaptive Strategic Plan and collectively decide how we develop indicators of success.



One of the other ideas I developed was a **CEFS End of the Year Report** for the first time in our organization's history. Below is an expert of the End of the Year Report based on 2023 impacts across our whole organization, programs, and three partner institutions called "CEFS by the Numbers". My goal was for our team to first visualize their collective impacts, and I only made this report internal with the goal of making the 2024 CEFS End the Year Impact Report to be shared with our stakeholders and the public (we are currently formatting this now).



What I Gained from FSLI

- **Strengthened Leadership Identity.** Through coaching and reflection, I developed greater self-awareness of my leadership style and its impact. I also learned about my challenges. This has helped me lead with greater confidence, clarity, and purpose in a dynamic academic environment.
- **Enhanced Communication Skills, Especially Diverse Styles.** I focused on strengthening my communication skills (and am still learning this!)—especially communicating with diverse individuals within and external to CEFS. This was essential for me in leading change, influencing stakeholders, and navigating high-stakes conversations with diverse audiences. It is also critical in these turbulent times to be able to clearly communicate when there are threats and negative impacts on our organization.
- **Gained Collaborative and Inclusive Leadership Skills.** I gain skills on how to foster more inclusive environments and engage diverse stakeholders. This was key for engaging our team in strategic planning and essential for leading change in dynamic and interdisciplinary settings.
- **Vision and Purpose for Impact.** Improved ability to communicate vision, build coalitions, and lead across boundaries. At the heart of all of this, I gained the confidence to lead transformational change. - FSLI gave me the tools, frameworks, and confidence to lead institutional and organizational change initiatives that address critical issues in the food system.
- **Experienced Network of Leaders to Learn from.** This was perhaps the biggest impact on me to learn and develop friendships with the amazing, diverse leaders in my fellow cohort, as well as in our FSLI leadership team with Claudia, Sarah, Sam, and John. I feel privileged to know and be able to reach out to this amazing group of people.