URMIA's Strategic Goals

Strategic Goal 1

Connect Members to Each Other

"You do not have to go it alone. URMIA members help each other."

Leader: Matt Tuttle, University of Utah

Strategic Goal 2

Connect Members with Professional Development

"We offer you many educational opportunities in formats that fit your needs. We provide you a framework to meet core competencies for higher ed risk managers."

Leaders: Susie Johnson, Iowa State University, and Tim Wiseman, University of Wyoming

Strategic Goal 3

Connect Members to Resources and Tools

"We are working to make it easier for you to access content that can help you do your job."

Leader: Jenny Whittington, URMIA

Strategic Goal 4

Connect our Actions to the Long-Standing Values of our Members that Promote Diversity, Equity, Inclusion, and Belonging (DEIB)

...within our Community and the Profession of Higher Education Risk Management

"Diversity, equity, inclusion, & belonging are critical to evolve our organization and profession. We are committed to taking intentional and affirmative steps as we progress into the future."

Leader: Zelena Williams, Louisiana State University and Agricultural and Mechanical College

Strategic Goal 5

Connect URMIA with the Future to Ensure Sustainability for the Association

"URMIA is a thought leader for its members, which requires a forward-looking perspective and stewardship of our resources."

Leader: Chauncey Fagler, FCSRMC

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org
Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education

<u>Strategic Goal 1 – Connect Members to Each Other</u>

SG#1-Objective 1 – Pilot to gauge interest in monthly Water Cooler Discussion Zoom meetings with the URMIA membership to better connect members with each other by discussing topics such as URMIA Community posts, current events, hosting book clubs, etc.

What is Success?
Five or more attendees join each month with engagement from all participants. Kickoff in May.

SG#1-Objective 2 – Improve onboarding of new members by setting up quarterly meetings with new members to showcase URMIA and help connect new members with others. Engage with new members at regional and annual conferences. Meet with Australian members to assess their needs.

What is Success?
- Host a quarterly new member welcome session with structured programming.
- Have 10% of new members for the quarter participate in quarterly sessions.
- Schedule a meeting with Australian members by June 2023

SG#1-Objective 3 – Reboot the URMIA member spotlight in *URMIA Insights*. Questions will attempt to better connect members to each other (favorite books, issues you are dealing with, expertise, etc.)

What is Success?
1-2 monthly spotlights in *URMIA Insights* that showcase both new and seasoned members. First spotlight to be featured in May/June 2023.

SG#1-Objective 4 – Improve the ability for members to connect by improving URMIA profiles to allow members the ability to search for other members with similar interests or seeking others with specific expertise, region, etc. Ex. #minorsoncampus, claims, compliance, etc.

What is Success?
Adding the ability to identify subject matter areas (i.e., youth protection, claims, etc.) to a member's profile that are of interest to the member not based on being a subject matter (SME) on the topic. Other areas that may be captured include geographic area, size of institution, etc.

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org
Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education

SG#1-Objective 5 – Support the creation and launch of URMIA's Risk Management & Insurance Talent Network from a member perspective.

What is Success?

URMIA has a resource of subject matter/talent experts at its disposal and is able to connect those members to each other.

Strategic Goal 2 – Connect Members with Professional Development

SG#2-Objective 1 – Review, update, and re-launch URMIA's professional development page.

What is Success?

Evaluate page content and ensure appearance is consistent with other recently updated URMIA pages. Include cross-references to core competencies, education plan, and resource guide. Include educational program content, inside and outside of URMIA, that supplements a higher education risk manager's professional development.

SG#2-Objective 2 – Explore references, techniques, and modalities for enhancing member development of "soft" (power/essential) skills and develop options to increase emphasis on both training and references to facilitate.

What is Success?

Identify gaps in current resources and tools. Craft communications highlighting the importance of members developing these particular skills as a part of their professional development. Leverage best practice materials from affiliates and other outside sources for easy reference and use by members.

SG#2 – Objectives 3 – Develop pathways to facilitate member connection to professional development and educational resources.

What is Success?

Evaluate member comfort level with connecting to professional development and educational resources to establish a baseline. Members will have a better understanding of the resources URMIA offers and how to access them.

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org

Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education

Strategic Goal 3 – Connect Members to Resources and Tools

SG#3-Objective 1 – Continue to implement suggestions from technology audit & data summit meetings.

What Is Success?

The home office is responsible for Strategic Goal 3. This connects the other objectives of the plan to the staff for them to operationalize and communicate expectations to the other teams.

- Streamline communications with better software, including more sophisticated targeted marketing.
- Implement components of Higher Logic Thrive platform that enhance the URMIA*network.*
- Collect more data to understand member needs and develop an engagement score to assess activity of members at regular intervals.
- Continuous improvement connecting members with cohort groups using data.
- Move affiliates services directory from an outside vendor to an internal URMIA directory in 2024, to assist members in finding each other easier. Consider offering advertising options to monetize in the future.
- Hire additional technology staff person to support the organization's goals.

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org
*Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education*

Strategic Goal 4 – Connect our actions to the long-standing values of our members that promote diversity, equity, inclusion, & belonging (DEIB) within our community and the profession of higher education risk management.

SG#4-Objective 1 – Expand the ability to identify and support talent of diverse backgrounds.

What is Success?
- Guide the development of a Risk Management and Insurance Talent Network for the benefit of current and future URMIA members and audiences as they create methods of diversifying the pool of potential speakers, presenters, and subject matter experts.
- Launch the Professionals of Color Community for members who identify as a professional of color to include guiding and assisting the community as they establish a clearly defined mission and avenues of engagement and promotion.

SG#4-Objective 2 – Create an informed community through DEIB education that focuses on inclusivity and belonging.

What is Success?
- Create a focus group for members who are LGBTQ+ and those who are interested in supporting this members segment to better understand how URMIA can support their needs and educate the membership.
- Integrate gender pronouns in URMIA databases and on badges at the annual conference. Supplement these efforts with education to the organization's membership.
- Identify external resources for DEIB education, training, and certification and host them within a web page under URMIA's professional development section.

SG#4-Objective 3 – Opportunities for members of diverse backgrounds.

What is Success?
- Provide a Be the Change Funded Student Internship for a student at an URMIA member institution to learn more about higher education risk management through a paid internship working alongside professionals at a member institution. One $7,500 scholarship will be awarded. URMIA will award the scholarship to an institution prepared to offer this learning experience to a student from a population underrepresented in higher education risk management. Applying member institutions will be asked to explain the importance of—and demonstrate their interest and commitment in—promoting diversity, equity, inclusion, and belonging (DEIB) within their institution.

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org
Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education

- Provide two scholarship opportunities for Minority Serving Institutions (MSIs): (1) a free 2024 URMIA membership; and (2) and a scholarship to attend the annual conference for an employee of a MSI. This includes the Department of Educations list of [MSI's located here](#).
- Work with Annual Conference Committee to align efforts with an LGBTQ+ organization as part of URMIA*cares* in Baltimore.

Strategic Goal 5 – Connect URMIA with the Future to Ensure Sustainability for the Association.

SG#5-Objective 1 – Continue to curate an emerging risks list providing relevant and timely information to the members.

What is Success?
Continually tracking emerging risks, and possibly branding it as *"URMIA on the Pulse"* or *"What's New Now and Next"* to share with the membership. Work with Director of Information Technology on the best place on the website for this to live and members to consume. Continue to work closely with the Affiliates Committee to deliver the content in a variety of mediums (community conversations, webinars, podcasts, *URMIA Insights* articles).

SG#5-Objective 2 – Develop plan for the URMIA Office and overall organization structure.

What is Success?
(a) Succession planning for new leader will be major focus for 2023. Search committee in place and current executive director is documenting duties. (b) Analyze the financial health and strategies for the organization; including forecasting and proforma based on various scenarios. Analyze attendance at in-person and virtual programs. Do risk assessment of URMIA organization in 2024.

SG#5-Objective 3 – Launch Spencer Foundation URMIA internship grant in 3rd quarter and create future funding using Spencer Foundation.

What is Success?
Create a task force including members from the Finance Committee to create a plan for supporting the launch of the Spencer internship grant for 2024. (This is using funding from the donation URMIA accepted in 2022.) Also, create a strategy for sustaining this program's future by soliciting donations to URMIA – charitable through the Spencer Foundation and non-charitable directly to URMIA.

P.O. Box 1027, Bloomington, IN 47402-1027 | 812-727-7130 | www.urmia.org
Promoting the advancement and application of effective risk management
principles and practices in institutions of higher education