



UNIVERSITY RISK MANAGEMENT & INSURANCE ASSOCIATION
HIGHER EDUCATION RISK MANAGEMENT

URMIA's 2023-2024 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 Oklahoma

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: Michelle Smith, 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, and belonging are critical to evolving our organization and profession. We are committed to taking intentional and affirmative steps as we progress into the future."

Leader: Mellany Patrong, Texas Southern University

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: Nakeschi Watkins, Cornell University



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Strategic Goal 1 – Connect Members to Each Other

SG#1-Objective 1 – Develop a mentorship program for members who are interested in expanding their skills and advancement within higher ed risk management and insurance

What is Success?

Offer a mentorship program to provide members: 1) personal and professional growth 2) career advancement 3) networking opportunities and 4) organizational culture

SG#1-Objective 2 – Connect members who are interested in but have not yet presented for URMIA (annual conference, regional conference, webinars) with seasoned presenters to build future presenters' confidence and experience increasing the talent pool of higher ed risk management speakers

What is Success?

- Offer the full URMIA membership a training session on how to be an effective presenter
- Develop a list of identified members interested in developing presentation skills (through Water Cooler Discussion, direct asks, etc.) and help them apply for presenting opportunities including matching with experienced co-presenters
- Increase the number of calls for proposal entries in 2025 that include first-time URMIA presenters as part of the submission

SG#1-Objective 3 – Engage a variety of risk management cohort groups in a variety of ways that meet the needs of the cohort and help connect URMIA members (e.g., providing an online community, promoting cohort activities, creating new cohorts like a young professionals group, etc.)

What is Success?

- Deploy a survey to URMIA members asking for topics and criteria that they would have an interest in talking with other higher ed risk managers about, e.g., new-to-the-profession, size of institution, RM responsibility, etc.
- Contact leaders of URMIA's compiled existing risk management cohort listing to ask about interest in using URMIA infrastructure to help facilitate their meetings and assess URMIA's next steps to offer assistance where needed/desired
- Recommend an URMIA course of action to bring more risk managers together based on survey results and information gleaned from cohort connections

SG#1-Objective 4 – Continue Water Cooler Discussions and look at ways to connect more members in these types of events by helping facilitate targeted conversations such as RMIS users; those with specific job titles/levels; book, white paper, or article discussions; etc.



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What is Success?

- Involve at least five new members in a Water Cooler Discussion within their first quarter of membership
- Extend a personal invite to at least five experienced URMIA members for each Water Cooler Discussion who haven't attended a Water Cooler Discussion within the past six months
- Pilot diversifying the Water Cooler Discussions to make some of the monthly events focused on a specific topic identified and marketed in advance of the event in addition to the regular, open-forum conversations

SG#1-Objective 5 – Introduce more risk management/insurance students to the *higher ed* risk management/insurance specialty area career path

What is Success?

- Utilize the information URMIA has on programs that have risk management/insurance academic offerings and reach out to their program administrators to see how URMIA can get in front of their students
- Create a toolkit providing resources to URMIA members to share with risk management program administrators/professors/members who've told URMIA they teach risk management students - based on what we learn from contacting program administrators - to give them more information about promoting higher ed risk management as a profession in classes



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Strategic Goal 2 – Connect Members with Professional Development

SG#2-Objective 1 – Develop pathways to facilitate members’ connections to professional development and educational resources

What is Success?

- Ensure members are aware of URMIA educational resources and identify the pathways URMIA members use
- Update URMIA’s *Core Competencies for Higher Education Risk Managers* appendices to include resources for all learning levels: beginner/entry, intermediate, and advanced/expert
- Investigate developing a document to elevate risk management in higher education

SG#2-Objective 2 – Develop a virtual professional development series that combines the use of existing URMIA resources, roundtable discussions, and knowledge tests

What is Success?

- Create a Foundations of Risk Management virtual program series
- Explore the possibility of developing two additional virtual programs during 2024

SG#2 – Objective 3 – Develop pathways to connect risk management with other higher education disciplines by working with other associations to bring risk management to their educational offerings and invite them to participate in URMIA events

What is Success?

- Identify associations that also serve higher ed or higher ed professions
- Find opportunities to provide either educational content or information about URMIA/higher ed risk management to other associations
- Investigate the potential of developing a professional development portfolio/resume template



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Strategic Goal 3 – Connect Members to Resources and Tools

SG#3-Objective 1 – Continue to implement suggestions from 2022 technology audit and staff database summit meetings

What Is Success?

- Implement components of Higher Logic Thrive platform that enhance the URMIA *network*
- Increase the percentage of member records with submitted demographic data to understand member needs and develop an engagement score to assess the activity of members at regular intervals
- Support the addition of cohort groups identified by SG1 and report data at board meetings to relay areas of opportunity for membership growth
- Hire additional staff person to support the organization's goals in community engagement, volunteer management, and metric tracking

SG#3-Objective 2 – Support the work of the association with operational objectives to increase the effectiveness of resources and other online tools

What Is Success?

- Complete updates to the URMIA Resource Guide identified by the 2023 work group
- Finalize RMI Talent Network project to display data to members only
- Deploy a new online Affiliate Member Services Directory with expanded search capabilities
- Implement updated tagging structure for URMIA Library entries to create more dynamic search results and to use in the URMIA Resource Guide and investigate other areas where tagging may be helpful (future events, *URMLA Insights*, etc.)
- Expand the use of Google Analytics reporting features to learn more about what our members are interested in, how we can better support them, and ways to refine our marketing campaigns to make them more effective and personalized



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SG#3-Objective 3 – Streamline administrative duties to better support the work of the association volunteers and identify areas for more security, streamlined transactions, and better service to members and other stakeholders

What Is Success?

- Complete training in ASAE's Exceptional Boards program and assess additional areas for improvement including collaboration, reporting, and expense reporting
- Assess the current process for social media planning and implementation and make suggestions for improvement
- Work with URMIA's bank, credit card processors, and accountant to streamline transactions, lower costs, and make suggestions for improvement
- Determine the best tool for URMIA to help with project management
- Complete implementation of cloud-based file storage for ease in remote work.



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Strategic Goal 4 – Connect Our Actions to the Long-Standing Values of Our Members that Promote Diversity, Equity, Inclusion, and Belonging (DEIB)

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

What is Success?

- Recruit diverse talent to participate in the RMI Talent Network and showcase the benefits of participation to build a cadre of new speakers
- Highlight a diverse pool of speakers available for speaking opportunities to others through social media posts, *URMLA Insights* features, and other marketing channels

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

What is Success?

- Support the work of potential mentorship/ambassador programs
- Create virtual programming and support an essential skills track at URMIA's 2024 Annual Conference
- Monitor the environment for fresh content to update the new URMIA Resource Guide page dedicated to DEIB

SG#4-Objective 3 – Showcase members of diverse backgrounds and create opportunities for additional volunteer positions

What is Success?

- Administer the *Be the Change* scholarship program
- Recruit diverse speakers and moderators for URMIA programming



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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 that provides relevant and timely information to the members

What is Success?

- Implement a 2024 March Madness-style bracket to get member input on the top emergent risks facing higher ed today
- Monitor relevant publications (*Wall Street Journal*, *Inside Higher Ed* (risk section), *Business Insurance Magazine*) to ensure timely information is shared with the URMIA membership through professional development events

SG#5-Objective 2 – Enhance organizational resilience to ensure the sustainability of URMIA

What is Success?

- Conduct an audit with a focus on risk assessment to identify unforeseen risks, review financial records, and assess the efficacy of association operations including a report on the alternative annual conference plan suggestion and evaluating the need for event insurance
- Facilitate a smooth transition of new executive director by providing mentorship, resources, and other support through the onboarding process to ensure effective knowledge transfer for long-term association success

SG#5-Objective 3 – Build the sustainability of the URMIA Lisa Zimmaro Internship Grant and the Whittington Solo Risk Manager Professional Scholarship in partnership with the Spencer Educational Foundation

What is Success?

- Create a task force to develop a strategy on how to sustain our two charitable endeavors while respecting other fundraising
- Develop a fundraising plan for the two programs
- Secure funding to support both opportunities in 2024 and beyond