



# OPERATION BOLD TRANSITION TEAM

## RECOMMENDATIONS

**September 1, 2021**

Prepared by:  
Operation Bold Transition Team

Prepared for:  
President Taylor Randall

# BACKGROUND

On August 18, 2021, less than two weeks after being selected the 17th president of the University of Utah, President Taylor Randall announced the formation of an internal team to prepare a transition plan for his first year of leadership.

The Operation Bold Transition Team – named after the president’s desire for the university to be bold in its aspirations – includes a broad cross-section of university expertise. Team members include several deans, department chairs, and representatives of students, hospitals, athletics, staff, and other university areas.

This transition document presents the recommendations of the Transition Team. It’s bold both in its formation (turnaround time of two weeks even with the start of Fall semester during a pandemic) and in its scope. It covers crosscutting and foundational issues (such as equity, diversity, and inclusion), areas of presidential focus (such as student experiences and research innovation and creativity), and a collection of transition imperatives (such as education delivery and cybersecurity).

The Transition Team designed this plan to be fluid and functional. It provides directionally correct recommendations in an outline format that can be adjusted and refined as needs arise. Most importantly, it shares thoughtful insights that will help the university thrive under President Randall’s leadership.

<b>Transition Team’s Threefold Charge</b>		
<b>1</b> Design a process for the new president to listen and learn about the plans, priorities, and major issues faced by units across campus ranging from colleges to museums to health care facilities.	<b>2</b> Make recommendations for other meetings with students, faculty, staff, donors, alumni, community leaders, and other members of the community, both on and off campus.	<b>3</b> Identify and prioritize major strategic objectives and action steps to help guide his leadership.

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# LETTER OF TRANSMITTAL

September 1, 2021

President Randall,

Thank you for the opportunity to prepare a transition plan that will help the University of Utah thrive under your leadership. We've approached the task with enthusiasm, commitment, and urgency. At your direction, we've also approached it with boldness.

You will find in this document our recommended areas of focus for your first 500 days as president. The recommendations include strategic objectives and action steps in three general areas of concentration: (1) crosscutting – foundational to all we do, (2) changeover – essential steps for the start of your leadership, and (3) major initiatives – the first in a series of focus areas for your leadership. These areas are aligned within three sequential phases of activity: changeover, launch, and execution.

As you and others act upon these recommendations, we suggest you reconvene the transition team twice during the next year to evaluate progress and recommend potential “midcourse” corrections.

We submit these recommendations with a keen awareness of this moment in time. We face generational challenges and far-reaching opportunities. The global pandemic, systemic inequities, social unrest, a changing climate, and other trials require us to fulfill our teaching, research, patient care, and community service missions with skill, vigor, and a heavy dose of humanity.

At the same time, we wholeheartedly embrace the vast opportunities associated with being a member of the prestigious Association of American Universities as well as the state of Utah's flagship university. We lead from a position of strength with the nation's fastest-growing population and an economically prosperous state.

You've asked us to dream big and be bold. We believe this transition plan, which includes small and large steps for university leadership and execution, will help us become a model public university and realize the boldness to which we all aspire. Let's be bold!

Thanks for the opportunity to serve,

Operation Bold Transition Team

*“If your dreams don't scare you, they aren't big enough.”*

– Ellen Johnson Sirleaf

# TRANSITION TEAM MEMBERS

## CO-CHAIRS

Andy Weyrich	Vice President for Research
Natalie Gochnour	Director, Kem C. Gardner Policy Institute

## COMMITTEE MEMBERS

Brenda Bowen	Director, Global Change and Sustainability Center
Kerry Case	Chief Sustainability Officer
Sydney Cheek-O'Donnell	Associate Dean for Research, College of Fine Arts
Jason Cryan	Executive Director, Natural History Museum of Utah
Marla De Jong	Dean, College of Nursing
Angie Fagerlin	Chair, Department of Population Health
Julie Fritz	Associate Dean for Research, College of Health
Charmelle Green	Deputy Athletics Director/COO
Jeff Herring	Chief Human Resources Officer
Steve Hess	Chief Information Officer
Jakob Jensen	Associate Dean for Research, College of Humanities
Dan Lundergan	CEO, University of Utah Health Hospitals and Clinics
Lori McDonald	Vice President for Student Affairs
Melody Murdock	Director of Editorial & Content Strategy, Marketing & Communications
Jason Perry	Vice President for Government Relations
José Rodríguez	Associate VP, Health Equity, Diversity, and Inclusion
Christy Porucznik	President, Academic Senate
Sonia Salari	President-elect, Academic Senate
Charlie Saltzman	Past Chair, Department of Orthopaedics
Laura Snow	Chief of Staff, President's Office
Cory Stokes	Associate Dean, Digital Learning, Online & Continuing Education
Keith Squires	Interim Chief Safety Officer
Martell Teasley	Dean, College of Social Work
Sylvia Torti	Dean, Honors College
Peter Trapa	Dean, College of Science
Mary Ann Villarreal	Vice President for Equity, Diversity, & Inclusion
Smitha Warriar	Assistant Professor, Department of Anesthesiology
Heidi Woodbury	Vice President for Institutional Advancement

## RESOURCE GROUP

Cathy Anderson	CFO and Vice President for Administrative Services
Robert Muir	Executive Director, Debt and Asset Management
Patti Ross	Chief Business Strategy Officer
Phyllis Vetter	General Counsel and Vice President

# RECOMMENDATIONS IN BRIEF

The Transition Team deliberated over an intense two-week period to create a transition plan that will help the University of Utah thrive under President Taylor Randall's leadership. The plan's timeframe stretches from August 5, 2021 (the date of his appointment) until December 31, 2022 (approximately 500 days). The recommendations are fluid and functional, providing directionally correct recommendations in outline format that can be adjusted and refined as needs arise. The plan represents a bold start to a new dawn of leadership at the university.

## STRATEGIC OBJECTIVES

The Transition Team recommends 16 strategic objectives supported by approximately 100 actions steps. Strategic objectives are divided into three categories: crosscutting (foundational to everything we do), changeover (essential steps to inform the start of the president's leadership), and major Initiatives (the first in a series of presidential focus areas and transition imperatives).

### *Crosscutting*

1. **Equity, diversity, and inclusion** – Become a national model of an equitable and inclusive campus where diversity thrives.
2. **Campus safety** – Set a national standard for enterprise-wide safety practices at a public university.
3. **Health and well-being** – Recognize the link between health/well-being and prosperity and commit to monitoring and improving the health of one another.
4. **Sustainability** – Support equity-focused sustainability leadership in education, research, operations, and health care.
5. **Academic freedom** – Reaffirm the university's bedrock principle of open and unfettered intellectual inquiry and the pursuit and dissemination of knowledge.

### *Changeover*

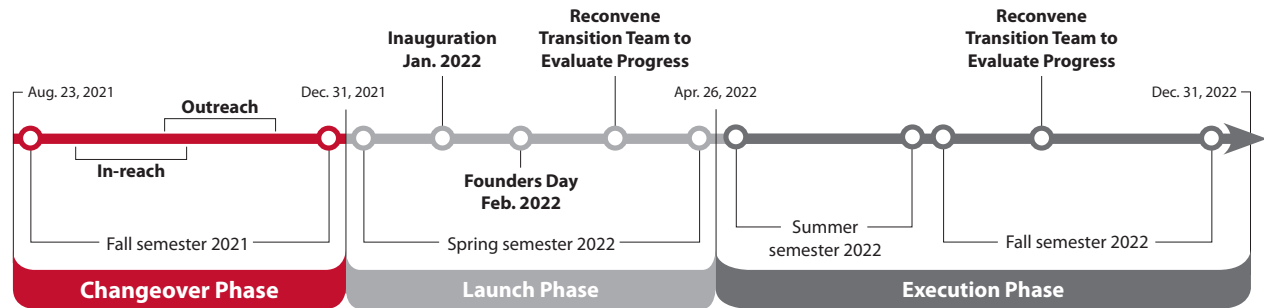
6. **Listen and learn** – Discover the plans, priorities, and major issues facing colleges, schools, faculty, staff, students, and other groups and individuals on campus.
7. **Engage with community** – Reach out and hear from the community we serve.



## PHASES

The transition plan contemplates three implementation phases: a changeover phase lasting through the end of the calendar year, an launch phase that lasts through the end of spring semester, and a execution phase that extends through Dec. 31, 2022. The Transition Team recommends the president reconvene the Transition Team twice over this period to evaluate progress and make midcourse corrections.

### Timeline



- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Acclimation/Integration</li> <li>• Introductions</li> <li>• In-reach/Listening</li> <li>• Outreach/Listening</li> <li>• Staffing</li> <li>• Foundation Building</li> </ul> | <ul style="list-style-type: none"> <li>• Continue to Listen &amp; Learn</li> <li>• Share Vision</li> <li>• Introduce Metrics</li> <li>• Design Resource Plan</li> <li>• Enhance Internal &amp; External Communications</li> <li>• Execute Strategic Objectives and Action Steps</li> </ul> | <ul style="list-style-type: none"> <li>• Continue to Execute Strategic Objectives and Action Steps</li> <li>• Make Midcourse Corrections as Needed</li> </ul> |
|---|--|---|

## NEXT STEPS

In addition to our recommended strategic objectives and action steps, we recommend the president consider the following next steps as part of this presidential transition:

- 1. Presidential vision** – Articulate an impactful, memorable, and bold presidential vision for the university. We believe we can aspire to continue to be a top-ranking public university using defensible metrics regarding impact and quality.
- 2. Resource plan** – Create a resource plan to help the university achieve this vision. A bold vision will require bold investment in human and physical capital.
- 3. Accountability** – Develop performance metrics and assign point people to lead out on the recommended strategic objectives and action steps. As a campus we are eager to support the university.
- 4. Communications** – Invest even more in internal and external communications. Communicate among ourselves and with the outside world with greater frequency, clarity, and a willingness to listen.
- 5. Midcourse corrections** – Reconvene the Transition Team during the launch phase and the execution phase to evaluate progress and recommend potential “midcourse” corrections.

# RECOMMENDATIONS

The Transition Team recommends 16 strategic objectives supported by approximately 100 action steps. Strategic objectives are divided into three categories: crosscutting (foundational to everything we do), changeover (essential steps to inform the start of the president’s leadership), and major initiatives (the first in a series of presidential focus areas and transition imperatives).

## STRATEGIC OBJECTIVES AND ACTION STEPS

### *Crosscutting – Foundational to everything we do.*

- I. **Equity, diversity, and inclusion** – Make recommendations on how the university can become a national model of an equitable and inclusive centered campus where diversity thrives.
  - i. Lead with presidential voice: The university supports leaders who practice a shared-equity leadership model with a focus on becoming a leader in EDI among AAU institutions.
    1. Center EDI themes of Belonging, Engagement, Climate, OHEDI, as outlined by the EDI Strategy Council.
    2. Task deans and chairs to engage in dialogue to express university’s goals and become partners in work.
    3. Encourage faculty to use the Inclusive Design Toolkit scheduled for release Spring 2022.
  - ii. Ask for help: Engage faculty expertise and the community.
    1. Reach out to faculty experts and ask them to curate a reading list and websites.
    2. Establish a speaker series centered around the theme of a book at a Friday Forum that brings the author to campus for conversations with various groups and dinner with the President’s Cabinet and student leaders.
    3. Ensure proper inclusive language which is acceptable among underrepresented groups and acknowledge those with intersections.
  - iii. Invest in organizational design of EDI and implement policies to achieve EDI institutional goals. President will work with VP for EDI, deans and other campus leaders to create policies & structures that align these EDI goals (and intersections with safety and culture) within 1) academic affairs, 2) student affairs, and 3) HR–faculty and staff affairs, particularly in terms of salary equity, and transparent budget models that incentivize retention of excellent employees.
  - iv. Actively recruit and hire leaders with attention to equity and inclusion practices and diverse representation.
  - v. Articulate good health as an EDI goal. Work with SVP Good and SOM-OHEDI to create a plan for equitable and accessible health care to reduce health disparities.



**II. Campus safety** – Set a national standard for enterprise-wide public university safety practices.

- i. Hire a new chief safety officer and police chief.
- ii. Complete and optimize the new campus safety building for the university community.
- iii. Include environmental/laboratory safety as a vital component of campus safety.
- iv. Form a small, presidential-level advisory group that helps do the following:
  1. Share what has been accomplished to date.
  2. Seek additional input.
  3. Make recommendations for how to elevate safety as a crosscutting, holistic issue that involves all of us.
  4. Refine “safety language” to be more precise and broadly understood.
  5. Refine plans to protect the physical and psychological safety of our people.
  6. Develop a safety metric to inform decisions that help us and other institutions of higher learning.
  7. Make a renewed commitment to prevention, transparency, and reporting.
- v. Achieve a national safety accreditation.
- vi. Conduct additional training and awareness of how issues of equity, diversity, and inclusion affect campus safety and policing (e.g., respect for women, implicit bias of police officers, and other critical areas).

**III. Health and well-being** – Recognize the link between health/well-being and prosperity and commit to monitoring and improving health of one another. Only by being proactive will we succeed.

- i. Consider the potential impact of the university on the optimal health of our populations (students, faculty, staff, patients, and community) as it pertains to promoting health and preventing disease by addressing nutrition, physical activity, sleep, and stress management.
  1. Facilitate employee health behavior change.
  2. Integrate wellness services into the clinical delivery system.
  3. Explore how the university can consider a Whole Person Health approach to well-being.
  4. Prioritize equity, diversity, inclusion, and especially belonging as vital to employee and student well-being.
- ii. Create an exceptional workplace and an exceptional learning environment through the cultivation of a culture and community of wellness.
  1. Expand awareness of employee wellness programs, systemwide support, resilience, and self-care resources.
  2. Support post-traumatic growth post-COVID.
  3. Improve built environments where university teams work and learn to promote health and wellness.
  4. Provide comprehensive resilience programming and support services.
  5. Help university teams identify and address well-being needs.
  6. Improve student and employees’ reported physical and psychological safety scores.
- iii. Create a senior level position on main campus responsible for leading the design, direction, and implementation of wellness/well-being programs.

**IV. Sustainability** – Support equity-focused sustainability leadership in education, research, operations, and health care.

- i. Know our sustainability strengths:
  1. Be aware of and voice support for existing sustainability goals, efforts, and innovative solutions.
  2. Be conversant in ways sustainability connects social equity, environmental integrity, and economic security.
  3. Meet regularly with key sustainability leaders and groups: Climate Commitment Task Force, U of U Health Sustainability Team, ASUU Sustainability Board, chief sustainability officer.

- ii. Reaffirm our sustainability commitments:
  1. Reaffirm the Presidents' Climate Leadership Commitments with the goals to improve resilience and achieve carbon neutrality by 2050.
  2. Participate in UC3 presidents' roundtable meeting.
  3. Support sustainable practices and policies statewide and across political boundaries.
- iii. Support bold action on sustainability education, research, operations, and health care:
  1. Ensure that all graduates are prepared to address sustainability challenges.
  2. Launch One U research initiative related to climate, justice, and health.
  3. Lead in operational sustainability (e.g., zero emissions building standards and considering opportunity costs, lifecycle costs, and deferred costs in decision-making).
  4. Model sustainable health care solutions.

**V. Academic freedom** – Reaffirm the university's bedrock principle of open and unfettered intellectual inquiry and the pursuit and dissemination of knowledge.

- i. Schedule separate university, student, and community forums to hear thoughts on the topic.
- ii. Work with the faculty senate and student government on drafting a statement on academic freedom within the university.
  1. Identify the value of academic freedom within the university and its mission:
    - a. Teaching and curriculum development
    - b. Research and outcomes
    - c. Technological developments/advancements
  2. Identify possible constraints on academic freedom and their impact on the university's mission.
- iii. Host forum(s) with external speakers on the topic.

***Changeover – Essential steps to inform the start of the president's leadership.***

**VI. Listen and learn** – Discover the plans, priorities, and major issues facing colleges, schools, faculty, staff, students, and other groups and individuals on campus.

- i. Meet with senior leadership of each college/school by Sept. 30, 2021 (18–20 meetings).
  1. Establish a consistent protocol for these meetings (ex. 90 minutes, hosted at the college, president's office provides one-page background document in advance, president shares brief message and then listens, president restates what he's learned at the end, and staff person documents items for follow-through).
- ii. Host roundtables or other convenings or tours with representatives from select areas by Nov. 19, 2021 (15–20 roundtables).
  1. Establish a consistent protocol for these events (ex. 60 minutes, hosted at a location of significance to the group, president's office provides one-page background document in advance, president shares brief and tailored message to the group and then listens, president restates what he's learned at the end, and staff person documents items for follow through).
    - a. ASUU leadership
    - b. Student affairs leadership team
    - c. One U Thriving
    - d. Office of the Chief Safety Officer
    - e. Equity, Diversity, & Inclusion
    - f. Council of Academic Deans

- g. Academic Senate Executive Committee
- h. Academic Senate
- i. Staff Council
- j. Health Sciences units, including ARUP and Hospitals and Clinics (under the direction of Dr. Michael Good)
  - i. School of Medicine department chairs
  - ii. Huntsman Cancer Institute
  - iii. Huntsman Mental Health Institute
  - iv. Clinical Translational Science Institute
  - v. Cardiovascular Research and Training Institute
  - vi. Research labs
  - vii. Functional, operational, and human side of the health system
    - 1. Staff
    - 2. Trainees
    - 3. Faculty
    - 4. ICU, OR, and outpatient facilities
- k. President's Leadership Council
- l. Budget/finances team (under Cathy Anderson's leadership)
- m. Academic Affairs leadership team
- n. Research Park
- o. Scientific Computing and Imaging Institute
- p. Energy Geoscience Institute
- q. Virtual meet and greet with Utah Asia Campus leaders/students
- r. Athletics department
- s. Arts and culture affiliates (UtahPresents, Pioneer Theatre Company, Red Butte Garden, Utah Museum of Fine Arts, Natural History Museum of Utah, Tanner Dance, and PBS Utah/NPR Utah)
- 2. Meet with "nominated" early career faculty, selected by deans and chairs (timeframe post-Nov. 19, 2021, and ongoing).
- 3. Meet with university communications and marketing staff from across campus (attend Communications Council/Marketing 601).
- 4. Others
  - a. Gender-Based Violence Consortium
  - b. McCluskey Center for Violence Prevention
  - c. University Neighborhood Partners
  - d. Presidential Commission on the Status of Women

**VII. Engage with community** – Reach out and hear from the community we serve.

- i. Donors and foundation boards (under direction of Heidi Woodbury)
- ii. Alumni (under direction of Heidi Woodbury)
- iii. Legislators (under direction of Jason Perry)
- iv. Business leaders
  - 1. Include leaders of cultural and local nonprofit organizations that are not affiliated with the university, such as the Sundance Institute, Ballet West, Salt Lake Acting Co., Salt Lake Film Society, and the National Ability Center.
- v. Community leaders
  - 1. Consider professional associations here (Utah Medical Association, Utah State Bar Association, Utah Nonprofits Association) and community organizations like the YWCA, Boys & Girls Club, public health organizations, and refugee support groups.

- vi. National Advisory Council
- vii. U of U Health outreach
- viii. Board of Trustees
- ix. Utah System of Higher Education Council of Presidents
- x. Utah Board of Higher Education
- xi. National education peers (AAU, APLU, Pac-12, etc.)
- xii. Faith community (Calvary Baptist, SL Catholic Diocese, Congregation Kol Ami, LDS Church, and others)
- xiii. Others

***Major Initiatives – Areas of presidential focus and transition imperatives.***

**PRESIDENTIAL FOCUS**

- VIII. Research innovation and creativity** – Continue the university’s momentum as a leader in research, scholarship, and generation of knowledge that seeks to solve major challenges as recognized in 2019 with the university’s invitation to join the Association of American Universities.
- i. Assess, prioritize, and invest in strategic One U research initiatives to grow research expenditures, philanthropic contributions, and advance the university’s national distinction and scholarly reputation.
  - ii. Continue to promote and facilitate discovery-based investigations and necessary infrastructure to enhance equity, diversity, and inclusion research across the institution.
  - iii. Develop programs to support faculty who are typically underrepresented in science and medicine.
  - iv. Identify opportunities to organize academic units to advance research, innovation, and interdisciplinary collaboration.
  - v. Create a main-campus research office that aligns and collaborates with the SVPHS research and VPR offices. The goal of the office would be to strategically plan, guide, and invest in research that elevates research and scholarly activity on main campus.
  - vi. Continue to promote the commercialization of university research technology by identifying/fostering new community partnerships (i.e., public-private partnerships, state partnerships, industry partnerships, etc.).
    - 1. Serve as the lead public university for dynamic hubs of innovation at The Point and in downtown Salt Lake City. These innovation districts will foster groundbreaking research and technology commercialization that solves difficult Utah problems and creates a more prosperous future for rising generations of Utahns.
- IX. Student experiences** – Continue the university’s focus on student success with deliberate emphasis on all dimensions of student experience.
- i. Conduct a “rapid assessment” of student experience to identify and prioritize potential enhancements. Focus areas should include experiences with:
    - 1. Education delivery, curriculum, learning, and teaching
    - 2. University processes and services
    - 3. Facilities and spaces
    - 4. Campus climate including sense of belonging, inclusion, and safety
    - 5. Affordability and financial support resources

- ii. Meet with a variety of students throughout the year for small group discussions about their experiences. Intentionally include undergraduate, graduate, and professional students with different backgrounds and affiliations (i.e., student parents, veterans, living on and off campus, etc.).
  - iii. Identify areas to expand and deepen student success opportunities through collaborations.
    1. Re-imagine cohort programs to include entire university.
    2. Improve and expand pathways for student recruitment, retention, and graduation.
  - iv. Identify domains, scales, and metrics to continuously measure improvement and highlight success.
- X. One U** (internal) and the **University for Utah** (external) – Capitalize on the One U initiative as an internal message of alignment and commitment to work across disciplines and boundaries to maximize our effectiveness.
- i. Definition: One U is an internal message of alignment and commitment to work across disciplines and boundaries to maximize our effectiveness. When the organization is working as One U it expands and enhances our ability to be the *University for Utah*.
  - ii. One U actions: Identify opportunities to organize academic units to advance research, education, innovation, and interdisciplinary collaboration. This includes:
    1. Creating and supporting cross-campus research teams
    2. Supporting interdisciplinary educational initiatives
    3. Supporting functional area collaborations and partnerships across campus
    4. Enhancing relationships with other institutions of higher education in the state, including expansion of academic programs
    5. Public and internal recognition of projects that showcase this unified approach (i.e., recognition in press releases, @theU stories, presidential mentions on social media/podcasts/speeches)
  - iii. Examples of One U initiatives: air quality, opioid research, mental health research and services, diabetes research and services, sustainability, water and climate research, combined marketing and communication initiatives.
  - iv. *University for Utah* will continue to emphasize and message how the academic, research, health care, and community missions align under a single framework to serve the state of Utah. Examples of showcasing how we are the *University for Utah* include:
    1. Culture: museums, performing arts, Red Butte Garden
    2. Athletics: state, regional and national pride (unifier)
    3. Academics/research: AAU membership
    4. Health care: top 10 ranking consistently over past decade
    5. Convener: Sorenson Impact Center, Gardner Policy Institute, McCluskey Center for Violence Prevention, Huntsman Mental Health Institute, Huntsman Cancer Institute, air quality, opioid research/treatment, sustainability, etc.

## TRANSITION IMPERATIVES

- XI. COVID-19 pandemic** – The Transition Team recognizes the leadership of the president, senior vice presidents, and the President’s Cabinet (vice presidents and special assistants to the president) in overseeing the university’s response to the COVID-19 pandemic. We encourage university leadership to reaffirm and strengthen the response in five areas:
- i. Acknowledgment of and response to the pain and sense of loss that has impacted students, patients, faculty, staff, and our entire community. The humanity of the moment and our compassion and consideration for others is paramount.
  - ii. Continuing and enhanced recognition of the medical professionals/essential workers in our hospital and care settings.
  - iii. The overriding need to increase the frequency, reach, and quality of communication about COVID-19 safety, response plans, and next steps.
  - iv. Recognizing how the pandemic experience has highlighted inequities on campus and provides an opportunity for us to identify remedies.
  - v. Concern for the mental health and general well-being of students, faculty, and staff. Consider devoting even more resources here.
- XII. Education delivery** – Capitalize on the rapidly changing education environment to significantly enhance education delivery.
- i. Identify innovative strategies for education delivery learned during the COVID-19 pandemic.
  - ii. Assess, prioritize, and invest in new educational offerings that leverage technology to provide fully online or hybrid online and in-person curricula.
  - iii. Evaluate the impact of increased use of technology for education delivery on efforts to enhance equity, diversity, and inclusion.
  - iv. Continue to promote and recognize excellence and innovation in teaching and education delivery.
  - v. Establish a budgeting model that is transparent and equitable, and that incentivizes creative and entrepreneurial approaches to academic program development (including online programming).
- XIII. Pac-12 engagement/athletics** – Leverage the Pac-12 Network partnership to build a platform for learning, showcasing, and collaborating.
- i. Engage in values-based discussions with the Pac-12 commissioner, presidents, and chancellors, Utah’s athletics director, and university community regarding the forthcoming media rights agreement and strategies that best position conference institutions for success.
  - ii. Consider partnerships with communications, engineering, athletics, and other relevant departments to develop degree and certificate programs in sports media production.
  - iii. In partnership with identified departments in action step above, build a “Control Room” in the newly constructed Ken Garff Red Zone for the purpose of establishing a student-centered production department to showcase Utah Athletics contests and other events that highlight and promote the university.
  - iv. Identify shared revenue streams to fund and sustain a student-driven sports media production company in partnership with the university, Athletics Department, and the Pac-12 Network.

**XIV. Communications** – Enhance internal and external communications to create greater context and understanding about the university’s vision, role, contribution, and activities in the community.

- i. Hire a new chief communications and marketing officer and executive communications manager.  
– Secure additional executive support.
- ii. Form a crisis response team to inform communications and policy.
- iii. Prepare weekly updates from the president to be shared in @theU and on president’s webpage feed.  
– These updates can take a multimedia approach, short videos, written messages, etc.
- iv. Renew activity on the presidential social media accounts.
- v. Arrange strategic media and editorial board interviews/introductions with the president (local and national outlets).
- vi. Rebrand look of the president’s personal communications materials (PPT templates, signature tags, photos, etc.).
- vii. Prepare profile on the president in *University of Utah Magazine* winter issue (February 2021), circ. 180K. Boost distribution to additional strategic audiences (higher-ed leaders, business owners, community members, lawmakers, etc.).
- viii. Take advantage of op-ed opportunities in strategic areas where the president can share thought leadership locally and nationally.
- ix. Broaden scope of U Rising Podcast; use as a tool to introduce key messaging.
- x. Work with student groups, interns, and Student Affairs to promote and increase student voice and visibility across university communications and marketing channels.
- xi. Provide media/message training for president, cabinet, and senior leaders.
- xii. Use inauguration as platform for launching key messaging.
- xiii. Conduct national media deskside briefings post inauguration.
- xiv. Roll out of Imagine U refresh campaign in first 100 days.
- xv. Infuse presidential messaging into existing content strategy and conduct new market research about perceptions of the university to guide that strategy.
- xvi. Continue to strengthen collaboration between communication and marketing teams among units (Athletics, U of U Health, colleges, cultural/arts entities, etc.).

**XV. Enterprise risk management** – Formalize the university’s risk management program as a presidential initiative.

- i. Create a framework to effectively identify risks, quantify and prioritize risks, create action plans, and assess progress toward mitigating risks.
- ii. Identify and communicate with risk owners to assess and document mitigation plans for key risks.
- iii. Promote collaboration among risk owners and the campus community to help manage risks.
- iv. Balance the goals of the university’s strategic plan, which is focused on growth and innovation (upside of risk), and the necessity of effective risk management, which requires anticipation of adverse consequences (downside of risk).
- v. Provide university’s senior leadership with actionable information to enable risk-informed decisions and effective allocation of resources.

- vi. Empower two ERM committees:
  - 1. ERM Steering Advisory Committee (ERM SAC) (established)
  - 2. ERM Working Advisory Committee (ERM WAC)

#### **XVI. Cybersecurity – Enhance the campus-wide strategy.**

- i. Conduct a third-party campus wide cybersecurity risk assessment.
- ii. Communicate security posture and risk exposure to key stakeholders.
- iii. Align security objectives with strategic business goals.
- iv. Establish acceptable security and risk tolerance levels.
- v. Document acceptance of security requirements in policies and procedures.
- vi. Create a campuswide tactical plan to progress from current to desired state.
- vii. Obtain sufficient resources to reach security goals.
- viii. Measure progress toward industry standards (CIS) and desired security state.

## NEXT STEPS

The Transition Team views this transition plan as a valuable first step for presidential leadership. The plan includes thoughtful and timely input from a broad cross section of the university. It includes action steps that can be assigned and monitored to help with execution. And, most importantly, it provides a foundation for President Randall to build upon as he leads us towards a bold future in student success, research excellence, patient care, and community service.

In addition to our recommended strategic objectives and action steps, we recommend the president consider the following next steps as part of this presidential transition:

- 1. Presidential vision** – Articulate an impactful, memorable, and bold presidential vision for the university. We believe we can aspire to be a top-ranking public university using defensible metrics regarding impact and quality.
- 2. Resource plan** – Create a resource plan to help the university achieve this vision. A bold vision will require bold investment in human and physical capital.
- 3. Accountability** – Develop performance metrics and assign point people to lead out on the recommended strategic objectives and action steps. As a campus we are eager to support the university.
- 4. Communications** – Invest even more in internal and external communications. As Utah’s largest employer with a vast teaching, research, patient care, and service mission, the University of Utah has an immense economic and societal footprint. We would do well to communicate among ourselves and with the outside world with greater frequency, clarity, and a willingness to listen.
- 5. Midcourse corrections** – Reconvene the Transition Team during the launch phase and the execution phase to evaluate progress and recommend potential “midcourse” corrections.



# APPENDIX

## SUMMARY OF UNIVERSITY OF UTAH STRATEGIC PLAN: STRATEGY 2025

### *Vision*

The University of Utah strives to be a model public university in delivering unmatched value in higher education, research, and health care while making social, economic, and cultural contributions that improve the quality of life throughout the state, the nation, and the world. The U's reputation for excellence draws top-tier faculty and attracts motivated students nationally and internationally. Traditional and nontraditional students alike bring diverse experiences and outlooks, thereby enhancing the exceptional educational experience the U offers.

### *Mission*

The University of Utah fosters student success by preparing students from diverse backgrounds for lives of impact as leaders and citizens. We generate and share new knowledge, discoveries, and innovations, and we engage local and global communities to promote education, health, and quality of life. These contributions, in addition to responsible stewardship of our intellectual, physical, and financial resources, ensure the long-term success and viability of the institution.

### *Core Values*

- **Student success and engagement**

The U is committed to providing the financial assistance, personalized support, and engaged learning experiences that increase access to the university and facilitate persistence through degree completion.

- **Research and teaching excellence**

The U engages in cutting-edge teaching and research that foster inter- and trans-disciplinary innovation, creativity, entrepreneurship, and knowledge and technology transfer.

- **Health and well-being**

The U seeks to be a national leader in health care that provides exceptional care, promotes improved health for all, is accountable for outcomes, and advances exceptional health discoveries, innovation, and care practices. (This value is a suggested addition from the transition team.)

- **Diversity**

The U celebrates the rich diversity of people as well as creative and intellectual traditions by being inclusive in every respect.

- **Sustainability**

The U contributes to a more sustainable world through research, teaching, and demonstrating best practices in protecting and enhancing the natural and built environment on the campus and environs, making it a great place to live, learn, work, play, create, recreate, and visit.

- **Global vision and strategy**

The U thinks and acts globally by increasing opportunities for students and faculty to engage in international study, teaching, research, and service.

- **Community**  
The U maintains a strong sense of community among students, faculty, and staff, and cultivates meaningful university, neighborhood, city, region, state, and global partnerships.
- **Leadership**  
The U engages students, faculty, staff, and the larger community in conversations that lead to positive transformation at the local, state, national, and global levels.

***Overarching Goals/Core Goals – The outcomes we intend to achieve.***

- 1. Promote student success** – Promote student success to transform lives
  - a. Measures
    - i. Increase enrollment to 40,000 students
    - ii. Increased completion rates for underrepresented populations
    - iii. Achieve national safety accreditation
- 2. Generate knowledge** – Develop and transfer new knowledge
  - a. Measures
    - i. Increase annual research awards to \$650M
    - ii. Increase major prizes and awards received by faculty to 1,200
    - iii. Increase the number of innovative technologies that positively impact society and move from concept to market by 20%
- 3. Engage communities** – Engage communities to improve education, health, economic well-being and quality of life
  - a. Measures
    - i. Create One U community engagement network
    - ii. Expand degree completion options for community members with “some college, no degree” and community college partnerships
    - iii. Broaden the U’s alumni network by increasing the number and quality of touchpoints, both in Utah and around the world
- 4. Ensure vitality** – Ensure long-term vitality of the University
  - a. Measures
    - i. Achieve carbon neutrality by 2050
    - ii. Meet or exceed capital campaign goal of \$2 billion
    - iii. Increase both faculty and staff diversity each by 35%
    - iv. Grow university’s endowment to at least \$1.3B

Sources:

University of Utah Office of the President (see <https://president.utah.edu/university-mission-and-values/>)

University of Utah *Strategy 2025* (see <https://strategy.utah.edu/#doc1>)

University of Utah *Health Strategy Refresh 2020-2025* (see <https://strategy.utah.edu/#doc1>)

## PRESIDENT TAYLOR RANDALL “LISTEN AND LEARN”

### Background and Key Questions

#### *Background*

President Randall is eager to listen and learn about the plans, priorities, and major issues facing colleges, schools, faculty, staff, students, and other groups and individuals on campus. Over the next 30–45 days, he plans to meet with senior leadership of each college/school for a 90-minute listening session. These meetings will be scheduled by the President’s Office and hosted at the college/school. Participants are encouraged to review the U’s strategic plan prior to these discussions (Strategy 2025). In addition to these college/school leadership meetings, President Randall will host approximately 20 roundtable discussions with representatives from specific campus groups, to include students, faculty, staff, health science units, the Utah Asia Campus, Athletics department, cultural entities, and more. The following questions serve as a guide for the types of issues President Randall hopes to learn about at these meetings.

#### *Key Questions*

President Randall asks each college and university to address the following key questions:

- What are your major priorities over the next 24 months?
- What are your most significant opportunities in the coming year?
- What are your most significant challenges and risks that may impede your success and the success of the university in the coming year?
- How can the President’s Office help magnify the opportunities and address the challenges?
- What insights can you share about the U’s response to the global pandemic?
- What challenges do you face in using interactive video and online learning technologies to enable more flexible access to classes?
- How can we take greater steps to be a more equitable and inclusive campus where diversity thrives?
- How can the U be a model of campus safety for the nation?
- How can you deploy your assets strategically to create greater research innovation and creativity to better serve our community and the world?
- How can we do more to improve student experiences?
- How can we strengthen our efforts to be One U?
- What’s something you want to do that you lack the resources to accomplish?
- How can empathy play a greater role in our success at the U?
- What is a bold idea that will help the U thrive?