

**Goal:**  
**Investigate and test models for next gen educational programming, curriculum design and delivery methods**

| Action Items |   | Assigned                  | Target Date | Status  |
|--------------|---|---------------------------|-------------|---|
| 1            | Explore opportunities to deliver next gen educational programming through blended learning models   | Kirby/Becky/CAC           | 6/1/22      | Due to COVID, this strategy was expedited and implemented in fall 2020 with 8 virtual educational programs. The first-ever 100% virtual Graduate Banking School session was in August 2021 and received very positive student comments. Continue to discuss with BAB and CAC.           |
| A            | Identify and evaluate additional online courses/modules connected to core curriculum  | Kirby/Becky/CAC           | 9/1/20      | Co-sponsored a free DEI webinar, "Diversity & The Future of Banking" with UW-CPED in September that had 120 registrations. Good complement to the curriculum within the leadership section at GSB. Pursuing additional educational opportunities in this important subject area.        |
| B            | Explore self-paced learning modules that extend or enhance existing curriculum  | Kirby/Becky/CAC           | 6/1/22      | Initiated a new "stacked" schedule for the August 2021 virtual session. This model could work well for self-paced learning down the road.   |
| C            | Identify and test opportunities for fully online courses that maintain GSB curriculum rigor and that offer engaging digital experience              | Kirby/Becky/CAC           | 6/1/2021    | Due to COVID, this strategy was expedited and implemented in fall 2020 with 8 virtual specialty schools. And in August 2021 for the full Graduate Banking School program.   |
| 2            | Identify and explore next gen educational preferences for prospective students  | Kirby/Becky/CAC           | 9/1/2022    |   |
| A            | Work with UW to find expert in next gen learning preferences to assist GSB staff and faculty in curriculum model design and delivery                | Kirby/Becky/CAC           | 2/1/2020    | UW representative presented next gen workshop at BAB/CAC Meeting in January 2020.   |
| B            | Expand data gathering from emerging/future leader groups at state level to determine preferences for educational experience and delivery mechanisms | Kathy/ED                  | 11/1/2021   | Kathy working on survey options that can be jointly offered with Ed Directors and state associations to gather more info in this area.  |
| C            | Deepen insights around "experience" for emerging leaders groups to feed into both next gen model development and core model enhancements            | Kirby/Becky/CAC           | 9/1/2022    |   |
| D            | Research additional models for student experience that reduce on-site time requirement and increase online learning requirements                    | Kirby/Becky/CAC           | 6/1/2021    | Given the success of the virtual August 2021 Graduate Banking School along with the successful implementation of virtual specialty school offerings over the two years continue to research options in this area. Continue to include on the agenda for discussion at BAB/CAC meetings. |
| 3            | Identify and explore next gen educational programming to enhance current student experience   |                           | 6/1/2021    |   |
| A            | Explore and evaluate reduced-time, track-based curriculum for current students (tracks/modulars model)  | Kirby/Becky/CAC           | 6/1/2021    | See 1B, 1C and 2D above.  |
| B            | Consider ways blended learning model could vary based on student's year in GSB program, rural locations, etc.                                       | Kirby/Becky/CAC           | 6/1/2021    | See 2D above.   |
| 4            | Identify and explore ways to leverage next gen educational programming to deepen alumni connections   | Kirby/Becky/Kathy/CAC/BAB | 6/1/2021    |   |
| A            | Research and identify potential curriculum relevant to GSB alumni   | Kirby/Becky/Kathy/CAC/BAB | 6/1/2021    |   |
| B            | Recommend model for alumni track-based program with reduced on-site time requirement that retains emphasis on GSB on-campus experience              | Kirby/Becky/Kathy/CAC/BAB | 6/1/2021    | With the implementation of 1B above, there is now a definite possibility for alumni tracks in the future.   |
| 5            | Expand satellite specialty schools to capitalize on regional opportunities  | Kirby/Becky/CAC/ED        | Ongoing     | Prior to COVID, planned to hold 2020 IT Security School in Dallas. Nothing on the books in the near future. Will continue to evaluate possible regional opportunities.  |
| A            | Identify ways to expand current specialty schools or offerings with specific emphasis on those that feed into on-campus GSB programming             | Kirby/Becky/CAC           | Ongoing     | Added a new, very timely Digital Banking School in fall 2020 that is on a "per bank" registration basis to expose more candidates to quality GSB educational programming. Nearly 200 banks have participated in the first three years.  |
| B            | Partner with state association sponsors to potentially offer specialty schools in their areas/locations   | Becky/ED                  | Ongoing     |   |
| C            | Consider additional geographic locations that would enhance participation levels for specialty school attendance                                    | Kirby/Becky/Kathy         | Ongoing     |   |

**Goal:**  
**Maintain GSB-WI as the premier banker education program in the country**

| Action Items |   | Assigned                              | Target Date | Status   |
|--------------|---|---------------------------------------|-------------|--|
| 1            | Maintain excellence in faculty and curriculum rigor for all GSB educational programs  | Kirby/Becky/CAC                       | Ongoing     | Very pleased to see the outstanding student evaluation scores across the board again in 2022.  |
|              | A Explore ways to evaluate GSB-WI curriculum against competitor school curriculum   | Kirby/Becky                           | 6/1/2022    |  |
| 2            | Identify potential content, curriculum and experiences that are specifically relevant to women in banking and diversity in banking  | Kirby/Kathy/Becky BAB/CAC             | 6/1/2021    | Offering a GSB webinar this fall titled "A Passion for Women in Leadership: Encouraging the Next Generation of Women Leaders".   |
| 3            | Increase student enrollment from core central states  | Kathy                                 | Ongoing     |  |
|              | A Innovate with state associations around partnership opportunities for program development and marketing   | Kirby/Kathy                           |             |  |
|              | B Co-host events with state associations for local alumni and/or prospective students   | Kirby/Kathy BAB/ED                    | 6/1/2024    | Initiated discussions this year with the IL Bankers Assn on a possible joint program for alumni and prospective students to attend. Date and location tbd.   |
| 4            | Integrate FiSim throughout GSB on-campus experience to establish differentiation from competitor schools and to better support the full student experience                      | Kirby/CAC                             |             |  |
|              | A Explore additional outside uses of FiSim in the financial industry to enhance the GSB-WI brand (state schools, colleges and universities, in-bank uses, regulatory agencies)  | Kirby                                 | 1/1/2024    | This component is included in the FiSim 2.0 development project that the board approved in July 2021. Phase 1 of Fisim 2.0 was released in August 2022 and Phase 2 will be released in August 2023. Working with GSB constituents to identify student/faculty needs and goals for a FiSim Lite model at state schools and colleges/universities. Targeting for beta test at UW in spring 2024. |
| 5            | Develop relationships with additional post-secondary institutions to increase on-campus presence at GSB   | Kirby/Kathy/ED/BAB/Trustees           | 1/1/2021    |  |
| 6            | Continue to identify future-leaning key trends/issues in banking that should be incorporated into GSB curriculum, particularly those most relevant to the central states region | Kirby/Becky/CAC                       | Ongoing     | Ongoing agenda item for discussion at the annual BAB/CAC meeting   |
| 7            | Expand student off-campus experience to incorporate community/industry service opportunities  | Kirby/Kathy PEF Mission Comm Students | 8/1/2023    |  |

| <b>Goal:</b>  |   |  |                    |   |
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| <b>Develop marketing initiatives that enable GSB to establish a differentiated market position focused on diversity, data-driven insights and institutional partnerships.</b> |   |  |                    |   |
| <b>Action Items</b>   |   | <b>Assigned</b>                          | <b>Target Date</b> | <b>Status</b>   |
| 1   | Introduce marketing efforts and programs that promote GSB as an educational leader for women in banking and diversity.  | Kathy/BAB/Trustees/<br>DEI Working Group | 9/1/2020           | Formed new Diversity, Equity and Inclusion Working Group in fall 2020 to discuss educational opportunities and outreach within various demographic groups. Started marketing partnership with MinBanc Foundation that provides opportunities for educational grants to minority and women-owned banks. Attended National Bankers Assn Annual Convention in Washington, DC, in October 2022. |
| 2   | Leverage relationships with state associations to improve data gathering on educational program decision making among our key market segments (emerging leaders, senior executives, state school attendees, etc.).                  | Kathy/EDs                                | Ongoing            |   |
| A   | Develop survey or polling tools for distribution at/through state association educational programs to gain insight into GSB decision making   | Kathy/EDs                                | 6/1/2022           | Kathy working on survey options that can be jointly offered with Ed Directors and state associations to gather more info in this area.  |
| 3   | Expand messaging around opportunity to receive higher education credit for GSB graduates  | Kathy/Kirby/BAB/ED<br>Trustees           | 1/1/2020           | Specific flyer produced for all SBAs around the UW Executive Leadership Certificate; mention of SBS IT certification credits in specific GSB emails and brochure mailings to IT professionals.  |
| A   | Extend messaging around current MBA/graduate school relationships   | Kathy                                    | 2/1/2020           | Dedicated page on GSB web site about current MBA/graduate school relationships. Include mentions in promo emails about Grad School, too.  |
| B   | Gather data on GSB graduates who have received higher education credits after attending GSB   | Kathy                                    | Ongoing            | Fall updates from primary contacts at universities that provide defined advanced placement for GSB graduates into their MBA. As of last update, about 25 or so have graduated or are attending the UMass MBA program.   |
| C   | Develop list of central region colleges and universities with banking degree programs (or certificates)   | Kirby/Kathy/ED/BAB/<br>Trustees          | 9/1/2023           |   |
| D   | Identify new higher education institutions with whom GSB can develop credit-hour partnerships   | Kirby/Kathy/ED/BAB/<br>Trustees          | 1/1/2021           | In addition to existing UMass and UN-Lincoln advanced placement partnerships also pursuing this opportunity with UW-Madison and their newly revamped Executive MBA program along with UW CPED offerings.  |
| 4   | Make marketing efforts more data-driven (i.e. more use of alumni database, high performing banks data, ROI of marketing efforts - state and national campaigns/conferences, target market identification based on statistical data) | Kathy                                    | Ongoing            | Work already underway in this area in advance of 2024 marketing campaign  |
| 5   | Allocate marketing dollars for expanded conference sponsorships and targeted approaches to key audiences of core and specialty programs   | Kathy                                    | Annually           | Ongoing review of ROI for sponsorship/exhibits at state, regional and national events. GSB represented at a # of targeted SBA conferences that feed into GSB specialty school programs.   |
| 6   | Develop additional partner marketing programs and campaigns with state associations to improve in-region student acquisition  | Kathy                                    | 6/1/2022           |   |
| 7   | Continue to find ways to market the full GSB experience, including curriculum relevance, peer networking and off-campus experiences   | Kathy/BAB                                | Ongoing            | Being virtual in 2021 and back in person for the first time at the 2022 session this has been somewhat restricted. Exploring regional student/alumni networking gatherings over the next year.  |

| <b>Goal:</b>  |  |                 |                    |  |
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| <b>Continue to proactively monitor the banking school environment for partnership opportunities and potential mergers</b> |  |                 |                    |  |
| <b>Action Items</b>   |  | <b>Assigned</b> | <b>Target Date</b> | <b>Status</b>  |
| 1   | Monitor competitor banking school attendance rates and financial performance for potential merger opportunities                                    | Kirby           | Ongoing            | Continue to network with director colleagues throughout the year. Held a virtual meeting in the spring and our first in-person meeting in three years was held in Denver in September. Next update due fall of 2023.   |
| A   | Create Ad Hoc Committee of Trustees to study and keep abreast of opportunities   | Kirby           | 12/1/19            | Outreach from Trustees to other Graduate Banking Schools that were going through CEO searches in 2020. Limited interest in merger discussion but possibility of joint co-sponsored educational programs.   |
| B   | Keep board apprised with updates of findings   | Kirby           | Ongoing            |  |
| 2   | Monitor industry conditions (economy, consolidation, etc.) to stay ahead of forces that would drive banking school consolidation                   | Kirby/Trustees  | Ongoing            |  |
| 3   | Continue to grow financial strength of GSB in order to be positioned as primary potential partner for state associations and other banking schools | Kirby/Trustees  | Ongoing            | While the financial uncertainties were definitely tested throughout COVID over the past 18 months, very positive financial standing for both GSB and PEF going into and coming out of COVID.   |
| 4   | Explore opportunities to expand partner programs and specialty schools with other banking schools  | Kirby/Trustees  | Ongoing            | Currently working with UW CPED to possibly partner in offering their DEI Certificate program. Opportunity for sponsoring states that are interested, too. Good working relationships with other Grad Schools. GSB-LSU is a marketing partner of GSB's IT Management and IT Security Schools. |

| <b>Goal:</b>   |  |  |               |  |
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| <b>Expand role of PEF to incorporate community/industry service and diversified forms of student support</b> |  |  |               |  |
| <b>Action Items</b>  | <b>Assigned</b>  | <b>Target Date</b>                             | <b>Status</b> |  |
| 1  | Explore and recommend foundation mission changes to include community/industry service opportunities for GSB participants  | Kirby/Kathy<br>PEF Mission Comm                | 11/1/2023     |  |
| 2  | Identify collaborative community/industry service opportunities with state associations to enhance brand positioning among bankers in the central region   | Kirby/Kathy<br>PEF Mission Comm                | 9/1/2023      |  |
| 3  | Consider PEF brand change to connect more directly with GSB  | Kirby/Kathy/BAB                                | 9/1/2023      |  |
| 4  | Identify PEF funded GSB scholarship opportunities focused on women in banking and diversity in banking   | Kirby/Kathy/ED<br>PEF Mission Comm<br>Trustees | 6/1/2020      | Formed new Diversity, Equity and Inclusion Working Group in fall 2020 to discuss educational opportunities and outreach within various demographic groups. |
| 5  | Recommend changes to state scholarship fund distribution to encourage more usage of scholarship funds  | Kirby/Kathy/ED<br>PEF Mission Comm<br>Trustees | 11/1/2022     | PEF Mission Committee bringing recommended scholarship changes to the November 2022 board meeting.   |
| 6  | Research innovative uses of PEF funds to better support on-campus attendance of GSB by individual participants (i.e. Habitat For Humanity or 2nd Harvest Foodbank community service events while students are on campus) | Kathy/BAB/Students                             | 8/1/2022      | See Action Item #1.  |

| <b>Goal:</b>  |   |                                |                    |  |
|---|---|--------------------------------|--------------------|--|
| <b>Maintain and enhance strong working relationships with governing and sponsoring associations</b> |   |                                |                    |  |
| <b>Action Items</b>   |   | <b>Assigned</b>                | <b>Target Date</b> | <b>Status</b>  |
| 1   | Active dialogue with state association Education Directors seeking input on new and existing program content, delivery, marketing efforts and staying abreast of GSB activities | Kathy/Becky/ED                 | Ongoing            | Annual ED Forum scheduled for August 2023 session.   |
| 2   | Collaborate with Ed Directors and support core state association programs that are good feeders into GSB educational programs   | Kathy/Becky/ED                 | 9/1/2020           | GSB has remained supportive via sponsorships of SBA educational events that are good feeders into GSB programs. Many states offer "sponsorship packages" when GSB selects multiple events. Many have given a GSB rep time on the program for a GSB update related to the program's content.  |
| 3   | Grow GSB/state association co-sponsored in-state workshops  | Becky/ED                       | 1/1/2021           | With the growth in virtual delivery during COVID, GSB converted our in-person SBA workshops to virtual and offered our first multi-state virtual workshop in spring 2021 and again in spring 2022. This approach has proven successful with our SBA partners and this spring offered two virtual workshops - one on Credit Risk Mgmt in a Recession with Mike Wear and one on Employment Law Compliance with Patty Wise. Both were successful. |
| 4   | Develop marketing and events in partnership with state associations focused on alumni engagement  | Kirby/Kathy/ED/BAB             | 6/1/2020           | Initiated discussions this year with the IL Bankers Assn on a possible joint program for alumni and prospective students to attend. Date and location tbd.   |
| 5   | Partner with Ed Directors to develop data gathering mechanisms to enhance GSB student insights (prospective, current or alumni)   | Kathy/ED                       | 8/1/2023           |  |
| 6   | Identify key community/industry needs in state association regions for potential PEF support  | Kirby/Kathy/ED<br>BAB/Trustees | 8/1/2023           | Based on PEF funds available.  |