

Union Theological Seminary in the City of New York Strategic Plan

2022 to 2026

Where Faith and Scholarship Meet to Reimagine the Work of Justice

Introduction

Union Theological Seminary (UTS) is in the midst of a remarkable transformation. Driven by seismic events like the COVID-19 pandemic and by the decline of traditional religious institutions, we are adjusting to meet the needs of our ever-changing world. Simultaneously, we are staying true to our mission to use faith and scholarship to reimagine the work of justice.

This twin commitment, the consistency of our core values alongside the unpredictability of current events, is at the heart of our strategic plan. Our roadmap allows UTS to remain nimble and adaptable while advancing our ever-present social justice goals.

Our strategic plan outlines the steps that will ensure our financial sustainability, promote innovation in theological education, expand our body of religious scholarship, support our students, strengthen our community, reimagine faith in the public square, and cultivate strategic partnerships

In 2015, Union Theological Seminary's Board of Trustees approved a comprehensive strategic plan to guide the Seminary's work from 2015 to 2020. The plan was called Jubilee, a reference to the biblical occasion on which a community clears its debts and rejoices. Members of the UTS community planned to revisit the roadmap in 2020. When the pandemic arrived, the world fundamentally changed, and the institution recognized that it could not proceed with business as usual.

In the spring of 2022, the UTS Strategic Planning Committee re-evaluated the plan. The committee met regularly with faculty, students, staff, and trustees, and identified areas that called for significant realignment. It found that UTS faced a precarious but not insurmountable financial situation, one that would require swift and deliberate adjustments. Out of that work came three overarching priorities that form the financial foundation of the entire plan: Plank A, Campus Renewal and Climate Responsibility; Plank B, the Development Operating Plan; and Plank C, Financial Sustainability; Every other commitment in this plan flows from the stability these three priorities create. This 2022 to 2026 Strategic Plan is the result of that work, carrying forward the enduring commitments of the Jubilee plan while adding a renewed financial foundation to secure the Seminary's future.

Mission

Progressive theology has long taken shape at Union, where faith and scholarship meet to reimagine the work of justice. Grounded in the Christian tradition and responsive to the needs of God's creation, a Union education prepares its students for committed lives of service to the church, academy, and society. A union education develops practices of mind and body that foster intellectual and academic excellence, social justice, and compassionate wisdom. Union forms courageous faith leaders who make a difference wherever they serve.

Vision

Education at Union Theological Seminary is deeply rooted in a critical understanding of the breadth of Christian traditions yet significantly instructed by the insights of other faiths. It makes connections between these traditions and the most profoundly challenging issues of our contemporary experience: the realities of suffering and injustice, world religious pluralism, the fragility of our planet, and discoveries of modern science. Union envisions a future in which teaching and learning continues to be ecumenical in spirit, supporting a record of academic excellence and a deep commitment to social justice. Union envisions its graduates changing the world by practicing their vocations with dedication that bring a religiously grounded, critical and compassionate presence to the major personal, social, political and scientific realities of our time.

Part One. Ensuring Union's Future

The foundation of this plan is financial. Before Union can advance its broader commitments, it must secure its financial future. The plan therefore begins with three interconnected priorities that together ensure the Seminary's stability: campus renewal and climate responsibility, a development operating plan, and financial sustainability.

Plank A. Campus Renewal and Climate Responsibility

Responsible offices: Facilities and Operations Office; Campus and Facilities Committee.

UTS is committed to ensuring that every corner of its campus is used to the fullest and that the institution fulfills its responsibility to protect the planet. The Seminary is pursuing every available path to make its operations more cost-effective and to reduce its carbon footprint. The most significant project is 100 Claremont Hall, developed by monetizing the Seminary's air rights to create a LEED-certified building that provides space for UTS offices and faculty apartments alongside new housing for New York City residents. Following the renovation of Hastings Hall in 2020 and a transition to electricity drawn entirely from a green power source, UTS continues to pursue its goal of becoming a net-zero campus. Current capital work includes the Refectory and Undercroft renovation beneath James Chapel, the new Prayer and Meditation hall, the 100 Claremont Cloister Garden Walk, and HVAC and elevator upgrades at Burke Library.

Strategic Goal	Key Metric(s) / KPI
Complete a capital investment program spend report	• Complete the report in a timely fashion
Ensure McGiffert orderly and timely move-out prior to the end of the lease	• Completion by end of lease term
Ensure completion of 100 Claremont project in a timely manner	• Complete expeditiously and without major disruptions
Measurable progress towards a net-zero campus	• Take measurable steps to ensure goal is reached within a timely fashion

Plank B. Development Operating Plan

Responsible offices: Development Office; Development Committee.

UTS is undertaking a major campaign to expand its donor pool and increase fundraising. The Seminary is engaging a wide cross-section of its community, including previous donors, alumni, faculty, and staff, to understand what matters most to them for Union's future. Donors are invited to support the projects they care about, from scholarships to faculty research to campus development. The centerpiece of this work is the Voices of Union campaign, which asks the community what comes next and seeks to ensure the Seminary's sustainability for the long haul.

Strategic Goal	Key Metric(s) / KPI
Meet annual fund fundraising goal Launch public phase of comprehensive campaign Launch Foundation and Corp partnership/fundraising strategy	• Total annual giving goal of 1,525,000 dollars for FY2025 • Board annual giving goal of 450,000 dollars • Voices of Union campaign goal of 40,000,000 dollars • Board of Trustees participation rate of 100 percent • Temporarily restricted gifts of 300,000 dollars

Plank C. Financial Sustainability

Responsible offices: Finance Office; Finance Committee.

The 2022 to 2026 plan sets out to place UTS on stable financial footing for the long term. The Seminary is generating additional tuition revenue by expanding its part-time and online offerings, which reach more prospective students, including those with time or geographic constraints, while delivering a high-quality education more cost-effectively. UTS is also sharing resources with peer institutions to reduce costs, supported in part by a grant from the Lilly Endowment, and is modernizing its financial systems, strengthening its finance staff, and refining the management and servicing of its endowment.

Strategic Goal	Key Metric(s) / KPI
Achieve an endowment value that keeps our annual spending draw in line with prior years. Align financial resources with our core mission, and target certain revenue and expenses dollars (annual operating budget)	• Endowment value target of \$118,000,000 • Total revenue target of \$17,300,000 • Operating budget of approximately \$19,739,060

Part Two. Our Commitment to Excellence

With its financial foundation secured, UTS commits to six enduring priorities, most of which carry forward from the Jubilee plan. These commitments express the Seminary's academic mission and its public witness.

Plank 1. Shaping 21st-Century Religious Scholarship

Responsible offices: Academic Office; Educational Policy Committee.

Union Theological Seminary has been the birthplace of many major developments in theological scholarship. The Seminary continues this legacy by supporting the intellectual passions of its current faculty and recruiting new scholars who bring fresh and distinctive perspectives. As a historically Protestant seminary committed to interreligious engagement, Union is particularly committed to cultivating scholarship across many religions and spiritual practices.

Strategic Goal	Key Metric(s) / KPI
Transform our static mission statement into an active updated one	• Monthly task force meetings • Complete faculty IE training • Adopt a revised mission statement
Ensure integration of JEI (Justice, Equity and Inclusion) into Faculty Work	• Complete review of 50% of syllabi of foundational courses • Meet with faculty to discuss pedagogy • Establish JEI Committee
Successfully recruit 3 Full-Time faculty, due to retirements	• Create Job Descriptions • Hire three full-time faculty
Successfully recruit Visiting Part-Time faculty	• Number and expertise of visiting faculty (pending enrollment, student demographics, curricular direction, and funding) aligned
Strategically Recruit Adjunct Faculty, while reducing the overall number of Adjunct Faculty	• Number of adjunct faculty reduced 5%/yr (pending enrollment especially for MASJ program)
Develop Faculty – Size & Expertise Projections	• Revised faculty table to include and expand different categories of faculty
Develop Faculty – Tenure & Promotion	• Supported three junior faculty through tenure • Clarified process for tenure and promotion
Enhance Institutional Prestige by encouraging Faculty Publications & Recognition	• 3 monographs/yr • 5 chapters/articles/yr • 3 recognitions/yr • 25 presentations/yr
Successfully Onboard new Field Education Supervisors	• 5 new supervisors/yr onboarded
Enhance the PhD Program	• PhD program direction discussed • 2 PhD students admitted/yr

Plank 2. Pursuing Innovation in Theological Education

Responsible offices: Academic Office; Online Education and Learning Innovation; Educational Policy Committee.

The institution will pursue innovation in theological education by expanding its portfolio of online, part-time, and non-credit offerings while creating new pathways into graduate education. Over the three-year period, Union will strengthen its advanced certificate portfolio, grow enrollment and revenue from online and part-time programs, build stackable non-credit credentials that articulate into degree programs, and establish undergraduate-to-graduate pathways through new partnership models. Success will be measured by enrollment, program development, revenue growth, and the creation of new educational partnerships.

Strategic Goal	Key Metric(s) / KPI
Expand online and part-time for-credit programs	• Target an additional 4 advanced certificates with five or more annual student enrollments; and a total online and part-time student enrollment of 45 students; and a gross revenue (post-scholarship) of \$300,000.
Develop stackable non-credit educational pathways	• Target an additional 12 non-credit courses and programs; number of non-credit participants; gross revenue from non-credit offerings of \$30,000; number of participants transitioning into for-credit programs.
Create undergraduate-to-graduate pipeline partnerships	• Number of 4+1, 4+2, and 3+2 programs; number of undergraduate institutional partners; student enrollment in pathway programs.

Plank 3. Recruiting, Retaining, and Supporting Students

Responsible offices: Admissions and Financial Aid Office; Educational Policy Committee.

UTS aims to grow enrollment by building its recruitment pipeline and offering more flexible and innovative course options. The Seminary is expanding scholarship opportunities and strengthening the financial aid, bursar, and registrar processes that ensure students have the resources and support they need to pursue their education with ease.

Strategic Goal	Key Metric(s) / KPI
Grow Enrollment to 300 across all Degree and Certificate Programs	• Incoming fall enrollment (headcount) • Total fall enrollment (headcount) • Attain a Fall Yield Rate of 55%
Build Sustainable and Student-Serving Financial Aid Programs	• Incoming fall enrollment (headcount) • Total fall enrollment (headcount) • Attain an Annual Net Tuition Discount Rate of at least 75% • Average Award Amount • Percent of Enrolled Students receiving institutional aid
Build Strong Student Systems and Processes	• Average Award Amount • Graduation Rate by Program Type (Hybrid/Certificate or Residential) • Persistence Rate by Program Type (Hybrid/Certificate or Residential)

Plank 4. Cultivating Intentional Community

Responsible offices: Student Affairs; Educational Policy Committee.

At UTS, community means not only that people can enter the institution but that they are genuinely welcomed. The Seminary is expanding interfaith opportunities, improving disability and wellness services, strengthening career services and the Writing Center, and building support for remote and commuter students and for learners in the Masters of Professional Studies Program.

Strategic Goal	Key Metric(s) / KPI
Graduation Rates are to be at / or above ATS annual reporting for similar degrees	• Master's Degree Programs • Doctorate Degree Programs
First-Year Persistence Rates are to be at / or above ATS annual reporting for similar degrees	• Master's Degree Programs • Doctorate Degree Programs
At Least 50% of Student Participants	• Student Organizations • Student Elections

Plank 5. Reimagining Faith in the Public Square

Responsible offices: Marketing and Communications Department and Committee; Center on Race, Ethnicity, and Social Justice; Justice Education Initiative.

As the world faces a host of compounding crises, UTS offers a clear and needed voice on faith and social justice. The Seminary is strengthening its presence in the media and in public conversation on issues that include climate change, LGBTQ rights, and racism, and is further cementing its role as a driver of social justice.

Strategic Goal	Key Metric(s) / KPI
Return to first place in share of voice among peer seminaries	Track Share of Voice by Mentions for Harvard Divinity School, Princeton Theological, and Yale Divinity School.
Show growth in total earned media hits	Total Earned Media Hits of at least 2.45k
Increased engagement across newsletters and social media	- Newsletter Open Rate of 27.17% - Instagram, LinkedIn, YouTube, and Facebook engagement rate per the metric dashboard

Plank 6. Cultivating Partnerships

Responsible offices: President's Office; Development Committee; Facilities and Operations; Online Education and Learning Innovation.

The institution will strengthen collaboration, sustainability, and operational effectiveness by expanding strategic partnerships across administrative operations, academic programming, and externally supported initiatives. The institution will increase the use of shared service arrangements, deepen collaboration with peer institutions through shared courses and joint academic programs, and cultivate partnerships with nonprofits, foundations, companies, and other organizations that directly support academic programs. Progress will be measured through the following strategic goals, metrics, and targets.

Strategic Goal	Key Metric(s) / KPI
Expand non-curricular shared services through shared service arrangements and joint contracting.	• Number of service areas provided through shared service or joint contracting arrangements; Number of institutional partners participating in shared service arrangements.
Expand institutional partnerships for shared courses and joint academic programs.	• Number of institutional partners participating in shared courses or joint academic programs.
Increase programs directly supported by institutional and organizational partners.	• Number of programs with one or more institutional/organizational partners providing direct support; • Total number of institutional/organizational partners across all supported programs.

Union's Promise for the Future

Since its founding in 1836, now 190 years ago, UTS has cultivated generations of leaders who have put faith into practice for the common good. Through this strategic plan, Union will ensure that it can continue this work for decades to come.