Lutheran School *of* Theology *at* Chicago

ON THE WAY...

Strategic Plan 2024–2029

A PLAN IN MOTION

Our most recent strategic plan emerged in peculiar times. So many unsettling matters existed then – global pandemic, political instability, social tensions, and earth care, to name but a few. It was no surprise, then, that the name of our strategic plan conveyed our timely, opportune intervention at such an urgent and pressing moment. Within our school and for our church, we needed to respond in bold and decisive ways. So, our plan back then quoted from Esther 4:14 to express all we would do with what was in our grasp on which so much depends. Our plan was therefore entitled "For such a time as this…" to show a commitment to our students who would serve, our church in its witness, and our school amidst rapid change. We were making plans, in short, for such a time as this…

So many things from those days persist, and yet we are not in the same place. Following the sale, relocation, and construction of our main facility, drawing on our ongoing attention to antiracism and queer advocacy, open to new ways of sharing formational resources with new kinds of learners, we have come quite a distance since a few years ago. We have been underway and learned some things besides. The changes and challenges once faced have not ended, but we now see ourselves headed somewhere new and hopeful. We are still on the move, becoming a new kind of seminary, true to our roots, open to the spirit's leading. We are, in short, on a journey. Things are happening all around us, and we trust our merciful and loving God to accompany us as these days unfold anew.

For all these reasons and more, the driving metaphor for our next strategic plan – the one you are now reading – has shifted from temporal to locational, from time to motion. This plan is called "On the way…" in a fully, deeply scriptural sense. In common parlance, that phrase is usually bland. It often refers only to a vague transition between more important points – "On the way from here to there" – or begs those who seek change to wait just a little longer – "Trust me, help is on the way." But this is not how the phrase is used most often in the Bible. Instead, on the way is a space of eventful encounter, a place of holy engagement. We already know all our life is a journey with God. To refer to our present plan as on the way gestures at this wider journey, but now in microcosm.

Being "on the way" appears scores of times in scripture, a third in the New Testament. Consider a few examples in Luke alone. Jesus tells his followers to settle with their accusers on the way to trial, seeking reconciliation over dispute (12:57-59). While on the way between Samaria and Galilee, Jesus meets ten lepers, heals them at once, and praises the foreign leper who showed faith (17:11-19). The first Easter evening, two disciple walk toward Emmaus only to encounter the Risen One, who opens scripture to them on the way, a meeting they later share with all the disciples (24:13-33). Being "on the way" means seeking real transformation, welcoming the outsider, being open to God's horizon. It's exactly the right way to regard our next strategic plan, as something ready for use on the way…

As you review the four strategic initiatives shared here, I hope you will sense that each of them began within earlier efforts and now lean into a growing promise. Building upon our work so far with innovation, sustainability, equity, and capacity, this plan expects that more will now happen as we become better stewards of our many resources. We are on the way from what we have already been to who God is shaping us to become. If these plans for our future also awaken your interest, let's talk about that soon. We'd be glad for you to join us on the way… There's always room for more.

James Nieman

James Nieman, PhD
President, Lutheran School of Theology at Chicago

MISSION, VISION, VALUES & MARKS

This strategic plan builds directly on several long-standing formal commitments of our school. Each has been articulated by the Board of Directors in four approved statements regarding our mission, values, marks, and vision. These statements guide how we will address new challenges while ensuring that the plan is aligned with the history and gifts of this seminary.

Mission

What we do best, our central purpose

The Lutheran School of Theology at Chicago, a seminary of the Evangelical Lutheran Church in America, forms visionary leaders to bear witness to the good news of Jesus Christ.

Vision

Where we are going, our emerging direction

The Lutheran School of Theology at Chicago seeks to build up the body of Christ and work for a world of peace and justice that cares for the whole creation.

Values

What we believe deeply, our guiding principles

Christ-centered – Striving by God1 s grace to follow Christ's call into loving service, directed and impelled by the Spirit's transformative power.

Responsive to context – Embracing our diverse setting and academic environment in order to learn from and minister to the community.

Attentive to diversity – Knowing and honoring cultural, ethnic, and religious perspectives to build communities of hospitality and reconciliation.

Committed to excellence – Preparing leaders who are academically, practically, and spiritually ready to serve in a variety of vocational settings.

Marks

Who we are distinctly, our special character

Urban – LSTC is an urban seminary that believes the best way to prepare leaders to witness to the gospel in any setting is to provide them with a diversity of experiences found in a large city. This context is also crucial for those intending to specialize in urban ministry.

University-related – LSTC is located by intention near the University of Chicago. Through interaction with the university faculty and students and other educational resources, including the university's libraries, LSTC relates theological education and ministerial preparation to the wider search for wisdom in our society.

Multicultural – LSTC's theological commitment to diversity is a high priority and makes the seminary a rich environment in which to equip leaders of all cultures.

Ecumenical – LSTC is a member of one of the largest theological consortia in the world, the Association of Chicago Theological Schools (ACTS). This resource and the contributions of its own ecumenical staff, faculty, and student community members give students access to a broad array of opportunities for education that is thoroughly Lutheran yet respectful of other Christian traditions.

Global – LSTC equips leaders for the church in the United States and the world, engaging gifts that international faculty, students, and their families bring to the community, and structuring a curriculum that integrates care of creation and worldwide peace and justice int o its degree programs and daily life.

Interfaith – LSTC's specializations in Christian-Muslim and Jewish-Christian relations and its wide-ranging studies in world religions and interfaith dialogue prepare students to exercise pastoral and public leadership in an increasingly multifaith world.

PLAN DEVELOPMENT AND FEATURES

The 2024-2029 Strategic Plan guides the school's health, growth, and direction during the next five years. It began on 1 July 2024 and concludes on 30 June 2029. It was developed with careful consideration of our current and evolving mission, values, marks, and vision, all set within today's rapidly changing context of theological education and Christian witness. The plan's development began in late 2023 and involved many stakeholders across the school. It also took advantage of the comprehensive visits by both accreditors in spring 2024, including our self-study reports and their evaluative response. As a result, a wealth of insight informed the Board of Directors in its final action to endorse the plan in May 2024.

Four central initiatives stand at the heart of this plan — **Asynchronous education, Philanthropic campaign, Policy review,** and **Staffing strategy** — and will be detailed in the next section. Each was selected for its promise to drive substantive improvement for the school. What is more, this plan continues our commitment to both material and moral sustainability as first introduced in the previous strategic plan. We once again seek to be fitting and effective stewards of the resources we hold for the school's mission, aligning these with values of diversity, equity, inclusion, and justice in our common work. This plan again seeks to guide us through challenges and opportunities ahead and is marked by several important features that make it distinctive and timely.

Strategic

Wider goals with institutional impact

Strategic plans are often frustrated by too many initiatives. Stakeholders cling to valued priorities or legacy projects, leaving a plan mired in detail. For this plan, though, we sought not "operational" but truly "strategic" planning. The former involves daily activities and short-term objectives. Such plans surely help us run smoothly by attending to specific areas of work within a narrower scope and briefer timespan, but they do not offer the direction needed for change. The latter approach is truly strategic by focusing on long-term goals and overall direction for the school. Such plans generate substantial impact, engage new opportunities, propose major investment and reallocation, affect our place in the marketplace, and align our deepest values with institutional direction.

As you review the four initiatives at the heart of our plan, you will note a special section within each called "Why is this strategic?" Look for three characteristics that make each initiative strategic:

Impact and significance – How does this initiative affect the school's market position, competitive advantage, and overall growth in ways that have long-term importance?

Scope and complexity – How does this initiative require coordination and collaboration across the school in entering new markets, launching new products, or facing the unexpected?

Innovation and change – How does this initiative bring about transformation that aligns with the school's mission in terms of new approaches, technologies, or business models?

Evergreen

Annual reviews within multiyear horizon

This plan marks a transition away from a three-year cycle (as in our previous three plans) toward a five-year horizon. That may sound counterintuitive. As the pace of change affecting our school and society accelerates, we want to extend the timeline for our planning? Doesn't that risk rendering our plan more remote and inaccurate? The irony, though, is that by moving in the other direction and abbreviating the plan's horizon, we would essentially offer only an operational plan (see the section just above) and lose sight of the longer span actually needed for genuine, deep change. How, then, do we hold these two in proper tension? How do we stay focused on a longer target that is essential, and how do we monitor progress toward that target so the plan can remain grounded?

To achieve this balance, we are deploying an "evergreen" process – rigorous annual reviews within a multiyear horizon. At the start of each fiscal year, benchmarks for each initiative are set with clear goals and outcomes for the year ahead. Each initiative team sets its annual goals and establishes criteria by which the initiative is evaluated. Each benchmark will also include specific DEIJ objectives to ensure our commitment to moral sustainability is consistently integrated across all parts of the plan. This annual review process will ensure we are on track toward our five-year goals by regularly evaluating progress, responding to new opportunities and challenges, adjusting our annual plans as needed, and so remaining closely tied to and effective in reaching our overall targets.

Performance

Key benchmarks, resources, and metrics

Each of this plan's four initiatives seeks positive outcomes for the school over the next five years. We cannot reach those outcomes all at once, of course, but only through shorter-term goals that are clear and have measurable outcomes – the benchmarks noted above and established every year. These annual benchmarks in turn rely on two features that are clearly named for each initiative: change resources and associated metrics. The former (resources) are areas of activity or influence that can be deployed to achieve the intended annual benchmark. Think of these like levers or mechanisms that a given initiative can put into action to change institutional conditions and so bring about real transformation. Naturally, these resources often affect many parts of the school.

The latter (metrics) are the ways we show evidence for and measurement of change – in particular through the use of change resources for a particular initiative. Suppose this plan enacts various changes to reach an annual benchmark on the way to a five-year goal. Metrics are the way we then show how this is so, the basis to be used for our narrative of strategic change. To be sure, these metrics are "associated" with an initiative and so may be quite narrow in scope. In this regard they differ from the fourteen "institutional metrics" in six core areas that are regularly tracked by the Board of Directors to monitor overall health of the school. On that model, though, the metrics in each initiative show in a more compressed way the health of the plan in reaching its aims.

Dynamic

Wider ownership, reviews, and improvements

While the conventional "owner and sponsor" model for implementing a strategic plan has clarity about who leads a given initiative, it also tends to narrow any wider buy-in about what unfolds, and thus isolates initiative leaders. We have therefore adopted a broader approach to accountability through larger cross-functional teams that invite participation across departments, drawing in a wider range of expertise than was formerly the case. Such teams promote the wider ownership needed for effective plan implementation and are themselves directly accountable to existing administrative structures for review, decisions, and correction. Particularly important in this is the Executive Cabinet, for whom strategic plan implementation becomes a core task.

Another key aspect of a good strategic plan is maintaining effective reporting for the sake of accountability, communication, and institutional learning. Toward this aim, quarterly reports are submitted for each of the four initiatives to the Executive Cabinet for its regular consideration, response, and direction-setting. That is, we will utilize evaluative feedback loops so that reports generated about initiatives lead to needed annual redirection and wider institutional improvement. The reporting process will also be supported by greater sharing of initiative results through updates to the strategic plan portion of the school's website. Benchmarks can then be tracked according to established metrics, with updates and changes available for the benefit of all.
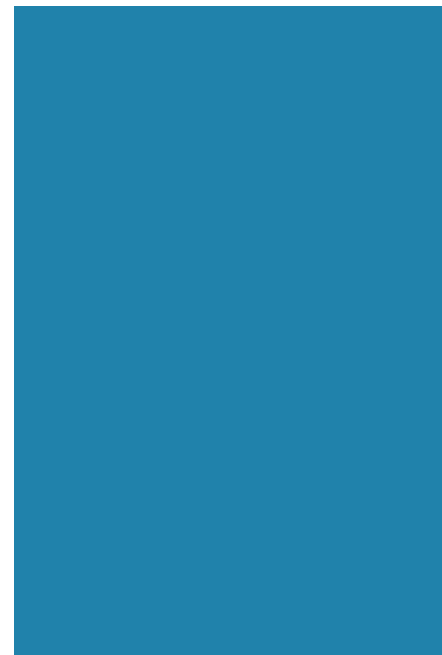
STRATEGIC INITIATIVES

Four initiatives are central to this strategic plan and promise institutional transformation:

Asynchronous education – Give wider access to quality learning for new kinds of learners.

Philanthropic campaign – Build a broader base of support for our mission and innovation.

Policy review – Develop institutional capacity through equitable, consistent practices.

Staffing strategy – Improve staff abilities by refining roles and investing in deeper skills.

Initiatives are detailed below using the same format. The substantive focus for each is followed by its rationale, intended multiyear and annual outcomes, means and measures by which these are assessed, and the team responsible for implementation and communication.

ASYNCHRONOUS EDUCATION

This initiative expands and transforms LSTC's existing educational approach by developing a broad array of asynchronous learning materials available for a wider range of learners – such as working persons wanting to retool, church workers seeking continuing education, and eager learners needing no credentials at all. To reach such audiences, we will build a new enterprise for educational programming that combines the best of instructional design and assessment, faculty development in online pedagogies and planning, technological resources and expertise needed for quality production, and reimagined recruitment and student services that support learner retention, satisfaction, and improvement.

Why Is This Strategic?
Rationale for inclusion

Our school's current programs are only available in person or synchronously online. Conventional educational models like this limit access for many new and diverse learners due to their geographic, financial, and scheduling constraints. We already know that the demand for more flexible learning options is on the rise. By acknowledging and adapting these, LSTC can remain competitive and relevant in the evolving landscape of theological education, especially since other peer institutions are entering this marketplace and developing comparable offerings.

This initiative represents a significant opportunity for us to broaden our reach to non-traditional learners and audiences, including especially those from diverse backgrounds presently underserved by extant conventional approaches. By focusing on "asynchronous education" this initiative will:

- Enhance our ability to offer quality theological education by deploying more flexible access.
- Broaden our appeal to underserved groups seeking accessible, equitable learning options.
- Foster our institutional health and growth through greater enrollment and new revenue.

Five Year Goals
Outlook and outcomes

In five years, LSTC will establish a robust portfolio of asynchronous materials, from single modules to sequenced resources. As a result, there will be a 20% increase in the size of our TEEM and SAM programs, with a significant portion of these learners from previously underserved populations. Our school will be a recognized leader in offering equitable access to inclusive, progressive, high-quality theological education that appeals both to those seeking church service and many other interested learners besides. This will unfold using a sustainable financial model that generates net positive revenue able to support the school overall as well as further educational innovation.

Annual Benchmarks
Targets and criteria

To be supplied by implementation teams at the start of each new fiscal year...

Change Resources
Areas for activity

Technology infrastructure – Invest in platforms, software, equipment, and expertise needed to develop and deliver asynchronous learning materials.

Instructional training – Identify and support programs that can equip faculty and other presenters with skills for effective asynchronous educational design.

Marketing outreach – Design, implement, support, and improve efforts to promote new asynchronous learning and recruit new learners we do not presently reach.

Support services – Improve intentional services to support retention of new learners, including technical assistance, academic advising, and vocational attention.

Associated Metrics
Measures showing change

Resources launched – Track the development and implementation of new asynchronous materials, from single modules to full sequences of topical offerings.

Enrollment figures – Monitor online program enrollment, with attention to diversity in order to ensure reaching underrepresented individuals and communities.

Financial effect – Measure the economic impact of asynchronous offerings, both new revenue generated and operational expenses incurred for such programming.

Program quality – Collect, review, and evaluate feedback from asynchronous learners about the access to and value of the various resources they engage.

Implementation Team
Leadership and accountability

Keisha Dyson, Vice President for Enterprise Innovation

Rhiannon Koehler, Senior Director of Marketing and Communications

Linda Thomas, Dean and Vice President of Academic Affairs

Richard Vivian, Vice President of Finance and Operations

"With Project Starling, we're able to meet people where they're at – whether it's church leaders looking for continuing education, professionals wanting to sharpen their skills, or anyone eager to learn just for the sake of it. It's all about making theological education more accessible, inclusive, and meaningful, while keeping LSTC at the forefront in a world that's always changing."

–Keisha Dyson, Vice President for Enterprise Innovation

PHILANTHROPIC CAMPAIGN

This initiative focuses on and seeks to secure LSTC's financial sustainability by cultivating existing and new long-term philanthropic relationships that can, over time, support educational innovation and institutional growth. Its initial three-year campaign is mainly oriented toward developing new current use support in four areas identified as essential for the school at this time. This campaign aims to raise $7.5 million in unrestricted revenue through targeted fundraising, expand the number of donors in the top three giving bands, improve donor retention scores, and develop new funding partnerships to support strategic initiatives. The next campaign will then be designed and launched, adapting to an improved awareness of our fundraising needs and opportunities at that later point.

Why Is This Strategic?
Rationale for inclusion

Like most other educational and religious nonprofits, LSTC faces a challenging financial landscape. Once familiar sources of revenue are being displaced (e.g., tuition), fixed or semi-fixed expenses are growing (e.g., salaries and facilities), and other cash streams (e.g., endowment earnings) cannot keep pace with these twin forces. Strong and lasting donor support has been a mainstay during such times, but current donor engagement strategies and processes need improvement to meet the daunting requirements for the school's thriving and innovation.

This initiative is crucial for ensuring our overall material stability and health, not simply by providing needed financial resources but especially by building a base of supporters who connect with and advocate for the school's mission. By focusing on "philanthropic campaign" this initiative will:

- Foster sustainable growth through diversified and expanded donor relationships.
- Build our competitive advantage by funding scholarships, innovations, and partnerships.
- Secure needed resources to support new educational models and leadership development.

Five Year Goals
Outlook and outcomes

In five years, LSTC will expand its committed and diversified donor base, whose sustainable stream of fundraising revenue supports our operations and strategic initiatives. The initial three-year campaign emphasizing unrestricted giving will have raised $7.5 million, expanded the number of donors in the top three giving bands by 5%, exceeded an 85% major gift retention score and a 67% annual donor retention score, and developed funding partnerships to support strategic initiatives. Also during the period of this initiative, the school's next campaign will have been designed and launched, attuned to whatever focus is most appropriate at that time.

Annual Benchmarks
Targets and criteria

To be supplied by implementation teams at the start of each new fiscal year...

Change Resources

Areas for activity

Fundraising team – Plan for and coordinate operations within the Advancement office that help support and inform the effectiveness of the campaign.

Marketing and communications – Collaborate with Marketing and Communications to develop materials and strategies that support fundraising efforts.

Board and volunteers – Engage board members and other volunteers to leverage their networks, experience, and skills in fundraising efforts.

Associated Metrics

Measures showing change

Fundraising support – Track the annual and cumulative gift revenue received during the campaign, including fundraising sources and intended uses.

Donor engagement – Monitor the growth in new donor relationships, including at which giving levels, and the outcomes of moves management work.

Donor retention – Measure the success of existing donor relationship efforts, including moves management and attention to LYBUNT and SYBUNT donors.

Donor satisfaction – Assess qualitative feedback from donors about their experiences working and communicating with the school.

Implementation Team
Leadership and accountability

Sandra Nelson, Vice President for Advancement

Jennifer Stone, Director for Advancement Services

"LSTC's philanthropic campaign is a vital step toward ensuring the sustainability of our mission, fostering innovation, and empowering us to continue transforming lives through faith-based education and leadership development."

–Sandra Nelson, Vice President for Advancement

POLICY REVIEW

This initiative supports and enhances LSTC's environment by developing an improved approach to institutional policies that regulate operations, establish uniform procedures, and structure regular practices. Such an improved approach aims to make our policies accessible to all, subject to review, updated to accepted standards, reflective of core values, and actually used in fair and consistent ways. Existing institutional policies will be gathered, catalogued, and assessed to determine access, gaps, and inadequacies. Working area by area through the school, this review process will develop a consistent structure for policies, update their content, disseminate them through various channels of communication, and establish an ongoing three-year review cycle.

Why Is This Strategic?
Rationale for inclusion

An inconsistent or inadequate policy environment leads to unfair treatment, uneven experiences for all stakeholders, subversion of core institutional values, and waste of goodwill and trust. While this may seem like merely an operational concern, the longstanding problems at LSTC with policy development, implementation, and revision have become wasteful of our resources and capacity, raising this matter to one of strategic significance. If we want to expand our reach to new learners or secure new employees, equitable and reliable policies are critical for institutional thriving.

This initiative addresses not just operational challenges but also major strategic issues as we try to improve our policy competency as well as our marketplace position. Being attuned to effective policy is not an optional matter for someday. By focusing on "policy review" this initiative will:

- Streamline operations, making the institution more efficient, consistent, and responsive.
- Enhance the student and employee experience through transparent and equitable documents.
- Reinforce our commitment to DEIJ through standardized practices in all areas of the school.

Five Year Goals
Outlook and outcomes

In five years, LSTC will exhibit a standardized, detailed policy environment that supports all learners in all programs and all employees in all departments. Policies will be regularly reviewed so that the entire scope is examined and updated on a known three-year cycle in order to remain relevant, equitable, and aligned with wider standards. Beyond this, policies will be accessible to all relevant stakeholders through known communications channels so reference to and use of all policies becomes an institutional norm. This consistency and availability will improve the school's efficiency and fairness, leading to a healthier campus climate and greater student and employee satisfaction.

Annual Benchmarks
Targets and criteria

To be supplied by implementation teams at the start of each new fiscal year…

Change Resources
Areas for activity

Review committee – Invite and utilize a diverse policy review committee including varied stakeholders and perspectives in order to oversee the review process.

Administrative support – Arrange for staff time and capacity to manage documentation, communication, and coordination of policy reviews.

Legal expertise – Access legal counsel and compliance experts to ensure revised or new policies meet appropriate regulatory standards.

Training and communication – Identify resources for training relevant stakeholders about revised or new policies and maintaining clear communication channels.

Associated Metrics
Measures showing change

Policies reviewed – Track the completion of policy reviews, revisions, completions, and dissemination in light of the aggregate pool of policies to be considered annually.

Stakeholder feedback – Gather responses from students, staff, and faculty on policy transparency and fairness, both for existing and revised materials.

DEIJ instrument – Monitor the impact of policy changes on diversity, equity, and inclusion within the school, using the campus climate survey and other tools.

Implementation Team
Leadership and accountability

Vima Couvertier-Cruz, Director of Diversity, Equity, Inclusion, and Justice

James Foster, Director of Security and Operations

Nate Ramsey, Director of Financial Aid

"This initiative is crucial to foster a healthy community of learning in which stakeholders will know where to locate all policies and will be aware of the administrative commitment to review and implement policies in a way that will demonstrate institutional accountability and alignment."

–Vima Couvertier-Cruz, Director of Diversity, Equity, Inclusion, and Justice

STAFFING STRATEGY

This initiative aims to align LSTC's staffing with its actual operational needs and strategic goals, particularly as we now engage enterprise innovation through asynchronous programming. This strategy does not deploy a blunt instrument of reductions in force, but leverages staff attrition and redeployment, coupled with enhanced training and supervision, to support institutional initiatives and operational efficiencies. It also seeks to recruit and retain a diverse, inclusive workforce, provide antiracism training, and create opportunities for professional development. In sum, this approach balances the critical need for financial sustainability through reducing labor costs with the value of retraining and maximizing the contributions of our current staff.

Why Is This Strategic?
Rationale for inclusion

The level and kind of staffing at our school is typical for a religious educational nonprofit, and thus places two challenges in tension. On the one hand, total compensation and benefits represent the largest portion of all our expenses, nearly 60% of budget. On the other, an effective and supported employee base is essential to carrying out our mission, not optional or inconvenient. Loss of staff invites loss of institutional knowledge and relational capital. Yet failure to adjust and refocus roles during rapidly changing times leads to its own kind of waste and wandering.

This initiative seeks a more balanced, nuanced, thoughtful approach to ensure the school can adapt to changing educational needs and financial realities while retaining and developing the valuable contributions of our qualified, talented staff. By focusing on "staffing strategy" this initiative will:

- Reduce expenses thoughtfully by managing planned retirements and staff departures.
- Reinvest in existing staff through training, development, and redeployment to new roles.
- Support an inclusive workplace that reflects our DEIJ commitments as foundational to our work.

Five Year Goals
Outlook and outcomes

In five years, LSTC will have a leaner, more agile staffing structure that aligns with our operational needs and strategic goals. Staff will be well-trained and equipped to support new initiatives. The school will have strategically managed retirements and departures to reduce staffing costs. In the very near term, it will be crucial to focus financial resources on mission-critical activities in order to achieve an operational fiscal balance within the next few years. This focus will lead to a sustainable financial position that supports institutional thriving, and so this initiative will ensure we have a highly capable team ready to direct the school through and beyond these changes.

Annual Benchmarks
Targets and criteria

To be supplied by implementation teams at the start of each new fiscal year...

Change Resources
Areas for activity

Human resources – Commit resources to dedicated and additional HR leadership to manage staff assessments, training programs, and redeployment plans.

Training budget – Seek and reassign funding for professional development programs and coaching for staff, both individual and group, on varied topics and areas.

Change management – Identify resources for effectively communicating staffing changes and supporting staff about transitions and morale.

Associated Metrics
Measures showing change

Staff development – Track the number of staff who participate in training programs (and of what kinds), as well as staff-wide development opportunities.

Staff redeployment – Monitor the redeployment of staff to new roles and responsibilities, as well as the positions that are redescribed and refocused.

Cost savings – Measure the reduction in staffing costs through managed attrition and redeployment, and survey staff morale about these and other changes.

Implementation Team
Leadership and accountability

Aaron Copley-Spivey, Director of Human Resources and Title IX Coordinator

James Nieman, President

"As we prepare leaders for the Church and the world, our caring and dedicated employees are a critical component in carrying out this mission. Strategically adjusting our staffing patterns and upskilling our employees ensures that we can expand who we reach and how we are able to serve them."

–Aaron Copley-Spivey, Director of Human Resources and Title IX Coordinator