

THE SEARCH

Union College, a historic and distinguished residential liberal arts college, seeks a collaborative, innovative, and strategic leader to serve as its 20th president. Union has been a leader in the integration of the liberal arts, science, and engineering for more than two centuries, and with its unique history and distinctive assets, the College is exceptionally well-positioned as a national leader in redefining what it means to be liberally educated.

Founded in 1795 and located in Schenectady, New York, Union is one of the oldest colleges in the nation and the first to redefine traditional liberal arts education with modern languages, science, and engineering early in its history. As technology advances and the boundaries between disciplines are increasingly blurred, Union College's integrated approach to liberal arts and engineering with exceptional faculty, motivated students, and supportive alumni provides the next president an outstanding platform to build upon a long history of innovation and propel the College toward a bold future. The next president of Union will inherit an ambitious and innovative institution, ever committed to its founding mission and ready to push itself in new ways to meet the challenges and opportunities of the present and future.



Under the leadership of President <u>David Harris</u>, Union has strengthened its reputation as a leading liberal arts college, enhanced its academic program, advanced its work in equity and inclusion, improved its financial and administrative infrastructure, deepened its ties to the Schenectady community, and completed the largest fundraising campaign in Union's history.

The next president will bring a deep commitment to the integration of liberal arts, science, and engineering and will boldly seize the opportunity to secure Union's place as the national leader in integrated liberal arts education. The president will galvanize the Union academic community, apply financial acumen to ensure long term financial sustainability, and be able to astutely navigate the changing landscape of higher education. The president will embrace Union's culture of community by building meaningful and personal relationships with students, faculty, staff, parents, and alumni and will serve as the College's ambassador to local and national audiences. In addition, the next president will be a change agent with the ability to execute ongoing strategic objectives, building on the College's 2020-2025 Strategic Plan, and the ability to imagine and inspire a future for Union that honors the past while charting an ambitious course for the future.

Union has retained the services of Isaacson, Miller—a national executive search firm—to assist in conducting this search and to identify outstanding candidates. All inquiries, applications, and nominations for this opportunity should be directed to the search firm as indicated at the end of this document.

THE COLLEGE: HISTORY AND OVERVIEW

Union takes great pride in its history with a vision of "Developing every student to lead with wisdom, empathy, and courage, in ways large and small, now and across multiple tomorrows." On February 25, 1795, Union was the first college to receive a charter from the Board of Regents of the University of the State of New York, and it has continuously operated as one of the 30 oldest institutions of higher education in the United States. The College's name comes from its early mission to be an ecumenical institution where individuals from multiple Protestant denominations could study and work together. Over time, the understanding of what it means to be diverse has expanded, and the commitment to building a community characterized by mutual respect is part of the Union's institutional DNA.

Union's early history played a seminal role in the development of the modern American college curriculum. Though Union's earliest students received a classical education, in the 1820s, Union became one of several Hudson Valley colleges that adopted parallel courses of study. In this way, students continued to pursue the liberal arts while also studying natural sciences. Union was among the first colleges to allow modern languages to satisfy graduation requirements, and Union's engineering curriculum, which continues as a robust component of the campus to this day, began in 1845. What once were parallel courses of study have blossomed into an integrative approach to the liberal arts and applied sciences.

Academics

Building on its distinctive academic history and mission, Union spans and integrates academic disciplines in new and exciting ways. A Union education is rigorous and innovative and encourages its more than 2,000 students to work beyond the limits of disciplinary boundaries, allowing them to think globally and

lead creatively in a world where problem-solving requires breadth across humanities, arts, social sciences, natural sciences, and engineering without sacrificing depth of preparation.

Union is well-positioned to be a national leader in interdisciplinary education and scholarship in the coming years. In February 2020, the College announced it had received the <u>largest single gift</u> made to the institution in its history. Alumni Mary and Rich Templeton ('80) donated \$51 million for the creation of the Templeton Institute for Engineering and Computer Science, which anchors the College's Engineering and Computer Science Initiative and aims to further integrate engineering and the liberal arts. In addition to the new institute, the gift will be used in the recruitment and retention of women pursuing a degree in engineering or computer science, as well as enhancements to curriculum, faculty support, and capital to develop new spaces and facilities on campus. A further gift of \$40 million from the Templetons was made in April 2024 to expand on their original commitment.

Union offers opportunities for meaningful academic endeavors outside the classroom. Undergraduate research is a hallmark of a Union education, having taken hold in all disciplines and across all academic divisions. Union cultivates collaboration and creates learning communities to develop in its students the specialization and breadth necessary to become innovative problem-solvers while offering multiple points of entry into high-impact undergraduate research experiences, including independent study, summer research, research practicums, terms abroad, internships, and senior theses. These experiences fully engage students, excite them to construct their own investigations, give them practical experience, and prepare them for postgraduate study and careers.

Union is accredited by the Middle States Commission on Higher Education (MSCHE). In 2020, Union had its decennial review, and its accreditation was reaffirmed without conditions. Union's engineering programs are accredited by the Engineering Accreditation Commission of ABET.



Faculty and Staff

At the core of Union's academic experience are over 200 faculty members, 80 percent of whom are tenured or on the tenure track, and approximately 10 percent of whom are lecturers or senior lecturers. All classes and lab sections are taught by faculty – not teaching assistants – and 97 percent of tenure-line faculty hold a terminal degree in their field. The Union faculty and all the College's educational offerings are organized into four divisions: Arts and Humanities, Social Sciences, Science and Mathematics, and Engineering and Computer Science. Close student-faculty interaction and small classes are a hallmark of the Union experience. The relationship between students and faculty motivates students to learn through inquiry and discourse. The College's 9:1 student to faculty ratio allows for students and professors to get to know each other, fostering a spirit of collaboration and partnership.

Their partners include the over 600 staff members who support the student experience. Staff are integral not only to the administration, maintenance, and operation of the College but also to its educational mission. The staff's loyalty, hard work, and commitment to the mission of the College are critical to its success.

Student Life

Union students are actively engaged in the campus community. Students participate in more than 130 student-run organizations and engage in more than 15,000 hours of community service annually through Union's Kenney Community Center and other campus clubs, residences, organizations, and athletic teams.

At Union, athletics is an extension of the academic enterprise. Union athletes are students first, and in the last 10 years, the average GPA of its NCAA student-athletes has mirrored the student-body average. Athletes also make up a robust portion of the student body, as nearly 36 percent of each entering class are varsity athletes. Nearly all of the College's athletic teams compete in the Division III Liberty League, with men's and women's ice hockey competing in the Division I Eastern College Athletic Conference.

More than 90 percent of students live in campus housing. The student-run Theme House Consortium boasts a series of residences built around particular programs in the academic curriculum and in other interest areas. Union became home to America's first fraternities with the founding of Kappa Alpha in 1825 and remains home to fraternities and sororities today. All students belong to a Minerva House, seven lively hubs blending academic, social, residential, and leadership interests. Faculty, administrators, and staff are also members of one of these seven Minerva Houses, which sponsor a wide range of programs open to the full Union community.



Students at Union come from 50 countries and 40 states. Nine percent of students are international, and over 25 percent of students are domestic students of color.

Union's historic and continued commitment to depth and breadth in the liberal arts has produced leaders in all fields, including arts, medicine, science, engineering, media, entertainment, law, and politics. The College is consistently recognized in national rankings for high return on investment. Union alumni include Nobel Prize, Lasker Award, Emmy Award, and Academy Award winners, a National Book Award winner, two MacArthur Fellows, Olympic gold and bronze medalists, seven Cabinet secretaries, a secretary of state, 13 governors, 200 judges, 90 college presidents, and Chester A. Arthur, the 21st President of the United States.

Facilities

Union has undertaken aggressive investment in the renovation of its campus, strengthening facilities by building or renovating many major structures over the past 15 years. Nearly every academic building has received refurbishment, along with significant expansions and construction of new facilities. Recent projects include facilities for dance, humanities, social sciences, and a visual arts renovation.

In 2020, the College completed its most ambitious project to date: the Integrated Science and Engineering Complex. The \$100-million, 142,000-square-foot facility houses six major departments in science and engineering and promotes visibility and multidisciplinary connections with departments across campus. The College is also assessing the needs of its new civil and environmental engineering majors and creating plans to renovate existing space or build new space with the support of the transformational gift from the Templetons. More broadly, the College is evaluating the results of a comprehensive study regarding residential life and student life spaces, which will guide future renovations or enhancements to campus.

Construction is currently underway with a new public-private partnership to update the College's hockey facility in a new state-of-the-art 100,000-square-foot arena at Mohawk Harbor adjacent to campus, which,

once complete, will offer space for conventions, trade shows, and other Union and non-Union-activities alike.

Schenectady, New York

Union College occupies 130 acres in downtown Schenectady, New York. Incorporated three years after the College was chartered, the city's history is deeply connected to Union. Seated near the confluence of the Hudson and Mohawk Rivers and a short distance from the Adirondack, Catskill, and Berkshire mountains, Schenectady is part of the Albany metropolitan area, with the state capital located 20 minutes to the southeast of Union's campus. Schenectady is three hours from New York City and Boston and four hours from Montreal. This location has been a historic asset for Union, allowing students and faculty easy access to the state capital and the major metropolitan areas of the Northeast.

Union itself has contributed to Schenectady's renewal. The Commission on Independent Colleges and Universities estimates Union's total economic impact at more than \$313 million, including an annual average of \$133 million in operational spending, \$21.8 million in expenditures by students and visitors, and an estimated \$8 million in construction. The College is also a source of pride and comradery for the community.



Leadership and Governance

The current search for the president comes as David Harris, president since 2018, has <u>announced his</u> <u>decision to conclude his service</u> at the end of the 2024-2025 academic year. Under his leadership, Union

developed a five-year strategic plan that aims to fully blend the liberal arts and engineering, transcend disciplinary boundaries, bridge classroom and immersive experiences, and engage and embrace diverse experiences and perspectives. The key to meeting the goals of the Strategic Plan has been the Powering Union philanthropic campaign, which came to a successful close in 2023 as the College exceeded its \$300 million goal by raising more than \$316 million.

In addition, President Harris created the <u>Making U Possible</u> initiative to raise funds to ensure that all students can participate in the co-curricular and extra-curricular activities that comprise a full Union experience. He formed the <u>Presidential Initiative on Race, Power, and Privilege</u>, a 40-member working group of students, faculty, staff, and alumni that made recommendations to create and maintain an environment that values and respects all members. Harris also moderates the College's Forum on Constructive Engagement, a series of events aimed at enhancing our appreciation of other perspectives.

As the chief executive officer of the College, the president reports to the Board of Trustees and works closely with the chair of the board. Union is governed by a board of up to 38 members, including the president. <u>Julie Greifer Swidler '79</u> currently serves as chair of the board, and Guy Logan '90 serves as vice-chair.

Finances

Union's operating budget for the fiscal year 2024 was \$148.5 million, and net tuition revenue remains the greatest source of operating income. Union's tuition has a discount rate of 50 percent this past year. Union is supported by an endowment of over \$500 million.

Union is one of fewer than five percent of American colleges and universities that commit to meeting 100 percent of demonstrated financial need, with more than \$58 million awarded in scholarships each year. More than 50 percent of Union students receive need-based financial assistance, including those receiving Making Union Possible Family Grants. For those receiving support at Union, the average need-based scholarship is \$43,800. About 25 percent of students receive merit scholarships; the average award is \$20,000.

THE ROLE

The president is charged with setting a vision and strategy to lead the institution forward, enhancing academic excellence, supervising and managing all institutional affairs, developing and maintaining relationships with a wide array of constituents in the College community and beyond, and representing the institution externally—all in support of Union's core mission At Union, the president must be the chief ambassador and fundraiser, externally positioned, and, at the same time, an accessible, reliable, inspiring champion and leader for the campus community.



The next president will be deeply knowledgeable in effective financial management and will work transparently to address the headwinds faced by liberal arts colleges, including the financial impact of rapidly changing demographics combined with a demanding cost structure. The role of college president has become more complex in an ever-changing world, at a time when societal issues and societal discourse have impacted higher education, the president will be creative and adaptive in leading the Union community through difficult conversations and engagement in open inquiry and free speech on campus.

The president will be supported in this work by the College's senior staff, which includes the Vice President for Academic Affairs and Dean of the Faculty, Vice President for Student Affairs and Dean of Students, Vice President for Administration and Finance, Vice President for Communications and Marketing, Vice President for Admissions, Financial Aid, Vice President for College Relations, and the Vice President for Human Resources and Chief of Staff. The Chief Diversity Officer and Dean for Equity and Inclusion reports dually to the president and the Vice President for Academic Affairs.

OPPORTUNITIES AND CHALLENGES

Union's intrinsic strengths build upon its deep history of innovation and equip the College to provide an outstanding education in the modern era. Union seeks a president with a professional and personal commitment to the liberal arts and appreciation for, and understanding of, the breadth of disciplines of the College, including engineering and other STEM disciplines. The next president will be a change agent with broad intellectual curiosity; an inclusive, collaborative leadership style; financial proficiency; fundraising acumen; and a natural inclination toward community engagement – both on- and off-campus with the Schenectady community and beyond. By leveraging Union's distinctive academic profile, a dedicated Board of Trustees, and a highly engaged community of students, faculty, staff, alumni, and parents, the next president will continue to lead the College on its upward trajectory and address the following opportunities and challenges.

In partnership with the Union community, develop and implement a strategic vision for the future of the College

The incoming president will join the Union community and embrace its history and achievements, while simultaneously engaging faculty, staff, students, alumni, and other key leaders from across the College to develop a shared vision and shape the strategic framework to successfully guide Union into the future. The vision must be responsive to a changing and challenging higher education landscape while remaining faithful to Union's traditions and values. The president will coalesce and broadcast Union's vision, highlighting the College's ability to provide an integrated liberal arts and STEM education centered in an intimate, supportive community. In doing so, the president will have the opportunity to play an active and sustained role in the ongoing national conversation about the value of a liberal arts education in an era of economic uncertainty.

The Union experience is transformative for its students and alumni, and while the College's reputation has expanded over the last few years, it is less established across the country with prospective students. The next president will continue the work of effectively broadcasting Union's value proposition in a competitive market and the emerging world of global and technological change to increase enrollment trends for the College. While many liberal arts colleges are struggling with a lack of depth in science and technology, Union finds itself at the forefront of integrated liberal arts. With a compelling vision, the next president will continue to raise Union's national visibility by serving as its chief advocate and spokesperson to internal and external constituencies and ensure its academic leadership among the very finest educational institutions in the country.

Judiciously steward and increase Union's resource base to ensure financial sustainability

The next president must effectively and proactively manage the College's financial resources and provide leadership in the face of competing financial priorities that align with the College's academic mission to provide a rigorous, holistic, and immersive liberal arts education. The president will collaborate with the Board of Trustees and senior leaders to ensure that Union is effectively resourced into the future, ensuring both near- and long-term fiscal health. Union has not been immune to the demographic challenges liberal arts colleges are facing, and while the College has implemented a number of strategies to navigate the demographic trends to utilize its growing reputation and distinctive programs to reach an ever-larger base of potential students, there is continued work to be done. The next president must manage Union's finances with discipline, informed by a well-understood strategy to ensure long-term success by addressing spending priorities, securing and strengthening sources of revenue, and increasing the endowment.

The president will have the opportunity to shape and launch the College's next capital campaign. The College will need additional resources to grow the endowment and fund additional capital projects prioritizing student housing and facilities. Early in the president's tenure, the board and other senior leaders will look to the president to lead an effort to define the overarching vision for the campaign, the specific contours of these priorities, and the strategic initiatives and programs that will aid Union and appeal to donors. In addition, in collaboration with the Board, the president will ensure Union's endowment grows through market gains and targeted fundraising efforts.

Sustain and lead an active and engaged campus community

Union has a flourishing campus life where the president is an active part of the community. While the president has a significant external role, they must also recognize the importance of the on-campus community. The president will prioritize the well-being and culture of the campus, weaving inclusivity, transparency, and accessibility into policies and processes on campus with a commitment to shared governance. The president will be a visible and engaged presence on campus, interacting openly and genuinely with faculty, staff, and students. The president must attend carefully to the student's sense of community, working to promote ever-greater campus inclusion and authentic conversation to broaden and deepen student life. The president will actively support and foster the faculty's work in the classroom and as scholars, as well as support the development of staff and their overall engagement in the intellectual life of the College. As Union grows increasingly diverse and as society grows increasingly polarized, issues of free speech and how to engage across differences on campus and across the country will be of critical importance. The next president must lead with wisdom, nuance, courage, and grace.

Enhance Union's commitment to inclusion, access, and diversity

Access and diversity are integral to the mission of the College, and under the outgoing president and his administration, diversity of all kinds has increased dramatically. The broad culture of the College welcomes all students and supports a wide range of needs. The College seeks to sustain that positive momentum, using Union's diversity to continuously expand and enrich the educational environment and to ensure that all students benefit from studying and living in a diverse community.

Union will expect its next president to bring the same genuine commitment to these priorities in the recruitment of diverse students, faculty, and staff and address the academic and social needs of the student population to ensure that every Union student feels included in the campus culture and is positioned to thrive. Union's next president will have not only a deep-seated commitment to the mission of diversity and equity but demonstrable measures of success in this area. The president will have a sophisticated understanding of the complex challenges that must be addressed to ensure an equitable experience and success for all students, faculty, and staff on campus.

Collaborate closely and effectively with the Board of Trustees to secure a promising future for Union

Union has a large, collegial, and dynamic Board of Trustees. As this group continues to add new members and diversify the experiences and contributions represented, the president will work to maintain a positive working relationship with the Board, continuing past successes and fostering new opportunities for growth and collaboration. This will require effective relationship-building with individual Board members and the ability to effectively maintain ongoing, informative, and reciprocal communication with the Board as a whole. A close partnership with the Board will help the president to guide Union's direction in support of the College's strategic priorities.



QUALIFICATIONS AND CHARACTERISTICS

The search committee seeks candidates with many of the following qualities and characteristics:

- A deep commitment to the liberal arts and the Union mission;
- An ability to cultivate trust and build relationships to bring campus constituencies to actionable
 consensus and the ability to energize and inspire students, faculty, staff, alumni, board members,
 and external stakeholders around a collective vision;

- Commitment to high academic quality, rigor, and excellence;
- An ability and desire to lead the College in discussion and quick action about the rapidly evolving landscape of liberal arts and higher education. A proven ability to build consensus and challenge the status quo to develop and implement creative and innovative solutions so Union will thrive in the future;
- Knowledge of current and emerging issues, trends, and strategies in higher education; a keen understanding of enrollment; experience developing strategies to address demographic shifts, including internal and external marketing and communications;
- Experience designing, managing, executing, and communicating a collaborative strategic planning process with demonstrable outcomes;
- Successful experience as a strategic, inclusive, transparent, respectful, and visible leader; the
 ability to build strong management teams, delegate responsibility and authority, and execute
 plans with fiscal responsibility;
- Experience and demonstrated skills to fundraise successfully and an ability to connect with potential donors individually and in a group;
- Strong financial acumen, including ownership and understanding of the budgeting process, active
 management of financial performance, and effective measurement of operating performance for
 small, independent institutions of higher education;
- A personal commitment to and professional record of success in advancing diversity, equity, and inclusion, including the recruitment and retention of a diverse and representative population of students, faculty, and staff;
- A track record in crisis management—knowing how to quickly and empathetically plan for, respond to, and manage through a changing risk environment;
- Experience building and sustaining relationships with government, business, community partners, and other educational leaders;
- Unquestioned integrity, trustworthiness, sound judgment, and ethics.

APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and CVs with cover letters should be sent via the Isaacson, Miller website for the search, which can be found here. Electronic submission of materials is strongly encouraged.

Cati Mitchell-Crossley, Partner Keight Tucker Kennedy, Partner Karen McPhedran, Managing Associate Isaacson, Miller

Union College is an equal opportunity employer and is strongly committed to student and workforce diversity.

Union College is committed to providing access and reasonable accommodation in its application process for individuals with disabilities and encourages applicants with disabilities to request any needed accommodation(s).

Union College's Strategic Plan highlights the role of diversity in providing an effective education for the 21st century at the heart of our mission and vision for the College. Diversifying the student body, the faculty, the administration, the staff, and the curriculum requires a commitment to honor our mission and advance our goals. Union provides a blend of intellectual, social, and cultural opportunities to facilitate the integrated academic, social, and personal development of a diverse community. We value and are committed to a host of diverse populations and cultures, including, but not limited to, those based on race, religion, ability, ethnicity, sexual orientation, gender, gender identity, and national origin.

