

Executive Summary

Oberlin's previous strategic plan was adopted in 2005. In light of rapid and dramatic changes affecting the higher education sector since then, the Board of Trustees decided, in June 2014, to undertake a new strategic planning effort. It charged the Oberlin Strategic Planning Steering Committee ("Steering Committee") to offer advice on the strategic direction the College should take to ensure its continuing strength and excellence; to review the landscape of higher education and assess the impact of disruptions, opportunities, and threats to America's liberal arts colleges and music conservatories; and to recommend a shared vision for Oberlin and steps it should take in the next 3-5 years to achieve that vision. The Board requested a final report by December 2015.

The Steering Committee, which includes representatives from a wide spectrum of the Oberlin community, has met monthly since September 2014. It formed three Working Groups to facilitate in-depth conversations and development of ideas: (1) Education Futures; (2) Students of the Bicentennial; and (3) Resources and Sustainability.

This preliminary report reflects the current thinking of the Steering Committee and is designed to elicit comments and feedback from Oberlin's faculty, students, staff, trustees, and alumni before the Steering Committee proceeds further. Instructions on how to post comments are found below. This is by no means a final report and contains no action steps or recommendations; rather, it includes the following elements:

- **A new Mission Statement - articulating what Oberlin does and why it does it:**

The Oberlin College and Conservatory educational community is built upon a history of academic and musical excellence. It champions educational access and opportunity for all, embracing a diverse and inclusive learning environment that welcomes a free and respectful exchange of ideas, and an enduring commitment to equity, social justice, and environmental sustainability. Oberlin prepares students for lives of intellectual and artistic breadth and rigor; leadership; and sustained inquiry and impact. Oberlin graduates are empowered with knowledge, skills, and habits of mind that are essential to confront complex and difficult issues and to create change and value in the world.

- **Core Values** - expressing what Oberlin stands for and considers its fundamental beliefs in support of the purposes stated in the Mission Statement. For example:
 - the desire to prepare students for the future with a challenging and

- connected educational experience;
 - the significance of building bridges between and among all constituents within the Oberlin community—especially alumni—while students are in residence and after graduation;
 - the importance of fostering compositional and interactional diversity within the student body, faculty, and staff;
 - the need to keep Oberlin financially accessible;
 - the imperative of living within financial constraints;
 - the continued support of faculty scholarship and artistic achievement and of full engagement of faculty as teachers and advisors;
 - the need to attract and retain outstanding staff;
 - the commitment to environmental sustainability;
 - the collaboration with the City of Oberlin to benefit both College and City;
 - the recognition that College governance systems must adapt quickly to changes and challenges.
- **Strategic Directions** - indicating how the Core Values can or could be realized. Examples include:
 - creating a comprehensive advising system providing the strongest possible suite of integrated services to students;
 - deriving benefits from integrative, culminating educational experiences;
 - promoting and piloting new and disruptive ideas through an “innovation zone”;
 - providing students with resources to maintain the health and wellness necessary to achieve academic and personal success during their time at Oberlin;
 - encouraging more collaboration and interconnections between and among the College, Conservatory, library, and the Allen Memorial Art Museum;
 - developing a new model for the career center and alumni relations that builds on synergies and promotes lifelong engagement of alumni with students and with the entire Oberlin community for the mutual benefit of all;
 - developing strategies to achieve more fully the College’s goals for equity, diversity, and inclusion;
 - engaging the Oberlin community in a thorough assessment of our financial objectives in light of resource challenges with the goal of reorienting Oberlin’s financial model towards greater long-term stability;
 - exploring greater use of educational and administrative technologies;
 - formulating plans for a “year-round Oberlin” to generate revenue and leverage the physical plant’s assets;
 - recruiting and retaining an excellent and diverse faculty, and ensuring that they are compensated at a level that is competitive with our peer institutions in each continuing rank;
 - assuring continued leadership in environmental sustainability;

- achieving a more nimble governance system.

One point must be emphasized: the Steering Committee has examined in detail the financial model that underpins Oberlin—a dependence on tuition for up to 80% of operating expenses, and on tuition increases to fund those growing expenses. Moreover, compared to peer schools, Oberlin has both a lower endowment-per-student ratio and high tuition. In the current climate, reliance on continuing substantial tuition increases every year is not tenable. If adjustments are not made to our model, we will experience a deficit as early as fiscal year 2016. Therefore, a key focus of the Steering Committee is to ascertain what can be done to increase revenues and reduce costs to put us on a sustainable path. The entire Oberlin community should be engaged together in an exercise in re-engineering and reimagining that, while painful at times, can be an opportunity to redirect existing funds and identify new resources to enhance the Oberlin experience and affirm what makes us unique. The effort will require setting priorities, weighing the pros and cons of potential tradeoffs, and multi-layered decision-making. Success in this endeavor will position the College to be in the vanguard relative to its competitors as a top choice of the most talented and thoughtful students seeking an education in the liberal arts and music for decades to come.

The members of the Steering Committee welcome your thoughts and suggestions.

Preliminary Report

Note To Readers:

With this document we are seeking the input of the Oberlin community on the themes that have emerged from the work of the Strategic Planning Steering Committee and Working Groups. As you read and react to this Preliminary Report, we ask you to especially consider the extent to which the Core Values found on pages 9-10 align with your vision of Oberlin and the extent to which the Strategic Directions on pages 10-12 align with those Core Values. We would also like to know what your top three priorities (from the Emerging Strategic Directions) are and why. We are eager to receive your responses and thank you for completing the form [here](#) by Monday, May 18, 2015.

Introduction

Oberlin is preparing a strategic plan. Oberlin's last strategic plan was approved in 2005. Much has changed since then. The Board of Trustees recognizes an urgent need to understand the powerful forces affecting higher education, especially those that raise questions about our financial model, and wishes to take steps today to make sure that Oberlin as we know it survives and prospers in the coming decades.

This is why the Board has formed the Strategic Planning Steering Committee (“Steering Committee”) and asked it to:

- provide advice to the Board of Trustees on the strategic direction that Oberlin should take for the future to make Oberlin one of the most distinguished institutions of higher education in the world;
- review the landscape of higher education, the driving forces that have emerged and will likely develop, views of relevant constituencies, and various trends that will affect the status and stature of liberal arts colleges and conservatories of music over the next two decades; to see relevant readings, go [here](#).
- make recommendations for a plan for the future that articulates both a shared vision of Oberlin and specific recommendations to be implemented over the next 3-5 years to help us realize that vision.

The Steering Committee and Working Groups are made up of trustees, faculty, administrative and professional staff, alumni, and students. They have been meeting monthly since September 2014.

The purpose of this Preliminary Report is to inform the Oberlin community about the work of the Strategic Planning Steering Committee and to describe why we believe we need a new strategic plan. It presents a draft mission statement, the core values that guide the plan, and identifies some of the strategic directions we are considering. It also describes some of the debates we have had.

Our goal is to complete a strategic plan by December 2015. We are aware that the timing of this request for input at the end of the semester comes at a very busy time for many in our community, but we believe it is better to ask our communities to give feedback now, at a meaningful early moment, rather than later.

Context for the Strategic Plan

In the last year alone, there have been an enormous number of articles in the media and statements by public officials that have found fault with what liberal arts colleges are trying to do, questioned the continuing value of the humanities, assailed rising tuition expenses, looked to MOOCs (Massive Open Online Courses) as cost savers, and urged institutions to be more utilitarian and focus greater attention on training for specific jobs. In an environment of rapid, dramatic, and unpredictable change, as well as unprecedented public scrutiny and criticism, colleges must think strategically, identifying and capitalizing on their opportunities while assessing and understanding their vulnerabilities. The status quo is no longer an acceptable course of action. Oberlin College and Conservatory has many strengths—a long tradition of academic excellence, an outstanding faculty of teacher/scholars, a world-famous conservatory, one of the country’s best academic art museums, a robust admissions pool, significant financial resources, a long history of civic engagement and commitment to social justice, an attractive campus, and alumni deeply committed to the college. Oberlin also faces many

challenges: we have a lower endowment-per-student ratio than many of our peer schools and depend on tuition for more than 80% of our operating budget; our tuition is higher than virtually all of our “Sweet Sixteen” peer group; and our financial aid packages are frequently not competitive enough to attract the best students, especially those from economically disadvantaged and underrepresented backgrounds. Furthermore, we are a residential institution with traditional-aged students at a time when disruptive technologies have led to a proliferation of highly flexible, online, on-demand learning opportunities and alternatives and the number of high school graduates is plummeting.

Oberlin has always been ambitious beyond our resources. Certainly in a future in which there is little prospect of revenue growth from tuition due in part to an increasing demand for financial aid and in part to the public and media outcry regarding tuition hikes and student debt burdens, Oberlin must make thoughtful choices now about where to invest our resources, determine which of our many worthy goals should have priority, and how best to position ourselves going forward.

The Steering Committee believes it is imperative to actively and continuously educate the full Oberlin community about these realities, because by understanding the higher education marketplace and our position in it, we can better shape our future. Oberlin must adapt and evolve in nimble fashion to be able to meet the challenges of these new constraints and driving forces and to assure it continues to advance.

Draft of New Mission Statement

Oberlin College included a mission statement in its 2005 Strategic Plan and, since 1977, has published a “Statement of Goals and Objectives for Oberlin College” in its annual Catalog. The Strategic Planning Steering Committee reviewed these documents and decided it was time to draft a new Mission Statement that would capture the most compelling characteristics of an Oberlin education and describe the overarching purposes of the institution. It proposes the following:

The Oberlin College and Conservatory educational community is built upon a history of academic and musical excellence. It champions educational access and opportunity for all, embracing a diverse and inclusive learning environment that welcomes a free and respectful exchange of ideas, and an enduring commitment to equity, social justice, and environmental sustainability. Oberlin prepares students for lives of intellectual and artistic breadth and rigor; leadership; and sustained inquiry and impact. Oberlin graduates are empowered with knowledge, skills, and habits of mind that are essential to confront complex and difficult issues and to create change and value in the world.

Working Groups, Core Values and Strategic Directions

The Committee has formed three Working Groups, each to work on a dimension of the plan. These are

- 1) Education Futures: Cultivating a New Learning Environment;
- 2) The Students of the Bicentennial: Who We Teach; and
- 3) Resources and Sustainability: How We Support Our Mission.

The Working Groups include members of the Steering Committee and additional members and consultants (the roster of the Steering Committee and Working Groups is found in [Appendix A](#)).

Over the past several months, the Groups have deliberated, reviewed research, held listening sessions with students, faculty, alumni, and staff, and sponsored the Oberlin Strategic Planning Speaker Series (which has brought to campus distinguished experts on trends in higher education, the arts, technology, and sustainability to campus). (A Report about Process with chronology is [Appendix B](#).)

On the basis of this work, the Working Groups have developed a broad statement of their goals. We have synthesized these statements into a set of Core Values that describe who we are and what we stand for as a distinguished college of arts and sciences and conservatory of music.

The Core Values will be the basis for more refined Strategic Directions and, ultimately, a set of practical recommendations to guide Oberlin over the coming years (and especially over the next three to five years). Yet many of the debates we are having over our strategic plan remain unsettled.

An excerpt from a recent column by President Krislov in the *Source*, April 29, 2015, illustrates some of the concerns the Committee is discussing:

“If we do not raise tuition, we probably could not replace the revenue we would lose in the short-term and probably not completely in the long-run. We have been working and continue to work on generating revenue from sources other than tuition, including fundraising, bringing conferences and summer programs to campus, and through partnerships with other institutions.

“But to make up a budget shortfall, we would have to reduce costs. Some reductions could be realized through greater efficiencies, and we are working on that. But we are already fairly efficient. So at some point reductions are likely to result in a degradation of the quantity or quality of the education and support

services we currently offer.

“In other words, the alternative to raising revenue is cutting costs. That could mean cutting or reducing some combination of programs, personnel, and operating costs. Doing so could certainly affect the quality of the education Oberlin’s provides, our ability to attract and retain a diverse student body from across the socio-economic spectrum, and our reputation as one of the world’s great liberal arts colleges and conservatories.

“But the current course of endless tuition increases is clearly not sustainable. So we are going to have to make difficult, strategic decisions about what can be cut from our budget.”

Committee members continue to ask questions such as these:

- Does the new landscape for higher education imperil Oberlin’s financial model? If we are committed to living within our means, should the Strategic Plan set forth a specific budget target to be met at some point in the future? Must Oberlin reduce its reliance on tuition to cover its costs, and if so, how can it meet its revenue needs or achieve cost savings to offset the revenue loss? What other revenue sources might Oberlin develop?
- Interdisciplinary study has been an important part of an Oberlin education. Do departmental structures and processes inhibit interdisciplinary exploration? What structures and processes would enhance these explorations?
- Aspects of the online learning environment are both threatening and promising. What short- and long-term goals can we articulate that allow us to explore and assess the promise of these technologies? What will be the impact on assumptions we make about campus residency and the current credit system?
- Are we doing enough to meet the evolving needs of students, e.g., advising, health and wellness? Must we create more integrated resource structures and processes for supporting students by maximizing intra- and inter-divisional collaborations and connections? What kinds of professional development opportunities can ensure faculty and staff are best positioned to educate a diverse range of students? How can we be more intentional about building relationships between students and alumni in order to foster the personal and professional development of students and the connection between alumni and the college?
- How can we build stronger connections between the Career Center and the Alumni Office, between students and their future, alumni and the college, and students and alumni?

We will need to settle most of our debates in order to present a thoughtful strategic plan that enjoys broad support within the Oberlin community. This is why we are asking for your feedback.

Goals and Aspirations of each Working Group

Education Futures

In order to continue to thrive under the market conditions described in “Context for the Strategic Plan” above, Oberlin needs to pursue an educational approach that is attractive to prospective students and their families who are investing in a top-tier liberal arts and conservatory education. We believe that a personalized and holistic “connected learning” approach is compelling and builds upon our strengths.

Connected learning works to engage the curricular and co-curricular experiences of students. It approaches the process of problem-solving by drawing together multiple academic disciplines, ethical judgment and student agency. Connected learning offers students an enduring educational approach for integrating learning in the arts, sciences and conservatory with civic engagement, arts and culture, and personal and professional development.

Students of the Bicentennial

This group’s goal is to describe the student population we want to attract in the future and the means for bringing them to Oberlin.

Historically, Oberlin College has held a unique, moral commitment to access to higher education for traditionally underserved populations, including African American students and women. This strategic commitment expands to the reality of the changing demographics in the United States, and the effects of globalization. In order to continue identifying and admitting the talented student body that makes Oberlin the vibrant institution it is, our admissions efforts have to reflect those changes. Further, in order to prepare students for the world they wish to impact, the Oberlin community must reflect the diversity of that world, and must equip our graduates to operate effectively there.

Resources and Sustainability

This group’s goal is to develop strategies to ensure that Oberlin College and Conservatory can continue to provide and support excellent experiences for students from diverse backgrounds in a challenging higher education environment using all of our resources: physical, financial, human, and reputational in a productive and sustainable manner.

Oberlin is fortunate to hold a position of financial privilege compared to many similar institutions. Nevertheless, increasing economic inequality and decreasing numbers in traditional student populations, coupled with our desire to create a diverse and inclusive student body and to support outstanding faculty and staff, puts serious pressure on this resource. Without intervention, our spending will continue to grow at a faster rate than our revenue, and the budget will be in deficit spending in the coming years.

Oberlin has always been ambitious beyond its means. In the future it will be increasingly imperative to prioritize our goals and to more fully integrate considerations of financial constraints into our planning processes. Creating a culture of greater collaboration and cost consciousness will allow us to maintain our commitment to our core values and to support the directives of highest priority.

Emerging Core Values

What follows are the Core Values that we believe should guide the Oberlin College Strategic Planning Process, as well as the Strategic Directions that have grown out of a discussion of those Core Values. We have numbered the Core Values and put letters by the Strategic Directions for the sake of reading clarity, and to act as a reference when you respond with your own views as to which Strategic Directions you'd like to see prioritized. This numbering and lettering device is not meant to suggest a hierarchy or preference of Core Values and Strategic Directions on the part of the Steering Committee.

Each of the Working Groups has contributed a set of Core Values, which the Steering Committee has synthesized as follows.

1. The Oberlin educational experience must be one that constantly challenges and supports our students over the course of their undergraduate experience through the individual contributions of dedicated faculty and staff.
2. Oberlin's mission is to prepare students for the future. An Oberlin education must prepare students to see and understand the connections among all aspects of their Oberlin experience, and we must strengthen the bridges between Oberlin undergraduates and the entire Oberlin community—especially the alumni community—that they will join once they have graduated.
3. Oberlin must reaffirm and revitalize its historic commitment to diversity in the composition of its community and equity and inclusion in our institutional structures.
4. Oberlin must find new ways to provide a valuable education that is financially

accessible.

5. Oberlin must acknowledge the imperative of living within financial constraints through operational excellence and efficiency and prudent financial management.
6. Oberlin must continue to recruit and support excellence in scholarship, achievement, and artistic accomplishment of faculty who are also actively engaged in teaching and advising.
7. Oberlin must attract and retain a knowledgeable and creative staff dedicated to supporting our students and the overall operation of the College and Conservatory.
8. Oberlin should renew its commitment to leadership in environmental sustainability.
9. Oberlin must continue to share the resources of the College and Conservatory in a meaningful way with the City of Oberlin as we recognize that true partnerships benefit all involved.
10. Oberlin must develop a system of governance that is transparent and inclusive. This requires a governance structure that allows the College to act quickly and effectively, but one that delivers thoughtful decisions that enjoy broad legitimacy among Oberlin's stakeholders.

Emerging Strategic Directions

Here is a set of draft Strategic Directions that have emerged from the Working Groups, each designed to advance the Core Values. We have clustered them to correspond to the order of the Emerging Core Values. Going forward, we will need to prioritize these Strategic Directions based on their relevance to the Core Values, their importance to strengthening an Oberlin education, and their affordability.

As mentioned above, we have provided letters for the Strategic Directions for the sake of reading clarity, but this is not meant to suggest a hierarchy or preference of Strategic Directions on the part of the Steering Committee. ([Appendix C](#) is Budget and Finance Slides prepared by Vice President for Finance and Administration Mike Frandsen and [Appendix D](#) includes additional information about the Strategic Directions with links below.)

- A) Ensure that students will have an individualized and high achieving trajectory for their Oberlin years and beyond. The College should deploy a wide range of mechanisms and services to provide appropriate and personalized advising,

counseling, mentoring, and health and wellness support to accomplish this. This may include international study and a culminating senior experience.

For more information, see [Appendix D](#).

- B) Support Oberlin’s mission in the current environment of a dramatically changing landscape in higher education through the creation of an “innovation zone” to pilot new programs involving novel pedagogies, technology, and disruptive innovations.

For more information, see [Appendix D](#).

- C) Provide students with resources to maintain the health and wellness necessary to achieve academic and personal success during their time at Oberlin.
- D) Deepen collaboration and interconnection among the college and the conservatory, academic and other divisions, departments, the Allen Memorial Art Museum, and the library system to enhance student connected learning outcomes.

For more information, see [Appendix D](#).

- E) Develop a new model for integrating the work of the Career Center and the Alumni Office to create, strengthen and broaden support and professional opportunities to help students and young alumni make the transition to their professional lives. At the same time, enhance opportunities for career counseling for current students to the end of preparing our students for finding careers that will allow them to synthesize the many facets of their undergraduate learning experience.

For more information, see [Appendix D](#).

- F) Develop even more effective institutional structures to achieve measurable goals related to equity, diversity, and inclusion:
- Continue to assess student recruitment, admission, yield, and graduation rates and develop financial aid models, faculty and staff professional development opportunities, student support programs, and other outreach and communication programs with a focus on issues of diversity and inclusion.
 - Secure a high level of domestic and international compositional and intellectual diversity among faculty and staff in order to achieve this connected learning outcome.
 - Increase frequent and thoughtful intergroup interaction and critical thinking by enhancing pedagogies, residential experiences and extra-curricular opportunities that hone student skills and intellectual, social and cultural

understanding.

For more information, see [Appendix D](#).

- G) Engage the Oberlin community in a thorough assessment of our financial objectives in light of resource challenges with the goal of reorienting Oberlin’s financial model towards greater long-term stability by reducing the rate of growth of tuition (total student charges) and our reliance on it, maximizing endowment growth, developing new revenue streams, re-engineering to achieve greater efficiencies and synergies in operations—along with a building a culture for maintaining these positive changes—and exploring greater use of educational and administrative technologies.

For more information, see [Appendix D](#).

- H) An excellent and diverse faculty of active scholars, artists and musicians who are also superb teachers and mentors is critical to Oberlin’s future. A talented and diverse staff that supports the educational, personal and social development of students as well as the infrastructure of the institution is also key to its future.

For more information, see [Appendix D](#).

- I) To provide an outstanding educational experience for Oberlin students, we must continue to recruit and retain an excellent and diverse faculty, and support faculty scholarly and artistic achievements as well as pedagogical innovations. To accomplish this, we must recommit to our initiative to reach a level of faculty compensation of at least the median among our peer institutions (the “Sweet Sixteen”) in each continuing rank.

For more information, see [Appendix D](#).

- J) Maintain leadership in environmental sustainability and fulfill the prior institutional pledge to achieve carbon neutrality by 2025.

For more information, see [Appendix D](#).

- K) Enable Oberlin to act thoughtfully and adapt to changing conditions more quickly by developing a governance structure that enhances collaboration, communication, and engagement among trustees, administration, faculty, staff, and students.

For more information, see [Appendix D](#).