

Oberlin College Strategic Plan  
Report about Process  
April 30, 2015

**December 2013: Planning Advisory Group formed.**

- Board of Trustees named members to the Planning Advisory Group, an *ad hoc* committee of the Board.
- Goals were to serve as an advisory group to the Board and to develop a framework for the strategic planning process.
- The group met a total of five times through May 2014.

**March 2014:** Carol Christ, former president of Smith College, selected to be our planning consultant.

**April 2014:** Draft Framework for the Strategic Visioning Process (April 2014) posted—<http://new.oberlin.edu/strategic-plan/process/framework/>—with request for responses (also posted).

**June 2014: The Oberlin Strategic Plan initiated and Steering Committee and Working Groups formed.**

The Board of Trustees passed a resolution to initiate The Oberlin Strategic Plan. The charge to the Steering Committee included these points:

- 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.
- To 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 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 three to five years to help us realize that vision.

Composition of the Strategic Plan Steering Committee:

- Co-chaired by President Marvin Krislov and Board member Diane Yu.
- Staffed by Vice President for Strategic Initiatives Kathryn Stuart.
- Membership includes 12 Trustees, 11 Faculty Members, 3 Members of the Senior Staff: the Deans of the Conservatory and the College of Arts and Sciences and the Vice President for Finance, 2 Members of the Administrative and Professional Staff, 3 Students (plus 6 additional students added to Working Groups in March 2015 bringing total to 9), and 2 Alumni.

Projected Timeline: The Steering Committee plans to complete the majority of its work during the spring semester of 2015 so communities can give feedback and then the Board of Trustees will receive recommendations at its December 2015 meeting.

Since Fall 2014, the Steering Committee and/or Working Groups have met in person seven times. Working groups have also held numerous meetings with members of senior staff, other individuals, and groups on campus—in person and by conference call—throughout this period.

**August 2014:**

- Outreach to community included: Students, staff, and faculty were asked to respond to the following two questions: 1) What current or future challenge is most important for Oberlin? 2) In light of this challenge, what is the most important opportunity for us to explore? Over 60 responses are posted at <http://new.oberlin.edu/strategic-plan/conversation/responses.dot>.

**Summer 2014:**

- Strategic Plan website developed: <http://new.oberlin.edu/strategic-plan/>. Includes relevant readings, meeting summaries, feedback from community, announcements about speakers and videos of these events, and other information.
- Strategic Plan Speaker Series established by the Steering Committee. Speaker Series brings outside experts to Oberlin College to provide multiple perspectives on key areas for study. The list of the speakers is below.

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**Oberlin Strategic Plan Speaker Series, 2014-15**

Videos of events are posted on <http://new.oberlin.edu/strategic-plan/>

***The Future of Liberal Arts Colleges.*** **Eugene Tobin**, Senior Program Officer for Higher Education and Scholarship in the Humanities at The Andrew W. Mellon Foundation, September 4, 2014.

***Diversity In Higher Education.*** **Sylvia Hurtado**, Director of the Higher Education Research Institute at UCLA and a professor in the Graduate School of Education and Information Studies and **Terrell Strayhorn**, Professor of Higher Education and Director of the Center for Higher Education Enterprise at the Ohio State University, October 9, 2014.

***The Future of the Arts.*** **Aaron Dworkin**, founder of the Sphinx Organization, **Jenny Gersten** OC '91, most recently Executive Director of the High Line and Artistic Director of the Williamstown Theatre Festival, and **Michael Kaiser**, former President of the John F. Kennedy Center for the Performing Arts and founder and Chairman of the Devos Institute for Arts Management, November 11, 2014.

***Financing Higher Education.*** **Sandy Baum**, Senior Fellow at the Urban Institute and Professor at the George Washington University Graduate School of Education and Human Development, **Michael McPherson**, President of the Spencer Foundation and former President of Macalester College, and **Daniel Madzellan**, Associate Vice-President of Government Relations at the American Council on Education, December 4, 2014.

***Disruptive Innovation and Higher Education.*** **Michael Horn**, co-founder of the Clayton Christensen Institute and Executive Director of its Education program, March 12, 2015.

***Disrupting Class.*** **Michael Horn** and **Bryan Alexander**, futurist, researcher, writer, speaker, consultant, and teacher, working in the field of how technology transforms education; founder of Bryan Alexander Consulting, LLC, March 13, 2015.

***The Arts, Entrepreneurship, and Higher Education.*** **Wayne S. Brown**, President and CEO of the Michigan Opera Theater, **Claire Chase** OC '01, MacArthur Fellow, founder and Executive/Artistic Director of the International Contemporary Ensemble, **Ruby Lerner**, President and Executive Director of Creative Capital), April 9, 2015.

***Environmental Sustainability and Higher Education.*** **Thomas Ross**, President, University of North Carolina), **David Orr**, Special Assistant to the President of Oberlin College on Sustainability and the Environment moderated by Meghan Riesterer, Assistant Vice President of Energy Management and Sustainability, Oberlin College, April 13, 2015.

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### **September 2014:**

- Three Strategic Plan Working Groups are created. They are composed of members of the Steering Committee and additional members and/or consultants selected by the membership of each Working Group.
- The Working Groups are:
  - **Education Futures:** Cultivating a New Learning Environment
  - **The Students of the Bicentennial:** Who We Teach
  - **Resources and Sustainability:** How We Support Our Mission
- The groups are exploring two questions through a series of prompts:
  - 1) What does Oberlin want to be in the world of higher education over the next two decades?
  - 2) How can Oberlin convey effectively its vision externally to attract and retain students who can take advantage of the education, opportunities, and experiences it provides?

Note: The prompts proposed for a working group in some cases overlap with those in another group. The Steering Committee expects to acknowledge or reconcile overlaps and differences as the process moves forward.

- The Working Groups are discussing the following prompts:
  - **Education Futures: Cultivating a New Learning Environment**
    - Can we create a culture of learning in a dynamic environment that fosters bold experimentation in and outside the classroom?
    - Given this first goal, what should conservatory education be in the next two decades? What should liberal arts education be in the next two decades?
    - Are our organizational and governance structures optimal to deliver what we want?
    - In any changes that we contemplate, are there changes important in the conception of faculty positions and responsibilities?
    - What is our strategy for global education?
    - Are we using technology to best advantage to enhance the quality of our learning environment?

- Are we doing what we can or should to allow students to enter the workplace in the strongest possible position?
- Are we taking optimal advantage of the relationship between the College of Arts and Sciences, the Conservatory, and the Allen Memorial Art Museum?
- **The Students of the Bicentennial: Who We Teach**
  - How do we foster and sustain a diverse and inclusive learning environment? What is the optimum composition of the student body, including under-represented populations and international students?
  - What are the best recruitment/enrollment strategies for both arts and sciences and conservatory?
  - How do we define our financial aid strategy—all in the context of what we know about demographics, public perception, and federal policy?
  - Should Oberlin seek to increase its enrollment base through non-degree students (visiting, early college)?
  - An Oberlin education should instill in students that they are “permanent members” of the Oberlin College community. How can we best engage alumni to mentor students, network with each other and with students, and support Oberlin College financially?
- **Resources and Sustainability: How We Support Our Mission**
  - What changes do we recommend to our financial model?
  - How can we maximize the effectiveness, responsiveness, and flexibility of our governance model?
  - Should we anticipate the consolidation in higher education that some people predict by changing the way in which we deliver administrative services, e.g., are we using technology administratively to best advantage?
  - How do we ensure an on-going commitment to environmental sustainability and what should this commitment look like?
  - How are we prepared to respond to increasing Federal scrutiny of our financial position, student achievement, and demographic characteristics?
  - How are we prepared for a changing philanthropic landscape?
  - How do we strengthen the relationship between the College and the city of Oberlin?

### **September 2014:**

- Meeting, Steering Committee:
  - Consultant Carol Christ provided an overview of the current higher education landscape, focusing especially on two areas: 1) demographics and financing and 2) impact of information technology. Demographic trends include a rising number of those in their families who are first to attend college, falling median incomes for families with a 20 year-old, and fewer families with high incomes. Financial trends are making the traditional model of high tuition and high aid difficult to sustain. This results in pressure on financial and enrollment management.
  - Discussion of trends and uncertainties in higher education, from both the institutional and individual viewpoint. These addressed societal, technological, economic, environmental, and political perspectives.

- Outreach to community included: Presentation to Oberlin Alumni Weekend participants, Diane Yu, Board of Trustees member and Strategic Planning Co-Chair (delivered by Chuck Spitulnik, Alumni Association president and member of the Strategic Plan Steering Committee).

#### **October 2014:**

- Meeting of Steering Committee and Working Groups
  - Board of Trustees and Steering Committee were led by Carol Christ in scenario planning exercises. This methodology uses narratives about plausible futures to stimulate thinking and creativity. Discussions addressed the implications for Oberlin of positive and negative scenarios focusing on globalization, changes in the delivery of higher education, the explosion of information technology, and changes in the financial landscape. All the scenarios shared the assumption that the U.S. in the near future will be a minority-majority country with rising inequality.
  - Mike Frandsen, Vice President for Finance and Administration, presented a broad overview of Oberlin's finances, listing a breakdown of revenues and expenses. The key variables in this equation include enrollment/tuition, financial aid, room and board, salaries and benefits, debt service, endowment returns and spending, capital investment, and philanthropy. An increasingly competitive market, coupled with a decreasing pool of students able to pay full tuition, and increasing costs of services and salaries, puts pressure on the current model.
  - Initial meetings of the Working Groups (see descriptions above)
- Outreach to community included:
  - Two student listening sessions facilitated by Sophie Davis, Ryan Dearon, Machmud Makhudov (students on the Steering Committee)
  - Presentation about Strategic Planning process to Administrative and Professional Staff, Kathryn Stuart
  - Two Administrative and Professional Staff listening sessions facilitated by Deborah Campana and Andria Derstine, A&PS members of the Steering Committee.
  - Presentation about Strategic Planning process to area clergy, Kathryn Stuart

#### **November 2014:**

- Meeting of Working Groups: Discussions about work plan, people to consult, readings to review and data to study.
- Outreach to community included:
  - Presentation about Strategic Planning process to union leadership, Mike Frandsen
  - Presentation about Strategic Planning process to Oberlin City administration and Oberlin Public Schools administration, Kathryn Stuart
  - Two student listening sessions facilitated by Sophie Davis, Ryan Dearon, Machmud Makhudov (students on the Steering Committee)
  - Presentation about budget to General Faculty, Mike Frandsen

#### **December 2014:**

- Meetings of Steering Committee and Working Groups

- Discussion included the following topics:
  - Residential college
  - Bridge from Oberlin to whatever students do afterwards
  - Collaboration among the Conservatory, the College, and the Museum, as well as among academic divisions and departments
  - Affordability of new ideas
  - New technologies
  - Diversity and inclusiveness
  - Oberlin’s financial model
  - Admissions and financial aid
  - Governance systems
  - Environmental sustainability
- In response to a request from students, the Steering Committee agreed to add six additional students to serve as members of the Working Groups. The students began attending meetings of the Working Groups and Steering Committee (with voice but no vote) during the March 2015 meetings.
- Outreach to community included:
  - Presentation about budget to students, Mike Frandsen
  - Presentation about budget to Administrative and Professional Staff, Mike Frandsen

**February 2015:**

- Meetings of Working Groups
  - Discussion included the following topics:
    - Consideration of similar issues from different perspectives
    - Integrated advising
    - Inclusive environment focused on success for all students
    - Budget challenges and maximizing resources
    - Relations among students and alumni and between faculty and Career Center
    - Core principles, strategic directions, communication with communities, then action steps
- Outreach to community included: The Resources and Sustainability Working Group, in collaboration with Oberlin Community Services, sponsored networking lunch presentation and discussion entitled “A Connected Community—Best Practices and Lessons Learned” in mid-February.

**March 2015:**

- Meetings of Steering Committee and Working Groups
  - Discussion included the following topics:
    - Opportunities to build inclusive communities
    - Collaboration among College, Conservatory, museum
    - Advising, including about careers, for students and new alumni
    - Faculty diversity
    - Alumni engagement

- Governance structure
- Align existing and develop new resources
- Innovative new programs
- Environmental sustainability
- Winter Term and summer use of facilities
- Student health and wellness
- Technology-enhanced education
- Ideals and finances
- Outreach to community included: Alumni Phonecast. Conducted our first-ever phonecast with alumni to solicit their opinions about possible outcomes of the planning process.
  - Working with a company located in Iowa that uses sophisticated technology and phones, about 37,000 Oberlin alumni were invited to participate in a live and interactive conversation with President Krislov.
  - He ultimately took questions from 34 alums in two sessions, one focused on the east coast and one on the west, while more than 900 additional alumni listened in. Chuck Spitulnik '73 moderated the conversations.

**April 2015:**

- Meetings of Steering Committee and Working Groups
  - Discussion included the following topics: Review of drafts of mission statement, core principles, and strategic directions.
- Outreach to community included: Meeting of President's Advisory Council with members of the Steering Committee.

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