

**The Oberlin College**  
**Strategic Plan 2016-2021:**  
*Shaping the future*

DRAFT

October 26, 2015

*For internal discussion purposes only*

## Introduction

This draft of The Oberlin College Strategic Plan 2016-2021: *Shaping the Future* is intended for review by our community. While we will accept your feedback throughout the fall 2015 semester, we are eager to know what you think and encourage you to send your responses to the document via [go.oberlin.edu/planfeedback](http://go.oberlin.edu/planfeedback) by the end of the day on Monday, November 2, 2015.

Last May, the Strategic Planning Steering Committee posted a Preliminary Report. The Committee carefully considered feedback it received from all constituencies—both written and in-person sessions with members of the Steering Committee. This new Draft Strategic Plan reflects the current thinking of the Steering Committee as influenced by responses to the Preliminary Report and following five additional months of meetings since May. While this is not yet a final draft, feedback to this new draft from Oberlin's faculty, staff, students, trustees, and alumni will inform the work of the Steering Committee going forward.

In addition to your written responses, members of the Steering Committee will offer opportunities to all constituencies for in-person discussion. Once the feedback has been gathered, the Steering Committee will review it and propose appropriate adjustments to the Strategic Plan.

The Steering Committee will make a final presentation of The Oberlin College Strategic Plan 2016-2021: *Shaping the Future* to the General Faculty in February, and then to the Board of Trustees in March.

Following approval of the Strategic Plan, the Trustees and administration will form groups to work on implementation of its recommendations. These groups will include members from all constituencies within the Oberlin community. They will be asked to determine how progress on implementation will be measured and assessed, and will report their progress regularly.

Thank you for your consideration. We look forward to hearing from you.

## **Executive summary**

Oberlin's Board of Trustees began an ambitious strategic planning process in the fall of 2014.

That process had several goals:

- To assess the academic, financial, and reputational progress achieved by Oberlin over the last decade
- To better understand both the rapidly changing landscape in higher education and Oberlin's competitive position within that landscape, and
- To help Oberlin chart a course that draws on our existing strengths, counters weaknesses, and builds new capabilities for an uncertain future.

The process was conducted by a Steering Committee that was co-chaired by President Marvin Krislov and board member Diane Yu, and which included faculty, staff members, students, Oberlin trustees, and alumni. As that group began its work, it revisited Oberlin's mission statement and core values, and also reviewed Oberlin's last strategic plan, which was approved in 2005.

The new plan took shape over the spring and summer of 2015. Its core conclusions were presented in the form of three powerful "directions for the future":

- Foster excellence throughout our students' educational experience, within and beyond the classroom
- Strengthen Oberlin's educational community, and
- Enhance our resources and sustainability

Each of these directions has specific recommendations associated with it. Collectively, these recommendations map out a strategy that is far-ranging and comprehensive—a path that carries forward the best of Oberlin's past and present, and points us toward the new and better Oberlin of the future.

Now begins the next and critically important step in the strategic planning process: a community-wide discussion aimed at understanding—and shaping—that future.

## **Strategic planning: why and how**

Why engage in strategic planning?

Oberlin is first and foremost a community of ideas, supported by a unique mix of resources: people, capital, and infrastructure. We can only succeed if we agree upon our mission, and deploy our resources in ways that support that mission.

This is never easy, even in a cohesive community like Oberlin. Every day, we make many small choices that help shape our future—but we often do so in a fragmented, *ad hoc*, and unsystematic way. The planning process compels us to work together, build consensus, and make choices together. These are, explicitly, *large* choices. If we choose wisely—and we do have to choose—Oberlin will only get stronger.

This was the charge that our Steering Committee accepted—and which we have done our best to carry out.

### **The starting point**

The strategic planning process that began in the fall of 2014 had two points of departure. The first was Oberlin's mission and core values, presented in the subsequent two sections of this document.

The second was Oberlin's 2005 Strategic Plan. Implementing that plan over the past decade, through a number of initiatives focused on enhancing student learning, has strengthened Oberlin enormously. By better utilizing our incomparable combination of educational assets—an outstanding College of Arts and Sciences, an internationally acclaimed Conservatory, and a world-class art museum primarily focused on teaching—the quality, rigor, and value of an Oberlin education have increased.

### **A record of accomplishment**

In the past ten years, the power and value of Oberlin's teaching, thinking, creativity, artistry, and innovation have manifested themselves in the collective and individual achievements of our faculty, students, and alumni.

Faculty members in both the Arts and Sciences and the Conservatory distinguish themselves as scholars, performers, artists, and teachers. They make important contributions to their disciplines—while at the same time remaining committed to successful teaching and mentoring of Oberlin students. Years or decades after the fact, as they look back on their Oberlin experience, many alumni credit their achievements in life to the motivation and guidance provided by a demanding, empathetic, and inspirational teacher.

Students in both the College of Arts and Sciences and the Conservatory have earned dozens of prestigious honors, including the Fulbright, Gates, Goldwater, NSF, Rhodes, Truman, and Watson scholarships and fellowships. Conservatory students have been recognized as winners of national and international music competitions, including the Fischhoff National Chamber Music Competition and the Metropolitan Opera National Council Auditions.

A significant accomplishment was the awarding of the 2009 National Medal of Arts to the Conservatory. This is the highest award given by the President of the United States in recognition of outstanding contributions to the excellence, growth, support, and accessibility of the arts.

In science, 21 Oberlin graduates are members of the National Academy of Sciences, which represents an astonishing 1 percent of the Academy's total. Eleven Oberlin alumni, graduates of both the College of Arts and Sciences and the Conservatory, have received MacArthur "Genius" Awards, including five since 2008. As has been the case for decades, more Oberlin graduates go on to earn PhDs than graduates of any other baccalaureate college. And our students are not simply self-interested: Throughout the year, they volunteer in large numbers to work for charitable and worthy causes. That tradition of service continues into their professional lives, as Oberlin alumni the world over not only play leading roles in almost every field of human endeavor, but also help build stronger families, communities, and societies.

### **Purposeful interventions**

Implementing the 2005 strategic plan, and subsequent refinements upon it, has meant launching multiple concurrent initiatives. One of these has to do with increasing diversity on campus. We define diversity broadly, to encompass racial, ethnic, gender identity/identities, cultural, and socioeconomic factors. Toward this important end, Oberlin partnered with two high profile organizations that identify and recruit talented, motivated, high potential students from multicultural backgrounds who are low income. We have also sought out opportunities to partner with other community-based and educational organizations, domestic and global, to draw students to Oberlin from a broad range of cultural and social backgrounds.

At the same time, we have devoted significant resources to improving the student experience. Residential life, student support—especially peer-to-peer programs—health and wellness programs, mental health and emotional well-being initiatives, disability services, and athletics have been expanded and revitalized. Innovative internship and entrepreneurship programs recently introduced are opening exciting new doors for our students and recent graduates.

We have also greatly improved our facilities, both by addressing deferred maintenance issues and by opening new LEED-certified buildings. These facilities not only enhance living and learning at Oberlin, but also—when combined with other "green" initiatives

and partnerships—contribute to our internationally recognized leadership in environmental sustainability.

Again, all of these far-ranging changes have won us new friends and increased support. To cite just two important pieces of evidence for this fact: Record numbers of high school students are now applying for admission to Oberlin, making us more selective than ever before. Meanwhile, philanthropy and engagement have increased across all segments of the broader Oberlin community, including alumni, parents, and other friends. We are now in the final year of a successful comprehensive campaign. We are very pleased with the substantial commitments we've received so far for financial aid, faculty support, and key facilities improvements. And we continue to seek additional gifts, especially for scholarships, so we are able to aid as many students as possible.

Unlike a great number of our peers, we do not have the financial resources to continue to increase the discount rate—the portion of tuition (“sticker price”) provided as financial aid from institutional resources. The last strategic plan called for the College to reduce the rate to achieve a goal of greater financial stability, and we have gradually done so and brought it down to a responsible level. This puts our finances on a more sustainable path for Oberlin's long-term future and has positively influenced our credit rating, keeping our cost of borrowing low. We have maintained our commitment to meeting 100% of the demonstrated need for all admitted students; however, we recognize the consequences of reducing the discount rate include making the cost of attendance an issue for some students and prospective students. It also could affect our ability to admit and retain students with substantial need from underrepresented groups, which would be a concern in light of our commitment to diversity. We will seek to keep the proper balance between these goals.

Meanwhile, looking to the long term, we have reduced our endowment payout for support of operations to 5 percent, and our total endowment payout from a peak of 7.2 percent in 2008 to 6.1 percent in 2015. This purposeful reduction in spending will help preserve the purchasing power of our endowment, and help give our successors the ability to support Oberlin's mission for many generations to come. (Endowment payout is the portion of the endowment withdrawn for use each year. For Oberlin, 5 percent of the three-year rolling average of the endowment is withdrawn for operations and an additional amount is withdrawn for purposes identified by the Board.)

In short, our accomplishments and interventions over the past decade—made possible by the combined and concerted efforts of Oberlin's faculty, students, staff, Board of Trustees, alumni, parents, and supporters—have had a huge and positive impact. They have enhanced the value of an Oberlin education, reinforced our financial footing, and strengthened our reputation as one of the world's elite colleges and conservatories.

## The challenges before us

Collectively, we can take pride in this record. At the same time, we have to acknowledge that much has changed in the world since 2005—in most economic sectors, and in higher education in particular—and that Oberlin now faces new challenges.

Beginning at the macro level, we note that over the past decade, the higher education environment has grown more complex, competitive, and challenging. We must confront these changes—even ones we find disturbing or threatening—because in many ways, they are already affecting Oberlin’s standing and future.

For example: The combination of rising college costs and growing income inequality is straining the financial model of higher education, especially for residential liberal arts institutions. The number of middle class families in the U.S. is shrinking, and those that remain often require considerable assistance from multiple sources to send their children to college. While Oberlin has made progress on enrolling underrepresented students, it has not achieved its goals for diversity, a critical value of our institution. The economic challenges for students who are from lower income families and the first in their families to go to college, or are from historically underrepresented groups, continue to increase. At the same time, colleges and universities are facing demographic shifts in the student-age population—by 2022, nearly 50 percent of public high school graduates will be from historically underrepresented groups and many are expected to be first-generation—as well as increasing globalization, technological challenges and opportunities, and the emergence of new kinds of educational institutions in the for-profit and not-for-profit sectors that aggressively recruit students at a lower cost than Oberlin charges.

In addition, colleges must be aware of the plethora of rankings and reports available to the public, some of which attempt to assess the value and “return-on-investment” of the education offered. Such rankings are a fact of life, but Oberlin’s worth derives from our values and our distinctive blend of humanities, social science, natural science, music, and the arts—which together shape and enrich our students’ learning outcomes and their lives. Our graduates are more accurately measured by their intellectual, musical, and academic achievements; their sharpened critical thinking skills; their completion of research or other sustained academic projects; their public performances, exhibitions, and presentations; their study abroad; and their steadfast belief in working to make the world a better place for all.

What are the implications of these macro trends for Oberlin? The evidence points to at least three overriding conclusions:

- **We must recognize and act on the fact that our high-tuition, high-financial-aid model is vulnerable in the near and long-term.** Oberlin is not yet on a sustainable financial trajectory. Our endowment value and our fundraising still lag behind those of many peer institutions, and we remain far more dependent on tuition revenue than many other colleges.

- **We must make the case for Oberlin more effectively.** This is less a challenge of invention, and more a challenge of articulation. We know who we are, what we do well, and what that means for our students, graduates, and the world at large. To secure the support we need—and to thrive in a context where “success” is often defined by metrics that are not our own—we must demonstrate why Oberlin deserves to be cherished and strengthened.
- **We must position Oberlin strategically for continued prominence in a rapidly changing world.** This Strategic Plan proposes a number of initiatives—some that build on important existing strengths and others that are new and creative. Taken together, we believe the implementation of these strategic recommendations will significantly advantage Oberlin as it seeks increasing excellence, impact, and relevance, all essential to greater prominence.

### Shaping the plan

To meet these challenges and to chart a course for the coming years, Oberlin’s Board of Trustees determined in 2013 that a new strategic plan was essential—first for building internal consensus, and subsequently for speaking to the larger Oberlin community in a clear and compelling voice.

The new plan—crafted by a Steering Committee that was chaired by President Marvin Krislov and board member Diane Yu, and which included faculty, staff members, students, Oberlin trustees, and alumni—is appropriately ambitious. It maps out a strategy whereby Oberlin can offer a world-class, enriching education to its students: a plan that builds on Oberlin’s current strengths, and calls for experimentation and innovation.

We are a residential college committed to educational excellence in a diverse and inclusive learning environment. With this as a foundation for the Oberlin experience, we recommend an even greater emphasis on “connected learning,” which at Oberlin means the creative integration of:

- learning in the College of Arts and Sciences, Conservatory, and Allen Memorial Art Museum
- civic engagement and other opportunities for learning outside of class
- engagement with arts and culture, and
- personal and professional development.

Among other things, we want to further collaborations between and among our unique trio of academic assets: the Arts and Sciences, Conservatory, and Museum. We call for a more intensive and integrated advising system. We advocate the creation of a seamless, intentional, and extensive network of world-beyond-Oberlin experiences—made possible in part through the creativity and support of our alumni—which will not only enrich our students’ time at Oberlin, but also enhance their prospects for challenging and fulfilling lives hereafter.



## Shaping the future

Even as we survey these daunting challenges, we have many reasons for optimism about Oberlin's future. We hope that this document adequately describes those challenges, and—by laying out a strong strategy for moving forward—provides yet another reason for optimism.

We seek the participation and support from the entire Oberlin community to achieve these objectives. Together, we can and will succeed. We can and will shape the future.

## Mission Statement

Oberlin's mission is clear and compelling:

*Oberlin College and Conservatory educate students for lives of intellectual, musical and artistic rigor and breadth, sustained inquiry, creativity and innovation, and leadership. Oberlin aims to prepare graduates with the knowledge, skills, and perspectives essential to confront complex issues and to create change and value in the world.*

*Oberlin is committed to educational access and opportunity, embraces a diverse and inclusive learning environment defined by a free and respectful exchange of ideas, and shares an enduring commitment to a sustainable and just society.*

The Steering Committee embraces and honors this new mission statement.

As we consider the implications for Oberlin of the changing environment of higher education, we understand that great accomplishments grow out of a clear sense of mission, and out of the core values associated with that mission.

## Core values

- **Educational Excellence:** The College of Arts and Sciences and Conservatory of Music are committed to educating students to achieve academic, musical, and artistic excellence. An Oberlin education prepares students for successful lives, careers, and leadership by enabling them to see and develop meaningful connections and integration with all aspects of their Oberlin experience, and with the wider world.

The Oberlin Conservatory provides professional education at the highest level, enabling students to reach their greatest potential both as musicians and individuals, and to attain skills and perspectives—not only in music, but also in other disciplines—that will prepare them to become leaders.

- **Diversity and community:** Oberlin is dedicated to diversity, inclusion, social justice, and an equitable educational environment, which are critical to the educational outcomes for all students and together enable community members to make important contributions to society.
- **Stewardship:** Oberlin seeks life-long engagement with and wise stewardship of the institution by students, parents, faculty, staff, and alumni.
- **Sustainability:** Oberlin is committed to leadership in environmental sustainability and education.

## Directions for the future

Our planning process began as a blue-sky inquiry—*what’s the broadest universe of possible futures that Oberlin could embrace?*—and gradually became more specific and concrete. We considered various scenarios and alternative futures. This trajectory of increasing focus over time certainly reflects our embrace of real-world constraints, financial and otherwise. But it also reflects our determination to craft a plan that is both ambitious and actionable.

In that spirit, we present three interrelated directions for the future:

- Foster excellence throughout our students’ educational experience, within and beyond the classroom
- Strengthen Oberlin’s educational community, and
- Enhance our resources and sustainability

In the pages that follow, we briefly describe each of those directions and present strategic recommendations associated with each of them. Some features of each direction and its recommendations are already established practices at Oberlin but are essential to the education we provide. Others are new and distinctive. And some may be hybrids—an existing idea with a new element. Explanations appear at the end of each section.

Our sequencing is purposeful. We begin with a distinctive thread of excellence in every aspect of our students’ educational experience. An important component of this goal of excellence is **connected learning**—introduced earlier, and explored more fully below—that weaves through almost everything we do at Oberlin. We then move on to a consideration of the kind of **community** that we have to create to support connected

learning. This, in turn, leads naturally to an exploration of the **resources** needed to sustain that community.

## **Direction 1: Foster excellence throughout our students' educational experience, within and beyond the classroom**

Oberlin is extremely well positioned to excel in every aspect of the education it provides for students. Direction 1 focuses on the concept of connected learning, an educational model that allows students to integrate coursework, advising, mentoring, internships and experiential learning, applied learning (that is, putting classroom learning to work in the real world), and personal support throughout their undergraduate careers. Connected learning is both *integrated* and *individualized*. It has proven itself many times over as a powerful educational approach. Oberlin students are extraordinarily well prepared for an uncertain future because they know how to navigate between and among complex and varied subjects and disciplines, how to synthesize, and how to see patterns and themes that are both traditional and leading edge. Given that success, we believe that the time has come to approach connected learning more systematically, and extend the concept in new ways. How can this be achieved?

### **Direction 1 focuses on:**

- advising for successful connected learning, with special attention on a distinctive new initiative, Oberlin 4+4, designed to build strong bonds between our students and our alumni
- the powerful relationship among the College of Arts and Sciences, the Conservatory of Music, the Allen Memorial Art Museum, and the residential experience
- a coherent curriculum
- “big idea” cluster courses
- engagement in and beyond the classroom including:
  - civic engagement
  - engagement with local and regional communities
  - engagement with the world

Connected learning requires steady and wise guidance and counsel. It's not enough for Oberlin to point our students toward high educational achievement, the acquisition of life skills, and a successful transition to a rewarding professional life. We have to help them *get there*, at many points along those paths. So effective **mentoring, advising, and coaching** will create a culture where faculty and staff will “walk with students” as students learn to negotiate and make choices—choices that are increasingly skilled, wise, beneficial, and healthy—about their education and lives. Such support is absolutely central to helping our students develop their individual trajectories, and shaping their integrated learning experiences. Rich exposure to career options and acquiring skills for effective professional interaction—including appropriate technological expertise—are also important, especially as students progress through their undergraduate years.

**Oberlin 4+4** will bring together the substantial potential of the Career Center, Creativity and Leadership, LaunchU, Alumni Relations, the Bonner Center for Service and Learning, and Oberlin Shansi in an important new initiative. Because connected learning also connects across time, it includes **building strong bonds among our students and our alumni**. Career advising and mentoring by alumni for students throughout their four or five years as students, and then for another four years as young alumni, is one goal of Oberlin 4+4. The other goal is this: students and young alumni will be guided by alumni as well as faculty and staff members to connect their Arts and Sciences and Conservatory experiences—both in the academic and applied learning contexts—more intentionally, using their entire Oberlin experience to set the stage for their professional journeys. Again, our on-campus resources are key components of this effort, helping all students and recent alumni identify and achieve meaningful career objectives that build upon their Oberlin education and experiences.

At Oberlin, we believe the heart of connected learning is **the subtle but powerful relationship among the College of Arts and Sciences, the Conservatory of Music, the Allen Memorial Art Museum, the Libraries, and the residential experience**. The presence of these assets is unique among the country's top tier liberal arts colleges. Together—as core contributors to a larger whole—they help define us as surely as they influence the education of our students. The rich array of curricular, co-curricular, and extra-curricular opportunities that they present to our community is rare enough—but the *interplay* among these offerings is rarer still, adding up to an unparalleled immersion in the artistic and the intellectual. Together, they provide spaces for meaningful intellectual engagement with challenging ideas, and a wide range of possibilities for social engagement.

Connected learning depends, in large part, on a **coherent curriculum** that provides pathways for deep examination within the primary area of study and opportunities to explore within the rich traditions of a liberal education. The abundant array of pathways reflects the richness and promise of the Oberlin experience. A student's path through Oberlin should reflect a purposeful course crafted with guidance from a principal academic advisor as well as support from other resources. Connected learning helps students:

- build coherent pathways **through** the curriculum, from a first-year seminar to a culminating experience;
- build connections **across** the curriculum through interdisciplinary study and ties between the College of Arts and Sciences, Conservatory of Music, Allen Memorial Art Museum, and Libraries;
- engage within and beyond the classroom, acknowledging the powerful impact of meaningful interaction **among** people of racial, ethnic, gender identity/identities, cultural and ideological difference;
- connect the academic experience at Oberlin with what comes after Oberlin.

Some students choose to pursue our distinctive double-degree program, which offers students the unique opportunity to combine rigorous pre-professional musical training

with a broad liberal arts education. Less formally, but just as important, students have the opportunity to work on research projects with sustained faculty supervision—giving them a firsthand understanding of the discipline necessary to maintain an active research program, and also showing them how to transfer their curiosity from the classroom to the library, the laboratory, and field sites around the globe. The Oberlin College Libraries, in particular, play a critical role in supporting intellectual rigor and inquiry.

Faculty are currently exploring ways to develop concepts and ideas that have permeated faculty and strategic planning discussions about connected learning: **project-based learning, culminating and transitional experiences, and course-based research**. For example, an initiative under discussion is the development of **“big idea” course clusters**. A cluster would be comprised of several courses offered simultaneously by faculty from different disciplines. Courses would focus on a single theme chosen to engage students and faculty on the world’s great challenges by transcending individual disciplines and strategically bringing to bear the full intellectual and artistic power of the Oberlin community and the diversity of minds, backgrounds, and disciplines that inform it.

Integral to connected learning is fostering and facilitating engagement within and beyond the classroom. Among the important connections we seek to cultivate are those that are forged among members of our diverse community as we continue to grapple with issues of equity, diversity, inclusion, and social justice. Civic engagement provides one meaningful way to address these topics.

Almost since its founding, Oberlin has been applauded as a beacon of **civic engagement**. That engagement begins on campus, in the Bonner Center for Service and Learning. Its mission is to make connections—among students, faculty, staff, community partners, and alumni—to help address the most pressing challenges of our time. Each semester, students may choose to pursue community service or community-based research through Community-Based Learning. Community-Based Learning courses bridge the gap between college and community, and offer learning experiences that increase interdisciplinary thinking and enhance critical thinking skills. But civic engagement also extends far off the campus as well, as illustrated by instances where students take advantage of Winter Terms and summers to engage with the world, and—ideally—to improve it.

Certainly, connectedness means **engagement with the local and regional communities**. The City of Oberlin, Lorain County, and greater Northeast Ohio provide Oberlin students with numerous opportunities for civic engagement that enrich their Oberlin experience while connecting their classroom education to their work in the community. In turn, we share the resources of the College of Arts and Sciences, Conservatory of Music, Allen Memorial Art Museum, and Libraries in innumerable ways with the City of Oberlin and the region. We build robust public and private sector partnerships, and make thoughtful investments in local and regional economies, knowing that these relationships are both mutually beneficial and the right thing to do.

And finally, connectedness means **engagement with the world**. This comprises both the coursework—theoretical and experiential—described above, opportunities to study abroad, and the kinds of civic engagement upon which our students thrive. We provide the language skills, the cultural understanding, the technical background, and technological training for our students to thrive in the world as it is, and also contribute to its becoming what it should be.

## **Strategic recommendations for Direction 1**

1. Create individually tailored systems of guidance and support through mentoring, advising and coaching that help students connect their academic, artistic, personal, social, and professional development at Oberlin and beyond.
2. Connect students and young alums to professional pathways by developing and investing in Oberlin 4+4: a new model for integrating academic and applied learning experiences with multiple on-campus resources such as the Career Center, Creativity and Leadership/LaunchU, Alumni Relations, the Bonner Center for Service and Learning, Oberlin Shansi, and with Oberlin’s alumni network. In addition, further develop Oberlin’s programs in entrepreneurship (Creativity and Leadership/LaunchU) by cultivating relationships with faculty, staff, alumni, and outside experts that help students create and develop entrepreneurial ideas and master the latest technological advances as part of their education and as they transition to a post-Oberlin life.
3. Enhance student support for building personally meaningful pathways through the curriculum, from first-year seminars to culminating experiences.
4. Deepen educational collaboration among the Arts and Sciences, Conservatory, and Allen Memorial Art Museum with the development of problem-based “big question” course clusters, with several courses offered simultaneously by faculty in different fields that encourage integration of learning across disciplines.
5. Prepare students to connect effectively to their global environment by enhancing opportunities to study and engage with languages and cultures through coursework, study abroad, and international co-curricular opportunities, and assure they attain appropriate technological capabilities.

### **Direction 1:**

**What we already do:** An Oberlin education in the College of Liberal Arts and in the Conservatory of Music prepares Oberlin students extraordinarily well for an uncertain future because students develop the intellectual skills to navigate between and among complex and varied subjects and disciplines, to synthesize, and to see patterns and themes that are both traditional and leading edge.

**What is new and distinctive** (see above for descriptions of each):

- 1) Oberlin 4+4
- 2) Connected Learning
- 3) “Big idea” course clusters

**What are existing ideas with a new element:**

- 1) Individually tailored systems of guidance and support through mentoring, advising and coaching that help students connect their academic, artistic, personal, social, and professional development at Oberlin and beyond.
- 2) The rich array of curricular, co-curricular, and extra-curricular opportunities that the College of Arts and Sciences, Conservatory of Music, and Allen Memorial Art Museum present to our community is rare enough—but the *interplay* among these offerings is rarer still, adding up to an unparalleled immersion in the artistic and the intellectual.

## **Direction 2: Strengthen Oberlin’s educational community**

As noted above, Oberlin achieves its distinctive academic mission by creating and sustaining a dynamic, diverse, and welcoming community of students, faculty, staff, parents, alumni, and community partners that enables every person to have the opportunity to achieve at the highest level.

*An engaged community provides the foundation for intellectual and creative endeavor at Oberlin. We purposefully locate individual achievement in a context of teaching, mentoring, and peer relationships that foster, sustain, and enable innovation and lifelong success.*

What are the building blocks of community at Oberlin? We will focus on these: **faculty and staff, students, a diverse community, a culture of active engagement, systems of support, residential life, stewardship, and governance.**

First and foremost are our **outstanding faculty and staff**. Without these resources, there is no “Oberlin.” Our faculty members consistently demonstrate their deep commitment to teaching and advising, scholarship, and musical/artistic accomplishment. Staff members are similarly committed to supporting the educational, personal, and social development of students, mentoring students in work-study and other opportunities that offer pre-professional career preparation, and ensuring that Oberlin operates efficiently, safely, and responsibly.

Next we spotlight our **world-changing students**. Oberlin doesn’t create people who create change; it draws students who are already committed to being a part of that change. What Oberlin does—through its dedicated faculty and staff, and the structure and philosophy of its curriculum—is foster and support its students as they pursue their wide-ranging, far-reaching, world-changing goals.

How do we bring these great human resources—faculty, staff, and students—together for productive engagement? **A diverse community** is critical to fostering the spectrum of perspectives, interactions, and approaches upon which the most effective teaching and learning depend. We have a proud history of confronting and overcoming structural barriers to educational inclusion for African Americans and women. This obligation to strengthen our diverse community is very much with us today. Because general societal inequality makes some forms of diversity difficult for selective colleges to achieve, we must concentrate resources on surmounting those obstacles.

This challenge extends beyond our student body to our faculty and staff, as well. At this historic moment, attention to socioeconomic and racial, ethnic, gender identity/identities, sexuality/orientation, and cultural diversity of students, faculty, and staff reflects the College's commitment to educating the next generation of College students at a time of rapid demographic change. And even as we work toward greater **compositional diversity**—people from different racial and ethnic groups in our campus community—real benefits to the community come from achieving **interactional diversity**: establishing a culture of interacting meaningfully and effectively across lines of cultural and ideological difference. To achieve both of these goals—which we believe will better prepare our students to live in an increasingly diverse world and bring the necessary understanding to change this world for the better—we must commit both resources and determination.

In that spirit, Oberlin cultivates a **culture of active engagement**. We believe the development of a rich landscape of diverse ideas and perspectives is a community responsibility. In particular, active engagement supports and reflects the importance of freedom of thought, inquiry, speech, and assembly. These values are expressed through the practices of listening to, experimenting with, questioning, thinking about, discussing, and debating diverse ideas and perspectives, as well as the opportunity to voice criticism of existing practices and values. These practices are critical to both the College learning environment and to a democratic society. Through this culture of engagement, Oberlin honors its deep commitments to such critical goals as academic freedom and social change. We are fortunate to have the Oberlin College Dialogue Center, a resource coordinated and overseen by the Office of the Ombudsperson. The Oberlin College Dialogue Center promotes social change through conflict transformation, mediation, community building, and dialogue, and it serves an important role in our community of active engagement.

A recently created position, Special Assistant to the President for Equity, Diversity, and Inclusion, works with the campus community to implement Oberlin's sexual misconduct policy and further enhance institutional understanding of equity, diversity, and inclusion. This position has significantly improved Oberlin's ability to help not only our students but the entire community as we strive both to learn and deal effectively with these issues on our campus. Oberlin has made progress on developing initiatives to improve interactional diversity, especially important given the tensions in the US and in the world. As we move forward with this important work, we are confident in our leadership to bring our community to an increasingly high level of mutual respect and understanding.



**Oberlin continues to build a strong support system** for students. In collaboration with students, we have made impressive progress in increasing and enhancing services and initiatives in student mental, emotional, and physical health and wellness. We have established or improved peer-to-peer mentoring and support programs, disability services, residential experiences, and resources dedicated to supporting historically underrepresented students.

In addition, Oberlin values its increasingly diverse, inclusive, and complex student communities and is committed to helping all our students succeed. These communities include students of color, first generation students, lower income students, LGBTQ students, international students, students with disabilities, and students of faith and spirituality. Offices that connect student communities include, but are not limited to the Multicultural Resource Center, Student Academic Services, Student Union, Residential Education, the Office of International Student Advising, and the Office of Religious and Spiritual Life. We applaud the work of all the staff and faculty members and peer support students that are working to develop an inclusive institutional structure that removes structural barriers to student success.

Oberlin also values the personal connections that develop in a residential college community. The **residential experience**, in a context that connects the curricular, co-curricular, and extra-curricular, becomes a critical laboratory for developing the skills in communication and interaction, reflection and engagement, tolerance and openness, and advocacy and dissent that sustain a dynamic intellectual environment. We live in an era when human interactions are increasingly mediated by technology—in ways that both create new forms of community and challenge older ones. Oberlin is committed to thinking creatively about the role of technology in building and enhancing a more meaningful residential, artistic, and intellectual community.

The full community, in turn, has a shared responsibility: to **steward and enhance the institution** in ways that help it fulfill its mission. **Governance** is a key element of stewardship and encompasses roles played by the Board, administration, faculty, staff, students, and alumni. Our governance models need to be as thoughtful, transparent, and as broadly participatory as possible. At the same time, they must become agile enough to make decisions in a timely and effective way in the rapidly changing environment of higher education. These twin goals of transparent participation and nimble adaptability may initially seem at odds with one another, but employing collective will to clarify roles of governance parties and streamline repetitive or time-consuming processes can contribute to their fulfillment.

## Strategic recommendations for Direction 2

6. Recruit and retain students from a broad range of racial, ethnic, gender identity/identities, sexuality/orientation, cultural, and socioeconomic backgrounds. Develop additional future resources targeted to increasing the opportunity for enrollment of students from historically underrepresented communities in the United States.
7. Hire and retain an outstanding faculty and staff from a broad range of racial, ethnic, gender identity/identities, sexuality/orientation, cultural, and socioeconomic backgrounds. Develop new ideas and priorities for success in faculty and staff recruitment and retention.
8. Encourage and support faculty to develop as scholars, musicians, and artists throughout their Oberlin careers. Enable and encourage faculty and staff members to develop their abilities as effective, engaging, and innovative teachers, mentors, and advisors. Provide them with opportunities and training to enhance their use of innovative technologies appropriate to their pedagogical and/or professional goals.
9. Enrich Oberlin as a community of learning by expanding support for academic programs and offices that help students develop the understanding and skills essential for interacting effectively across lines of cultural and ideological difference. Continue to review and address structural barriers that inhibit student success and further develop and create institutional structures that foster the highest achievement for all students.
10. Develop new and enhance existing programs and services to support mental, emotional, and physical health and wellness.
11. Create new and diverse pathways for judicious stewardship of the institution by alumni and also by faculty, staff, students, and parents. Engage all members of the wider Oberlin community in stewardship of the College of Arts and Sciences and the Conservatory of Music.
12. Streamline all of our systems of governance so that they can act more quickly and effectively in addressing the rapidly changing environment of higher education, while still delivering thoughtful decisions backed by broad consensus among all stakeholders.

### **Direction 2:**

**What we already do:** Recruit and retain students, faculty, and staff from a broad range of racial, ethnic, gender identity/identities, sexuality/orientation, cultural, and socioeconomic backgrounds.

**What is new and distinctive:**

- 1) Develop new and enhance existing programs and services to support mental, emotional, and physical health and wellness.
- 2) Engage all members of the wider Oberlin community in stewardship of the College of Arts and Sciences and the Conservatory of Music.

**What are existing ideas with a new element:**

- 1) Develop new ideas and priorities for success in faculty and staff recruitment and retention.
- 2) Enrich Oberlin as a community of learning by expanding support for academic programs and offices that help students develop the understanding and skills essential for interacting effectively across lines of cultural and ideological difference. Continue to review and address structural barriers that inhibit student success and further develop and create institutional structures that foster the highest achievement for all students.
- 3) Streamline all our systems of governance so that they can act more quickly and effectively in addressing the rapidly changing environment of higher education, while still delivering thoughtful decisions backed by broad consensus among all stakeholders.

**Direction 3: Enhancing resources and sustainability**

As noted in earlier sections of this report, we have embraced a unique mission. It is a mission that is entirely appropriate for Oberlin: both *focused* and *ambitious*. We have also defined the core values that make us distinctive and successful.

Now we have to bring our resources—financial, human, physical, and reputational—to bear on that mission and those values, and on the two directions outlined previously. Thanks to the generosity of those who have gone before us, and thanks also to the College’s tradition of strong financial stewardship, those resources are substantial.

On the other hand, they are not unlimited, and they are not enough to achieve all of our objectives. With our mission firmly in mind, we will have to set priorities. As always, there are far more good and worthy ideas than there are resources, so we will have to make choices about what to do and not do. Those choices will be difficult. But because we are determined to maintain our traditions of financial responsibility and effective governance, we will make them.

In that spirit, we will develop and implement a financial plan that will allow us to flourish as an outstanding College of Arts and Sciences and Conservatory of Music. The plan will be both *concrete*—clearly defining a path toward sustainability—and *flexible*, enabling Oberlin to respond nimbly to the challenges that certainly will emerge in an uncertain future.

As we consider the most effective use of our resources—which involves striking the balance between meeting the needs of today and serving many generations in the future—there are four areas that require particular attention:

- our enrollment
- our endowment
- our people, and
- our campus.

In terms of **enrollment**, we are in an increasingly competitive market. We know, without question, that our residential, liberal arts education model delivers incredible value in preparing students to create their own futures. We also know that this model is capital- and labor-intensive—in other words, expensive. We therefore must consider our size and the breadth of our program offerings. We must seek out the balance that will give us the financial resources we need, and at the same time allow us to serve our students effectively and achieve our goals of diversity, inclusion, and access. We remain committed to meeting 100% of the demonstrated financial need of every student we admit and meeting these goals will require significant resources.

Our **endowment** is the financial bedrock on which our entire plan rests. Its growth over time—through a combination of gifts, investment returns, and disciplined spending—is essential to our long-term success.

Our **people**—with their remarkable energy, diversity, commitment, and expertise—are our most important intangible asset. At the risk of stating the obvious, we must attract and retain outstanding faculty and staff. We must invest in them, by providing competitive compensation and opportunities for personal and professional development.

Our **campus** shapes almost every aspect of the experience of living and learning at Oberlin. We must have the right educational, residential, recreational, and other spaces to support our mission. We must provide a safe, secure, and efficient physical infrastructure—one that is equipped to support the education of today and tomorrow. These facilities must also embody our commitment to environmental sustainability.

But our environmental obligations extend still further. Not only will our physical campus strive towards carbon neutrality, but our students, faculty, staff and visitors will ensure that their actions are aligned with our goals of sustainability, resiliency, and equity. In this pursuit, Oberlin College will partner with the local community and be a leader and model to others.

Finally, we must study and prioritize campus-wide educational and administrative technology needs, so that we can adopt and adapt technologies that are appropriate for Oberlin. All of this will require major upfront and ongoing investments, and so our capital expenditures must be undertaken with a clear view of their long-term impact on institutional finances.

### **Strategic recommendations for Direction 3**

13. Slow the rate of annual increases in student charges—tuition, fees, room and board—while developing resources to ensure that we can offer an opportunity for enrollment to a student body from the United States and abroad that represents a broad range of racial, ethnic, gender identity/identities, cultural, and socioeconomic backgrounds.
14. Continue efforts to build the endowment through philanthropic gifts, sustainable levels of spending, and top-quartile long-term returns. Slow the rate of annual endowment draw, including withdrawals for all purposes—operations (unrestricted and restricted), capital spending (including debt service), and other expenditures—to ensure long-term financial sustainability and growth.
15. Maintain commitments to achieve competitive faculty compensation. In 2013, the Board of Trustees set a faculty compensation goal of reaching at least the median among a competitor group of peer institutions in each continuing rank.
16. Fund institutional priorities by analyzing current expenditures, determining appropriate tradeoffs, and reallocating funding accordingly. Redesign to achieve greater efficiencies and synergies in operations.
17. Use the campus year-round, offering programs that will both enhance the reputation and revenue of the Arts and Sciences and Conservatory and leverage our investments in improved facilities and physical assets.
18. Reaffirm and take progressive action towards Oberlin’s previously announced commitment to carbon neutrality. Through bold leadership, innovation, and creative collaboration, we will prioritize sustainability efforts, and mobilize the entire campus community to embrace an ethic of environmental care, social equity, and financial responsibility.

#### **Direction 3:**

##### **What we already do:**

- 1) Continue efforts to build the endowment through philanthropic gifts, sustainable levels of spending, and top-quartile long-term returns.
- 2) Slow the rate of annual endowment draw, including withdrawals for all purposes.
- 3) Maintain commitments to achieve competitive faculty compensation.
- 4) Take progressive action towards Oberlin’s previously announced commitment to carbon neutrality.

**What is new and distinctive:** Slow the rate of annual increases in student charges—tuition, fees, room and board.

**What are existing ideas with a new element:**

- 1) Use the campus year-round, offering programs that will both enhance the reputation and revenue of the Arts and Sciences and Conservatory and leverage our investments in improved facilities and physical assets.
- 2) Through bold leadership, innovation, and creative collaboration, we will prioritize sustainability efforts, and mobilize the entire campus community to embrace an ethic of environmental care, social equity, and financial responsibility.

DRAFT

## Appendices

Document 1: [Steering Committee roster](#)

Document 2: [Working Group Rosters](#)

Document 3: [Summary of Process](#)

Document 4: [Preliminary Report](#)

- Appendix A: Working Groups Roster (see earlier document for updated version)
- Appendix B: Summary of Process (see earlier document for updated version)
- Appendix C: Finance/Budget Information
- Appendix D: Strategic Explanations and Details
- Summary of Responses to May 2015 Preliminary Report

DRAFT