

The Oberlin College Strategic Plan
Report about Process
February 2016

2013-14

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 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 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.

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? More than 60 responses are posted at <http://new.oberlin.edu/strategic-plan/conversation/responses.dot>.

Summer 2014

Strategic Plan website developed. Includes relevant readings, meeting summaries, feedback from community, announcements about speakers and videos of these events, and other information, <http://new.oberlin.edu/strategic-plan/>.

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.

2014-15

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 Madzlan**, 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 Environmental Affairs moderated by Meghan Riesterer, Assistant Vice President of Energy Management and Sustainability, Oberlin College, April 13, 2015.

September 2014

Three Strategic Plan Working Groups are created. Groups 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 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 David, 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 David, 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
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Students added to Working Groups. 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.

May 2015

Meetings of Steering Committee and Working Groups

- Discussion included the following topics: general student concerns, budget and finance document with Mike Frandsen; Preliminary Report.

Posted Preliminary Report May 5, 2015 and sent email announcement to all constituencies. Purpose of the Preliminary Report: to elicit feedback from our communities that will inform the process going forward.

- Received 172 written responses to the Preliminary Report (15 faculty, 8 students, 12 staff members, one committee, and 136 alumni).
- In addition, 16 students participated in two listening sessions led by student members of the working groups and 77 faculty and staff discussed their responses to the Preliminary report during three sessions.

June 2015

Meetings of Steering Committee

- Discussion included the following topics: financial framework for strategic planning; summary of responses to Preliminary Report; draft mission statement, core values, and strategic directions.

July 2015

Meetings of Steering Committee

- Discussion included the following topics:
 - Consensus about the latest draft mission statement (July 23)
 - Financial context for strategic planning including cost structures, number of students, and net price
 - Technology
 - Connected learning: advising and equity, diversity, and inclusion critical to educational experience
 - Opportunity for international study, cross-disciplinary work
 - Students should learn multiple approaches to problem solving
 - Integration of alumni relations and career center
 - Consider a set of “values” as a means to define important concepts
 - Completing the strategic planning process in March 2016 to allow adequate time to vet the final document before seeking approval from General Faculty and then the Board of Trustees
 - The September meeting will include time to talk about challenging issues; a small budget group will be formed and will report back to the Steering Committee at their September meeting.

August 2015

Meetings of Strategic Planning Budget Group

- Discussions included the following topics:
 - Studied sources of our financial resources and competing goals
 - Drivers of institutional health are personnel; enrollment; physical plant; endowment
 - Important that the quality of these resources grow over time
 - Five strategic variables: compensation; enrollment number; net tuition per student; capital expenditure; endowment payout rate

2015-16

September 2015

Meeting of Steering Committee

- Discussions included the following topics:
 - Report of the Strategic Planning Budget Group
 - Recommendations of the current draft and suggestions about moving some from one Direction to another
 - What recommendations could distinguish the College
 - Opportunities for increasing both compositional and interactional diversity

- Considerations of measures of progress, success, and leadership
- Action steps should accompany recommendations
- Technology piece not adequately focused
- Consider a gradual and long-term time-frame [for implementation]
- Important to consider strategic recommendations along with strategic budget reduction

October 2015

Meeting of Steering Committee

- Discussions included the following topics:
 - Critically important that we move forward with two parallel processes to complete our strategic plan.
 - The first, which is the charge to this group, is to determine strategic priorities that reflect Oberlin's mission and will strengthen even more the quality of the education and of the entire Oberlin experience we offer our students.
 - The second is to acknowledge that the board will evaluate and determine key factors and metrics including enrollment, net tuition, and endowment payout rate, while senior staff works on divisional budget development.
 - After the plan is approved by the Board of Trustees, groups composed of members of all constituencies will be formed and charged with implementation. These groups will be asked to develop metrics so we can measure and report on our progress.
 - On issues of budget and finance:
 - We are *not* a poor college.
 - In fact, we have demonstrable strengths in our faculty, staff, students, admissions, facilities, and endowment.
 - We do, however, need to develop a more stringent fiscal discipline.
 - We should determine—with an awareness that not all have high prices—the recommendations with the greatest strategic content.
 - We may decide to make some choices from among those on our current list and also think about those that we can phase in over time.
 - We have to balance the present and the future. And we have to balance the need reduce costs with the imperative of maintaining an excellent Oberlin experience.
 - The Board, guided by market and institutional data, our discussions, and their fiduciary duty, must set the broad parameters for financial planning.
- Carol Christ comments:
 - Thinks process is in a terrific place, and she is impressed with the improvements in the report.
 - Supported Mike and Marvin's comments about Oberlin's wealth: compared to many liberal arts colleges, Oberlin is wealthy.
 - Suggests identifying a peer group more similar to Oberlin in terms of resources, as this could allow a more useful comparative exercise.
 - Budget-cutting can't be a Plan's center—it's about choices and priorities that drive the budget, rather than vice versa.

- A strategic plan should focus on the distinctive—it doesn't contain everything you believe and do, but focuses on the few things that will make a difference.
- Noted a few things we might put greater focus on:
 - The 4+4 Plan: The need to prepare students for careers and life after college; it is market savvy and adds value to young alumni and students
 - Sustainability: This is a role in which Oberlin is a distinctive leader
 - Connected learning is important, but we need a different, less “inside baseball” term for it.
 - Renewing Oberlin's commitment to diversity—racial, ethnic, gender identity/identities, socioeconomic.
- Other comments:
 - Pay more attention to highlighting what is distinctive
 - Make language more forceful, dynamic, and appealing
 - Draft strategic plan will be posted for review by community as soon as it is reviewed by steering committee, senior staff, Board.
 - November and December GF meetings will include discussion of this draft
- Review of document:
 - Strategic plan is a place to build on a core of a liberal arts education, then moving out in innovative directions. Consider what a student will know or has done by the time the student graduates?
 - The document needs to be more student-centered rather than institutionally-centered
 - Need more language about building community on campus e.g., interactional diversity, health and wellness
 - Needs greater focus on strengthening the residential experience
 - Important to highlight environmental sustainability
 - “Stewardship” is not so much about finance, but about a broader context of institutional leadership
 - Steering committee needs to understand operating budget going forward
 - Document should be bolder, both in language and ideas e.g., “students as curators and composers of their own lives”
 - Use language that will be understandable to all readers
 - Make the document shorter

Draft Strategic Plan posted on website October 26, 2015

- Feedback: 114 written responses; in-person feedback sessions hosted by members of the steering committee for 20 groups including faculty, administrative and professional staff, alumni leadership council, committee on environmental sustainability, committee on teaching, committee on admissions and financial aid, arts and sciences EPPC, conservatory EPC/division directors, general faculty council, representatives from the Oberlin City Schools and government
- Recommendations for changes included: provide more explicit definitions of equity, diversity, and inclusion and discussion of what this means at Oberlin; support faculty to develop inclusive pedagogies, and institutionally address structural barriers that inhibit student success and create new structures that enable each person to succeed to their

fullest potential; clarify that faculty development of theme-based course clusters are for those who are interested; commit to change institutional climate to one that is inclusive; increase capacity of faculty and staff working in an inclusive environment; hire, support, and retain more black and Latino faculty; enroll and retain students from historically underrepresented, lower income, first-generation, and international groups; clarify support for and value of our international students

- Support for: Oberlin 4+4; slow rate of tuition increase; make college financially sustainable; grow endowment; use campus year round; re-commit to environmental sustainability

Outreach to community included: Meeting of President's Advisory Council with members of the Steering Committee.

November 2015

Meeting of Steering Committee

- Discussions included the following topics:
 - Communicating about financial decisions
 - Focus second direction more on fostering educational engagement
 - Strengthen recommendation about structural barriers
 - Equity and inclusion in direction 1
 - Development of course clusters—for faculty who are interested
 - Support for international students
 - Financial framework

December 2015

Meeting of Steering Committee

- Discussions included the following topics:
 - Delay in release of new draft to be sure it addresses our aspirations and commitments to inclusive excellence more directly
 - Issues of diversity that are challenging higher education—Title IX, ADA, Black Lives Matter—are a reflection of the ways higher education has already been transformed by work on diversity and inclusion, including changes in compositional diversity of the student population in the past 50 years.
 - Diversity is central to core mission of academic excellence
 - Equity, diversity, and inclusion central to achieving all other goals
 - Creating an environment in which in which people from different backgrounds and come together and learn from each other
 - Income inequality important consideration
 - New draft should reflect that we are developing a strategic plan in an environment of reduced financial resources
 - Need to consider what we can stop doing
 - Develop new draft during December; maintain schedule for completion in March 2016

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