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## A Future by Design



By John Pulley

Strategic Plan takes Oberlin to new levels of academic, musical, and artistic excellence.

Since its founding in 1833, Oberlin College has pursued excellence the way a mountaineer approaches a lofty summit: one assiduous step at a time. The journey, stretching to almost 175 years, has resulted in the consensus recognition of Oberlin as one of the premier private liberal arts colleges in the country.

Peak conditions, however, have changed. Rapid globalization, the tech revolution, and shifting markets for post-secondary education have destabilized the higher education landscape. Oberlin is well positioned to hold its ground, but staying on top is a precipitous proposition. Even the strongest of institutions must adapt to new realities.

For months now, teams of alumni, administrators, faculty, and students at Oberlin have been working to develop and implement some 150 recommendations in accordance with the strategic vision adopted by the

College in 2005. Specific actions range from increasing faculty salaries and restructuring teaching loads to trimming enrollment and strengthening the College's international presence; from promoting a greener campus to developing programs that rely on close collaboration among the College, the Conservatory, and the museum; from bolstering the sense of community on campus to raising students' rates of persistence and degree attainment.

The overarching goal is to tweak the trajectory and enhance the sparkle of a college that has long orbited in the firmament of top institutions. To that end, the College seeks to leverage its considerable assets, more aggressively market its strengths, and attract and retain the best students and professors.

The good news, officials say, is that Oberlin College is proceeding from a position of strength. The College's culture, its commitment to excellence, and its sense of mission are intact.

"Taking Oberlin to new levels of academic, musical, and artistic excellence is the center of our plan," says President Nancy S. Dye. "Within the world of American higher education, Oberlin enjoys an enviable reputation. But we need to do a better job of communicating to all of our constituencies—including prospective students and their teachers and families—that Oberlin's greatest strength is its capacity to give every one of its students an excellent education of singular quality and rigor."

A recurring motif of the plan is the concept of intentionality. The College must advance itself in precise ways that acknowledge shifts in technology, geopolitics, the higher-education marketplace and, not least of all, the financial underpinnings of the educational enterprise itself.

"It's taking a look at what Oberlin is doing and being more intentional about it," says Robert Lemle '75, chair of the Board of Trustees. "What kind of student housing do we want? What kind of pathways through the curriculum? What is a liberal arts education in the 21st century?"

To a large degree, the strategic plan and its implementation is an attempt to reconcile the lofty goals of an ambitious institution against cold, hard financial reality. "Oberlin's values have always outrun its resources," says Al MacKay, provost of the College. "Now we need to come to terms with our resources and ambitions and bring them into congruence. That's the underlying theme."

## Romancing the Brand

For much of its history, Oberlin's reputation as a progressive institution of exacting standards has served it well. Among its distinctions, the College has been a coeducational institution for more consecutive years than any college, and it is the first American institution of higher education to regularly admit African Americans. By 1900, approximately one of every three black college graduates in the country had a degree from Oberlin. In the 19th century, the College was a leader in the movement to abolish slavery. One hundred years later, it was prominent in the Civil Rights movement.

The College enjoyed something of a monopoly position for many years. If you wanted to avail yourself of a top-shelf education at a private college with a coed environment, chances are that you'd wind up in northeastern Ohio. Long before marketing gurus infiltrated higher education, Oberlin was an established "brand."

In the past 30 years or so, however, that historical advantage has disappeared. "At a certain point, everybody

figured out that what people really wanted was high quality, coed education,” says MacKay. “We’re still coming to terms with figuring out how to capitalize on our strengths and operate in an environment in which we no longer have that historical edge.”

And now, more than ever, an edge is precisely what private liberal arts colleges need. The higher-education marketplace has evolved into a hyper-competitive Darwinian landscape. In the struggle for funds, people, and prestige, competitors are increasingly swift, strong, and hungry.

“We have to be on top of our game to survive in this increasingly competitive world,” says Wendell P. Russell Jr. ’71, president of Oberlin’s Alumni Association. “Unless you continue to improve, you will be left behind. The species that are successful are constantly adapting to their environment.”

During much of the 1990s, the severity of this harsh new world was temporarily masked by a robust stock market that created new wealth, bolstered donations to institutions, and generated rapid endowment growth. The inevitable market crash was a wake-up call for all of higher education.

“After the stock market bubble burst, it became very clear that we needed a plan that focused on Oberlin’s future, both strategically and financially,” says Lemle. “Oberlin has such a unique combination of strengths. We need to make sure that students today and in the future will benefit from them.”

The College created strategic planning and financial task forces that tapped the expertise of trustees, faculty members, administrators, students, and members of the Alumni Association. The goal was to determine the important strategic questions facing the College and find answers. What are the institution’s primary goals and directions? What are the strategies for achieving them? The broad objectives that emerged were to enhance the value of an Oberlin education, broaden the public’s appreciation of that value, and achieve financial sustainability.

“The fundamental ethos behind the plan is to begin a culture at Oberlin of reflecting on the institution we seek to be in the future,” says David Stull ’89, dean of the Conservatory of Music. “We have to remain focused on who we want to be and not just on who we are or who we have been. The strategic plan requires us to shift our focus from the past to the future. You can no longer sit back and let the world come to you.”

## **From Plan to Practice**

The strategic plan, in its various manifestations, seeks to strengthen relations with the College’s three main constituent groups: students, faculty, and alumni. To that end, half a dozen ad hoc committees charged with implementing the plan have worked to reform the curriculum and student-advising programs; support and build the faculty; upgrade public and social spaces on campus; build upon Oberlin’s international programs; and enhance environmental sustainability and the College’s commitment to a green campus.

Among the steps taken to focus students’ educational experience, the College has revamped orientation for new students, taken steps to strengthen first- and second-year advising, and begun to promote curricular pathways that build cumulatively over four years, culminating in some kind of “senior experience” involving a sustained intellectual effort.

The College hopes that these and other measures will improve overall graduation rates, which lag those of some peer institutions. Emphasizing the importance of that goal, Dye, in a May 2006 speech, acknowledged

that “while Oberlin has worked hard and effectively in recent years at improving its retention of students to graduation, we must continue to see both our four-year and six-year graduation rates rise.”

Consideration has been given, as well, to rethinking the entire credit system and graduation requirements, and to bringing more coherence to a “daunting variety of options and requirements.”

A major thrust of curricular reform is to promote more collaboration among three world-class assets: the College of Arts and Sciences, whose graduates complete PhD programs in unmatched numbers; the Conservatory of Music, whose alumni populate top orchestras and opera houses worldwide, and the Allen Memorial Art Museum, which houses one of the finest college or university collections in the country.

“We really believe that inspiration through art is part of the [Oberlin] experience,” Stull says. “No other large college has 500 concerts a year.”

Beginning next fall, an interdisciplinary course and faculty seminar on modernism will incorporate the musical, artistic, and academic resources of the three divisions, a strategy that the deans have termed the “blockbuster approach.”

“I think it will help us in the marketplace,” says MacKay, who is hopeful that such innovations will set the College on a path to regaining its “commanding, competitive position.”

To help students think more seriously about career paths, the College is moving to expand opportunities for internships and raise funds to help students with related living expenses. “Fifty percent of Oberlin students now have an internship experience,” says Dye. “Many more would like to, but they don’t have the resources to accept an unpaid internship, which many of them are.”

To stay competitive in the recruitment of top faculty members, the College is looking at reducing or restructuring workloads, which are perceived as heavier than at peer institutions; providing for more frequent sabbaticals; and increasing salaries and benefits.

MacKay says the plan envisions a shift toward “a new pedagogical focus,” in which teaching occurs in smaller, more intimate environments.

Other proposals for strengthening the professoriat include establishing a center for faculty development and developing “family friendly” recruitment strategies that address housing and schools.

## **The Global Community**

A cluster of initiatives for implementing the strategic plan speaks to the issue of building campus community. In terms of physical plant, those plans call for constructing or overhauling campus buildings in a way that fosters interactions among students and faculty. An architect has been retained to create a residential master plan that would appeal to prospective applicants and reduce the number of students living off campus. Funds are being raised for an Academic Commons—complete with musical programs, academic lectures, and a café—in Mudd Library. A number of other plans under review seek to provide more social and community space throughout campus.

Civic engagement—a longtime hallmark of the Oberlin experience—will get an even bigger boost, as talks begin about creating a certificate program in civic engagement for students of all majors. Dye says the move

would bring greater cohesiveness and academic grounding to students' engagement. Another town-gown initiative with strong curricular roots launches this summer: a 12-month, graduate teacher education program that places up to 12 student teachers in the Oberlin public schools for a full year.

Students also will be encouraged to tap into their entrepreneurial spirit, thanks to a \$1.1 million grant from the Burton D. Morgan and Ewing Marion Kauffman foundations. The idea is to interweave students' interests —be they in music, art, or economics— and to move project ideas from theory to implementation.

In terms of marketing, the College has begun a number of initiatives intended to attract a broader base of prospective students. "For the first time, Oberlin has allocated money to conduct market research," says Vice President for College Relations Al Moran. "We're competing with the best schools in the country for the best students. Knowing how that audience makes decisions about college selection is crucial."

To create buzz about Oberlin, the College has embarked on a "Fearless" marketing campaign, which seeks to more clearly define Oberlin and differentiate it from other schools. Also important is positioning the institution's counterculture image in favorable terms. "In the Internet sound-byte age, we have to better manage our image and not be defined by others," Russell says.

Working with Edwards and Company, a Boston communications firm with a higher education niche, Oberlin has redesigned the viewbook it sends to recruit high school students. An overhaul of the College's web site is also in the works, as are other, more targeted communications pieces.

In recognition of globalization and the importance of providing students a broader worldview, the strategic plan seeks to build on Oberlin's international offerings and enhance its reputation as a global college. A new campus facility devoted to international programming is up and running, and a Global Scholars program is in the works. New student exchange programs are under development, and the admissions office has adopted a five-year plan to expand international recruitment. In addition, the College is exploring the possibility of adding more international programs in places like South Africa, India, and China, which a year ago received the Oberlin Orchestra for a five-city, nine-concert tour.

"Who better than Oberlin to capitalize on the Asia connection than a school that has been in Asia for more than 100 years?" asks Russell.

At home, the strategic plan calls on Oberlin to recommit itself to environmental sustainability. Doing so honors the College's culture and its history of progressive activism, reinforces the "Fearless" marketing campaign, and serves to raise Oberlin's stature among prospective students. In November, the College became a charter member of the American College and University Presidents Climate Commitment. "Addressing climate change in our curriculum and in our campus operations is an urgent and integral part of our mission as educators and in our social obligation to society," says Dye.

The Conservatory is looking at a slew of initiatives as well, among them increasing the number of "flagship performances" abroad and in renowned venues. Carnegie Hall, for example, welcomed the Oberlin Orchestra in January, where they played to a near-capacity crowd. Other initiatives include raising additional funds for a new jazz facility, reshaping the music education curriculum, adding more cross-divisional courses, launching a Community Music School, and creating a record label for contemporary music.

"We are looking to deliver consistent messages about Oberlin across various means of communication," says Lemle of the coordinated outreach envisioned by the strategic plan. "We were able to start from a position of

strength, to build on the accomplishments of Nancy Dye's presidency, and to move forward from there."

## Balancing the Books and the Texts

The strategic plan has not been without controversy or resistance. Steps being taken to build the College's financial position have created the most heartburn.

If nothing is done, the College's business model will be unsustainable over the long haul, its leaders say. A prominent challenge is the institution's generous financial support of students, primarily through the practice of tuition discounting. The comprehensive fee for a year at Oberlin runs to \$45,000, but only about one of every three students pays the full sticker price. The rest pay a fraction of the total cost, and many are given a deep discount.

The upshot? Unlike many of its top-tier competitors, the distribution curve of Oberlin's enrollment is a bell curve representing the larger population. But the cost of socioeconomic diversity is high. Millions of dollars that might otherwise fund day-to-day operations are dedicated instead to financial aid.

To make up the difference, the College has been spending its endowment income at a higher-than-desired level, which, unchecked, can limit investment growth. And while Oberlin's \$695 million endowment ranked it 89th among all 765 institutions of higher education surveyed by the National Association of College and University Business Officers last year, it is still smaller than the endowments of competitor schools. (Among the country's wealthiest liberal arts colleges, Oberlin ranks 13th.)

At the same time, operational costs have risen dramatically. Health care, new technology, and capital improvements are just a few of the areas that are putting pressure on the College's budget. Obvious belt-tightening and cost-cutting measures have already been taken.

"We clearly need to improve all of our revenue streams over a five-year period," Lemle says.

To put the institution on a more solid financial footing, the College seeks to reduce undergraduate enrollment to 2,720 students by 2010, a net reduction of 163 seats, and to eliminate by attrition 12 faculty positions, five from the Conservatory and seven from the College. Those moves would maintain the 12:1 student-faculty ratio while increasing the College's endowment per student, a factor in the national rankings published by *U.S. News & World Report*. Enrolling fewer students will also ease pressure to expand facilities and allow the College to undertake capital improvements at a more sustainable pace.

The plan calls for lowering the annual endowment payout rate over five years and to gradually decrease the tuition discount rate, while continuing to enroll a diverse group of students, which will continue to be a costly pursuit.

"If we want more students of color or students from lower economic brackets, that costs more money," Russell says.

Underlying the strategic plan is a paradox: Oberlin is both a luxury good and a public good. That consumers value the institution and will pay tuition and fees at the upper end of the higher education cost spectrum make it a luxury good. That the institution and its constituents value diversity and social justice and insist on opening the College's doors to qualified students, regardless of their ability to pay, make it a public good.

Reconciling those competing interests is a key challenge of the strategic plan.

The challenge, then, is to embrace business principles while also staying true to the College's core values. So, can a top-tier liberal arts college shore up its books and maintain a focus on the books? That's the bottom line.

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