

ONE OBERLIN

The Academic & Administrative Program Review [AAPR] Final Report

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THE AAPR'S HISTORY, CHARGE, AND PROCESS

I. Introduction

In the spring of 2018, Oberlin College launched an extraordinary project of institutional self-examination and strategic reimagining, designed to build a new level of educational and operational excellence for Oberlin's third century while overcoming significant challenges that would otherwise threaten the institution's long-term financial health. As the name of the Academic and Administrative Program Review suggests, this is an ambitious effort that touches almost every part of the institution. With the support of President Ambar and the Board of Trustees, 31 members of Oberlin's faculty, staff, students, alumni, and trustees created and conducted a distinctive and fact-based process for assessing the institution's needs and advancing a creative set of interrelated ideas. The purpose of this exercise is to help Oberlin fulfill its mission in a new way, translating its core values and distinctive strengths in a way that is most relevant and sustainable for future generations while laying a foundation for even greater creative evolution in the future.¹

The AAPR stands out from other reviews and strategic planning efforts around the nation, as well as previous efforts at Oberlin, by addressing difficult tradeoffs head-on, with a clear focus on the institution's long-term best interests. The review is also unusual for the amount of information committee members collected and considered in their work and the openness with which committee members have shared that data with the Oberlin community. That openness carries some risk — information can be misused, and statistics taken out of context could shed an unfavorable light on Oberlin. But the AAPR Steering Committee, with the full support of President Ambar, believes that the value of transparency and a deeper understanding of the issues at stake across the Oberlin community outweigh those short-term risks.

As its work developed, the AAPR Steering Committee adopted as its maxim the phrase "One Oberlin." One Oberlin captures the spirit with which committee members and their colleagues across campus have undertaken this task — unity and goodwill that has grown from their

¹ This report has its roots in the AAPR Summary of Work to Date, posted online on March 29, 2019. Much of the background and context for AAPR are taken directly from that report. Most of the recommendations in this report reflect ideas discussed in the Summary of Work to Date, as shaped, amended or added to following six weeks of campus consultation. The most substantive changes since that time are noted throughout this report. Details of the campus consultation can be found in the appendix.

shared dedication to Oberlin and their willingness to put the institution's future well-being before any self-interests, parochial habits, or short-term concerns.² One Oberlin also captures a culture that many of the AAPR recommendations are designed to foster, one marked by new forms of collaboration among different elements of the Oberlin community, with structures that capitalize on the collective power of Oberlin's strengths, and programs that mutually support one another and the larger goals of the institution.

On April 25, 2019, the AAPR Steering Committee inaugurated a phase of final comment, capping off an intense period of consultation with Oberlin audiences. With the approval of the AAPR Steering Committee, its Final Report will be submitted to President Ambar at the end of the spring semester. The AAPR Steering Committee will also seek the endorsement of the General Faculty for its Final Report on May 15, 2019.

II. The Challenge

Oberlin relies on student tuition and fees for 83% of its operating revenues, while 63% of its operating expenses go toward employee costs. At Oberlin, as across most of higher education, employee costs have been rising faster than student revenues. As a result, Oberlin has for many years balanced its budget with extraordinary draws from its endowment, essentially masking the structural deficits in its operating budgets and eating away at resources available for the future. Annual extraordinary draws on the endowment have occurred for more than two decades, in some years pushing the annual draw as high as 8% of the endowment's value. The trustees and president have determined that this use of the endowment is not sustainable and threatens the health and long-term existence of the institution.

Without those unsustainable draws from the endowment, the operating deficits would quickly mount. Even if Oberlin were to enroll the maximum number of students currently possible, with annual tuition increases of 3%, the budget would not balance. Looking at it from a different angle: without significant action beginning in FY2018, the cumulative deficit would have grown by FY2024 to a total of \$52 million — equivalent to roughly one-third of Oberlin's annual operating expenses. Over 10 years, that would have grown to a devastating \$162 million in cumulative deficit. Adding urgency to the challenge, as the size of the cumulative deficit grows, the number of options to address the problem would dwindle, and the kinds of measures that would bring short-term budget relief would increasingly work against the long-term excellence of an Oberlin education.

While Oberlin's situation has unique elements, the pressures evident here are part of a larger trend affecting higher education institutions across the nation. With fewer sources of revenue and increasing demographic challenges, small, private institutions have been hit especially hard in recent years. The number of colleges that have been forced to close, merge, or make drastic cuts grows every month — including institutions that seemed to be financially stable even a few years ago. Some experts have predicted that as many as half of American colleges and

²See p.4 <http://www2.oberlin.edu/alummag/winter2018/winter2018.pdf>

universities will close in the next 15 years.³ Whatever the accuracy of such predictions, it is true that many financially challenged colleges have been unable to take action before the choices became destructive or undermining of mission.

The good news is that Oberlin has time to shape its own future — but only if we take decisive action immediately.

President Ambar and Oberlin's senior leadership have already begun plans to implement a multiyear strategy of cost-cutting to help address the structural deficits, outside and apart from the work of AAPR. Staff and compensation reductions began last year and are expected to continue. They include salary freezes for faculty and administrative and professional staff (A&PS) over the last two years and reductions in benefits paid by the institution for those categories of employees — two steps that have amounted to \$5.5 million in baseline savings for Oberlin. The equivalent of 25 full-time faculty positions will be eliminated by FY2024, both by attrition — forgoing replacement of some tenured faculty who leave or retire — and by the reduction of visiting faculty lines. More than 50 staff FTE will be eliminated, potentially impacting up to 40 active employees. These cost reductions are expected to amount to baseline reductions of roughly 9% across the institution by FY2024, creating a net baseline savings of \$11.1 million going forward. Yet these cost-cutting measures alone will not eliminate annual deficits. Even with the \$11.1 million of savings generated by these divisional cuts, the cumulative deficit would still be \$11.7 million by FY2024 or \$16 million by FY 2028. While this is far less than the \$52 million deficit incurred with no action, it is still unsustainable and would continue to grow with each passing year. Approximately an additional \$6.2 million of baseline budget relief will be needed by FY 2024, through some combination of increased revenues and reduced costs, to ensure sustained, balanced operating budgets for the foreseeable future.

The critical work in short-term cost control undertaken outside of the AAPR process, while not a complete solution, has created the immediate financial relief needed to allow a new approach to the remaining challenges—a more broad-based and creatively ambitious project for seeking the path forward. In this context, the Board of Trustees approved the AAPR as a means of ensuring Oberlin's continuing excellence and achieving financial sustainability through a combination of strategic contractions in programs and expenses, together with mission-focused programmatic investments that will lead to growth in revenues and enhanced educational quality.

III. Charge and Commitments

On March 9, 2018, the Board of Trustees approved the creation of the AAPR Steering Committee, directing that this “cross-functional team will report to the President its

³ See, for example: <https://www.insidehighered.com/digital-learning/article/2017/04/28/clay-christensen-sticks-predictions-massive-college-closures> <https://hechingerreport.org/college-students-predicted-to-fall-by-more-than-15-after-the-year-2025/>

recommendation of the optimal academic and non-academic program mix for the College.”⁴ In response, President Ambar, in consultation with the General Faculty Council and with the endorsement of the General Faculty, appointed the faculty, staff, students, trustees, and alumni who now make up the 31-person AAPR Steering Committee, which began meeting in June 2018. College and Conservatory faculty make up almost half the committee.

Last fall, at the request of the Steering Committee, the Board provided additional, practical guidance about its expectations for securing Oberlin’s financial viability and sustainability. In particular the Board expects AAPR to:

1. Make recommendations that will reduce the annual draw on the endowment and provide for 15 consecutive years of balanced budgets;
2. Examine the financial interdependence of the Arts & Sciences and Conservatory, including comparative expense levels, discount rates, net tuition revenue, and size of the divisions’ respective staffs and student populations;
3. Explore alternative models for institutional services such as dining, housing, facilities operations, and maintenance and administrative support;
4. Examine the viability of our current labor cost model for all employees;
5. Evaluate the viability of current and alternative student access and financial aid strategies;
6. Leverage Oberlin’s strengths as well as existing and newly identified collaborations as a strategy to diversify revenue streams and enhance excellence; and
7. Identify areas for programmatic investments and contraction.

In September 2018, the Steering Committee made its own set of commitments to the Oberlin community in a campus email distributed to all faculty, staff, students, and alumni. In particular, the Steering Committee promised that the AAPR process would:

1. Be authentic to Oberlin’s history, culture, and excellence;
2. Honor faculty oversight of our curriculum and faculty appointments;
3. Be a broadly inclusive process that taps Oberlin’s wisdom, creativity, and experience;
4. Develop thorough and transparent recommendations that respect governance processes; and
5. Find long-term solutions that help Oberlin thrive educationally and financially.⁵

Those commitments have guided the Steering Committee as it developed its own, distinctive path for examination and recommendation, true to Oberlin’s values and culture, and focused on Oberlin’s mission.

⁴ <https://www.oberlin.edu/about-oberlin/leadership-and-administration/aapr/announcements/announcement-boards-decision-create>

⁵ <https://www.oberlin.edu/about-oberlin/leadership-and-administration/aapr/announcements/update-academic-and-administrative>

The Steering Committee organized itself into working groups focused on mission-centeredness, quality, financial viability, potential student interest, administrative review, and survey design. Over the summer and fall of 2018, the working groups collected information from campus-wide surveys; detailed program reports; interviews and focus groups; admissions and student interest data from the outside enrollment consultancy Human Capital Research Corp.; reputation and perception data gathered by the branding consultancy Generations; quality, mission, potential student interest, and financial data gathered by the consultancy Stevens Strategy, including the Revenue Center Model it has developed to compare revenues and expenses among different programs; data from peer institutions; and more. Steering Committee members held 31 outreach meetings with different organizations that are part of the Oberlin community, including faculty governance bodies, staff representatives, students, alumni, parents, coaches, and others. These sessions provided further opportunities for the Committee to listen, gather ideas, and supplement statistical data with the lived experience of the community.

As the working groups analyzed these diverse sources, they began to identify particular findings that illuminated both significant challenges facing Oberlin as well as promising opportunities. These significant observations often required further examination or additional information to ensure that the data was accurate and the interpretation was sound. In January 2019, the Steering Committee reviewed these significant observations and used them as the basis for generating initial areas of recommendation. The Committee realigned its working groups around those areas and began developing the ideas for action outlined in its recommendations, often turning to experts and key stakeholders in those fields to engage and incorporate their thinking.

The Steering Committee presented that work-in-progress to the larger Oberlin community through a series of three campus presentations on March 13 and March 14 for faculty, staff, and students, and an alumni webinar on March 21. Together more than 1,000 people took part in those broadly focused presentations, which presented the full body of interrelated AAPR ideas, provided context, and demonstrated how recommendations could work together to build excellence and ensure financial sustainability. That outreach continued, even as the Committee began a series of more narrowly focused meetings with groups that have a specific governance responsibility or interest in a particular area of recommendation. This multi-layered consultation has allowed the Steering Committee to continue refining its ideas and develop them into specific recommendations that benefit from a broad base of experience and perspectives.

IV. Safeguarding Core Priorities

While the recommendations touch almost every part of Oberlin's activities and operations, it is important to acknowledge a few key areas the committee considered carefully but will not recommend changing at this time. These go to the heart of Oberlin's mission and values. They are aspects of Oberlin that the Steering Committee feels are so important to our mission that they should be preserved and even enhanced.

First, though it is a large and growing part of Oberlin's budget, the Steering Committee does not recommend any reduction in student financial aid. Financial aid is simply too important a tool for providing access to an Oberlin education for students of all backgrounds, ethnicities, identities, and experiences. That diversity is an historic value at Oberlin and a foundation for excellence inside and outside the classroom.

The Steering Committee's recommendations also leave intact the fundamental and distinctive elements that make up Oberlin and an Oberlin education, including the liberal arts college, the conservatory of music, the art museum, and a comprehensive residential experience.

Finally, after examination of the quality of Oberlin's academic programs individually and their cumulative importance to an excellent liberal arts education, the Steering Committee favors both preserving the breadth and depth of Oberlin's current educational offerings and maintaining the capacity of our faculty to be scholar-teachers. While recognizing that the curriculum will continue to evolve through the normal processes of faculty governance, the recommendations do not contemplate the elimination of departments or majors or the termination of faculty in continuing, tenure-track positions. We also do not recommend reduction of institutional support for faculty research or of sabbatical leave or increasing teaching loads, although all of these options were considered.

The Steering Committee believes Oberlin can achieve financial sustainability while preserving these core priorities by making key trade-offs outlined in its recommendations. But the Committee has also cautioned that if Oberlin refuses to make the necessary choices now, it will become increasingly difficult to safeguard these priorities in the future.

V. Overarching Goals

Oberlin is not in immediate jeopardy. But like many small colleges, it is facing an existential challenge. As an institution, Oberlin needs to find new ways of achieving its core educational mission of inquiry, creativity, and innovation with programs and opportunities that capture the imaginations and sense of relevance of our 21st-century students. Oberlin needs to continue to be a beacon for access and opportunity. Oberlin needs to continue living out its commitment to a more just society in a way that meets the needs of current and future generations of young people who are encountering a world that is changing rapidly. Finally, Oberlin must prepare to evolve even more quickly in the years to come, bringing its values and distinct excellence into a future we can only begin to envision.

The Steering Committee organized its approach to that challenge around four high-level goals, all of which must be achieved in order to live up to Oberlin's mission and thrive:

1. Oberlin must take better advantage of its unique combination of a liberal arts college and conservatory of music, fostering a new suite of interdisciplinary opportunities through a new level of collaboration.

2. Oberlin must develop academic structures that are creative and nimble enough to pioneer a new, more relevant curriculum and educational experience for our 21st-century students.
3. Oberlin must be more focused and intentional about helping its students connect their classic liberal arts and musical educations with meaningful and thriving careers.
4. Oberlin must address employee costs in a way that takes into account both internal and external forces that affect its ability to hire and retain talented faculty and staff, remaining competitive enough to foster excellence throughout its operations, while controlling expenses in order to ensure a sustainable future.

Together these goals point toward an emerging vision of Oberlin that will offer new opportunities to prospective and current students. This new Oberlin will redesign some of its organization and infrastructure to ensure that we are prepared to support both 21st-century needs and core values such as high levels of academic and artistic achievement; diversity and inclusion among our students, faculty, and staff; thriving students; environmental sustainability; and respect for members of the Oberlin community.

The connection between excellence and financial sustainability is practical and concrete. No institution can cut its way to excellence, so Oberlin must find more revenue consistent with its mission, even as it controls costs. Some of the most important factors for Oberlin's long-term financial health will be expanding the pool of prospective students, matriculating the best of those applicants, and ensuring that they remain at Oberlin to complete their undergraduate educations. The way to ensure each of those steps is through outstanding and relevant educational offerings and an outstanding and inclusive student experience. The real and perceived value of an Oberlin education must increase.

Supporting Oberlin's excellence and investing in new opportunities will require trade-offs that will be difficult. It will involve position eliminations that will displace some members of the Oberlin community, while other employees will be asked to do more or change the way they fulfill their roles. The Steering Committee takes seriously the disruption that large-scale change can bring to individuals and does not offer such ideas lightly. The Committee also recognizes the greater pain and disruption that would occur, both to individuals and the institution, if Oberlin does not make substantive and tough choices now. The stakes go beyond our beloved institution — the world needs Oberlin, and it needs Oberlin's graduates, whose thinking, actions, and values, powered by a distinctive Oberlin education, change the world for the better. Each recommendation outlined here is aimed at that mission.

Recommendations for Academic Reorganization

VI: New Approach to College and Conservatory

ABSTRACT

Challenged by the Board of Trustees to examine the interdependence of Oberlin's Conservatory and College of Arts & Sciences (including their financial interdependence and the relative sizes of their student bodies), the AAPR Steering Committee has developed a suite of ideas that will provide new educational opportunities for students in both the Conservatory and the Arts & Sciences; enhance excellence within the Conservatory; and generate new revenue.⁶

SIGNIFICANT OBSERVATIONS

Potential student survey data, departmental surveys, and conversations with faculty all pointed to the idea that there is untapped potential in Oberlin's distinctive joining of a premier conservatory of music and an outstanding liberal arts college. Specifically, potential Arts & Sciences students indicated a strong interest in musical education, yet almost 80% of students admitted to Arts & Sciences who listed music performance as a field of primary or secondary interest enrolled somewhere else. Potential Conservatory students indicated an overwhelming interest in career preparation, an area where greater collaboration with the Arts & Sciences could yield opportunities.

Financially, both outside analysis and internal budgeting materials showed a disparity in the costs of providing an education in the College of Arts & Sciences and an education in the Conservatory of Music. One important factor in that disparity is tuition revenue per student. Because of the differences in their competitive admissions markets, and the amount of financial aid Oberlin offers to ensure enrollment of a strong and diverse class, Arts & Sciences students pay an average of \$10,000 a year more in net tuition than Conservatory students. Therefore, the AAPR steering committee recommends reducing the size of the Conservatory by 100 students over four years while simultaneously increasing the Arts & Sciences by 100 students over this same time period will generate approximately \$1 million in new revenues per year beginning in year four.⁷

⁶ Through the process of campus consultation, this proposal was amended to clarify the process for introducing, deliberating upon, and implementing changes in curriculum, ensuring the proper roles for leadership and for governance bodies. Greater detail about the curricular and co-curricular opportunities was also added to help provide a foundation for future deliberations.

⁷ Sources and additional data for key observations is available in Section XVII of this report.

PURPOSE AND RATIONALE

The benefits of this shift are more profound than simple budgetary relief: there are opportunities to enhance academic quality and take better advantage of Oberlin's unique differentiator as a provider of outstanding liberal arts and musical educations.

First, this shift will provide an opportunity to strengthen the connections between those two educations, their faculties, and their students. Specifically, the Conservatory will be able to use new available teaching capacity to offer greater and more meaningful musical experiences to Arts & Sciences students, who will have increased access to classes, lessons, coaching, ensembles, and other experiences. The Arts & Sciences and Conservatory faculties could thereby collaborate to develop an array of curricular pathways in areas such as Arts and Creative Technologies, Interdisciplinary Performance, Arts Administration, and Popular Forms and Practices, to name but a few possibilities. Developing and marketing these curricular possibilities should help with Arts & Sciences student yield, increase the College's value proposition, and spotlight Oberlin's most prized and distinctive feature.

Second, a smaller student body will allow Conservatory faculty members to engage their students in new modes of teaching or in modes of teaching for which they might not otherwise have opportunity or capacity to explore. Examples include more intensive small- and mid-sized ensemble coaching (such as the recently revived Advanced String Quartet Seminar), more intensive sectionals coaching, and seminar- or topics-based teaching. By helping enable interested faculty members to explore other models in addition to private lessons and studio classes, the Conservatory will create an exciting array of meaningful artistic and intellectual opportunities for its students. This will focus the Conservatory's mission to provide an extraordinary and relevant education that arms students with the academic and artistic fluencies required to thrive today and in the future, particularly in light of ongoing transformations in the field of professional music-making.

Simply put, these changes will enable the Conservatory to offer an undergraduate music education that is second to none for years to come.

KEY ELEMENTS

To achieve these outcomes, we recommend the following steps:

- Over the course of four years (likely 2020-23), contract the Conservatory by 100 students (twenty-five students per year) and enroll 100 more students in the Arts & Sciences over the same period, preserving Oberlin's overall size;
- Charge the Conservatory leadership, in consultation with EPC, to appoint a curricular committee in Fall 2019 that will consult with EPC and the Conservatory Faculty Council and work with every department in the Conservatory to review and revise the Conservatory curriculum, with the goals of (1) substantially completing a curricular

overhaul by the end of 2019-20, (2) securing final approvals and announcing the new curriculum in 2020-21, and (3) having the new curriculum go live in the 2021-22 academic year. Included in the work of this committee:

- Exploring ways to redesign the curriculum so that Conservatory students will have more individualized pathways and more opportunities for specialization;
 - Rethinking the large-ensembles program to maximize learning for a smaller student body, beginning with a revision in 2019-20, final approvals and release in 2020-21, and launch in 2021-22;
 - Maximizing newly available teaching capacity among studio teachers;
 - Maximizing teaching capacity among the academic faculty, who will now have increased opportunity to teach first-year seminars and participate in alternate modes of teaching and scholarship (e.g., partnering with applied faculty to offer courses combining performance and scholarship or participating in interdivisional concentrations);
 - Redoubling the focus on undergraduate education, with possible elimination or reform of non- or low-revenue-generating graduate programs;
 - Planning for future regularly-scheduled reviews of curriculum.
- Charge Conservatory leadership, in consultation with College leadership and Conservatory and College governing bodies, to appoint a committee in Fall 2019 to study and design new connections between the College and Conservatory and new educational opportunities for students in both divisions. Included in the work of this committee:
 - Through broad faculty and staff consultation, create thematic, interdivisional concentrations that will be available to students in both the College and the Conservatory, with programming, instruction, and mentoring from both faculties. Possible concentrations might include Arts and Creative Technologies, Music and Science, Interdisciplinary Performance, Popular Forms and Practices, Critical Studies/Discourse, and Arts Administration, among others;
 - Create a music minor for Arts & Sciences students, including expanded opportunities for private lessons, classroom study, and performing;
 - Support the implementation and assessment of the College's BA in Music, newly revised by the Musical Studies Committee.
 - Charge the Conservatory Faculty Council with exploring alternate admissions models and/or updated admissions procedures for the Conservatory; investigate committee-based decision-making and more flexible ideal-enrollment distributions to better attain revenue and quality targets; explore increased collaboration with College Admissions regarding recruitment of Arts & Sciences students with strong interest in music. This will involve a complete review of admissions practices in 2019-20, with the goal of implementing revised procedures in 2020-21.

To strengthen the Conservatory brand and its ability to compete in the marketplace, we also recommend that Oberlin:

- Review auxiliary and summer programs with regard to their financial viability and mission-centeredness, and consider reforming or eliminating programs requiring substantial subsidization;
- Explore alternate labor models, such as an expansion of post-doctoral Teaching Fellows programs, perhaps in partnership with R1-institutions;
- Create post-graduate study/experiences that would add value and generate revenue (similar to the Piano Technology Program). Initial ideas include instrument repair and post-graduate certificate programs involving our organ collection. We have numerous opportunities to monetize existing resources outside of conventional four- or five-year degree programs.

Even providing for the reallocation of teaching time and resources described above, the Conservatory will also be able to make modest reductions in its staff and faculty through attrition, thereby helping realize divisional budget-reduction targets for FY 2020-2024, which were set independent of AAPR. By strengthening programs in areas of demonstrated student interest, these ideas will continue to broaden Oberlin's appeal to potential students and build revenue. And by increasing collaboration between Oberlin's two academic cores, these ideas will help shape a culture of One Oberlin.

EXPECTED OUTCOMES

Financial impacts: Reducing the size of the Conservatory student body while simultaneously increasing the size of the student body in the College will increase Oberlin's capacity to realize tuition revenue. Considered in isolation, this student shift might seem counterproductive: examined alone, a smaller Conservatory will generate less tuition revenue, thereby potentially exacerbating the Conservatory's operating deficit. The logic for this recommendation derives not from a divisional perspective, but an institutional one: changing the sizes of the two divisions' student bodies (+100 in the College, -100 in the Conservatory) will increase the capacity of the institution as a whole to realize approximately \$1M annually in additional net tuition revenue.

In addition to helping the institution realize additional revenue, a contraction in the size of the Conservatory will help facilitate a reduction in expenses. Reducing the size of the Conservatory student body will support the Conservatory as it achieves its five-year budget-reduction target, assigned as part of the institution-wide budget-reduction plan for FY20-24. This five-year budget-reduction plan is separate from AAPR. However, the reduction in the size of the Conservatory student body will allow the Conservatory to achieve these divisional budget reductions without compromising the quality and fundamental outlines of the teaching and learning experience that it offers its students.

By responding to demonstrated student interest with innovative programs, curricular changes, and increased collaboration between the divisions, we further hope to broaden Oberlin's appeal to prospective students, thereby boosting revenue. We hope, too, that these efforts will

help improve student retention. Furthermore, eliminating or substantially reforming auxiliary and summer programs requiring significant subsidization will free up resources for new initiatives, while the creation of revenue-generating post-graduate programs and other educational experiences beyond conventional four- and five-year degree programs would likewise have a positive financial impact.

One potential negative impact bears note: as the size of the Conservatory contracts, and as the size of each year's incoming class becomes smaller, the margin for error with regard to admissions targets shrinks. These changes will likely create upward pressure on the discount rate. This upward pressure will be exacerbated by external forces—namely, the deep tuition discounting that has become increasingly pervasive among competitive programs in music. We hope to mitigate these pressures by maximizing flexibility and tolerance in our admissions targets. Changing our large-ensembles program (e.g., moving to a single-pool system) is one way to potentially increase flexibility in admissions. To reiterate the importance of thinking institutionally, our belief is that the new opportunities made possible by the proposals herein—even if they increase pressure on Conservatory discount rates—will improve the overall generation of revenue for Oberlin, as we maximize the impact of new interdivisional offerings to attract more students to the College.

SUPPORT FOR OTHER AAPR RECOMMENDATIONS

The initiatives herein would contribute to, and benefit from, several other AAPR recommendations. New interdivisional connections as well as better support structures for existing interdivisional connections (notably our many double-degree students) are likely to benefit from restructuring in the Arts & Sciences. New curricular pathways in the Conservatory will benefit from a more robust set of Winter Term options, the presence of a Business concentration, and enhanced curricular and co-curricular career preparation. Increased collaborative connections between Conservatory and College and improved facilities scheduling should positively impact an efficient use of space and resources as we develop new programs.

STEPS TOWARD IMPLEMENTATION AND TIMELINE

Conservatory size

- Over the course of four years, contract the Conservatory by 100 students (25 students per year). Initiate contraction with 2020 admissions cycle (i.e., for the class that will matriculate in Fall 2020), and complete with 2023 admissions cycle (i.e., for the class matriculating in Fall 2023).

Conservatory curriculum & large-ensembles program

2019-20

- Substantial review and initial revision of Conservatory curriculum, and substantial revision of large-ensembles program. Goal of completing majority of revision, in its broad outlines, by end of 2019-20 academic year. (Curriculum Committee)

2020-21

- Secure final approvals, finalize catalog entry, and announce/market new curriculum and large-ensembles program

2021-22

- New Conservatory curriculum and large-ensembles program go into effect

Conservatory-College Connections (Con/College Committee)

2019-20

- Substantially develop new connections between the College and Conservatory and new educational opportunities for students in both divisions;
- Examine the most effective structures for providing ongoing design, support, and assessment of these programs;
- Consult and seek endorsement from EPC and EPPC, consult with Conservatory and College Faculty Councils as necessary; seek votes for approval from Conservatory and College faculties (if possible, finalize initial catalog copy in time for 20-21 academic year)
- Engage with Admissions, Communications, Alumni, Career Center, and other related offices

2020-21

- Series of new Conservatory/College initiatives go live (e.g., reciprocal minors; new interdivisional concentrations; etc.)
- Assessment plans refined and implemented
- Consult and seek endorsement from EPC and EPPC, consult with Conservatory and College Faculty Councils as necessary; seek votes for approval from Conservatory and College faculties (remaining programs and catalog copy, in time for 21-22 academic year)
- Continue to engage with Admissions, Communications, Alumni, Career Center, and other related offices

2021-22

- Analyze initial assessments and refine ongoing assessment procedures
- Strategize long-term success and support for all programs

Admissions

- Review of admissions practices (Conservatory Faculty Council) in 2019-20, with the goal of implementing revised procedures in 2020-21.

Graduate programs

- Review graduate programs, with the aim of making recommendations in time for the 2020 admissions cycle.

Other

- Charge the Conservatory Faculty Council with reviewing, from a financial perspective, auxiliary and summer programs. Conduct review in 2019-20.
- Charge the Conservatory Faculty Council with further exploration of methods to increase productivity and further opportunities to monetize existing resources outside of conventional four- or five-year degree programs in 2019-20.

VII. Restructuring Arts & Sciences Organization and Administration

ABSTRACT

The AAPR Steering Committee recommends a mission-centered administrative reorganization of the College of Arts & Sciences to enhance: inter- and multi-disciplinary collaboration for both teaching and scholarship, while respecting the strengths of intensive disciplinary education; the college's ability to adapt to the ever-changing academic environment and to capitalize on new opportunities; overall quality and consistency of academic administration; and administrative efficiencies and communication. To this end, the Steering Committee provides a proposed model that envisions the creation of new academic divisions that would organize and undertake much of the outward-facing work now taking place at the departmental level with varying degrees of effectiveness. This recommendation for the configuration of divisions is a starting point for deliberations, understanding that next year the appropriate governing bodies will shape and determine the details and structure of the new organization of the Arts & Sciences.⁸

KEY OBSERVATIONS

In seeking to better align academic structures to Oberlin's mission of educating students and generating knowledge, AAPR Arts & Sciences faculty committee members made a number of significant observations⁹:

- 80% of departments expressed the desire to reduce the silo effect in order to foster more synergies and greater flexibility for curricular and scholarly relationships such as Studio OC, first-year seminars, capstones, innovative introductory courses, and more collaboration on the construction of tenure-track faculty lines;

⁸ During the campus consultation phase of AAPR, many modifications to this proposal were made, based on discussions with Arts & Sciences faculty in more than 15 meetings and many more individual and small group sessions. Areas of modification include clarifying the role of governing bodies in determining final shape of reorganization; balancing power between divisions and departments; addressing workload concerns, particularly for department heads; and added suggestions for easing implementation.

⁹ These significant observations derive from surveys administered in the fall of 2018: Mission-centeredness, Quality, Potential Student Interest, Administrative, Financial, Stevens Strategy, Human Capital Research Corp., and Generations. In addition, data from the following offices were examined: Dean's Office (including the fall 2018 Higher Learning Commission report and recommendations), Institutional Research, Admissions, Financial Aid, Career Development Center, Registrar, Communications, and Chief Financial Officer.

- Students and alumni expressed the desire for enhanced connections with each other and the faculty through curricular and co-curricular initiatives, and many departments expressed a desire for stronger connections with their alumni who often work in areas that cross curricular pathways;
- The current organizational structure in Arts & Sciences breeds inefficiencies and creates added expenses due to overlapping administrative structures in processes such as coordinating events, course scheduling, and enrollment management;
- Surveys and comments from department chairs and administrative offices call for better communication with administrative offices (Registrar, Communications, Development, Admissions, Alumni Relations, Dean's Office) to eliminate wasteful inefficiencies with real effects on students and faculty and to improve hourly and A&PS employee job satisfaction;
- Surveys reveal the need for enhanced focus on student career paths, career-readiness, and career and curricular connections with alumni that often cross departmental silos;
- The Higher Learning Commission, our accrediting body, has called for the College to institute standardized assessment across campus and do better assessment of teaching beyond the major.

PURPOSE AND RATIONALE

Based upon these observations, the AAPR Steering Committee articulated and recommends a set of interconnected goals for the restructuring of the Arts & Sciences that should inform discussions for Arts & Sciences administrative reorganization:

1. Increase inter- and multi-disciplinary collaboration for both teaching and scholarship while respecting the strengths of intensive disciplinary education;
2. Increase the College of Arts & Science's ability to adapt rapidly and comprehensively to the ever-changing academic environment and capitalize on new opportunities;
3. Improve the overall quality and consistency of academic administration, including the collaboration with the conservatory and non-academic units across the institution, and enhance communications across campus as well as develop better messaging about our high quality to the world;
4. Enhance administrative efficiencies so as to realize substantial reductions to baseline operating costs and increase access to classes through the reduction of faculty course releases for administration.

To fulfill those goals, Art & Sciences faculty members of the AAPR Steering Committee developed a new organizational vision designed to benefit the curriculum, students, faculty, and administrative teams that support them. Restructuring Arts & Sciences would enhance communication and institutional efficiencies, promote a more evenly distributed workload, yield more faculty time for teaching, scholarship, and creative production, and foster interdisciplinary collaboration. It would preserve the manifest strengths of disciplines and

discipline-specific approaches as well as all personnel processes but do so through a nimble structure designed to respond creatively and collaboratively to shifts in student interests and evolutions in the base of human knowledge.

KEY ELEMENTS

As a starting point for deliberations in 2019-20, this recommendation envisions a model of six to eight administrative divisions, each composed of departments and programs from a group of related fields. Each division will have a chair, who, together with a financial administrative assistant or business manager and administrative assistant(s), would oversee assessment, equity in workload across departments and programs, equipment maintenance, budget management, catalog copy, and space use, and would assist with scheduling, admissions, alumni/ae outreach, communications, development, winter term, and career development. Division chairs would teach a substantially reduced course load and would be exempted from election to major faculty governance committees. These ideas and the following key elements will provide a starting point for the reorganization, understanding that the appropriate governing committees next year will make decisions about the implementation of this recommendation, shape the details of the plan and potentially provide alternative measures that achieve the same goals.

Department Heads: The reorganization model replaces department “chairs” with department “heads” who would assist the divisional chair with faculty assignments to curricular and personnel committees and would help ensure the equitable division of labor among department members and the timely completion of catalog planning. Course releases and stipends currently associated with department chairs would be eliminated, and the service workload of the department heads would be compensated through reduction in other service to the college to avoid an excessive service burden for any one individual.

Addition to Staff Requests: Departments, programs, and curricular committees would retain their standing to generate new position requests. Requests would be discussed with the division chair and, where appropriate, a curricular committee developed by the division. This process would balance the requisite expertise in appropriate methodologies and content areas with a comprehensive perspective on the needs and opportunities of the division and the institution as a whole. Some hires may be designed to serve the curricular needs of more than one department in the division; in other cases, two or more departmental requests for positions may be designed to complement each other. This would be a consultative process.

Hiring Practices: As in current practice, hiring committees would typically be generated by departments, programs, or curricular committees and developed in consultation with the division chair. Coordination at the division level may open opportunities for shared hires — in continuing or multi-year visiting positions — or strategic hires that help serve curricular needs that transcend the department.

Personnel Review: Personnel committees of 5-7 faculty members — with one member designated as convener for the duration of the review — would be populated in consultation with the division chair, department head, and candidate for review. For many departments this model does not represent a departure from current practices. However, it would standardize the review process across departments and programs of disparate sizes and for faculty with joint appointments, achieve greater efficiencies in faculty workload, and allow flexibility in constituting personnel committees responsive to a faculty member’s specific areas of teaching, research, and creative production. To avoid disruption of current pre-tenure reviews, we recommend that current junior faculty continue to be reviewed by their current personnel committee as reorganization procedures are phased in.

Catalog Planning: Curricular planning would be done in two phases. It would begin, as it does now, in the department; but before finalizing the catalog, it would be coordinated at the division level to take full advantage of curricular overlaps and points of connection within the division, while avoiding schedule conflicts among complementary courses. Curricular coordination at the division level may open opportunities for co-teaching, course clustering, or the design of courses that serve multiple majors at a time; it would also help ensure sufficient support for college-wide general education needs such as the First-Year Seminar Program; and non-major curricular pathways such as the proposed integrative pathways (see sections XII-XIV).

Service Loads: To avoid service overload and ensure equity, AAPR recommends charging the elected committees to institute a 5-point scale to quantify faculty service loads. Oberlin culture currently has a vague and ill-defined sense of the “appropriate service load.” Faculty have raised concerns that reorganization could result in a heavy service load for those who are willing to serve as department heads. The proposed point scale would address this unevenness by quantifying service, as Oberlin currently quantifies teaching loads. Currently, all full-time continuing faculty have a 4.5 teaching load. Comparably, we suggest introducing a 5-point service load for full-time tenured faculty not on leave and a 3-point service load for full-time tenure-track junior faculty. Continuing faculty in their first year would continue to be exempt from service. For example, elected committee work could be valued at 3 points, serving as department head could be 3 points, and a committee that meets two times a semester could be 1 point. Calculations of service load would be averaged for the periods covered by personnel reviews.

EXPECTED OUTCOMES

This proposal for restructuring Arts & Sciences organization and administration would help Oberlin achieve the four goals enumerated above in “PURPOSE AND RATIONALE,” including increasing interdisciplinary collaboration, increasing the ability to adapt effectively to the changing academic landscape, improving the quality and consistency of academic administration and collaboration with other units across the institution, and enhancing efficiency substantially.

In addition to better aligning organizational structure to mission, this model would further realize the four goals of this recommendation by:

- Saving roughly \$750,000 per year (preliminary estimate) achieved through consolidation of administrative staffing made possible by greater administrative efficiency and greater utilization of technologies that can support such needs;
- Recovering four full-time equivalents (FTE) amounting to 18 courses in department chair course releases, which:
 - a) reduces the need for visiting professors;
 - b) adds potential support for the First Year Seminar Program;
 - c) adds teaching capacity for the 100-student addition to the College (shift from the Conservatory)
 - d) helps alleviate problems with access to classes, especially for first and second years;
- Enhancing the breadth of consultation on future strategic additions and reductions of faculty lines;
- Reducing administrative redundancies and inefficiencies across the Arts & Sciences that needlessly consume faculty and staff time and effort and reduces job satisfaction;
- Enhancing engagement with alumni across the Arts & Sciences as well as better communication strategies to convey our high quality to the world.

The proposed Arts & Sciences reorganization buttresses other AAPR recommendations as well. Restructuring Arts & Sciences aligns with, and could help further, the development and review of College-Conservatory curricular pathways within and across both bodies. In addition, each division would provide representatives to administrative and co-curricular offices such as the Registrar, Development Office, Alumni Relations, Career Development Center, Communications, and Winter Term to promote direct communication that provides students with the strongest programming possible. (Division representatives will be compensated by reduction in other service duties.) The reorganization would also provide opportunities to use space, staff, and other resources more efficiently. Through consolidation of administrative tasks, the A&S reorganization would reduce wasteful redundancies, streamline staff work, and enhance working conditions and job satisfaction while decreasing the number of staff required.

STEPS TOWARD IMPLEMENTATION

AAPR recommends the establishment of an *ad hoc* Arts & Sciences Administrative Reorganization Committee. AAPR further recommends that EPPC and CFC appoint this committee that should include faculty, students, and administrators knowledgeable of essential elements of Arts & Sciences operations. The committee should also consult extensively with administrative assistants who support the work of the Arts & Sciences. This committee would assess AAPR's proposed divisional model and assess alternatives that may better achieve the four goals outlined in this recommendation. The findings of this committee will come before the College Faculty for approval.

Among other things, the *ad hoc* Arts & Sciences Administrative Reorganization Committee should consider the following questions raised by faculty during the consultation process:

- Will the division structure allow Arts & Sciences to reduce its number of assistant and/or associate deans?
- Is a 1-1 course load appropriate for all division chairs, or should course relief be determined by the size of the division?
- At what intervals, and how, will the newly reorganized system be assessed and, if necessary, modified to better meet the goals outlined here?
- What incentives can be deployed to encourage faculty and staff to embrace the institutional culture change that the reorganization seeks to foster? (E.g., curriculum development funds; opportunities for retreats; training for division chairs; etc.)
- How can the organization of space (office, classroom, and communal) be leveraged to support the goals of the reorganization (including fostering connections, reducing overall service loads, enhancing pedagogy, and allowing faculty to focus more on teaching and scholarship)?
- How do we continue to build a sense of community in these larger divisions?

Following CF approval of a detailed model that achieves the four goals outlined in this recommendation, CFC, EPPC and the Dean's Office will prepare for the formal establishment of the new administrative model. EPPC and CFC would also establish regular reviews to assess the success of the new model. The model will be modified based on these measures of success and community feedback.

TIMELINE

Summer 2019: Appointment of the *ad hoc* Arts & Sciences Administrative Reorganization Committee (ASARC).

Fall 2019: ASARC review of data and consultation with appropriate bodies and individuals.

Winter Term 2020: Draft Academic Reorganization recommendation.

Spring 2020: CF deliberation and approval of detailed Academic Reorganization recommendation.

2020-2021: Preparation for the implementation of the CF-approved new administrative model.

July 1, 2021: Formal establishment of the new model.

VIII. Creating a More Robust Winter Term

ABSTRACT

As part of its efforts to enhance the Oberlin experience for prospective and current students, the AAPR Steering Committee recommends creating a more robust Winter Term, including a significantly larger on-campus presence, expanded and enhanced curricular and co-curricular options for students, and enhancing administrative coordination and faculty engagement.¹⁰

SIGNIFICANT OBSERVATIONS

Winter Term is a distinctive part of the Oberlin experience that provides opportunities for intensive educational experiences, for students to conceptualize self-directed projects, for collaborative work between students and faculty, and for students to test and apply their knowledge off campus. Survey data found that current students, faculty, and alumni rate Winter Term especially highly for promoting inquiry and creativity, a core aspect of our educational mission.

While Winter Term relates directly to Oberlin's mission, both survey data and the 2017-18 external review of Winter Term suggest:

- current quality of the programming is uneven;
- serious inequities exist in students' opportunities to do meaningful projects;
- inequities exist in the time faculty spend teaching during Winter Term (faculty are expected to teach half time during Winter Term);
- A 2019 Student Senate survey found that about half of the 430 respondents said they welcomed a more structured Winter Term program. About half also said that they were eager for more on-campus projects or even a required on-campus winter term (the same number opposed a required on-campus winter term); and
- "More community events" was the foremost response to the question of how past winter term on campus experiences could have been improved.

The 2017-18 external review of Winter Term argued that Oberlin should either end Winter Term or take steps to improve its quality. AAPR explored whether ending Winter Term would offer significant cost benefits, or alternatively, whether changes to our existing Winter Term program could help the College meet its goals to attract and retain more students, to foster a better campus climate, and to prepare students for their post-Oberlin lives.

¹⁰ As a result of the campus consultation process, this recommendation was updated with additional data informing its significant observations.

While AAPR discovered that ending Winter Term would not offer major savings, if rightly structured, it could become a high-impact and signature Oberlin program of interest to prospective students and could assist with recruitment and retention.¹¹

PURPOSE AND RATIONALE

Re-conceptualizing Winter Term by providing it with a more rigorous and robust structure could yield significant benefits to students and to Oberlin. An improved Winter Term program could:

- better serve institutional learning goals;
- support efforts to help students prepare for their careers and connect their Oberlin educations to life after college;
- help Oberlin students develop a more positive sense of community; and
- become one of Oberlin’s distinctive selling points in a crowded market, and a more effective tool in recruitment and retention.

This planning aims to build more institutional structure and support to help students develop strong Winter Term projects without losing the important ways in which Winter Term encourages creativity, innovation, and independent thinking. It also aims to make Winter Term a vibrant and exciting time on campus, allowing a sizeable cohort of students to take courses and co-curricular workshops to develop academic or career skills while building a stronger sense of community among them through organized social activities.

KEY ELEMENTS

The AAPR Steering Committee recommends that Oberlin administration and faculty undertake a coordinated initiative to create a more robust, fruitful, and distinctive Winter Term with the following elements:

Student presence: Provide additional on-campus group project to increase students in residence over Winter Term by 600 to 800 as a way to maximize use of the institution’s resources and to build a stronger sense of community through shared experiences and organized social events.

¹¹ These significant observations are based on: 1) the perception survey completed by potential students, current students, alumni, faculty, staff, and trustees; 2) the quality and mission-centeredness questionnaires completed by academic departments and the questionnaire completed by the Winter Term committee; 3) the 2017 self-study and external review of the Winter Term program; 4) conversations with the Dean of Admissions and with the Associate Dean of Students; 5) comparisons of other schools that have Winter or May terms; 6) financial data about Winter Term costs from the Chief Financial Officer and the Manager of College Dining Services; and 7) the 2019 Student Senate survey.

Increased programming: Winter Term offerings will include a limited number of 2-credit academic courses focused on curricular areas especially appropriate for students who have fallen behind in course hours towards graduation. ExCo will also be encouraged to offer Winter Term courses to create more on-campus opportunities for students. New offerings will include programming in support of personal growth or public service; academic or artistic inquiry; and professional development (e.g. Excel) or career exploration, including off-campus internships.

Faculty engagement: Faculty will be expected to sponsor Winter Term projects three years out of every four, with the fourth year off. In addition, AAPR recommends requiring faculty to offer an on- or off-campus Winter Term group project at least once every four years. This will allow the institution to offer many more on-campus Winter Term group opportunities and will help address equity issues around how much time faculty devote to Winter Term teaching, which varies widely across the institution.

Staff coordination: AAPR recommends additional staff support (1 FTE) to coordinate Winter Term activities and Winter Term programming collaborations across campus.

EXPECTED OUTCOMES

This more robust form of Winter Term will contribute to both recruitment and retention, although it is impossible to quantify how many students might be attracted or retained through developing a more structured Winter Term. These enhancements will help Oberlin realize the full value of its current investment in Winter Term, which already include faculty and administrative time, overhead, and opportunity costs in scheduling. By doing so, Oberlin will improve the student experience, help students connect their educations to life beyond college, and enhance Oberlin's reputation and distinctiveness.

Financial impact: The College will achieve efficiencies on dining services if more students stay on campus over Winter Term (while direct costs will go up, greater economies of scale mean that actual costs are estimated to decrease by \$20,000). Other estimated costs for this recommendation amount to approximately \$130,000 annually: \$60,000 plus benefits for a staff member; a \$10,000 programming budget; and an \$40,000 for Winter Term funding for student projects and faculty group project curriculum development.

Support for other AAPR recommendations: An expanded and strengthened Winter Term program will support other AAPR initiatives by bolstering the recommended investment in the Career Development Center and career development more broadly. An expanded Winter Term could also provide integrative and experiential learning opportunities as part of the new recommended integrative concentrations and joint College-Conservatory concentrations. It will also support other efforts to increase our applicant pool and yield and to improve our student retention rates.

STEPS TOWARD IMPLEMENTATION

The AAPR recommendations align with the Winter Term Committee's own recently-concluded program review, which has been "received" by EPPC.

The Winter Term Committee, comprised of faculty, staff, and students, has voted unanimously to endorse the AAPR recommendations, including the budget estimate; support for more on-campus projects; exploration into either a recommendation or requirement that students to participate in one on-campus project; a clearer articulation of faculty responsibilities during Winter Term, as well as resources to support Winter-Term specific curriculum and program development.

The Winter Term committee is prepared to develop implementation strategies, which will include submitting all curricular changes to EPPC and EPC for assessment, with a motion to the General Faculty for approval.

TIMELINE

Summer 2019 and beyond: Where possible, adopt these goals for planning underway for 2020 Winter Term through existing structures.

Fall 2019: EPPC and EPC develop new programming and faculty expectations. Faculty expectation instituted for one Winter Term group project every four years.

Winter Term 2020: Begin to expand student presence to an additional 600-800 on-campus students, and expand the number of on-campus group projects sponsored by our faculty.

AAPR RECOMMENDATIONS FOR OPERATIONAL EFFICIENCY

IX: Personnel Costs and Administrative Efficiency

ABSTRACT

The AAPR Steering Committee supports a rigorous, comprehensive approach to Oberlin's largest category of expenditures, the cost of employing faculty and staff, to ensure that this singular investment serves mission-centered excellence in the most effective and efficient way. In addition to cost reductions already underway, we recognize that further reductions will be needed to achieve financial sustainability for the institution, and to make possible critically important investments in new programming. We recommend that these reductions be made in the way that prioritizes Oberlin's core academic and co-curricular mission, treats all categories of employees fairly, and mitigates the impact of transitions on both displaced and remaining employees. We also recommend short- and long-term investments over the next five fiscal years in human resources, technology, and data management infrastructures that maximize the effectiveness of Oberlin's employees and contribute to Oberlin's progress and sustainability.¹²

SIGNIFICANT OBSERVATIONS

In seeking to understand Oberlin's cost structure and the impact of personnel costs on the future of the institution, the AAPR Steering Committee made the following significant observations¹³:

- Total Compensation at Oberlin constitutes more than 60% of the College's operating budget. In FY 2019, compensation stands at 63% or \$101.6 million of the \$162.8 million operating budget, even after two years of salary freezes and benefits reductions for faculty and A&PS.
- With roughly 1,100 active employees for a student body of 2,850, Oberlin has an unsustainable ratio of employees to students.
- Some categories of employees are highly compensated for their markets, while others are not. Our average Arts & Sciences faculty salary, along with the average senior staff

¹² Based on feedback received during the campus consultation period, a number of changes were made to this proposal, including increased emphasis on the need for transitional assistance for displaced employees; clarification of AAPR's role in decisions about personnel costs; clarification of AAPR's rationale for addressing personnel costs; clarification of the other recommendations that are dependent on this recommendation, and therefore some of the inherent trade-offs; and clarification of market rationale, its limits, and the markets determined most relevant.

¹³ The sources for these significant observations include Oberlin administrative department budgets; administrative department organizational structures; administrative department surveys; a Great Lakes Colleges Association survey; a COHFE non-faculty study; Oberlin Group informal peer study of collective bargaining units in liberal arts colleges; U.S. Bureau of Labor Statistics; and a review of benefits expenses across Oberlin.

salary, falls significantly below the average of relevant liberal arts market peers, sometimes known as the Sweet 16¹⁴ — the colleges with whom Oberlin most directly competes to recruit and retain faculty and our upper- and mid-level administrators. Other A&PS salaries are roughly in line with that same peer set. Oberlin’s hourly workers, on the other hand, make significantly higher wages than their counterparts at the four other schools of the Five Colleges of Ohio¹⁵ — employees who represent a natural basis for comparison by industry, skills, and the regional labor market in which Oberlin competes when recruiting for such positions.

- Currently, the College manages multiple health plan cost models for its various active employee groups and retirees. For example, total benefits represent 30% of the costs for faculty and A&PS, while they reach an average of ~60% for other employee groups. While the sharp differences are based upon negotiated agreements, this does present itself as a financial and equity issue for the College. It should be noted that all employee groups have seen some changes in their level of benefits, but not equally so.
- Average healthcare costs per employee in Plan Year 2018 varied as follows:
 - Faculty: \$10,972 (total Oberlin cost of \$3.3M for 301 employees)
 - A&PS: \$8,781 (total Oberlin cost of \$2.8M for 316 employees)
 - Hourly: \$16,984 (total Oberlin cost of \$5.3M for 314 employees)
 - Retirees: \$5,664 (total Oberlin cost of \$2.1M for 363 retirees)
- The College currently utilizes a number of manual processes that require personnel or inconsistent use of technology. Many of these processes have been automated at other institutions thereby reducing fixed personnel costs. Examples include methods for payment of invoices (handled by multiple methods), manual expense reports, and general new employee onboarding (the use of paper-based forms for keys and parking permits).
- The absence of adequate job descriptions and position classification analysis has resulted in inefficient replication of practices, confusion regarding employee workflows, and ineffective project management.
- The absence of a performance evaluation process has hindered the administrative enterprise in being able to plan for the natural evolution of workflows within every division.

¹⁴ The Sweet 16 schools are Amherst, Bowdoin, Carleton, Colgate, Connecticut, Grinnell, Hamilton, Kenyon, Middlebury, Oberlin, Pomona, Reed, Swarthmore, Vassar, Wesleyan, and Williams.

¹⁵ The Five Colleges of Ohio are Denison, Kenyon, Oberlin, Ohio Wesleyan, and College of Wooster.

PURPOSE AND RATIONALE

Controlling employee costs will be critical for achieving financial sustainability and for providing funds needed to support current and enhanced programming for students, which is key to Oberlin's long-term success. Employee costs are far and away the largest part of Oberlin's budget and are growing significantly faster than revenues. Any effort to control costs for the institution as a whole will have to include reductions in personnel costs. We recognize that any move to control costs in a meaningful way will require difficult trade-offs.

We must be clear: Implementation of this recommendation will ultimately be the responsibility of Oberlin's senior leadership. It will involve questions that are beyond the purview of AAPR, including the organization of individual administrative offices, collective bargaining, and more. We do not presume any of those decisions; but given AAPR's charge, it would be irresponsible to remain silent about the institution's largest budgetary category, and a failure to live up to the AAPR charge to provide recommendations on how best to allocate resources to advance Oberlin's academic excellence and long-term sustainability. We also emphasize the following principles as guidance to senior leadership in its deliberations:

- First, we recognize that the difficult trade-offs inherent in controlling personnel costs will bring different values and valid loyalties into conflict. Where this occurs, the priority must be Oberlin's educational mission, and the long-term excellence of the institution in fulfilling that mission. Even as the institution values, respects, and treats with dignity all its employees, Oberlin must tailor its operations to serve its educational mission.
- Second, though external conditions cannot and should not be the sole basis for any decision, Oberlin must hire and retain talented faculty and staff who can best support its educational mission, in a way that is financially sustainable; that will require Oberlin to compete with other institutions and industries. Similarly, though internal comparisons cannot and should not be the sole basis for any decision, Oberlin will benefit where it treats different categories of employees fairly within the larger context in which the institution operates.
- Finally, given the potentially disruptive effects of personnel decisions on some individuals, families, and the institution, Oberlin should employ measures that mitigate those effects and help make transitions, both for employees who are displaced, and for those who remain at Oberlin. Those mitigating factors may reduce the immediate financial benefits of cost controls but should be viewed as one-time investments in the overall good of the institution.

All of this must be considered as part of a more comprehensive effort to nurture excellence across all parts of the institution. The long-term success and financial viability of Oberlin relies on the high-level performance of the staff within our administrative enterprise. Central to this success (which directly impacts and enhances student success, curricular evolutions, and the reputational goals of the institution) is our ability to attract, retain, train, and deploy our

employees. Through strengthening the administrative enterprise in a manner that also is in alignment with a financial model for long-term viability, we position Oberlin for a growth trajectory that instigates and supports trans-divisional and departmental innovation and collaboration. None of this work is a one-time effort. It will require support for cultural change, long-range strategy, and tiered implementation to ensure success.

KEY ELEMENTS

There are five key elements to be considered as part of our recommendations:

- Cost control
- Personnel Management
- Effective Organizational Design and Development
- Essential Business Process Management and Data Management
- Community and Town & Gown Relationships

Cost control: In order to ensure long-term financial sustainability, we estimate that Oberlin will need to reduce personnel costs by at least \$4 million by FY 2024, beyond reductions already undertaken or planned for through the regular budgetary process, and beyond reductions proposed elsewhere in AAPR recommendations. This estimate takes into account current long-term projections, modifying them by other savings and new revenues we expect to realize through other AAPR recommendations. In seeking to control the growing costs of employee compensation, Oberlin's leadership has a limited number of levers it can move: the number of people employed; the tasks performed by employees, the tasks which can be contracted through outside vendors, and the tasks discontinued; the efficiency with which employee tasks are performed; the salaries or wages paid to Oberlin employees; the nature and cost of benefits provided to current and former employees; and the employment of students. While senior leadership will decide which of those levers to use, and in which proportions, we recognize the necessity of this work, and recommend that all of these options be explored, employing the principles articulated above to guide decisions about how best to serve the institution.

Personnel Management: We recommend Oberlin adopt a comprehensive approach to personnel that addresses hiring, retention, role alignment, compensation alignment, management and optimization of workflow to ensure high levels of efficiency and excellence.

1. **Transition Planning:** As we move toward a sustainable level of staffing, we maintain our belief in the dignity of all people and the practice of mutual respect. Downsizing an organization is challenging not only for those who lose their positions but also for the colleagues who remain in place. We must plan for change in way that minimizes disruptions and focuses on the future of Oberlin.
2. **Role realignment:** Role realignment is necessary within the administrative enterprise to ensure that all work performed at Oberlin supports academic excellence, student success and enhancing institutional value as directly as possible. The absence of alignment has led to redundancy, inefficiency and inter and intra-departmental conflict.

3. **Competitive Compensation:** Oberlin must maintain the ability to offer competitive compensation for all categories of employees.
4. **Professional Development:** Oberlin must build a formal professional development program that fuels and supports excellence and personal growth throughout the institution.
5. **Management Development:**
 - a. **Basics of Supervision, Staff Development & Performance Management:** Managers at all levels must be trained on the basics of supervision, legal and ethical compliance in staff engagement, and how to effectively measure and manage staff performance.
 - b. **Fostering Managerial Courage:** We must foster a culture of managerial courage to make the key staffing and organizational changes necessary for Oberlin's ongoing viability.
 - c. **Leadership Development:** We must develop the leadership capabilities of individuals charged with the management of staff and the student workforce.
 - d. **Employee Performance Evaluation Processes:** We must support the ongoing implementation of the performance management system currently under development by the Office of Human Resources. We must also support Human Resources' efforts to create equity of job titles and responsibilities across the institution and to establish compensation ranges and guidelines for compensation realignment.

Effective Organizational Design and Development: Oberlin must ensure efficiency and excellence in our organizational structure followed by an ongoing assessment of the functions, departments and individuals needed to support Oberlin's mission.

1. **Organizational Design:** We must ensure that we are properly structured to address a wide, but defined, range of needs and complexities to support a prestigious liberal arts college and conservatory in a highly competitive sector. Oberlin must focus limited resources on essential functions that impact curricular and co-curricular education.
2. **Strengthen Support of Core Academic Mission:** Our service orientation requires ongoing agility and ability to adapt in support of student success, curricular innovations, and efficiencies that are required.
3. **Succession Planning:** Leaders should identify and develop the next level of leaders and employees that can grow into new roles across the institution.
4. **Change Management:** Oberlin must provide individuals and units support and continuing education in change management.

Essential Business Processes and Data Management: The ability of Oberlin's workforce to build excellence with reduced resources will require:

1. Effective Business Processes
2. Effective and Efficient Business Tools
3. Ongoing Measurement of Process and Organizational Performance
4. Succession Planning & Process Documentation
5. Performance Metrics

6. Data analysis processes as fostered by institutional research or divisional/departmental data “owner”
7. Implementing a system and set of practices that support data-driven decision making
8. Routine reporting across the administrative enterprise that facilitates data monitoring

Community and “Town and Gown” Relationships: Balancing our town/gown relationships and our reputation as an employer of choice within the region will be vital to our ongoing efforts to improve Oberlin’s financial viability. We should continue to foster and strengthen relationships that have mutual benefit with the recognition that Oberlin’s limited resources does not allow for increasing our existing investments in non-mission centered activities.

EXPECTED OUTCOMES

We believe the set of recommendations will:

- Strengthen the enterprise to best and most directly support Oberlin’s educational mission
- Provide necessary budget relief
- Produce a even more competent workforce
- Ensure the student experience justifies the investment families make in Oberlin
- Enable Oberlin to increase compensation to account for the cost of living
- Establish a sustainable staffing model
- Support successful transitions for both our employees and the institution
- Create a cycle of continuous improvement that will support effectiveness

Potential Impact on Costs: approximately \$4.5 million in base budget savings by FY 2024. The proportions of the savings that come from different changes to the personnel cost structure will depend on decisions by senior leadership, but after examining several scenarios, we believe this level of savings is possible and necessary.

INTERDEPENDENCE WITH OTHER AAPR RECOMMENDATIONS:

As noted previously, compensation expenses represent more than 60% of the total operating budget. Absent a decision to realize significant savings in personnel costs, the College cannot reach long-term sustainability or invest in the curricular and co-curricular programming recommended elsewhere in this report.

The recommendation about space utilization will have an important synergy with this recommendation. Reducing Oberlin’s physical footprint will reduce the number of employees needed to staff and maintain facilities.

STEPS TOWARD IMPLEMENTATION AND TIMELINE

Senior leadership's decisions on how to realize savings in personnel costs will determine what steps need to be taken, and what the specific timeline for each set of steps will be. Much of the implementation will take place through the normal budgetary procedures, with final approval of the budget by the Board of Trustees. Some steps may require the approval of other governing bodies or consultation with standing committees. Some steps may require collective bargaining. Once approved, implementation of some steps may need to be phased in over time.

We believe that the necessary steps can be approved between now and 2024.

X. An Equitable and Financially Sustainable Residential Experience

ABSTRACT

To ensure a robust residential learning experience that generates appropriate revenue and provides equitable financial support to students, the AAPR Steering Committee recommends that Oberlin College work with the Oberlin Student Cooperative Association and the Kosher-Halal Coop to develop a financial relationship that eliminates the \$1.9 million annual negative impact on Oberlin's budget.

SIGNIFICANT OBSERVATIONS

Oberlin College's four-year housing and dining requirement has two goals: to create a living-learning environment that supports student development, a key factor in ensuring students achieve the highest possible level of academic and artistic excellence; and to generate revenue in support of the College operating budget. Currently, the College releases students from this requirement for three reasons: 1) they are exempt according to College policy (for age or for commuter status, for example), 2) the College has insufficient capacity in its residential portfolio to house all students, or 3) a student elects to dine, or to dine and live, with Oberlin Student Cooperative Association, an independent non-profit. The portfolio includes approximately 2,600 beds, including 180 beds which are leased to OSCA.

Dining provides a similar scenario. The College currently leases 6 commercial kitchens to OSCA and 1 to Kosher-Halal Coop, which is an independent organization that is not part of OSCA. Approximately 590 students are released from the four-year dining requirement to participate in OSCA, with 35 released to participate in KHC. These students represent both lost revenue and additional facilities capital and operating costs to the College. The contractual relationship with OSCA and KHC is causing the College to operate facilities that it would otherwise decommission.

In fiscal year 2020, if the terms of the College's agreement with OSCA do not change, this agreement is calculated to have a net negative \$1.9 million impact on the College operating budget, which is consistent with the average impact over the past three years. This calculation

includes projected lost revenue of \$5.74 million if OSCA students participated in the College housing and dining program minus the \$1.8 million rent payment OSCA would make to the College and the estimated cost of \$1.99 million for the College to directly manage the food and staffing costs of the current program. In addition to the net revenue loss, College costs include an additional average annual building capital maintenance of \$1.2 million. Under our current OSCA model, the College does not generate surplus revenue to establish capital reserves to support these costs.

Kosher-Halal Coop has a much smaller impact on the budget due to differences in scale (in the range of hundreds of thousands, not millions), but the pattern is similar. AAPR notes that Campus Dining currently has extremely limited to no capacity to offer Kosher and Halal dining options to students and recommends that facilities investments occur to ensure equitable access to dining based on religious observance. Planning around the future of KHC must take into account options available to students for kosher and halal dining options.

AAPR also recognizes OSCA's service to students in fostering leadership skills, community-building, business management, communication, and career development.

Because the current arrangement allows OSCA to artificially underprice its program, students who participate in OSCA gain what is effectively additional financial aid, subsidized by students who live and dine with the College.

AAPR also examined other institutional data to understand the role OSCA plays on campus. This data demonstrated that OSCA has neither a positive nor negative impact on student retention. It also reveals that OSCA students have slightly less financial need than non-OSCA students, that OSCA enrolls slightly fewer lower income students than College housing and dining, and that OSCA enrolls fewer international students and Black students than College housing and dining.

PURPOSE AND RATIONALE

AAPR seeks to identify a way to preserve the distinctive and historically significant learning experience OSCA provides, which is a valuable contribution to Oberlin's co-curriculum. It also acknowledges the budgetary strategy to reach financial sustainability must necessarily be different with a third-party provider than it would be with an internal Oberlin College organization, even one that is fully and independently student run (long-running student organizations like student media illustrate this model).

Pricing is one of the few levers available to the College for managing revenue. By setting a price for facilities below their earning power, the College is surrendering an important revenue source for its residential program, creating inequities between students and increasing its own net operating costs.

AAPR reviewed and rejected the idea that the College should terminate its relationship with OSCA. Although this path would eliminate the negative budget impact, it would disregard the valuable learning experiences OSCA provides, which contribute greatly to the educational outcomes for some Oberlin students.

KEY ELEMENTS

AAPR recommends the College work with OSCA to find an approach that eliminates the negative impact on the College budget while preserving what is valuable about OSCA.

Process: The AAPR Steering Committee recommends that the College and OSCA design a process that would identify pathways to financial sustainability, including eliminating the impact of OSCA on the College budget, by 2024. This period will also allow the College and OSCA to engage in assessment of the learning outcomes from different residential experiences and to identify a strategic pathway to the strongest possible residential education curriculum. This process should also involve key stakeholders including professional staff, faculty who participate in theme housing, and student leadership.¹⁶

Transition: The most important element to this recommendation is its multi-year implementation. AAPR recognizes that neither the College nor OSCA will benefit from an abrupt shift, and that careful planning can create a robust and exciting new model. A modest investment in facilitators and external experts may be useful in creating positive outcomes and support the student leaders of OSCA, who have educational priorities that must be protected during this process.

¹⁶ AAPR identified a number of potential pathways for achieving this goal, including increasing rent costs, facilities independence, and growing or shrinking the size of OSCA. This document does not recommend the adoption of a solution for two primary reasons: first, it is in the spirit of the College's relationship with OSCA to work collaboratively toward a mutually beneficial solution, and second, AAPR did not have access to OSCA's finances, which would be critical to evaluate potential strategies. As an independent third-party vendor, OSCA is not required to share this information with the College. However, this represents one of the most significant differences between OSCA and independent student organizations within the College. Oberlin can examine the budgetary models for student organizations and analyze the consequences of choices within an institutional framework, as AAPR does throughout this document. Without a better understanding of OSCA's budgetary model and cost structure, it cannot evaluate the impact of strategies to reduce the budget impact. For example, AAPR recommends the College closely examine its staffing and compensation model elsewhere in this document. Without information about how OSCA operates, AAPR is unable to identify specific opportunities for changes that would preserve OSCA while creating financial sustainability for both OSCA and the College.

Financial aid: AAPR also recommends working with OSCA to create equitable pathways to financial assistance for students. To achieve this goal, the College may need to undertake further review of its financial aid policies to ensure these resources are distributed in as fully equitable a manner as possible.

EXPECTED OUTCOMES

Financial impact: This recommendation would result in an opportunity to reclaim a net of nearly \$2 million on an annual basis, providing significant budget relief to College operations. It should also result in a financially sustainable OSCA which is not dependent on artificially low rent prices to sustain its operations.

Support for other AAPR recommendations: A robust and integrated residential education curriculum supports the goal of academic and artistic excellence embedded in these recommendations and may impact options for providing housing and dining over Winter Term as well.

STEPS TOWARD IMPLEMENTATION

College representatives should meet with OSCA leadership to formulate and implement a plan for financial sustainability. Stakeholder engagement and representation should be carefully considered as part of this planning.

TIMELINE

Fall 2019: The College and OSCA develop a planning process to last no longer than one academic year which provides a pathway to eliminate the budget impact on the College and provide financial sustainability for OSCA within a five-year timeframe.

Fall 2019: Residential Education and OSCA collaborate on assessment of the residential program and clear articulation of learning goals and metrics to determine outcomes, to be complete within one academic year.

Fall 2020: Pilot assessment of new learning outcomes.

Fall 2020: Develop and implement a plan to provide kosher and halal dining options through CDS. Collaborate with Kosher-Halal Coop leadership to determine a plan for financial sustainability.

Spring 2024: By this semester, full implementation of the plan should be complete. Rubrics for assessing success include elimination of the budget impact on the College and financial sustainability for OSCA.

XI. Improved Usage of Space and Facilities

ABSTRACT

A significant portion of Oberlin's budget is devoted to owning, maintaining, and operating its facilities and physical space. AAPR proposes a significantly new approach to Oberlin's campus and facilities, focused on what the institution truly needs to support teaching and learning, a shared approach to space across the institution, and configuring space to achieve our goals for sustainability. The AAPR Steering Committee recommends Oberlin undertake additional planning to support cost and footprint reduction, efficient use of space, efficient use of energy resources and improved space quality.¹⁷

SIGNIFICANT OBSERVATIONS

Space costs represent nearly \$42 million, or 73% of Oberlin's total annual expenditures (\$57.8 million) for indirect costs. Recent in-house analyses and outside experts have found that Oberlin's overall footprint is significantly larger than it needs to be to achieve its mission: Oberlin currently maintains approximately 1,000 square feet per student, which is considerably higher than Great Lakes Colleges Association peer institutions, which maintain a median of 818 square feet per student.¹⁸

Oberlin's physical plant comprises approximately 2.75 million square feet of buildings, classified as follows:

- Academic: 28 buildings / 1,101,300 square feet
- Administrative: 7 buildings / 90,000 square feet
- Athletics: 7 buildings / 274,000 square feet
- Athletics fields: track & field, soccer, football / multi-purpose artificial-turf stadium, cross country / track, and miscellaneous practice fields
- Faculty / other residential: 18 buildings / 35,000 square feet
- Other support: 18 buildings / 292,000 square feet
- Student residential: 84 buildings / 957,000 square feet

As reflected in the Revenue Center Model (RCM), space costs in FY 2017 were nearly \$42.0 million of the total \$57.8 million in indirect costs college-wide. These costs breakdown as follows:

- | | |
|--------------------|---------------|
| ○ Salaries & Wages | \$6.3 million |
| ○ Benefits | \$3.5 million |

¹⁷ As a result of campus consultation, this recommendation has been edited to put additional emphasis on Oberlin's commitment to environmental sustainability, especially in an era in which global climate change presents a signal challenge to current and future Oberlin graduates.

¹⁸ Sources for significant observations include benchmarks provided by space consultant, the first phase of Oberlin's Space Use Assessment, GLCA space survey and the RCM model.

- Facilities Maintenance \$6.1 million
- Depreciation \$20.4 million
- Interest Expense \$5.6 million

Space is used inefficiently, in part because of a culture in which individual departments, programs, or employees are considered to “own” particular spaces. Some facilities are in poor repair, which has implications for financial and environmental sustainability as well as for our reputation and student retention.

PURPOSE AND RATIONALE

The physical plant is critical to creating an educational environment in which students and faculty can do their best work. Properly leveraged, facilities can actively contribute to the education of our students. Our physical spaces shape day-to-day activities across the institution, 24 hours a day, and stand as a tangible expression of Oberlin’s commitment to both environmental and financial sustainability and stewardship. As with other major investments, it is critical to ensure that Oberlin’s facilities directly support the mission and excellence of the institutions without unnecessary expenditures.

A reduced and more efficient footprint will require less maintenance and help to control employee costs. Shared management of most space across the institution will help foster collaboration and new programmatic opportunities.

KEY ELEMENTS

Specifically, AAPR recommends that Oberlin, in consultation with the relevant stakeholders:

- Reduce its footprint by roughly 20% to bring it in line with peer institutions, eliminating the most costly and inefficient facilities over time;
- Increase efficiency to reduce the use of natural resources and to control costs;
- Manage facilities as assets that belong to and benefit the whole institution, realizing greater flexibility and new efficiencies, including centralized scheduling of most spaces;
- Ensure existing space meets the needs and purposes of the functions residing in those spaces, while also ensuring that specialized spaces are used and protected appropriately;
- Ensure future development of space that is environmentally sustainable and enhances teaching and learning; and
- Increase annual expenditures on deferred maintenance, which would enhance environmental sustainability and reduce long-term costs.
- Increase the contribution to mission by using our facilities and their management as an educational opportunity for students.

EXPECTED OUTCOMES

Financial Impact: While all of the potentially significant recommendations will eventually yield substantial savings and allow Oberlin to better maintain its remaining physical assets, additional analysis is necessary to confirm the amount of savings. Additionally, many come with a significant up-front cost for renovation and/or demolition work and will require the thoughtful development in multi-year plans.

Support for other AAPR Recommendations: A strategic, comprehensive approach to space usage will provide important support for many of the other recommendations in this report. Most significantly, more efficient use of space will help reduce personnel costs and increase efficiency. As a key part of the Oberlin experience, facilities and physical space also play an important role in student recruitment and retention, one of the fundamental goals of AAPR.

Space considerations will also play an important role in creating a self-sufficient and successful OSCA that brings equity to Oberlin's residential housing. Efficient and purpose-driven facilities will also enhance new programming, including interdisciplinary concentrations, career preparation, and increased collaboration between the Conservatory and the Arts & Sciences.

STEPS TOWARD IMPLEMENTATION and TIMELINE

Over the next two fiscal years, the AAPR Steering Committee recommends additional efforts to:

- Reduce Footprint and Maximize Space Utilization
- Maintain Space and Address Current Deferred Maintenance & Poor Facilities Conditions
- Invest Resources to Manage Space as well as Facilities Data
- Develop Standards of Practice & Care

AAPR also supports the following steps planned by Oberlin's administration:

Summer/Fall 2019

- **Campus Engagement:** Establish a cross-functional Steering Committee to be led by the new Chief Facilities Officer to address a variety of facilities planning risks, opportunities, metrics and goals.
- **Develop Long-term Capital Planning Process:** Establish a Board-approved planning framework that supports addressing deferred maintenance as well as future needs based on program requirements.
- **Annual Facilities Stewardship Planning:** Oberlin should continue its work to develop a plan for annual stewardship that aims to increase the level of proactive and preventive maintenance while reducing the level of more costly reactive maintenance.
- **Data Management:** Create an institutional database of all College-owned properties to include condition assessments, work order management, cost management and capital planning tools.

- Building Metering Plan: Oberlin should continue its efforts to meter facilities and develop a prioritized plan to do so. Data obtained through metering identifies significant opportunities for efficiency and cost reduction.
- Building Cost Assessment: Oberlin should continue its study of the costs to maintain each of its facilities compared to benchmarks.
- Limit Single-Family Homes: Reduce reliance on inefficient single-family homes and improving efficiency and maintenance costs in facilities planning.
- Sustainable Infrastructure Investments: Continue to investigate and pursue opportunities to reduce long-term energy costs through short-term expenditures. Consider, in particular, recommendations from the Office of Environmental Sustainability and the Sustainability committee.
- Policy Development: Develop a policy for maintaining our campus footprint once it is adjusted down appropriately.

Fall 2019/Spring 2020

Refine Space Analysis & Space Planning Recommendations:

- Finalize the 2017 Space Utilization Analysis: Include additional facilities that were not considered in the original study and engage all relevant stakeholders.
- Facilities Condition & Deferred Maintenance Assessment: Expand the assessment of deferred maintenance beyond what was captured in the 2017 Space Utilization Study to gain a better sense of total deferred maintenance and facilities condition index.
- Res Ed Planning: Create a Residential Education facilities improvement plan, to include space condition assessment and financing strategies, with the presentation of results to the Board of Trustees in December 2019
- Identify Recommendations from Current Analysis for Action: Review Preliminary Recommendations included in the 2018 Space Utilization Analysis executive summary for academic and administrative space.
- Consolidate Space: Confirm, plan and pursue opportunities for space consolidation, including development of a stacking plan approach for academic and administrative departments to maximize space and heighten the nexus of related operations.

Spring 2020 / Fall 2020

- Explore & Select Centralized Scheduling Software: Oberlin employs a wide variety of decentralized and siloed approaches to scheduling spaces on campus managed by traditional "owners" of these spaces. To maximize efficient space use, Oberlin should move to a centralized, online scheduling system that enables scheduling by the broadest possible constituency.
- Explore Winter Term housing consolidation: Currently, very few students remain on campus for winter term, yet all dormitories are heated. Consider whether on-campus

students can be consolidated into fewer dorms, so that some buildings can be taken off-line.

- Summer Use of Facilities: A cost-benefit analysis of air-conditioning current and new facilities should be performed to determine whether expanded summer opportunities justify such costs. Oberlin should engage the Office of Environmental Sustainability to balance this approach with sustainability goals.
- Limit Single-Family Homes: Reduce reliance on inefficient single-family homes and improving efficiency and maintenance costs in facilities planning.
 - Reduce Space: Develop a plan to take off-line facilities with high maintenance costs. This investigation should include a review of all properties, including those leased and maintained on behalf of OSCA.
 - Develop zero budget impact facility plan
 - Develop Maintenance Action Plans

AAPR RECOMMENDATIONS FOR NEW CURRICULAR AND CAREER PROGRAMMING

XII. Integrative Concentration in Business

ABSTRACT

In response to demonstrated student interest, and as part of a broader effort to connect an Oberlin education to life after college, the AAPR Steering Committee recommends strategic development of an integrative concentration in Business. Students will take courses in foundational business concepts that will complement their liberal arts major. A co-curricular experience will provide an additional set of skills and career-oriented training.

SIGNIFICANT OBSERVATIONS

Many alumni have found success in the world of business and management, spanning the for-profit, non-profit and entrepreneurial sectors. The liberal arts education afforded by Oberlin provides students with skills in communication, critical thinking and problem-solving (among other skills) which are highly valued and sought-after by employers in these fields.

However, a significant number of prospective and current students have indicated a desire for a more formal credential in business principles. This credential will help students stand out to employers – employers who already understand the worth of the liberal arts education Oberlin provides, but now who also can see that the student has taken a suite of courses that has equipped them with core skills. To meet this desire, AAPR proposes an integrative concentration in business that will run alongside the student’s traditional liberal arts major.

In proposing this concentration, the AAPR steering committee explored a set of surveys and conversations to establish interest and note significant observations¹⁹. The Generations branding survey noted that inquirers to Oberlin and students who are admitted but choose not to come rated “professional training and skills” as important in their college education. On a 1-5 scale of their interest, more than a third of Oberlin’s prospective students rated business education a 4 or a 5 — data that is supported by write-in inquiries to the admissions office, as well as surveys of alumni and staff, who rate it the most important potential addition to our curriculum. Moreover, within the broader landscape of higher education, business is the most popular undergraduate major.

¹⁹ These observations are based on: (1) the perception survey completed by potential students, current students, alumni, faculty, staff and trustees; (2) the Generations survey; (3) data on undergraduate majors from the National Center of Educational Statistics; (4) conversations with members of the Dean’s office, the Department of Economics and other campus stakeholders; (5) conversations with an external consultant.

PURPOSE AND RATIONALE

In keeping to the AAPR's goal of being authentic to Oberlin, the AAPR steering committee explored different ways to offer business education on campus. One direction that was discussed but ultimately rejected was the recommendation of a new major in business. Business majors in selective liberal arts colleges are not common, but where they exist, they are popular. Nevertheless, the idea of a business major at Oberlin did not feel authentic to the history and character of the institution, and apart from that, a major would require a much more significant resource cost than would be prudent or strategic at this time.

Instead, AAPR discussion coalesced around the idea of an integrative concentration. This concentration would consist of a curricular component and a co-curricular experience. The curricular component would draw on the academic expertise of our faculty and provide students with a suite of courses in foundational business principles. The co-curricular experience would offer students an opportunity to apply their learning in real-world settings. The concentration would be distinctly Oberlin, in that it would allow Arts & Sciences and Conservatory students to combine core business management and financial skills with their liberal arts major or their conservatory specialization.

AAPR proposes collaborating with Economics and other departments to design a set of foundational courses for this concentration. With the addition of one faculty line in business management and in combination with existing courses, Oberlin could offer its distinctive take on what it means to prepare for a career in a variety of administrative and leadership fields.

KEY ELEMENTS

Curricular Component: The AAPR steering committee recommends collaborating with academic departments to design a set of foundational courses for this concentration. AAPR recommends that the Department of Economics take a significant role in this design, as several of the key courses are already offered by the department, and potentially others, may be offered by existing or new members. It is important to note, that other departments also offer practical courses in management or offer courses exploring the relationship between business and society; their input would be critical to ensuring the concentration is appealing to students throughout the College and Conservatory.

AAPR recommends that EPPC and interested faculty consider the balancing act between the variety of courses in the concentration (breadth) with some degree of rigor (depth). Conversations centered around the question, "What would an employer who sees that a student has graduated with a 'Business Concentration' expect to know something about?"

Some of the subjects that came up frequently in discussions include:

- Economics
- Finance
- Accounting

- Management
- Marketing
- Organizational behavior
- Business ethics

It is not necessarily the case that all of these subjects must be taught in separate courses, or must be taught within a specific department. For example, while it would make sense for the Economics Department to teach economics, finance and accounting, the Psychology Department may contribute to marketing, and Religion or Philosophy to business ethics.

Co-curricular Component: We propose integrating a co-curricular element directly into the Business Concentration. We could either require (or *strongly suggest* if resources are lacking) participation in one of the following:

- Ashby Business Scholars
- A program or course in entrepreneurship (to be developed with LaunchU)
- One of the Career Communities (Finance, Business, and Consulting; Non-Profit and the Public Sector; Arts and Creative Professions; Entrepreneurship and Innovation)
- An on-campus Winter Term course (more detail below)
- A business-related internship (signed off by the Business Concentration Committee)

The set of requirements should be broad enough that students can take on a co-curricular experience that not only touches on business but that also speaks to their major discipline or to their interests.

Most of these experiences are already taking place, but the program in entrepreneurship and the on-campus Winter Term course would require time to develop. The value of developing these programs is that they allow for greater numbers of students to participate. (Business Scholars and Career Community slots are competitive, and internships are very competitive.)

A Winter Term course can also draw on many different campus constituencies. For example, the Career Development Center may offer a course on resume-writing, interviewing and business etiquette. The Art Museum might offer a short course in nonprofit management. Alumni can be engaged to offer short courses on their expertise. Academic departments can also offer short, intensive courses -- for example, Economics could offer intensive quantitative finance.

Personnel: This recommendation envisions at least one new faculty line dedicated to subjects that would be key to this concentration. In particular, it anticipates one new line in business management, with a tenure home in Economics. The AAPR supports efforts underway in the Office of Development to find a donor or donors interested in supporting new business-oriented faculty.

EXPECTED OUTCOMES

This Concentration in Business will contribute to expanding our applicant pool, which has consistently asked about business education at Oberlin. We expect it will also help retention, as current students continue to search for ways to add value to their education. It is not possible to quantify how many students might be attracted or retained through this concentration.

Financial impact: The College stands to realize increased tuition revenues if the concentration broadens our applicant pool or improves retention. On the other side, the AAPR Steering Committee recommends that significant consideration be given to what types of financial resources it would take to offer a concentration. Several conversations, particularly with the Economics Department, suggest that new positions are absolutely vital to offer the types of courses that do not currently align with the teaching strengths of the existing faculty; we expect that these would be supported by philanthropy, mitigating the budgetary effect.

Support for other AAPR recommendation: A business concentration will support other AAPR initiatives by strengthening the relationship between academics and fruitful careers, as elucidated in recommendations concerning career development. Broadening the Winter Term experience could also figure in providing concentration students with valuable co-curricular, business-related opportunities. The Arts & Science reorganization could help the concentration to think more intentionally about how to offer courses that cover different disciplines. (For example, management and marketing may be offered within one course, team-taught by a management and a psychology professor.)

STEPS TOWARDS IMPLEMENTATION

Like the introduction of any concentration at Oberlin, the business concentration's curriculum will be vetted through EPPC. Position requests for new faculty would go through EPPC and CFC. The integrative concentration in Business would require the approval of the College Faculty as a new course of study. The Department of Economics and other departments need to be consulted to decide on what faculty would be needed, how courses would be implemented within their existing curriculum, and how new faculty members will be evaluated in their path towards tenure.

TIMELINE

2019-2020: Business Concentration Curricular Committee is formed and develops the set of academic requirements. Conversations with Career Center, Career Communities, Business Scholars, etc., to develop co-curricular programming. EPPC vets curriculum and brings it to the College Faculty for approval. A position request (likely from the Economics Department) is made for faculty who are needed to cover gaps in curriculum.

Spring 2020: CFC considers position requests.

Fall 2020: Finalize courses in the catalog. Hire new faculty members.

Fall 2021: Concentration enrolls first students.

XIII. Integrative Concentration in Global Health

ABSTRACT

In response to demonstrated student interest, and in keeping with a larger theme of connecting an Oberlin education to fruitful lives after college, the AAPR Steering Committee recommends development of an integrative concentration in Global Health and exploration of a 4-1 master's program in partnership with an accredited institution. We also propose that this concentration be developed in conjunction with the developing Career Community in Global Health. We recommend this unique multi- and inter-disciplinary approach to public health that integrates the humanities, social sciences, and natural sciences to ensure students develop comprehensive perspectives and critical thinking skills, on the range of human conditions.

SIGNIFICANT OBSERVATIONS

A Global Health integrative concentration contributes to Oberlin's core mission. Surveys show that students, faculty, staff and alumni view this as a compelling area of study; moreover, it provides students with educational and career opportunities that will enhance learning and retention of current students.²⁰

Survey data and the 2017-18 external review indicate:

- 42% of returning students indicated an interest in Global Health
- many students expressed an interest in pursuing a masters in global health
- prospective students seek programs in social justice
- prospective students see experiential learning as key to successfully launching post-Oberlin

PURPOSE AND RATIONALE

One of the primary purposes of the AAPR is to identify programming that will increase interest among prospective and current students, to enhance the relevance of an Oberlin education in the 21st Century and support sustained and new student revenue. Creating a concentration in Global Health will yield significant learning and career-related benefits for students who

²⁰ Sources include the perception survey completed by potential students, current students, alumni, faculty, staff, and trustees; the quality and mission-centeredness questionnaires completed by academic departments; study of, and interviews with institutions that offer public health and global health programs; Generations prospective student survey; data from Human Capital Research Corp.

currently view pre-medical training as the only path to a health-related career. This, in turn, should aid in retention. An integrative concentration in Global Health could:

- directly address institutional learning goals;
- directly address aspects of the College Mission;
- support efforts to help students prepare for their careers and connect their Oberlin educations to life after college;
- enhance retention.

This planning aims to create institutional structure for students interested in the broader context of public health, medicine, policy, and civil service. It also aims to support what promises to be a vibrant and exciting Career Community in Global Health.

KEY ELEMENTS

The AAPR Steering Committee recommends that Oberlin administration and faculty support a coordinated initiative to create a robust and unique Global Health integrative concentration for our students.

Formalize an integrative concentration that will provide experiential learning in a curricular area of great interests to our students.

Connect to the soon-to-form Global Health Career Community to connect students to alumni in the field and create community with other students in the concentration.

Explore a 4-1 program with a Global Health master's program institution whereby students can, within 5 years, complete an Oberlin undergraduate major and integrative concentration in Global Health, as well as a Master's in Public Health via one-year graduate study at an accredited institution.

Staff coordination: AAPR believes that this concentration could be supported through expertise already on campus and further enhanced through coursework provided by courses offered by future hires in a number of departments.

EXPECTED OUTCOMES

With a modest investment of resources, the AAPR believes that the College can create a popular integrative concentration in Global Health, unique to Oberlin, that will serve our students well and enhance retention.

Financial impact: Although we cannot point to evidence that an integrative concentration in Global Health will enhance recruitment of new students, given current student interest, we do believe that it could enhance retention. Because lost revenue from students who do not complete their education at Oberlin is a significant challenge to financial sustainability, new

initiatives that improve retention will bring direct financial benefits in increased revenue and financial stability.

Support for other AAPR recommendations: This integrative concentration will address stated student interest and directly support the soon-to-be-established Career Community in Global Health and help students launch meaningfully.

STEPS TOWARD IMPLEMENTATION

The currently-organized ad-hoc committee exploring Global Health should be enhanced to include broad representation from Oberlin's divisions, including additional membership from the natural sciences. This committee will design the proposed concentration and proceed through the normal procedures including submission to EPPC and final approval from the College Faculty. To explore a 4-1 master's arrangement, the committee chair will reach out to a set of potential masters-accredited institutions with strong global health programs. All programming will include a detailed assessment tool that generates data for annual analysis and reflection by the Global Health committee. The committee will also be charged with recommendations, based on the assessment, to ensure that appropriate adjustments are made in a timely fashion.

TIMELINE

Summer 2019: identification of full committee, and regular meeting dates for the 2019-20 academic year. Identify potential 4-1 master's partners and initiate conversations to determine level of interest.

Fall 2019: Develop concentration learning objectives, identify structure of the integrative concentration and curricular interface with Global Health Career Community. Continue exploration of 4-1 partner institution.

Spring 2020: Consult with EPPC to vet and endorse the program of study in Global Health with a motion for approval by the College Faculty.

2020-2021: Launch of concentration

Ongoing after 2021: Regular reviews of the concentration, potential partnership, and integration with the Career Community

XIV. Enhancing Career Readiness

ABSTRACT

In response to demonstrated student interest, the AAPR Steering Committee recommends investments that will enhance the career readiness of Oberlin students, helping them to

connect their Oberlin educations with fruitful lives after college. These investments include additions to the Career Development Center Staff and the creation of a centrally located facility integrated with other offices that support integrative and experiential learning. The AAPR Steering Committee also recommends an expanded Career Communities internship program that includes some academic credit for internships and summer funding for quality internship experiences. Finally, the AAPR Steering Committee recommends that all majors incorporate curricular or co-curricular programming to help students understand and prepare for careers.²¹

SIGNIFICANT OBSERVATIONS

Oberlin excels in placing students into graduate and professional degree programs. However it lags behind peer institutions in launching our students into meaningful career opportunities in their first year after graduation. According to the 2018 COHFE Senior Exit Survey, only 25% of Oberlin students have accepted a full-time position before graduation, in contrast to 48% of our COHFE college peers and 59% of our COHFE university peers.²²

Part of the challenge is the lack of institutional investment in this area. Oberlin's Career Development Center is underfunded and understaffed relative to its peers. Among a peer group of 37 selective liberal arts colleges, Oberlin's Career Development Center ranks 24th in operating dollars per student. With a mean of \$42 per student, Oberlin does not look robust in this peer group at only \$25 per student. A need for further investment in career development resources is further confirmed in the data gathered through the AAPR process. Both data collected by consultants and our internal survey of Oberlin faculty, students and staff reveal widespread concern about a College career services office that "needs more financial resources" and would benefit from "mobilizing alumni to help with career introductions."

Generation research revealed that among prospective students' top-ten criteria in selection an institution, career outcomes (#7) was the least identified with Oberlin.

PURPOSE AND RATIONALE

As part of its efforts to help shape a 21st Century education that is true to Oberlin's mission, enhances interest among prospective students, and best serves current students for a lifetime, the AAPR has sought ways to better connect an Oberlin education to life after graduation. In addition to a wide variety of curricular efforts, the AAPR Steering Committee sees an opportunity to support and elevate efforts already underway to expand and improve Oberlin's career preparation programming.

Oberlin has begun to provide a proactive career readiness program through the Career Communities initiative (in pilot for Spring '19). This co-curricular initiative, designed to

²² In addition to the 2018 COHFE Senior Exit Survey, sources for these key observations include quality and student interest surveys, interviews, and the Generations survey of prospective students.

complement a student's academic course of study, helps them: (1) understand and articulate the transferable skills they have developed at Oberlin, (2) develop a professional network of potential mentors and employers, and (3) explore potential career paths through internships. In order to position Oberlin strongly in an increasingly competitive higher education marketplace, further investments in staffing, facilities, and programing will help this initiative succeed and ensure that Oberlin sustains a robust career and leadership development program.

KEY ELEMENTS

Staffing: We recommend additional staffing for the Career Development Center of 3-5 new FTE in positions dedicated to employer and opportunity development, alumni engagement and career communities, career curriculum development, and data collection and student coaching.

Internship support: We also propose a development initiative to guarantee funding for one high-quality internship per student as part of a capital campaign. Internship experience is the single most significant factor in competitive advantage for post-bac opportunities, including job placement, graduate school admissions, and awards competitions. Funding for unpaid internships will help Oberlin students compete, and it will help to level the playing field for students otherwise unable to pursue these invaluable experiences.

Enhanced facility: Oberlin lacks the appropriate facility for expansions in its career readiness program. Some investment to outfit a current facility such as the Mudd basement to house all integrative and experiential learning, including the Career Development Center, will also be required.

Academic component: We recommend that Oberlin should require that all academic departments include some component that helps their majors to understand their options and launch their careers. Institutional data indicate that Oberlin graduates pursue a broad range of professional areas that do not always correlate in a direct way to a student's primary course of study. Working with the appropriate faculty governance committees, Oberlin will need to find a range of options to ensure all of our graduates' career readiness.

Academic credit: Oberlin should also review graduation requirements and the structure for granting academic credit for internships, a core curricular component of a number of current concentrations and majors. Academic credit is another valuable resource for students, as it helps them to make progress toward their degree through pre-professional activities and to showcase that experience on their transcript. Offering credit demonstrates a tangible link between students' academic and artistic work and their co-curricular experience. Credit-bearing options should include opportunities for international students.

EXPECTED OUTCOMES

Investments in career readiness more in line with peer institutions will contribute to recruitment, retention, and alumni satisfaction. Helping Oberlin students understand and

articulate connections between their curricular and co-curricular experiences will improve the student experience overall and help students connect their educations to life beyond college and enhance Oberlin's reputation and distinctiveness.

Financial impact: Annually: \$250,000-\$400,000 for positions and increases in operating budgets to cover related curricular and co-curricular needs. A fully-funded internship program that guarantees funding for one internship would require endowment support of \$60 to \$75 million dollars.

Support for other AAPR recommendations: An expanded and more central Career Development Center will help support integrative and experiential learning opportunities as part of the new recommended integrative concentrations and joint College-Conservatory concentrations. It will also support other efforts to increase our applicant pool and yield and to improve our overall student retention rates.

STEPS TOWARD IMPLEMENTATION

Curricular changes related to career readiness requirements and internship credit will need to be vetted through the EPPC and the EPC, with a motion to the General Faculty for approval. Relocation of the CDC will need to be included in comprehensive space utilization planning, and budget increases for CDC staff and operating expenses modeled in future budgets.

TIMELINE

Fall 2019: EPPC and EPC review requirements for granting academic and/or co-curricular credit for internship experiences and consideration of required career development programming within academic majors, bringing significant curricular proposals to the relevant faculties for a vote.

Summer 2019 and beyond: Increase CDC staffing levels to support integrative concentrations, expanded Winter Term (2021), and expanded Career Communities proposed for this fall and future.

Summer 2020: Move the CDC and other integrative and experiential learning offices to a central location, and should be included in facilities and budget planning.

Summer 2019 and beyond: A capital campaign to include CDC, Career Communities and internship support, and other opportunities.

RECOMMENDATION FOR MAXIMIZING AAPR'S VALUE

XV. Implementation Assessment and Further Exploration

ABSTRACT

As the AAPR Steering Committee concludes its work — providing recommendations to President Ambar for building greater excellence in fulfilling Oberlin's educational mission while ensuring financial sustainability — it has identified both a need and an opportunity to build upon what has been achieved thus far. The AAPR Steering Committee recommends that the president, in consultation with the General Faculty Council and the Board of Trustees, appoint an *ad hoc* committee comprised of faculty, staff, students, trustees, and alumni with two vital roles that fall outside of our governance structure: 1) the committee will conduct periodic assessments of the implementation of the 2019 AAPR recommendations, and report its findings to the president; and 2) the committee will coordinate a plan, in collaboration with existing governance committees, to address long-term challenges and opportunities for what we know will be an increasingly competitive market in higher education.

SIGNIFICANT OBSERVATIONS

The Steering Committee recognizes the need for assessing the effectiveness of the implementation of the AAPR recommendations as well as the need for exploring new initiatives that will help shape education in Oberlin's third century and provide opportunities for additional revenue. The need for this exploration will only continue to grow as student interests and the body of human knowledge continue to grow and change.

PURPOSE AND RATIONALE

In the past year, the AAPR has gathered and analyzed an unprecedented amount of information that has led to the recommendations presented in this document. Each AAPR recommendation points to professional roles and/or governing bodies responsible for implementation of specific recommendations. There is no single body charged, however, with tracking the progress of AAPR recommendations as a whole. This is particularly significant, given the interrelated and interdependent nature of the AAPR recommendations. Moreover, there is no single body responsible for assuring that the recommendations remain effective for meeting the evolving challenges Oberlin will need to address in the future. Therefore, we recommend an oversight committee that can monitor and report on the progress of implementation and coordinate the analysis of long-term challenges and opportunities.

KEY ELEMENTS

Based on those needs and opportunities, the AAPR Steering Committee proposes two linked processes to follow up on the work of the AAPR. These will help realize maximum benefit from

the work done over the past year, and help to sustain the momentum AAPR has created this year within the Oberlin community.

AAPR implementation assessment: The AAPR Steering Committee proposes an *ad hoc* committee comprised of faculty, staff, students, trustees, and alumni be appointed by the president, in consultation with the General Faculty Council and the Board of Trustees. This group will be charged with undertaking a periodic assessment of implementation efforts on AAPR recommendations and reporting back to the president.

This assessment will gather the best available measurements of progress toward financial sustainability, comparing actual progress toward AAPR projections and estimates. This assessment will also document progress toward other AAPR goals such as attracting and yielding more students, better integrating the Conservatory and Arts & Sciences, better connecting an Oberlin education to life after Oberlin, and enriching Winter Term.

Importantly, this committee would report to the president on any challenges in integrating AAPR recommendations, and on cases in which shortfalls in implementation in one recommendation affect implementation of other recommendations.

The next phase of campus-wide review: The AAPR Steering Committee proposes that this *ad hoc* committee, in collaboration with existing governance committees and fully respecting those committees' respective purviews, coordinate a longer-term exploration of Oberlin's strengths and opportunities, with an eye toward building excellence, institutional sustainability, and national leadership in higher education beyond the 15-year horizon of the current AAPR charge. The next phase will focus on exploring new programming that would build on Oberlin's mission, history, and strengths for the institution's third century, preparing to educate students who will face a different world than Oberlin alumni have in the past. This *ad hoc* committee could also coordinate with responsible committees and stakeholders the investigation of fundamental topics such as the academic calendar and time-to-degree; the ways in which Oberlin provides access to its education to the broadest possible range of students in experiences, perspectives, backgrounds, and identities; the use of technology to enhance pedagogy and research; and the responsibilities of a college at a time of global climate change.

EXPECTED OUTCOMES

Following up on AAPR with structured assessment of implementation will provide the following benefits:

- Better integration of implementation efforts for AAPR recommendations;
- Continued transparency in Oberlin's response to historic challenges, and accountability for those responsible for AAPR implementation;
- Early warning if AAPR recommendations are not meeting financial goals;
- Early warning if external conditions change assumptions on which AAPR recommendations are based; and

- A continued institutionalist perspective as AAPR initiatives move forward.

Following up on AAPR with a coordinated new phase of exploration and recommendation will provide the following benefits:

- Creative changes to programming that address evolving student interest and the value of an Oberlin education in a changing world;
- Solutions that go beyond the 15-year horizon of AAPR;
- A growing culture at Oberlin that values making change for the long-term good of the institution, drawing from perspectives across the institution and complementing Oberlin's existing governance structures;
- A continuous focus on Oberlin's mission in a public, high-level setting.

IMPLEMENTATION AND TIMELINE

Fall 2019: President constitutes the *ad hoc* committee in consultation with the General Faculty Council and the Board of Trustees for a five-year period from Fall 2019 through Spring 2024.

Spring 2020: First assessment report of AAPR implementation submitted to the president; annual reports would follow each Spring through 2024.

Spring 2024: Report to the president with any recommendations for ongoing long-range planning and comprehensive review.

THE PATH FORWARD

XVII. The AAPR Vision

Taken together, these ideas would live up to Oberlin's mission in a new way by:

- Taking better advantage of our unique combination of a liberal arts college and conservatory of music, fostering a new suite of interdisciplinary opportunities through a new level of collaboration;
- Creating new academic structures that are creative and nimble enough to pioneer a new, more relevant curriculum and educational experience for our 21st century students;
- Bringing employee costs in line with the realities of its various employment markets, remaining competitive enough to foster excellence throughout its operations, while controlling expenses in order to ensure a sustainable future;
- Helping our students connect their classic liberal arts and musical educations with meaningful and thriving careers.

This is an interconnected vision, not a menu. These ideas are deeply intertwined — together, they contribute to a responsible path toward Oberlin's long-term financial health. Built on a foundation of fact-based analysis, these ideas will help all members of the Oberlin community live out their shared commitments to excellence, fairness, access, and creativity in the highly competitive higher education marketplace. They provide a platform and precedent for the institution to explore more deeply the new frontiers of 21st century higher education. And they will prepare the institution to better adapt to change in the future — in a way that is true to the ethos of *One Oberlin*.

APPENDICES

XVII. Key Facts

The Academic and Administrative Program Review has been from the outset a data-driven process. As part of the overview presentations that began on March 13, Steering Committee members shared a list of key facts that emerged from their examinations and helped to shape the areas of recommendation. Many of these facts appear elsewhere in this report as well. This appendix gathers them, lists the sources for each key fact, and where appropriate, offers an explanatory note.

Key facts about Oberlin's budget:

- o Without change, Oberlin's cumulative deficit would have reached \$162 million in 10 years beginning in FY2018

Source: Oberlin long-range planning model, June 2018. Note: This projection has already been mitigated by cost reductions underway during FY2019.

- o Reductions of \$11.1 million in the baseline budget are planned from FY2020 to FY2024 across the institution through the regular budget process — including the equivalent of 25 faculty FTE through attrition. Yet these reductions alone will not balance our budget. *Source: Oberlin long-range planning model. Note: FTE stands for full-time equivalents. For this purpose, attrition includes both the decision to not replace some faculty members who leave Oberlin or retire, as well as the elimination of some vacant visiting professor lines. Cutting through attrition does not mean that all faculty hiring or replacement will end; similarly, the normal channels of faculty hiring and alignment will allow reallocation of replacement positions as needed.*

- o Adjusted for inflation, faculty and A&PS have forgone \$5.5 million in total compensation since 2017 through salary freezes and benefits cuts.

Source: Finance & Administration. Note: Difference is based on projections of budgetary impact if there had been typical raises and no change in benefits during those two years.

- o In 2016-17, Arts & Sciences realized net revenues of \$23.9 million after direct and indirect costs, while the Conservatory lost \$11.1 million.

Source: Stevens Strategy Revenue-Center Model

- o Arts & Sciences students bring in, on average, \$10,000 more in tuition revenue per year than Conservatory students.

Source: Human Capital Research Corp. data. Note: The Conservatory provides more financial aid per student in order to effectively compete for students with other top conservatories.

- o Revenue loss based on lower costs of OSCA model yields a negative financial impact to Oberlin of \$1.9 million per year.

Source: Finance & Administration. Note: Includes foregone student revenue, less program management costs if they reverted to the College.

Key facts about employee costs:

- o Employee compensation — all faculty and staff — makes up 63% of Oberlin's budget.

Source: FY2019 budget

- o The average salary for Oberlin's Arts & Sciences faculty is 11.3% less than peers with whom we compete in recruitment, the Sweet 16.

Source: AAUP data.

- o Oberlin's average hourly staff wage is 34% higher than the average of four other Northeast Ohio liberal arts colleges (Kenyon, Dennison, Ohio Wesleyan, and Wooster). *Sources: Chronicle of Higher Education, Bureau of Labor Statistics. Note: These colleges represent similar institutions within the same region.*

- o Health care benefits cost \$9,849 per year for each faculty and A&PS employee; health care benefits cost \$16,984 per year for each hourly employee.

Source: Human Resources summary of actual plan costs to Oberlin for each employee group.

Key facts about students:

- o 83% of annual operating revenue comes from student tuition and fees.

Source: FY2019 operating budget

- o In 2018, almost 80% of students admitted to Arts & Sciences who listed music performance as their primary interest enrolled somewhere else.

Source: Human Capital Research Corp. data

- o 38% of our prospective students showed a strong interest in business. *Source: Stevens Strategy Survey*

- o 91% of students admitted to the Conservatory listed career preparation as very or extremely important.

Source: Human Capital Research Corp. data

- o 42% of returning students have a strong interest in global public health. *Source: Stevens Strategy Survey*

- o Oberlin Arts & Sciences students secure career-related jobs by graduation at roughly half the rate of their liberal arts college COHFE peers.

Source: COHFE Senior Exit Survey

XVIII. AAPR Outreach Meetings, September 5, 2018, through April 25, 2019

September 5, 2018 Working Group Chairs Update for General Faculty Meeting
 September 7, 2018 AAPR Community Surveys Launch
 September 11, 2018 Working Group Chairs Update/seek feedback from EPC
 September 12, 2018 Working Group Chairs Update for College Faculty Meeting
 September 13, 2018 Working Group Chairs Update for A&PS
 September 14, 2018 Working Group Chairs Update/seek feedback from EPPC
 September 14, 2018 Potential Student Interest (PSI) Outreach re: International Students
 September 20, 2018 Working Group Chairs Update for A&PS Coaches & Athletic Staff
 September 20, 2018 PSI with Dean Gray about DD, Conservatory access for College students, Individual Majors in the Con, career and alumni connection opportunities
 September 24, 2018: PSI test-run DD outreach with Con Council
 September 25, 2018 Working Group Chairs Update for Faculty & Staff
 October 3, 2018 AAPR Website Launch
 October 3, 2018 Working Group Chairs Update for College Faculty Meeting
 October 5, 2018 Working Group Chairs Discuss/Update Alumni Leadership Council
 October 5, 2018 Working Group Chairs Discuss with/seek advice from EPPC
 October 6, 2018 PSI DD Listening Session #1
 October 9, 2018 Working Group Chairs Discuss with/seek advice from EPC
 October 10, 2018 PSI DD Listening Session #2
 October 14, 2018 Working Group Chairs Update SAAC, Our Student Athlete Advisory Committee
 October 17, 2018 Working Group Chairs Update for General Faculty Meeting
 November 1, 2018 PSI DD Listening Session #3 (Janet with students)
 November 2, 2018 Potential Student Interest, (PSI) with Student Focus Groups
 November 7, 2018 PSI with Student Focus Groups (Two separate meetings this day.)
 November 9, 2018 PSI with Student Focus Groups (Two separate meetings this day.)
 November 10, 2018 PSI meeting with Parents Executive Committee (PEC)
 November 14, 2018 Working Group Chairs Update for General Faculty Meeting
 November 15, 2018 Working Group Chairs Discuss with Great Lakes College Association (GLCA)
 December 5, 2018 Working Group Chairs Update for General Faculty Meeting
 December 11, 2018 AAPR Feedback Email Launch - address released on website and facebook
 December 17, 2018 Working Group Chairs Update for Faculty & A&PS
 December 19, 2018 Working Group Chairs Update for College Faculty Council Meeting
 February 6, 2019 Working Groups Update for General Faculty Meeting
 February 12, 2019 Working Groups Update for Con Faculty Meeting
 March 2, 2019 Acting Deans with Parents Executive Committee (PEC) re AAPR
 March 6, 2019 AAPR Presents Overview Recap Generation's and HCRC
 March 6, 2019 AAPR Chairs Update Alumni Leadership Council
 March 12, 2019 AAPR and OSCA Leadership (past, present, future Officers) meet to discuss OSCA area of recommendation and renewed relationship between the College and OSCA
 March 13, 2019 AAPR Broad Overview to Community
 March 14, 2019 AAPR Board Overview to Community

March 14, 2019 Broad Community Listening Sessions after the Big Three Presentations
March 15, 2019 Con AAPR Faculty members meet with Con Faculty Council
March 18, 2019 AAPR Steering Committee members meet with A&PS, Student Senate, Con Council of Students, GFC, College Fac Council and Con Fac Council, EPPC and EPC
March 19, 2019 Con AAPR Faculty and AAPR member Janet Wu meet with Con EPC/Division Directors
March 19, 2019 Student Life Committee
March 20, 2019 AAPR Steering Committee Update GF
March 21, 2019 Alumni and AAPR Webinar Update
March 21, 2019 Con AAPR Reps meet with Conservatory Council of Students (Conservatory)
March 22, 2019 AAPR consult with EPPC
March 22, 2019 AAPR Update to Junior Faculty
March 31, 2019 AAPR consult with EPC and EPPC - ConFC and ColFC
April 1, 2019 AAPR consult with OSCA
April 2, 2019 AAPR consult with Winter Term Committee
April 2, 2019 Con AAPR Reps meet with Voice Division
April 2, 2019 Con AAPR reps host Open Forum #1 for Con students
April 3, 2019 AAPR Meeting with CF's
April 4, 2019 Con AAPR reps host Open Forum #2 for Con students
April 4, 2019 Con AAPR reps meet with Piano Department
April 4, 2019 AAPR meet with Career Development Center
April 8, 2019 AAPR consult with GFC
April 8, 2019 Con AAPR Reps meet with String Division
April 8, 2019 AAPR meet with CES
April 9, 2019 Student Life Committee
April 9, 2019 EPC
April 9, 2019 Con AAPR with Conservatory Faculty (at monthly Con Faculty Meeting)
April 10, 2019 AAPR Meeting with GF
April 10, 2019 College Faculty Council
April 10, 2019 Consult with OSCA
April 11, 2019 AAPR consult with EPC, and EPPC
April 11, 2019 Con AAPR reps host Open Forum #3 for Con students
April 12, AAPR Consult with Winter Term Committee
April 12, 2019 Conservatory Faculty Council
April 12, 2019 CF AAPR Reps meet with Art History
April 15, 2019 Con AAPR reps host Open Forum #4 for Con students
April 15, 2019 Con AAPR Reps host Open Forum #1 for Con Faculty and Staff
April 16, 2019 Consult with CIT
April 16, 2019 EPC
April 16, 2019 Conservatory Faculty Council
April 18, 2019 Con AAPR Reps host Open Forum #2 for Con Faculty and Staff
April 18, 2019 Consult with SLAC
April 19, 2019 Con AAPR Reps host Open Forum #3 for Con Faculty and Staff
April 19, 2019 AAPR consult with Junior Faculty #2

April 22, 2019 AAPR Presentation at Kendal

April 24, 2019 Consult with Non-Faculty General Faculty Members

April 24, 2019 Consult with CFC and AAPR A&S Faculty

April 25, 2019 "Solution-Oriented" All Student Discussion with AAPR

XIX. Further reading

Full texts of campus communications about AAPR, FAQs about the process and particular areas of content, relevant webinars, and other information about AAPR can be found at <https://www.oberlin.edu/about-oberlin/leadership-and-administration/aapr>

XX. The AAPR Steering Committee

- **David Kamitsuka**, Chair of the AAPR Steering Committee and Acting Dean of the College of Arts and Sciences
- **William Quillen**, Vice Chair of the AAPR Steering Committee and Acting Dean of the Conservatory
- **Brian Alegant**, Professor of Music Theory
- **Corey Barnes '98**, Associate Professor and Chair of Religion
- **Cristina Briboneria '05**, Alumni Leadership Council at-large member
- **Ron Cheung**, Professor and Chair of Economics
- **Kameron Dunbar**, Class of 2019, Chair of Student Senate
- **Sebastian Faber**, Professor and Chair of Hispanic Studies
- **Cindy Frantz**, Professor of Psychology and Environmental Studies
- **Mary Garvin**, Professor of Biology
- **Aaron Goldman**, Assistant Professor of Biology
- **Alexia Hudson-Ward**, Azariah Smith Root Director of Libraries
- **Ben Jones '96**, Vice President for Communications
- **Leslie Joseph '06**, Director, Audiovisual Services
- **Sadie Keller**, Class of 2019
- **Wendy Kozol '80**, Professor of Comparative American Studies and Affiliate of GSFS
- **David Krischer '78**, Trustee
- **Minsok Pak '91**, Trustee
- **Michael Parkin**, Professor of Politics
- **Charles Peterson**, Associate Professor of Africana Studies
- **Nick Petzak**, Director, Fellowships and Awards
- **Meredith Raimondo**, Vice President and Dean of Students
- **Greg Ristow '01**, Assistant Professor of Conducting, Director of Vocal Ensembles
- **Renee Romano**, Robert S. Danforth Professor of History, Professor of Comparative American Studies, and Africana Studies, and Chair of History
- **Alexa Still**, Associate Professor of Flute

- **Peter Swendsen '98**, Associate Professor of Computer Music and Digital Arts, Chair of TIMARA
- **Rebecca Vazquez-Skillings**, Vice President of Finance and Administration
- **Joe Vitale**, Chief Human Resources Officer
- **Natalie Winkelfoos**, Associate Vice President for Athletics Advancement and Delta Lodge Director of Athletics & Physical Education
- **Jeff Witmer**, Professor of Mathematics
- **Janet Wu**, Class of 2020