

**The St. Olaf College Board of Regents Visioning Task Force
September, 2021**

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Preamble

American higher education is at a crossroads, with many colleges and universities facing dire, existential crises, based in part on the following national issues:

- Dissatisfaction with the “return on investment” of a traditional college education
- Fewer and fewer students (men especially) opting for a liberal arts college experience
- Burgeoning education alternatives using virtual learning and targeted career preparation to their advantage
- Under-addressed technological change

More specifically, St. Olaf and many of the colleges and universities with whom we compete, also face some daunting and urgent challenges:

- A 15+% reduction in the number of high school graduates, beginning in 2026
- A tectonic shift of U.S. population away from the Midwest
- Intense competition for students from elite colleges and universities
- Continuing increases in comprehensive fees and continuing, ever-deeper discounting

For so long, St. Olaf has excelled. In the past 15 years, the college has prospered even as some of these pressures have mounted. We acknowledge and celebrate these successes. Our challenge now is to look forward and secure a future more vibrant than our past, even in the midst of historic changes and the headwinds we now face.

While St. Olaf enters these next 20 years from a position of relative strength, it is just that: *relative*. St. Olaf is regarded as a strong institution in the region, but we cannot yet claim a distinctive reputation nationally. St. Olaf's national ranking by US News and World Report has declined significantly in recent years. The College's student retention and graduation rates have also declined in recent years. The pressures and challenges noted above already burden us, limiting important options, choices, and flexibility; left unaddressed, they threaten a sustainable and prosperous future.

Fortunately, we have a solid foundation upon which to build, with many smart, committed stakeholders who see these challenges as opportunities and have the courage to act. The successful liberal arts colleges of the future will be those that are *agile*, taking strong, decisive, and urgent action over the next five years. For St. Olaf this includes ensuring a successful presidential transition and effective implementation of the four commitment areas recommended in this document.

The St. Olaf Board of Regents Visioning Task Force met over the course of a year, asking these questions, learning from experts, and exploring the college's current strengths, weaknesses and opportunities, resulting in the following recommended areas of focus for the years ahead.

Timeline

- Task Force begins its work (late summer and Fall, 2020)
- Meetings and interviews with multiple subject matter experts
 - On the future of higher education
 - Brian Rosenberg, former President, Macalester College
 - Jim Day, FarrellDay, higher ed consulting
 - Matt Trainum, PhD, CREDO higher ed consulting
 - On religious history, tradition and identity
 - Eboo Patel, interfaith leader, Lutheran Center for Faith, Values and Community fellow, St. Olaf College
 - Deanna Thompson, director, Lutheran Center for Faith, Values and Community, St. Olaf College
 - Jo Beld, Vice President for Mission, St. Olaf College
 - Father Dan Groody, Vice President, University of Notre Dame
 - Don Bishop, Enrollment Vice President, University of Notre Dame
 - On enrollment and financial aid strategy
 - Jeff Bolton, St. Olaf Regent
 - Chris George, Dean of Admissions and Financial Aid, St. Olaf College
- Meetings with key stakeholders
 - President's Leadership Team
 - Faculty representatives
 - All-Faculty meeting
 - All-Staff meeting
 - Presentations to Board of Regents, October 9, 2020; February 5, 2021; May 6, 2021
- Task Force report delivered to the Board of Regents for consideration and endorsement (Fall, 2021)

We Aspire: A Compelling Vision for the Future

St. Olaf College will be known as one of the country's best liberal arts colleges, nationally and internationally recognized for excellence, academic rigor and community inclusivity, while developing and preparing students of character to lead lives of substance as contributing citizens of the world.

We Affirm: Four Commitments

St. Olaf offers students a rigorous academic experience paired with self-exploration in an inclusive and diverse community, welcoming people of different faiths, traditions and worldviews. As the country's premier colleges and universities face significant headwinds economically and culturally, St. Olaf claims its position as the pre-eminent "third path institution," rooted in its Lutheran identity and religiously inclusive, occupying space at the intersection of the elite and the practical.

As a Task Force, we endorse the following Four Commitments as central areas of emphasis and distinction over the coming years:

COMMITMENT #1: "FOR EVERY OLE" – Developing the Whole Person

Since its founding, St. Olaf has been committed to academic excellence and the development of habits of mind and heart enabling every student to flourish in an unknown future. We aspire to be a place that welcomes and includes each member of the community, achieved in part by the development of intentional connections between a rigorous academic experience and the encounters students have in a residential community. Our residential nature is not unique, nor is it differentiating, but the St. Olaf campus culture is, can, and should be.

The synthesis of what students learn in and out of the classroom, in conversations with faculty and staff mentors and advisors, and by being engaged with learning experiences on and off campus is critical to the St. Olaf student journey. Reflecting on these conversations and experiences advances students' sense of vocation and purpose to lead lives of consequence and impact.

The College's Lutheran identity also defines its unique place in higher education, shaping the character of our community and creating an environment that draws together people of many

and varied faiths and worldviews. St. Olaf should claim its distinctive Lutheran values, advancing a campus-wide commitment to be a welcoming place for every student from the widest variety of backgrounds.

This “Ole pathway” should include more intentional connections between academic and campus community experiences leading to a four-year development plan. The development of leadership competencies and character are critical in this plan to unleash each student’s full potential and discernment of their role in the St. Olaf community and in the world.

The four-year development plan for every Ole should combine the requisite support with excellent academic resources and thoughtful, intentional mentoring. Connecting it all from day one, and supporting it with a robust data and reporting infrastructure, will bring together classroom learning, advising and mentoring, engaged learning experiences, and post graduate planning, preparation and exploration.

The College should thoughtfully and intentionally integrate the Gallup “Big Six” college experiences that lead to engagement and more thriving at St. Olaf and after, with students reporting:

1. Professors who cared about me as a person
2. At least one professor who made me excited about learning
3. A mentor who encouraged my goals and dreams
4. A job or internship that allowed me to apply what I was learning in the classroom
5. A project that took a semester or more to complete
6. Being active in extracurricular activities

More than 60% of St. Olaf students participate in music or athletics, the vast majority of whom do not major in a discipline tied to those areas. Rather, St. Olaf students seek rich and deep opportunities to rehearse, play, practice, compete and work. Key life coaching, advising, mentoring and supervision of nourishing student workers occur precisely in these arenas, and these commitments should be amplified in this four-year development plan. In this orientation, advising and mentoring take on a central and critical place in the early and developing relationship between a student and the college. It is critical that faculty and staff from these areas are full participants and contributors to the envisioned comprehensive four-year development plan.

This commitment necessitates bringing students to the College who welcome mature, thoughtful, and challenging conversations about faith and values, and diversity, equity and inclusion, in and out of the classroom, on the Hill, and throughout the world.

Students should be able to clearly see both the College's commitment to cultural competency and the encouragement to reach out to others across differences. Likewise, students should be committed to their individual and collective responsibility to engage in meaningful dialogue and action to advance these goals. The Enrollment division should play a pivotal role in explaining and marketing these commitments, and offers of admission to prospective students should reflect this priority.

While St. Olaf has numerous and rich opportunities for students to grow, learn and explore, 2019 research revealed gaps in how students experience the college's culture and resources. This is especially prevalent among BIPOC, low income, non-Christian and first-generation college students. The "For Every Ole" model should have as a central focus the elimination of this gap, ensuring every student has access to a high-quality, transformational St. Olaf experience while also increasing student retention and graduation rates.

COMMITMENT #2: IMPROVING ST. OLAF CULTURE AND LIVING OUT OUR VALUES

The Faculty, Staff and Regents are the living embodiment of the College's mission. As such, St. Olaf employees and Regents should commit to — and hold themselves accountable for — living out the mission in authentic, individual and unique ways, addressing difficult issues with patience, care, intellect and action. All members of the St. Olaf community should be accountable for individual and collective commitments to a shared community that creates, sustains, and improves St. Olaf culture.

Integral to the College's mission is the conviction that a St. Olaf education must be bold, reflective and innovative. Transparency and authentic communication are essential to foster an environment of shared collaborative leadership. Faculty and staff offer both institutional knowledge and skills. In an environment increasingly marked by rapid change, faculty and staff must be supported in efforts to adapt and contribute proactively to this changing environment. The College must, in turn, offer the infrastructure essential to a dynamic learning and living environment.

Academic excellence is an imperative for our faculty and students; it thrives when committed and accomplished faculty and motivated students meet to explore knowledge, traditions and

values, and grows when faculty and staff are committed to a transformative educational experience.

Much of St. Olaf's distinctive identity is found in the work of the Piper Center, the Taylor Center, the Lutheran Center for Faith Values and Community, and The Institute for Freedom and Community. We are at a critical moment in society where the values championed by our Centers and the Institute are a critically needed lens for understanding, compassion, and personal wellbeing. These vessels provide a unique means to expand conversations on values and to manifest those commitments through programmatic integration and thoughtful community engagement.

Our Centers and the Institute have an opportunity to play a stronger role as interdisciplinary hubs, focusing and highlighting institutional values through an academic and co-curricular lens, thereby elevating the institution's commitment to whole-person education. The Task Force endorses these four units, and an envisioned Center for Global Connections and Understanding, being leveraged to play an active and integrated role through offerings, coaching, presentations and workshops to develop a student culture free of bias and judgment, focused proudly on inclusion, respect, fairness and honesty.

While faculty, staff and Regents have different roles, it is imperative that some core norms prevail in the work of the College. Faculty, staff and Regents should bear individual and collective responsibility to:

1. Advance the distinctive identity of the College
2. Advocate for the principles and commitments of the College, including its Lutheran identity and diversity, equity and inclusion
3. Balance the core of who we are and who we need to be—both reformed and reforming
4. Lead with courage to engage and inspire others
5. Execute with excellence
6. Promote healthy and respectful dialogue with each other and the students we serve

COMMITMENT #3: EMPOWERING DIVERSITY, EQUITY AND INCLUSION

Critical conversations about equity, access and systemic injustice have taken on new urgency and a well-deserved role in our national dialogue and our campus conversations. The Task Force endorses current and ongoing efforts throughout the campus that create, sustain and

expand an inclusive, culturally-competent community in which all students, faculty and staff members can thrive.

Continuing to more fully realize our long-standing values of inclusion and justice is a critical priority for St. Olaf. We celebrate the diversity, equity, and inclusion work which has advanced over the last several years that intentionally engages, uplifts, and celebrates all diversity, actively removing barriers to full participation in the St. Olaf community.

In an educational community such as ours, the burden often falls heaviest on those for whom equity has often been farthest from reach. We must expand efforts to have our campus experience fully reflect our deeply felt values on equity and inclusion.

St. Olaf must continue to adopt new ways of thinking, doing and acting, instilling in its faculty, staff, students and Regents a growth mindset, respect for those with different views, and acceptance that the work must be collaborative and ever-evolving. As a college grounded in values and faith, it is both an opportunity and a passionate obligation to advance this topic in alignment with the College's mission. Campus dialogue, conflict, and interaction must create and advance greater clarity, transparency, trust, cooperation, and respect.

If we don't set bold commitments and meet them with appropriate resources enabling us to seize the opportunity to re-examine and change how we live, work and relate to one another, we will have failed our students and our college. **As a strategic commitment of the institution, diversity, equity, and inclusion efforts must be generously funded** – the Task Force endorses and supports an investment that matches the needs of the moment and our commitment to the future.

COMMITMENT #4: BECOMING AN AGILE AND FOCUSED ST. OLAF

The successful liberal arts colleges of the future will be those that are *agile*, taking strong, decisive, and urgent action over the next five years – before it is too late. Being able to adapt and proactively respond to change requires a better understanding of who we are: a culture that rewards and supports risk-taking and change with a laser-sharp focus on the vision of who we want to be. The College needs to begin now to re-orient the academic profile, re-shape the campus work environment for staff, faculty and students and re-assess the post-pandemic student experience driven by virtual communities, technology and the need for a holistic development plan for each student.

The greatest threat to most American colleges and universities is a financial model which relies on a “high tuition/high discount” presumption. Tuition, room and board fees have risen annually at St. Olaf (and at 98% of all colleges and universities) and that has not resulted in increased net income, due in part to our market position but also in some significant measure to our commitment to meeting demonstrated financial need for every student while simultaneously pursuing an ambitious plan to diversify the student body. An additional challenge is our above-average size, which has offered little flexibility to pursue the one true path to a sustainable financial future, namely, growing net revenue per student. The College’s current model – a four-year “all at once” experience taking place primarily on campus – should also be tested regularly for shifts in the mindset of prospective students and families.

St. Olaf should pursue a model that efficiently and strategically deploys resources in pursuit of broad institutional needs and goals, with the overarching goal of generating sufficient net revenue and assets to achieve our mission.

Public suspicion of the liberal arts should not guide or direct rapid departures from core elements of the college’s curriculum. However, employers are increasingly seeking more lifelong skills – empathy, communication, cross cultural competency, and synthesis thinking. St. Olaf should position itself as a place that successfully develops those skills in its graduates to anchor current and future curricular decisions when adding or subtracting requirements and offerings.

Key to building the institution of the future is a rich, collaborative leadership model between the Board, President’s Leadership Team, faculty, and staff—a model that fosters collaboration while not stifling innovation and institutional agility. Reflecting our values and ethos, formal shared governance and informal, long-standing traditions of community engagement in decision-making will be central to our adaptability and collective success.

St. Olaf faces a set of choices and decisions as it implements a new general education curriculum, completes a significant residence hall project, and prepares for a presidential transition. As the College looks to its sesquicentennial in 2024-25, the Task Force invites the college community to begin a set of robust conversations centered on the future of higher education, St. Olaf’s core commitments, and opportunities we can seize. Through the Visioning Task Force, the Board has begun conversations on future priorities; as this dialogue continues, it is imperative that we engage the insight and energy of faculty, staff and other key stakeholders. This intentional conversation on change and institutional values should connect with other commitments and included charges while also transcending those specific topics,

creating agency for faculty and staff to imagine the best future for St. Olaf, all in anticipation of a new President and future strategic planning by 2024.

We Act: Charges to Advance the Vision

In full support of these four core commitments, we, the Visioning Task Force of the Board of Regents, present the following charges initially to the Board of Regents at its October, 2021 meeting and thereafter to the President, the President's Leadership Team, the St. Olaf community, and ourselves. We will advance the vision and bring these commitments to life for our students and for the long-term vibrant future for St. Olaf.

- 1. The Task Force recommends charging the President's Leadership Team (PLT) to develop a collaborative and comprehensive advising and mentorship model which will include a four-year, personalized development plan for each student.***

St. Olaf will develop a four-year plan to intentionally and fully focus on the whole person — intellectually, spiritually, physically, culturally and emotionally — with the clear outcome of higher retention and extraordinary student satisfaction. This focus for each student will include an integrated and holistic academic, personal and career advising and mentoring system for every student. This approach should break from the historic pattern of “advisor: student,” focusing instead on a collaborative, campus-wide, team-based approach where students receive coordinated guidance, empowerment, and direction from a range of community members. All students, regardless of background or circumstance, should have full access to a robust set of resources to meet their physical, spiritual and mental health needs as a part of this plan.

Initial outcome: Presentation of a plan to the full Board by the May, 2022 Board Meeting, with implementation beginning by Fall, 2022.

- 2. The Task Force recommends charging the PLT to develop a plan to elevate the College's stature and improve its performance with respect to salient and pertinent criteria in national rankings, moving St. Olaf into U.S. News and World Report's top 40 national liberal arts colleges.***

The College will actively pursue investments in faculty, research, and the academic program that will also raise the College's stature and relevant national rankings. While rankings will never in and of themselves drive curricular decisions and choices, rankings measure common markers of success, and help institutions achieve more prominent stature in the marketplace which has numerous benefits including consideration, philanthropy, and market share.

As part of this charge, the Board endorses:

- Significantly increasing the percentage of classes which have fewer than 20 students
- Reviewing accounting and reporting mechanisms to U.S. News and World Report, ensuring St. Olaf is appropriately receiving credit for its investments and commitments.
- Feedback from PLT on how space utilization and class time restrictions can be enhanced to better support smaller class sizes.

Initial outcome: Presentation of a plan by the February, 2022 Board meeting, with implementation beginning immediately.

- 3. The Task Force recommends charging the PLT to undertake a rigorous assessment of market perceptions of the College's image and offerings through a comprehensive market research project of the College's brand and stature.***

Strengthening our brand position as a premier liberal arts college with vibrant Lutheran values requires accelerating enhancements to the College's marketing efforts, ensuring its offerings and services are best-of-class and known as such. Our aspirations, including being a first-choice among prospective students, recruiting and compensating faculty and staff who are leaders and contributors in their field, and anchoring our reputation with some of the best employers and graduate schools, require this commitment and accompanying investment.

Additionally, the Pacific Consulting Group research, which we view as revealing and relevant, should be repeated semi-annually to best ascertain changing perceptions within our current student and parent cohorts.

Initial outcome: Presentation of a plan by the February, 2022 Board meeting, with research to be completed in 2022.

4. *The Task Force recommends charging the PLT with providing a multi-year enrollment plan, including optimizing total student body head count, recruiting and enrolling higher net revenue students, maximizing opportunities around new Davis UWC Scholars' funding, and enriching diversity of our student body.*

St. Olaf should determine the optimal size of the student body and the mix of revenue generated in pursuit of strategic priorities. The Task Force believes the College should, like most prestigious liberal arts colleges, both meet demonstrated financial need and pursue an ambitious and conscious effort to increase diversity in the student body. There is historical evidence that the best gains in net revenue per student occurred in years where the size of the first-year class was constrained.

Accordingly, the Task Force endorses the following:

- A plan to optimize total student body head count by marginally reducing the size of the first-year class (by 25 to 50 students), beginning as soon as it is strategically and financially feasible.
- A targeted effort to strengthen and expand our relationship with the Davis UWC Scholars program.

5. *The Task Force recommends authorizing the PLT to develop a resource generation and allocation plan to address the challenges we face and fully realize the aspirations we have to Fund the Future of St Olaf.*

Throughout its history, St. Olaf College has made prudent and thoughtful investments in the future. The Task Forces acknowledges with gratitude and admiration decisions made by the Administration and the Board to annually generate positive net operating income, fund depreciation and capital investments with a keen lens to the future, and grow the endowment. The realities facing St. Olaf and all of higher education will require different choices with respect to budgeting, investment, and resource allocation. The Task Force encourages the Board to be bold in its direction to the President to lean in on a strategy of investing for the future.

The Task Force endorses:

- The Finance Committee developing longer-term plans for endowment management, utilization, spending and reallocation to enable the requisite investments required by this Visioning plan.
- The Board, through the Finance Committee, pursuing various budget modeling scenarios that incorporate size of student body, investments to advance retention, adjusting how we meet demonstrated financial need, and investments in student and faculty resources, consistent with strategic priorities.

Furthermore, The Task Force encourages the Board, through the Advancement and College Communication and Finance committees, to pursue opportunities that align the conclusion of President Anderson’s successful tenure, the upcoming arrival of a new president, and the College’s 150th anniversary.

The Task Force endorses campaigns for excellence to raise funds that directly advance key strategic priorities (for example: mentoring, meeting demonstrated financial aid, or faculty support). These fundraising efforts could be designated specifically to support factors related to student learning as reflected in national rankings.

Initial outcome: Funding options and investment requests should be included in the requested plans

- 6. The Task Force recommends charging the PLT, in partnership with faculty, to develop the academic program of the future, ensuring our academic offerings remain excellent, relevant and sustainable.***

The premier liberal arts colleges of the future will be distinguished by their deft adaptation of classic (and essential) offerings with new priorities essential to an emerging and ever-changing world, while simultaneously maintaining the highest academic quality. We invite the campus community to grow and reframe our academic offerings—thinking through technology, modality, and the needed skills of future graduates.

While St. Olaf has not added programs and faculty in any considerable way over the past 10 years, it has also not prioritized programs that are in the greatest demand or that could draw additional consideration in the marketplace resulting in additional students and revenue.

Given the high quality of our academic offerings, the Task Force endorses a growth plan for top programs. For example, more than 45% of recent graduates are STEM majors. Additionally, the Task Force endorses PLT's effort to make long-range decisions on program viability, noting programs with enrollment declines and reassessing staffing accordingly during normal attrition moments. The Board does not seek immediate program cuts; rather, we endorse a continual, thoughtful alignment of academic offerings with market needs.

Initial outcome: Include a long-term, high-level program growth outline in the requested comprehensive enrollment plan or as a free-standing plan.

7. The Task Force recommends charging the PLT to actively pursue additional partnerships and relationships that will advance strategic aspirations and priorities.

St. Olaf will actively seek, evaluate, and pursue partnerships that broaden our impact, build on the College's core competencies, and create opportunities for enhanced net revenue and philanthropic support for the College's mission. Partnerships that further the College's mission and enhance St. Olaf's identity and strengths provide a distinctive competitive advantage.

The College should leverage its reputation and location to consider potential partners. We have already seen the tremendous opportunities offered by several key partnerships (including the level of talent and diversity the Davis UWC Scholars and the POSSE program have brought to our student body), and we must lean into this strength to develop new partnerships.

A culture that embraces partnerships and collaborations with foundations, community-based organizations, businesses, governments, non-profits and other colleges and institutions allows us to be more agile, competitive and offer additional opportunities to students.

Initial outcome: External partnerships should be a featured section within the requested four-year development proposal and enrollment plan.

We Avow: The Regents' Promise

The Visioning Task Force wishes to be explicitly clear: the charges listed herein are neither unfunded mandates or prescriptive declarations. The Board of Regents commits to supporting St. Olaf leadership and the St. Olaf community as it enriches these ideas, explores best directions, and builds the institution of the future. We, the Regents, intend to enhance today's investments now to achieve these aspirations, and thus stand ready to support these commitments with resourcing decisions and new investments. Wherever necessary, we welcome multi-year investment needs and long-term budget plans which will allow the Board to fully support these aspirations through necessary resourcing.

In short, the Task Force encourages the Board to accept its continuing charge to enthusiastically support the long-term health and success of St. Olaf through governance, financial stewardship, and long-term vision.

Upcoming Presidential Search

The Task Force presents this report and its listed priorities as a guiding document for the upcoming president search. The vision that grounds this document – and the commitments and charges that give that vision life – provide clarity on the expectations St. Olaf has for its next leader and on the partnership and support that leader can expect as we come together to sustain and advance this vision and the amazing legacy that is St. Olaf College.

Task Force Membership

Susan Gunderson, Chair

Jen Hellman

Sean Buress

Paul Grangaard

Mark Jordahl

Chris Klein

Tim Maudlin

John Raitt

Jon Salveson

Matt Richey, Faculty Representative

Michael Kyle, President's Leadership Team