

Progress Report submitted to the New England Association of Schools and Colleges

Commission on Institutions of Higher Education

Middlebury College

Middlebury, Vermont

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## Introduction

On February 27, 2008, Middlebury College notified the New England Association of Schools and Colleges (NEASC) of its intent to merge with and incorporate the Monterey Institute of International Studies (MIIS), and requested approval of a substantive change that would recognize the merger, subsume MIIS within Middlebury's accredited status, and include MIIS in subsequent reviews for re-accreditation.

Following a visit to both campuses and a report to NEASC by Colby President Bro Adams during the summer of 2008, the substantive change request was approved on November 21, 2008, The Western Association of Schools and Colleges (WASC) ceded its accreditation jurisdiction to NEASC, and MIIS accreditation shifted to NEASC's realm on March 9, 2009.

The merger formally took place on June 30, 2010 completing the process initiated by the affiliation of the two institutions in December, 2005. As of the date of the merger, the MIIS California Corporation was dissolved, and MIIS assets, programs and operations were subsumed under Middlebury College's 501(c)(3) organization. There is now one legal entity: The President and Fellows of Middlebury College; the Monterey Institute of International Studies functions as a discrete unit of the College. [See Appendix A: Plan and Agreement of Merger]

At the time of the merger, the official name of the Institute was changed to Monterey Institute of International Studies, a Graduate School of Middlebury College. This change is reflected in the Institute's logo, used on its web site and on all printed and electronic publications, transcripts, and diplomas, and appears on new campus signage installed during the summer of 2010.

MIIS was governed, during the period of affiliation, by a seventeen member Board of Trustees, many of whom were also members of the Board of Trustees of Middlebury College. The merged organization has one governing board – the Middlebury College Board of Trustees. However, MIIS retains a Board of Governors with delegated advisory authority. The members of the former MIIS Board of Trustees have been appointed to serve as the inaugural Board of Governors of the Institute. [See Appendix B: Bylaws of the Board of Governors of the Monterey Institute]

The chief executive officer of MIIS is its President, Sunder Ramaswamy, who was appointed to the position in 2008 and took office on January 1, 2009. President Ramaswamy is a member of the Middlebury faculty, where he has taught in the Economics department since 1990 and served in a variety of administrative capacities. In his role as president of MIIS, he reports to the president of Middlebury, Ronald D. Liebowitz.

This report recounts the steps that were taken from affiliation to merger, as these two institutions sought to strengthen each other through integration of operational and programmatic functions, and through the development of a shared vision of global education. It also offers an assessment of the many successes and occasional challenges encountered along the way. The initiative to

merge the Monterey Institute into Middlebury has come to be known as  $M^2$ , denoting the exponential value created when two institutions combine their resources, create a constellation of complementary programs in shared areas of strength, and reach out to learners around the world.

## Institutional Overview

### Middlebury College

From its proud history spanning more than two centuries, Middlebury College has emerged as one of a handful of the most highly regarded liberal arts colleges. Middlebury is unique among these schools in being a classic liberal arts college that also offers graduate and specialized programs operating around the world. Our planning has aimed to build on these strengths in a time of global change and intense competition in higher education by redefining the boundaries of the institution for a new century. Our central mission as a liberal arts college means that we are committed to educating students in a tradition that embodies a method of discourse as well as a group of disciplines; in our scientifically and mathematically oriented majors, just as in the humanities, the social sciences, the arts, and the languages, we emphasize reflection, discussion, and intensive interactions between students and faculty members. Our vibrant residential community, remarkable facilities, and the diversity of our co-curricular activities and support services all exist primarily to serve these educational purposes.

As a residential undergraduate college, Middlebury recognizes that education takes place both within and beyond the classroom. Since our founding in 1800, the College has sought to create and sustain an environment on campus that is conducive to learning and that fosters engaged discourse. Middlebury is centrally committed to the value of a diverse and respectful community. Our natural setting in Vermont's Champlain Valley, with the Green Mountains to the east and the Adirondacks to the west, is also crucial to our identity, providing refreshment and inspiration as well as a natural laboratory for research. The beauty of our well-maintained campus provides a sense of permanence, stability, tradition, and stewardship. Middlebury has established itself as a leader in sustainability initiatives, with an accompanying educational focus on environmental issues around the globe.

Beyond this central mission as a liberal arts undergraduate college, Middlebury's mission also includes the provision of top-quality graduate education in selected areas of critical importance to a rapidly changing world community. We offer coursework and graduate degrees through Middlebury's Language Schools, Schools Abroad, the Bread Loaf School of English, and with the completion of the merger described in this report, the Monterey Institute of International Studies. These programs offer study in and about a remarkably wide array of languages, literatures, and cultures.

Through Middlebury's Language Schools, individuals can study one of ten different languages at all levels in an immersive environment. Six of the ten Language Schools offer graduate degrees (in Chinese, French, German, Italian, Russian, and Spanish). The Language Schools also offer the opportunity to earn a Doctor of Modern Languages (D.M.L.) degree. This degree, offered

first in 1927, is unique to the College and prepares teacher-scholars in two modern foreign languages, providing them with the skills and resources that will help them develop as teachers of second language acquisition, literature, linguistics, and language pedagogy. Currently, there are seventy-six students enrolled in the D.M.L. program. Together the Language Schools in combination with Middlebury's Schools Abroad (five of which offer graduate level study), award about 170 M.A. degrees per year.

The Bread Loaf School of English is the largest graduate English Literature program in the country. It annually awards approximately 85 M.A. or M. Litt. degrees at four separate sites (Santa Fe, New Mexico; Asheville, North Carolina; Oxford, England; and Ripton, Vermont).

By virtue of its long experience offering graduate programs and managing these programs around the country and around the world, Middlebury is uniquely poised to incorporate the graduate programs at MIIS, which complement the existing graduate programs at Middlebury.

### Monterey Institute of International Studies

The Monterey Institute of International Studies (MIIS) was founded in 1955 to teach languages in a cultural context. Over 50 years later, that mission has expanded to include two professional graduate schools offering masters degrees in the areas of language teaching, translation and interpretation, international policy studies, and international business; world-class research initiatives, including the James Martin Center for Nonproliferation Studies; and specialized short-term training programs for active professionals. An emphasis on advanced language proficiency and deep cultural understanding is the thread that runs throughout the Institute's history and distinguishes its programs from those of its competitors.

The Institute currently enrolls approximately 750 degree-seeking students annually. More than a third of them are international students representing more than 50 countries, making MIIS one of the most genuinely multi-cultural institutions in the country. MIIS also attracts hundreds of active professionals each year to specialized training in languages and career-enhancing skills. Institute alumni, totaling over 6200, live in 122 countries, forming a strong global network, managing, leading, and inspiring others to address the world's greatest challenges.

MIIS is located in the heart of downtown Monterey. The campus includes fourteen buildings in a four square block area in the middle of town, housing classrooms, offices, the library (100,000 volumes and periodicals in more than thirty languages), a student center, and technology facilities.

### Areas of Focus

#### The Middlebury – MIIS Affiliation and Merger

Throughout its history as an independent institution, MIIS had a fragile financial foundation. Tuition-dependence, meager fundraising, and a miniscule endowment made its financial

existence precarious. In the 2001, 2002, and 2003 fiscal years, the financial picture became bleak. In those years, MIIS produced operating deficits aggregating in excess of \$19 million. Its financial condition prompted WASC to place the institution on probation for two years in 2003 and its auditors to issue a “going concern” opinion.

Corrective measures, including a new senior management team and stringent cost-cutting measures, were sufficient to lead WASC to remove MIIS from probation in early 2005 and to permit its auditors to issue a “clean” opinion. Nonetheless, there were real questions about whether MIIS was sustainable without a merger with a stronger institution that could further strengthen MIIS and continue its distinctive educational mission by helping to increase its visibility, build enrollment, and improve fundraising.

Through a Trustee contact in late spring 2004, Middlebury became aware that MIIS was seeking an institutional partner. In the fall of 2004, the College commenced an exhaustive due diligence effort probing the Institute’s accreditation, audit, academic program, finances, structure and governance, faculty, staff, and facilities. The Middlebury team, made up of administrators and faculty, made multiple visits to MIIS gathering information and gaining a basic understanding of MIIS programs and operations. The team’s findings were reported to the Middlebury Board of Trustees, and the Board created an *ad hoc* Trustee Steering Committee that visited MIIS in April 2005. Following that visit, and after further consultation with the Middlebury Board, the decision was made in June 2005 to actively pursue a relationship with MIIS.

Middlebury’s overriding rationale for entering into a partnership with MIIS was the shared belief that language skills, coupled with professional knowledge in areas such as international public policy and diplomacy, international trade and business, language education, and translation and interpretation are critically important to the education of the next generation of global leaders and problem-solvers. Because of its existing strengths in languages and international education at both the undergraduate and graduate level, Middlebury – including its summer Language Schools and its Schools Abroad – stood to gain significant benefits from affiliation with MIIS by:

- Strengthening its position among colleges and universities in critical areas of foreign languages, international studies, and environment and sustainability in the face of globalization;
- Expanding its presence in the field of graduate international education without changing the atmosphere for undergraduate teaching and learning on the Vermont campus;
- Creating collaborative graduate study opportunities with Middlebury’s Schools Abroad and its partner universities in thirteen countries;

- Offering greater visibility in a region of the country where the College is somewhat less well-known than its peer institutions, helping student recruitment and strengthening career networks for its graduates;
- Increasing links to Asia through MIIS programs and graduates;
- Allowing the College to grow and expand its educational reach without having to build infrastructure.

To be sure, there were attendant risks in entering into the partnership:

- Administrative stretch – The College had to be certain that it had or could acquire or develop the administrative and leadership strength to design and execute an affiliation or integration plan;
- Financial – A major investment would have to be made to improve MIIS’s faculty, staff, and facilities;
- Administrative attention – The needed focus on MIIS could reduce attention directed to the strategic planning process and other College initiatives;
- Diversion of donor resources – Gifts provided for the MIIS initiative could come at the expense of other College initiatives;
- Exit strategy – If necessary, the College needed to be able to withdraw from the transaction, leaving MIIS whole and Middlebury in a positive position to recoup its investment.

Despite these potential risks, the positives so outweighed the negatives that Middlebury’s Board of Trustees unanimously approved proceeding with the initiative. The relationship initially took the form of an affiliation, with the aim of a merger as the ultimate objective if the affiliation proved as successful as anticipated. In the first three years of affiliation (FY2006-FY2008), the focus was on rebuilding the Institute’s capacity and leveraging the partnership with Middlebury to streamline operations in a variety of operational areas. Middlebury made a significant investment up front in the form of an irrevocable grant of \$7 million (funded from its unrestricted net assets and through restricted gifts given for the Monterey initiative) to address MIIS’s most immediate needs. Early spending was heavily weighted toward facilities and technology upgrades, but there was also substantial investment in enrollment management, financial aid, communications, advancement, and human resources. More recent fundraising permitted MIIS to implement increases in faculty and staff salaries and to reinstate the Institute’s contribution to its retirement plans. In addition, Middlebury dedicated substantial managerial resources to the Institute in areas such as finance, audit, payroll, human resources, salary and benefits, institutional research, admissions, institutional advancement, communications, information systems and technology, and alumni relations.

By leveraging Middlebury's expertise, and through reduction or elimination of duplicative services, MIIS was able to achieve positive fund balances, enhanced earnings from the endowment, and enrollment growth that produced the two largest classes ever to matriculate at the Institute in 2008 and 2009. Fundraising results were initially exponential, but leveled off with the onset of recession. MIIS has continued to build its fundraising capacity and pipeline of donors, however, so that it is poised to take advantage of economic recovery.

The remainder of this report details efforts to achieve various degrees of operational and programmatic integration across the two institutions, and highlights the significant successes and occasional challenges associated with these efforts.

### Operational Integration

Working with a consultant who had expertise in mergers and acquisitions, Middlebury developed integration plans that called for creation of a single 501(c)3 organization, outlined a governance structure with ultimate authority flowing from the Middlebury Board of Trustees, and specified the degrees of integration appropriate for each functional unit of the organization in a document entitled "The Middlebury-MIIS Relationship: Principles of Integration" [See Appendix C]. Broadly speaking, MIIS would retain considerable autonomy in managing existing academic programs. The Institute would have its own president, reporting to the Middlebury president, and a Board of Governors with authority delegated to it by the Middlebury Board. The decision to maintain a president at MIIS reflected a desire to grant sufficient authority to the individual responsible for the overall functioning of the program, and to acknowledge the institutional history of MIIS, while at the same time being clear, both within and outside the institution, that the MIIS president would report to the Middlebury president, and that the role of the MIIS Board of Governors would be advisory. Functional administrative areas would be integrated to various degrees, depending on the issues involved. For example, facilities at MIIS would largely be administered locally, while functions such as payroll and benefits management would be centralized at Middlebury for greater efficiency.

Within these broad parameters, departmental working groups and coordinating committees on both campuses worked to more fully articulate the appropriate degree of integration for each area. Specifically, these working groups focused on key functional areas, including finance, human resources, and advancement. These groups made early and significant progress toward determining which tasks in a given area should be centralized, and which would work better if handled locally. Payroll and financial data systems, for example, were already nearing full integration by the spring of 2009. In January of 2010, MIIS employees were absorbed into the Middlebury health and welfare benefit programs, centrally managed at Middlebury. Full implementation of Middlebury's Banner administrative data system at MIIS is nearing completion with the launch in the spring of 2010 of online registration and grading. These are just a few examples of the many integration projects carried out between 2005 and June 30, 2010.

As of June 30, 2010, Middlebury assumed all the assets and liabilities of the Monterey Institute. Beginning in Fiscal Year 2011, MIIS prepares and manages to its own operating budget, which is incorporated into the Middlebury budget. Capital improvements for Monterey are integrated within Middlebury's renewal and replacement reserve budget. [See Appendix D: Financial Statements for FY 2008, 2009]

During the period of affiliation between the two institutions, each campus created a Finance, Operations and Communications (FOC) committee made up of the heads of the major functional areas that coordinated integration activities and ensured effective communication where issues overlapped administrative boundaries. As of June 2010, the Middlebury FOC has been disbanded. Moving forward, integration work will continue in the hands of the departmental working groups described above, with regular "bi-coastal" departmental meetings. These groups will also continue to evaluate opportunities for improving operations, for reassigning work, and for improving the efficiency of operations.

The FOC at MIIS will continue to meet, at least through the first year of merger. Because several Middlebury staff members have migrated to Monterey over the course of the affiliation, the MIIS FOC is now balanced between longtime Monterey staff and former Middlebury staff who have insight into Middlebury's policies and administrative culture. For this reason, the group continues to be a useful tool for communication and coordination. More generally, in addition to President Ramaswamy, a number of current and former Middlebury administrators (e.g., Bob Huth, Beth McDermott, Jai Shankar, Cathy Vincent, Amy McGill) have spent significant time working at MIIS in senior administrative positions, creating a strong Middlebury presence that has helped to ensure good communication, the evolution of common policies and processes, and the growth of a shared institutional culture.

Although the activities described above have largely been successful, both financial and cultural difficulties were encountered along the way. With the onset of the economic downturn, Middlebury and MIIS both engaged in careful but stringent cost-containment measures, and have ultimately weathered the recession with transparency, optimism for the long-term future, and a vision that remains focused on preparing the next generation of global leaders. Nonetheless, the difficult financial circumstances resulted in slower progress in some areas of integration. For example, Middlebury's Library and Information Services experienced serious staffing constraints during this period, and was not able to provide as much support for infrastructure planning and integration as might have been desirable. Despite this challenge, some significant projects, such as the transitioning of MIIS email and web site hosting to Middlebury, were successfully implemented. Similarly, staffing constraints in Human Resources at Middlebury have delayed a planned overhaul of the MIIS compensation system, but higher priority projects such as the review and synchronization of policies and the integration of health, welfare and time off benefits have been completed on schedule.



In addition to the economic hurdles, negotiating two organizational cultures across 3000 miles has also presented some interesting challenges. Differences in assumptions, processes and priorities have occasionally required both sides to step back and refocus on their common goals. It helps that most of the key administrators responsible for integration of functional areas have now had the opportunity to meet each other face to face, and in some cases to work together extensively over a period of years. They have also collaborated on the departmental integration models that serve as a guide to specific integration projects (see Appendix E: Functional Integration Framework). While recent financial constraints have curtailed travel between campuses, we have installed videoconferencing equipment on both campuses that we are now using effectively to hold bi-coastal meetings in several departments. There will continue to be differences and issues to be resolved, but there is a growing appreciation of complementary cultures that befits two organizations dedicated to intercultural understanding.

#### Program Integration

On the academic side, Middlebury and MIIS engaged in some early collaborations during the first two years of affiliation. Pilot efforts toward collaborative programs included: faculty exchanges; summer and winter programs at MIIS for Middlebury students; an M.A. in Chinese offered by the Language Schools that includes an optional year of study at MIIS; a joint conference on global education, held in Monterey in January 2008; opportunities for MIIS students to study at the Middlebury Language Schools; and the Middlebury-Monterey Language Academy, an “iso-immersion” summer program for high school student that launched in the summer of 2008.

The leadership and faculties of both institutions recognized, however, that an important early task in the integration process was for MIIS to assess and refine its academic programs, emphasizing its unique strengths in multi-lingual, multi-cultural, immersive and solution-focused development of global professionals. Thus, in the fall of 2007, MIIS senior management and faculty leaders undertook the task of transforming the Institute’s academic programs to focus on major areas of strength, enhance academic quality and reputation, and build complementarity with Middlebury programs. An Academic Excellence Task Force made up of faculty and administrators was convened in October 2007, to develop an academic model – entitled Monterey Way 2.0 – to refocus and strengthen the Institute’s programs. The Task Force’s recommendations provided guidelines for the design of the next generation of academic programs at the Institute. The original formulation of the Monterey Way, which had guided program development at the Institute before the affiliation, blended subject area knowledge with professional skills, language mastery, and inter-cultural competence. Building on these areas of competence, the task force identified five areas of curricular focus, representing the intersection between the Institute’s strengths and the world’s needs:

**Language education and multilingual communication** (e.g., translation, interpretation, and localization; applied linguistics; teaching of world languages; language policy)

**Peace and security** (e.g., nonproliferation; conflict resolution; counter-terrorism; human rights; governance and institutional development)

**Sustainability and the environment** (e.g., environmental policy; social and economic sustainability; green business management; natural resource management and conservation)

**Trade and business management** (e.g., international marketing, finance, and business strategy; entrepreneurship; trade policy and negotiation)

**Development and social change** (e.g., public administration; organizational management and transformation; equitable development)

The task force also defined a signature pedagogical approach to professional graduate education that would serve as a model for future program development. This approach includes three interconnected elements:

**Immersive learning:** authentic, intensive, and contextualized learning that is active, applied, hands-on, complex, and grounded in the “real world.”

**Metacognition:** the ability to monitor learning and adapt problem-solving strategies to new contexts and situations. Faculty members employ metacognitive strategies to help learners make connections across disparate bodies of knowledge. Students are also assisted in unbinding new knowledge from a specific context so that this knowledge can be readily applied to diverse settings and problems.

**Open learning architecture:** an organizing framework for creating flexible, customized, modular and scalable learning environments. We see high learning performance at MIIS being predicated on connecting the learning interests of the students, faculty and practitioners, knowledge sources from academia and beyond, and the actual contexts in which learning is applied. Key elements of an open learning architecture include strategic partnerships, knowledge and social networks, aggregated and harvested resources, and current and emerging technology.

The Academic Excellence Task Force issued its report in January of 2008, and over the following semester, the Institute’s leadership turned its attention to creating an organizational framework within which the task force’s recommendations could best be realized. In the fall of 2008, it was announced that the Institute would re-organize as two graduate schools: the Graduate School of International Policy and Management (GSIPM) and the Graduate School of Translation, Interpretation and Language Education (GSTILE). Retreats held during the spring

of 2009 provided faculty, staff and students with an opportunity to shape the development of the two new schools, as well as a restructured advising function.

The central purpose of the MIIS reorganization, which became effective in the fall of 2009, was to re-imagine the Institute in a way that would encourage the development of synergies among programs, maximize faculty collaboration and innovation, and produce new and better student learning opportunities. The reorganization was envisioned not as a re-arrangement of components, but a genuinely synergistic integration that would produce greater value for our students than the mere sum of the parts. The two new schools offer continuity by retaining all existing Institute degree programs, while creating exciting new opportunities for interdisciplinary teaching, learning and research for both faculty and students.

The linchpin of the MIIS reorganization plan has been the Center for Advising and Career Services. This new center was designed to bring together under one roof, and in a single unified organization, all the staff who had provided academic advising and career development services to MIIS students, from within each of the four former schools. Not only does this new organization concern itself with the whole of the student experience, providing continuity of service from before matriculation to after graduation, but cross-training on areas of specialized knowledge means that students whose interests transcend a single program can now be assisted in developing a unique pathway through the curriculum.

The final piece of the MIIS reorganization puzzle is falling into place in the summer of 2010, as a task force takes on the strengthening of our commitment to linguistic and cultural competence by modifying admissions and degree requirements in languages for GSIPM students to be more flexible, more relevant, and better integrated with other elements of the curriculum.

Having reorganized and refined the programs at MIIS, the question of program integration – the real payoff of the merger – can take center stage. The efforts are gaining momentum, as faculty on each campus learn about the other's strengths and interests, and find new ways to collaborate in bringing expanded learning opportunities to current students, and developing programs for new student markets. Programmatic integration is also the most complex part of forming a new partnership, and the area where the combined institution needs to spend more time to realize its potential. As with the efforts toward operational integrations, there has been significant progress, as well as challenges, and these are both outlined below.

Middlebury and MIIS have very different faculty and academic cultures. With the undergraduate college focused on a liberal arts education, broadly conceived, and with MIIS more focused on professional, practical graduate education, it has taken some time for colleagues to realize potential overlaps and common interests. It has also taken us some time to refine the structures that would best facilitate programmatic integration. Over time, a model has evolved that allows us to effectively explore opportunities for collaboration.

At the outset, there was a desire to involve as many people as possible, on both sides, in discussion about integration. That led to the formation of Program Committees on each campus: relatively large groups in both Vermont and California that discussed potential programs or strategies regarding integration. Each group generated ideas, which were then communicated to the committee on the other campus. More of the suggestions for new initiatives came from the Middlebury side, in part because more people were involved with “thinking about integration,” while MIIS was in the midst of its fairly extensive reorganization (described above). The fact that some ideas coming from the Middlebury Program Committee did not resonate with colleagues at MIIS led to occasional frustration on both sides, with Middlebury colleagues wondering why their efforts were not bearing much fruit, and MIIS colleagues feeling they had neither the resources of the time to respond to these new ideas.

Nonetheless, progress was made in a number of areas, most notably on integrated degrees that would allow Middlebury students to receive a BA and an MA in a five-year time span (a four year BA at Middlebury and a one year MA at MIIS). Colleagues on both campuses began to talk through how these degrees could be accomplished, they got to better understand the curricula of those at the other institution, as well as the complexities of working with one another. More relationships developed, and more colleagues visited the other campus to give lectures, teach, or hold workshops. A program that saw early success in building positive relationships among colleagues was The Global Vision-Global Reach Middlebury/Monterey Lecture Series, established for Middlebury and MIIS to promote shared expertise and education through the exchange of faculty visitors who participated in guest lectures, meetings and workshops at the other institution. As these kinds of networks developed, more colleagues on each campus learned to articulate and value the views of those on the other campus.

Both campuses also had to deal with their own internal governance mechanisms. At Middlebury, any major educational matter needed to be discussed with the Educational Affairs Committee (EAC), as well as with any affected or relevant parties on campus. At MIIS there is a parallel structure, the Academic Policies, Standards, and Instruction Committee (a standing committee of the faculty) that needs to vet new initiatives. There was not, at the outset, any semblance of shared governance when it came to programmatic issues.

As we approached the official date of the merger, in the spring of 2010, leadership at both institutions decided to try a different tack when it came to collaboration: involving fewer people in direct conversation about new initiatives, but making sure that the meetings that took place via telephone or videoconference involved colleagues from both institutions. This smaller group—dubbed the G8—includes 4 colleagues from Middlebury and 4 from MIIS (with the Middlebury chief financial officer as an ex-officio member). It incorporates those at senior levels on both campuses, including both Middlebury and MIIS provosts. The group consults with others on both campuses that have a stake in any new initiatives. Since we had gone through the experience of including so many colleagues at both institutions in earlier discussions, it is easier to identify, now, who should be brought into conversations on any new initiatives. Had there

been a narrow and highly structured process imposed for working together at the beginning, the two institutions might not have learned as much as they did about each others' cultures, programs, and future possibilities.

These efforts have resulted in the final approval of five integrated degree programs in the following areas: International Environmental Policy (MAIEP); International Policy Studies (MAIPS); Nonproliferation and Terrorism Studies (MANPTS); Teaching Foreign Language (MATFL), and Teaching English to Speakers of Other Languages (MATESOL). These new degrees allow Middlebury students to earn a combined BA from Middlebury and an MA from the Monterey Institute in five years. [See Appendix F: Middlebury-Monterey Integrated Degrees.] We have also now begun exploring new degrees that would be created based on the strengths of various parts of the combined institution. During summer 2010, 5 MIIS MBA students worked with colleagues at Middlebury to develop a business plan for a new MA in International Education Management. Such a degree could combine coursework and internships at the Language Schools, MIIS, and Middlebury's Schools Abroad, filling a professional training niche in the growth market of international education. If this proves successful, it may be the model for other new initiatives; one could envision regularly utilizing the talents of MIIS MBA students to develop new initiatives that leverage the strengths of all of our constituent parts. In the end, the hope is that these efforts ensure that the merger will result in a real "M<sup>2</sup>" – realization of the exponential potential in the union of two dynamic institutions.

Moving forward, we expect that the types of collaboration and consultation described above will become increasingly normalized and that new opportunities will emerge among the various entities now united under the Middlebury Banner. For example, in the area of sustainable development, prime for collaboration and expansion, students from Middlebury and MIIS are already engaged in internships and research projects to document socially responsible business case studies in China. In addition, other entities at Middlebury – primarily the Schools Abroad and the Language Schools – will participate in collaborative activities. A particular area of potential growth will involve new initiatives involving the Schools Abroad, and several directors of Middlebury's Schools Abroad have been in regular contact with colleagues at MIIS. To give one example that is made possible by the merger between Middlebury and MIIS, we expect to develop programs to teach English abroad – a particular strength of MIIS – at our Schools Abroad sites and facilities. This has already taken place in Spain, and we are in the planning stages of developing programs (either to train teachers to teach English, or to teach English directly to professionals) in Chile and China. Utilizing the infrastructure and networks of Middlebury's Schools Abroad should provide a number of new areas for collaboration, and we will look for ways to institutionalize regular interactions.

### Conclusion

The efforts detailed in this report represent our summary and assessment of the process of affiliation, merger, and integration of the Monterey Institute of International Studies with

Middlebury College. This task of review and appraisal will continue as we approach our first joint comprehensive reaccreditation review in 2011. The steering committee for re-accreditation, as well as each sub-committee, includes representation from MIIS as well as from Middlebury's other programs. Preparing for that review, and in particular, conducting the institutional self study, has afforded us another opportunity to work across campuses, evaluate our progress towards integration, and consider how we want to approach the future as a single institution. While self-assessment is an ongoing process, we can already say that many of the benefits initially hoped for as a result of this collaboration have begun to be realized, leaving us optimistic about the promise that lies ahead.

## Appendices

Appendix A: Plan and Agreement of Merger

Appendix B: Bylaws of the Board of Governors of the Monterey Institute of International Studies

Appendix C: The Middlebury-MIIS Relationship: Principles of Integration

Appendix D: Financial Statements for FY2008 and 2009

Appendix E: Functional Integration Framework

Appendix F: Middlebury-Monterey Integrated Degrees

