

ELI Planning Document for Review of Mission and Goals, Financial Resources, the Physical Plant, and Internal/External Factors Effecting Student Enrollment

In accordance with University policy, the Director provides leadership for the long term planning of the Institute, in terms of vision (i.e., the program's mission and goals), budget (financial resources), physical plant, and marketing (internal/external factors affecting student enrollments).

Mission

ELI's mission statement was over a year in the making. It began with a retreat in which a consultant from the Franklin Covey Institute guided all ELI employees in learning the principles of crafting a mission statement that reflected our core values and institutional goals, communicated the source of our strengths and our aspirations for the future, involved input and ownership by all stakeholders, and would, to a certain extent, prove timeless. It's not that our mission would never change, but it was written with the understanding that a well crafted mission statement, like a constitution, stands the test of time. At the ELI, we are proud that there is truly shared ownership of the mission by virtually all of our employees, that it has a nearly ubiquitous presence (on our walls, in our brochures, on our web, in our brochures, and even in our internal communication), and that we believe it to be true of who we are and what we aspire to be.

Nevertheless, we understand that changed circumstances and objectives could, at some point, lead to a need to revise our mission statement. For this reason, the ELI Advisory Committee is charged with reviewing the mission statement every five years as part of its ongoing charge to review all ELI policies based on a set schedule. That review would take the form of (1) gathering data (surveying all stakeholders—students, faculty, tutors, administration, and staff) regarding the currency of the mission statement and whether changes of any form might be appropriate; (2) researching what new directions the Institute might be taking that could inform a possible change in the mission; and (3) preparing recommendations to be brought before the faculty and staff during our annual planning retreat and considered for adoption.

Financial Resources

The Director submits an annual budget to the Dean of the College of Human Services, Education, and Public Policy. This submission is the culmination of extensive planning with the Dean, Assistant to the Dean and Assistant to the Director and from reviewing committee recommendations (through ELI's Annual Planning Process) that have budgetary implications. Planning for the budget occurs in

December each year and takes into consideration the following:

- The need, if any, for new faculty, administrative, or staff lines (positions) to meet enrollment or programmatic needs;
- Determination of sufficient reserve funds to weather downturns in enrollment;
- Allocations for short term capital outlays (e.g., computers, furniture, refurbishing of facilities);
- Allocations for long term capital expenditures (e.g., proposals for a new building or major renovations of existing facilities);
- Factoring indirect charges applied to the unit by the Provost's Office;
- Anticipating temporary salaries and wages for short term enrollment spikes;
- Forecasting revenues to offset expenses and reserve allocations;
- Allocations for supplies and expenses as needed to meet the needs of the core IEP and special programs;
- Determining benefit charges; and
- Recommending merit, promotion, and across the board pay increases.

The planning takes place over a series of quarterly budget meetings with the Dean and may require proposals for long term capital expenditures or requests for new lines.

Physical Plant

Planning for the ELI's physical plant involves the process of (1) gathering data through end of session program evaluations completed by students, which include facilities as a surveyed item, and by the Advisory Committee's review committee and individual faculty and staff recommendations that relate to the physical plant. This data are reviewed by the Advisory Committee during regular meetings, with the Director making final decisions on whether to proceed with specific recommendations. The next step would be the Director, or his appointed administrative staff (2) researching how best to fulfill the recommendation by selecting vendors, meeting with the University's facilities and construction design teams, investigating equipment specifications, and seeking bids. Depending on the nature of the project, committees, such as the Technology Committee, will be asked to propose designs or implementation plans. The Director will apprise faculty and staff of progress on facility-related projects through faculty and Advisory Committee meetings and at the annual planning retreat.

Factors Affecting Enrollment

Planning for internal and external factors affecting enrollment takes two forms: gathering data and acting upon that gathered information. The Director, together with ELI's admissions and recruitment coordinator, gather data on enrollment trends from the following sources:

- IIE's annual survey of ESL enrollment and sending countries;
- UCIEP and AAIEP listservs that provide alerts and opportunities impacting enrollment;
- Attendance at annual NAFSA and TESOL conferences to learn of new enrollment-related initiatives and statistics;
- Ongoing communication with agents, sponsors, and overseas advisors;
- Careful analysis of our own data, tracking registration, attrition, and retention rates compared with those of the previous session, year, etc.

The data are shared at marketing meetings that take place every session, in which decisions are made regarding advertising, attending educational fairs, pursuing agents, etc.—and in which countries or regions resources should be directed. Since the Associate Director also attends marketing meetings with the Director, Staff Assistant, and Admissions and Recruitment Coordinator, further action on the data can take the form of future hiring decisions, proposal drafting, and program design. This planning is ongoing throughout the calendar year.

| AREA | GOAL | WHO | ACTION STEP | WHEN | OUTCOME EVIDENCE |
|--------------------------------|--|--------------------|---|------------------|--|
| Financial Resources MISSION | Review mission statement to ensure its currency, relevance | Advisory Committee | Review program evaluations Survey faculty, staff | Every five years | Reaffirm current mission or initiate mission revision process, leading to new mission statement. |

| AREA | GOAL | WHO | ACTION STEP | WHEN | OUTCOME EVIDENCE |
|----------------|--|--|--|---|---|
| PHYSICAL PLANT | Planning for budget | Director and Assistant to Director, with Dean's approval | Review personnel, reserve, S&E, capital outlays, promotion/merit, benefit needs and charges | Quarterly meetings with Dean and Assistant Dean; December budget submission to Administration | Budget submitted and approved; ELI fiscal needs met |
| | Have facilities conducive for ESL learning, cultural programming, and faculty/staff productivity and comfort | Director and Advisory Committee | Review Program evaluations. Seek regular input from faculty and staff through Advisory Committee. Seek funding (see financial resources) | Ongoing basis, through monthly meetings of Advisory Committee | Improved student evaluations of physical plant Improved faculty and staff satisfaction with facilities |

| AREA | GOAL | WHO | ACTION STEP | WHEN | OUTCOME EVIDENCE |
|---------------------|---|---|---|--|--|
| ENROLLMENT PLANNING | Maintain optimum enrollment to ensure outstanding quality of instruction, financial viability, and effective use of human resources | Director, Admissions and Recruitment Coordinator, and Marketing Committee | Review marketing data from IIE, UCIEP and AAIEP listservs, NAFSA, in-house enrollment data, and ELI agents/sending organizations. Make decisions on marketing initiatives regarding educational fairs, advertising, web marketing, agent recruiting, and other options. Setting enrollment goals. | Data is reviewed each session during regularly scheduled marketing meetings. | Reaching enrollment goals within allocated marketing budget. |