

***ELI Program Development and Planning Document for Review of Mission and Goals,  
Internal/External Trends and Challenges, Evaluation and Allocation of Budget  
Resources, and Future Planning***

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 trends and challenges affecting student enrollments). Under this overall planning and development umbrella there are distinct planning and review processes for curriculum, student achievement, student services, and administrative policies.

***Mission and Goals***

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 classroom and office 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) analyzing data from program and course evaluations, reviewing recommendations to the Advisory Committee, summarizing recommendations emerging from annual planning retreats, and analyzing periodic needs assessment studies to assess the relevance of the current mission statement and to determine 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, if changes are deemed appropriate and necessary, (3) preparing recommendations to be brought before the faculty and staff during our annual planning retreat and considered for adoption.

## ***Evaluation and Allocation of Fiscal/Human Resources and Physical Plant***

### ***A. Fiscal/Human Resource Evaluation and Allocation***

The Director submits an annual budget to the Dean of the College of Arts and Sciences (CAS). This submission is the culmination of extensive planning with the Dean, Associate Dean, ELI Business Manager, and CAS Budget Director regarding how ELI supports college and university priorities and from reviewing ELI committee recommendations (through ELI's Annual Planning Process) that have budgetary implications. Planning for the budget begins in the fall each year and takes into consideration the following:

- The need, if any, for new faculty, administrative, or staff lines (positions) and commensurate benefit allocations to meet enrollment/programmatic needs or changes in UD/federal/state policies;
- 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 Dean'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 semi-annual budget meetings with the Dean and may require proposals for long term capital expenditures or requests for new lines.

### ***B. Physical Plant Evaluation and Allocation***

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.

### ***External and Internal Trends and Challenges 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 Office of Admissions and ELI Registrars Office admissions, 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 analyzed and shared at periodic (quarterly) manager meetings, 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 for Academic Programs and the Associate Director for the IEP also attend the meetings, further action on the data can take the form of recommended future hiring decisions, proposal drafting, and program design. This planning is ongoing throughout the calendar year.

AREA	GOAL	WHO	ACTION STEP	WHEN	OUTCOME EVIDENCE
MISSION	Review mission statement to ensure its currency, relevance	Advisory Committee	Review program evaluations, recommendations, retreats, needs assessments	Every five years	Reaffirm current mission or initiate mission revision process, leading to new mission statement.
Internal/External Trends and Challenges	Maintain optimum enrollment to ensure outstanding quality of instruction, financial viability, and effective use of human resources	Director, Office of Admissions, ELI Registrars Office	Review marketing data from IIE, UCIEP and AAIEP listservs, NAFSA, in-house enrollment data, and ELI agents/sending organizations. Examine trends and challenges in the field. Make decisions on marketing initiatives and determine if program design changes are warranted. Setting enrollment goals.	Data is reviewed each session during regularly scheduled manager meetings.	Reaching enrollment goals within allocated marketing budget.
Evaluation and Allocation Financial Resources	Planning for budget	Director and Business Manager, with Dean and College Budget Director	Review <b>personnel</b> , reserve, S&E, capital outlays, promotion/merit, hiring, benefit needs and make recommendations for increase or decreases	Semi-annual budget planning meetings with Dean and CAS team; finalize budget submission to Administration	Budget submitted and approved; ELI fiscal needs met

AREA	GOAL	WHO	ACTION STEP	WHEN	OUTCOME EVIDENCE
PHYSICAL PLANT	Have facilities conducive for ESL learning, cultural programming, and faculty/staff productivity and comfort	Director and Advisory Committee	Review Program evaluations for student feedback on facilities. Seek regular input from faculty and staff through Advisory Committee and Technology 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
FUTURE PLANNING	“Through an unwavering commitment to excellence and renewal, the ELI faculty and staff endeavor each day to enhance our reputation as a leader among intensive English programs” Mission Statement	Director, Senior ELI leadership, committee chairs	Faculty Committees make annual recommendations to the Director, which are reviewed at Institute-wide annual retreats and subsequently voted on. These approved steps form the basis of implementation plans for fulfilling short and long term planning	Continuous cycle throughout the year. Implementation Plans due June, faculty updated on progress toward goals in fall, final committee reports in March, with recommendations for new proposals. reviewed by faculty and staff in annual April retreat.	Reaching stated goals and assessing the implementation of recommended actions to discover they have been effective.