

Strategic Plan 2013-16

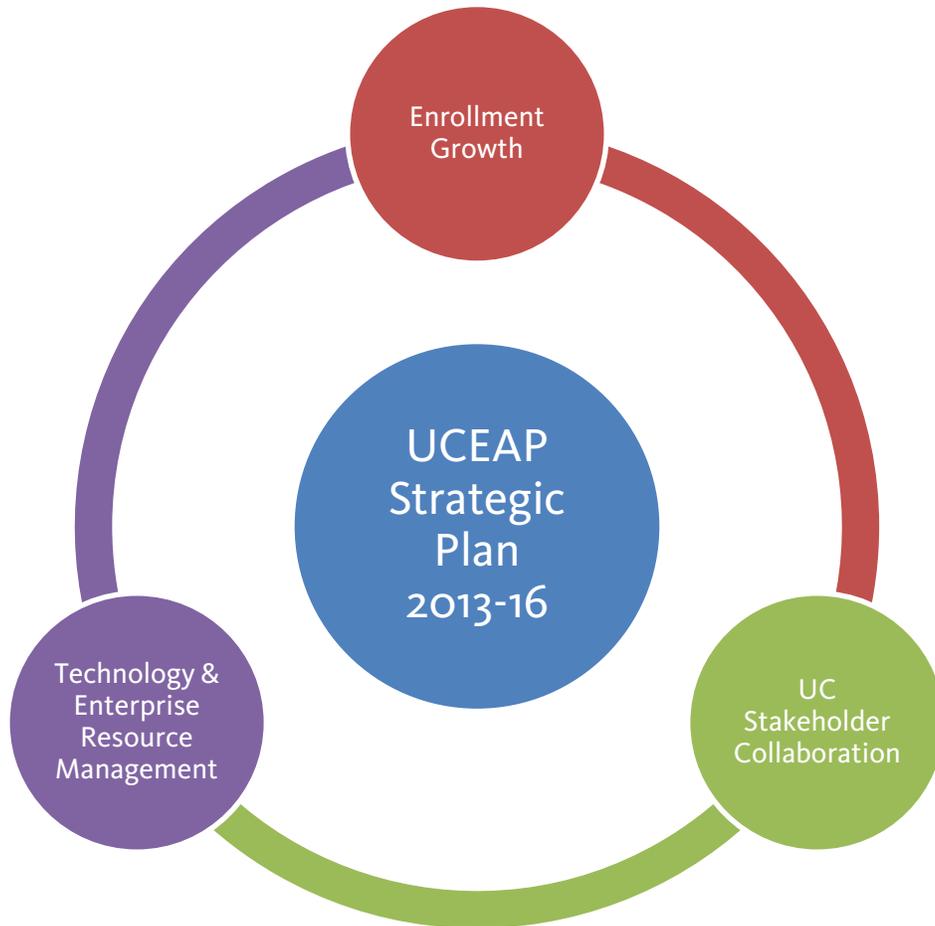


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Strategic Plan Overview



Introduction

The Mission of the University of California Education Abroad Program (UCEAP) is to equip UC students with the knowledge, understanding, and skills to work and live in a globally interdependent and culturally diverse world. Our research shows that participants cite UCEAP as a capstone program of their undergraduate education – and an experience that, for many, guides their future academic, career, and life paths.

Our vision is one of study abroad for all, academic excellence and best business practices. Students of all backgrounds should benefit from a study abroad experience, including those who may not have historically participated in UCEAP such as low-income or first generation students, transfer students, or Science, Technology, Engineering and Math (STEM) majors.

UC's Global Campus for Over 50 Years

UCEAP was established by the UC Regents at the UC Santa Barbara campus in 1962 as a systemwide UC study abroad program for undergraduate students. UCEAP also operates a reciprocal exchange program that brings students from around the world to study at UC campuses. Since its inception in 1962, UCEAP has successfully sent 91,000 UC students abroad and hosted almost 25,000 exchange students at the UC campuses. In the academic year 2012-13, some 4,500 UC students studied abroad on UCEAP with 1,800 international students on exchange at UC campuses. UCEAP now has expanded its offerings to some 40 countries with over 115 top-ranked partner institutions.

Since 2012, UCEAP has been administratively housed at the University of California, Santa Barbara with shared governance between the UC Office of the President and the UC Academic Senate. The current administrative staff and faculty include approximately 80 FTE at the Systemwide Office in Goleta, 45 FTE at Study Centers abroad, 6 visiting UC professors, and 8 Study Center Directors (UC faculty).

Each year, returning UCEAP participants along with 1,800 reciprocal exchange students (from UCEAP partner institutions) bring a critical international perspective to the UC campuses, often forming lifelong connections with the Program and University. Today, the demographic changes in California and our increasingly globalized economy continue to make the international perspective provided by UCEAP that much more valuable to the academic, economic, and cultural vitality of California and its citizens.

A study of students who enter UC as freshman showed that UCEAP participants graduate faster than UC students who do not study abroad. Transfer students also graduate at the same rate, regardless of their UCEAP participation. Furthermore, UC institutions enjoy a higher retention rate for these students. With the current economic reality of Californian families, the key challenges of cost and academic credit remain as perceived barriers to participation, and we continue to encourage both the academic and financial planning that is critical for successful study abroad participation and re-entry at the University.

Education for Today's Global Market

In addition to providing students with an international academic program, UCEAP prepares them for academic and professional work in today's global economy. UCEAP supports UC's mission to provide high-quality research and education for California's community and to groom future-oriented leaders, entrepreneurs, and researchers through academic instruction and global exchange relationships.

We work with partners across the 10 UC campuses to provide the highest level of support, preparation, and academic advice to all students. Faculty from throughout UC play a key role in UCEAP, helping shape and develop programs, ensuring academic excellence and quality through their oversight, and serving overseas as Study Center Directors and Visiting Professors.

Partnering with campuses remains central to UCEAP's success, even as a rise in campus-run faculty-led programs is altering the landscape of UC study abroad. UCEAP remains engaged with its various and diverse partners in the quest to find the right working balance between campuses and centralized operations. We continue to provide leadership in efficiency measures and best business practices across the system through continued collaboration and facilitation with our key stakeholders. We remain committed to expanding UC's global reach and leveraging our resources and expertise in ways that cannot be duplicated by any single campus. In fact, the University of California has become a leading institution for study abroad programs; according to the Institute of International Education, 6 UC campuses have consistently ranked amongst the top 20 public institutions in immersion (semester/year) study abroad.

Keeping California Vital

UCEAP is committed to enriching the public education of Californians, and recognizes the need to keep pace with an evolving academic and economic environment. As we grow and develop as a program, we continue to create international partnerships and academic opportunities that will meet the evolving needs of UC students and the demands of the global marketplace. Through study abroad, UCEAP contributes to the success of the individual and our state, preparing the next generation of Californians for successful lives and careers in a rapidly changing world.

Strategic Plan Overview

Our strategic plan has exciting prospects for students, campuses, study centers and systemwide staff. Our priorities remain focused on growing our partnerships while leveraging the collective work and expertise of our staff alongside our campus and international partners. Through continued and enhanced collaboration on these initiatives, students will benefit from the highest level of support, preparation, and academic programming.

UCEAP strives to provide leadership in efficiency and best business practices across UC through continued collaboration and facilitation. After close examination of our operations, we have identified challenges and opportunities for expanding UC's global reach. We have an ambitious plan, but with thoughtful analysis of our priorities, a practical approach to implementation, and careful monitoring of resources and metrics, we are confident in

managing an enterprise that is financially sustainable and vital. As we work together to find the right balance and synergies between campuses and centralized operations, we look forward to leveraging joint capabilities to generate optimal returns across the system.

The overarching goals of this strategic plan are:

- Enrollment Growth
- UC Stakeholder Collaboration
- Technology and Enterprise Resource Management

Through the goals above, and in conjunction with the four regional strategic plans prepared by each Regional Director, by 2015-16 UCEAP aims to enroll 5,000 participants, achieve self-funding financial sustainability, and extend international opportunities to all UC students. This growth represents an 8% increase from the projected enrollment of 4,600 for the 2013-14 academic year. For 2013-16, UCEAP is committed to annually allocate \$1 million to scholarships and \$500,000 to the strategic initiatives outlined in this plan. We remain grateful for your partnership throughout this journey and invite your leadership, creativity, and expertise in advancing our joint mission to expand UC's global reach.

GOAL 1: Enrollment Growth

- 1) Objective: To reach annual enrollment of at least 5,000 participants by the 2015-16 academic year.
 - a) Program Portfolio Management
 - i) The work group will:
 - (1) Conduct program reviews and develop new programs, taking into consideration academic rationale, financial feasibility, systemwide and campus staff capacity, and market appeal.
 - (2) Review all UCEAP programs and perform profit/loss and compliance analyses to determine potential opportunities for consolidation and growth.
 - (3) Review and develop programs that offer internships and field research opportunities.
 - (4) Conduct surveys of students and campus advisors regarding new programs and student interest.
 - (5) Members of the work group will include representatives from campuses, study centers and various units within the systemwide office.
 - ii) Resources: Surveys, focus groups and financial analysis to inform program development and consolidation
 - iii) Timeline:
 - (1) All proposals submitted to UCIE between January and March of each year.
 - (2) All approvals confirmed by mid-June of each year and announced at the UCEAP Annual Conference.
 - iv) Priorities for 2014-15:
 - (1) Campus advisor survey (to compliment student survey)
 - (2) Program development – focus on programs in English, summer, underserved cohorts, multi-site, internships, and discipline focused
 - (3) Review & evaluation of current program portfolio
 - (a) What’s working, what’s not, gaps?
 - (b) “Build-your-own” bundled programs
 - (c) Profit/loss analysis

- b) Underrepresented Student Outreach (formerly Targeted Cohorts)
 - i) The work group will identify and implement activities to support the recruitment of specific, targeted cohorts that may be currently underrepresented or a potential growth area for UCEAP enrollment. The work group will collaborate with appropriate campus staff to conduct a needs assessment in order to not duplicate current campus efforts.
 - (1) Selected Cohorts (as of Oct 2014):
 - (a) Latino/a students
 - (b) First-generation college students
 - (c) STEM majors
 - (d) Honors students
 - (e) Newly admitted freshman
 - (f) Newly admitted transfer students
 - ii) Priorities for 2014-15:
 - (1) Curate program list for each cohort – based on historical participation, courses in specific subjects and languages
 - (2) Spanish translation of major webpages and print materials
 - (3) Collaborate with Diversity Abroad to implement best practices
 - (4) Develop resource guides for advisors – address barriers faced by each cohort to study abroad
 - (5) Establish partnerships with Educational Opportunity Program (EOP) on campuses
 - (6) Establish partnerships with honors offices at UCD, UCI, and UCR & create web resources to guide students
 - iii) Resources: The work group is comprised of project leads for each of the listed cohorts. Sub-groups are formed as necessary to support project leads. The list of targeted cohorts will be revised annually in line with current trends, research and organizational priorities.
- c) Customer Relations & Student Outreach Initiatives
 - i) The work group will identify and implement activities to increase student outreach, improve customer service, and promote a culture of philanthropy.
 - ii) Selected initiatives include:
 - (1) Financial Planning Guide for students
 - (2) Information session webinars with interested students on each campus
 - (3) Linkage of study centers/programs with prospective students and applicants
 - (4) Live Chat, potential for added features

- (5) Streamlining student life cycles
- (6) Student Ambassadors
- (7) Student-to-student communication portal(s)/social media
- (8) Study abroad crowd-funding

iii) Priorities for 2014-15:

- (1) Complete financial planning guide (3/5 pages published)
- (2) Active engagement of student ambassadors
- (3) Identify gaps/needs & develop content for webinars (i.e. info sessions)
- (4) Launch crowdfunding on all UC campuses
- (5) Involve new Marketing Director (TBD) in strategy to build student-to-student communications
- (6) Integrate streamlining of student lifecycle with Student Information Management System (SIMS) initiative

GOAL 2: UC Stakeholder Collaboration

- 1) Objective: In order to further contribute to UC's internationalization efforts and increase UCEAP enrollment across the UC system, it is vital to work collaboratively with all UC stakeholders. As a systemwide program, UCEAP relies on the joint efforts of administrators, faculty and staff on each campus to promote, recruit and support UCEAP programs. UCEAP is fully committed to supporting these stakeholders to the best of its ability.
- 2) Primary stakeholders:
 - a) Campus International Education Offices
 - i) Campus Administrative Directors (CAD)
 - ii) Staff Advisors
 - b) Faculty
 - i) Council of Campus Directors (CCD)
 - ii) Study Center Directors and Visiting Professors
 - iii) Faculty Advisory Committees (FACs)
 - iv) Faculty Liaison Corps
- 3) Other key stakeholders:
 - a) Campus International Education Senior Administrators (i.e. UC SILC)
 - b) Academic Senate University Committee on International Education and Campus Committees on International Education (UCIE/CIE)
 - c) UCEAP Governing Committee (GC)
 - d) UCSB Administration
 - e) UC Office of the President (UCOP)
 - f) Alumni - UC & Reciprocity
- 4) Structure and Timeline: This ongoing initiative is the responsibility of all systemwide office staff, and is based on peer-to-peer collaboration (e.g. systemwide regional staff working with campus advisors, systemwide Marketing and Communication staff working with colleagues on the campuses, Alumni and Development staff working with campus development officers, etc.)
- 5) Metrics & Key Deliverables:
 - a) Development and monitoring of a 360-degree assessment tool to measure the quality of UCEAP's relationships with key stakeholders
 - i) Baseline survey on collaboration with campus staff completed July 2014
 - ii) Survey of systemwide office and study centers to be completed in 2014-15
 - iii) Five operating principles for campus stakeholder collaboration
 - (1) UCEAP...
 - (a) Collaborates & Consults;
 - (b) Imagines & Innovates;

- (c) Simplifies;
- (d) Is Accountable to You, and
- (e) Focuses on Service.

6) Focus of engagement with primary stakeholders:

- a) UCEAP to assist in:
 - i) Improving or making easier the jobs of primary stakeholders;
 - ii) Further supporting faculty and staff directors on campus;
 - iii) Further supporting campus recruitment and advising activities;
 - iv) Further supporting academic integration on the campuses; and
 - v) Identifying professional development opportunities to best support advisors.

GOAL 3: Technology & Enterprise Resource Management

- 1) Objectives: (i) a functional, fully staffed IT unit with adequate governance, (ii) integration of UCEAP's technology requirements and priorities with IT planning to support UCEAP's business needs, and (iii) achievement of a high-level of external and internal customer service.
 - a) Student Information Management System (SIMS)
 - i) Objective: data solution needed for 10 campuses & systemwide office
 - ii) Priorities for 2014-15:
 - (1) Analyze business needs, MyEAP & off-the-shelf options
 - (2) Determine best options – make, buy, or some combination
 - iii) Project goals:
 - (1) Improved user experience (students, staff & campuses)
 - (2) Better integration with existing registrar, finance, admissions systems
 - (3) Improved student data security
 - (4) Move towards paperless system
 - b) Website
 - i) Objective: Implementation of a mobile- and user-friendly website and content management system (CMS) that serves the needs of UC students, faculty and staff.
 - ii) 2013-14 Accomplishments (Phase 1):
 - (1) Guidance from Web Action Group (WAG) – systemwide & campus staff
 - (2) Creation of program database to support website & search engine
 - (3) Design and creation of new recruitment portal (homepage) & dynamic program search engine
 - (4) Campus specific information on application process & contact info
 - (5) Rollout planned for mid-October 2014
 - iii) Priorities for 2014-15 (Phases 2 & 3):
 - (1) Migration of site to Sitefinity CMS
 - (2) Fully mobile compatible, data-driven templates
 - (3) Creation of cost calculator

- c) Business Model Optimization
 - i) Work group created to conduct a thorough assessment of the current business model including revenue streams, expenditures, available resources, and administrative processes in order to recommend appropriate efficiencies.
 - ii) 2013-14 Accomplishments:
 - (1) Change of leadership to Interim Finance Director Jessica Blazer
 - (2) Began to update guidelines for financial processes & contracts/MOUs/Agreements
 - (3) Purchased lifecycle process & tracking system
 - (4) Supported investment strategies – contingency reserve in FFE & exploration of investing operating surplus in TRIP
 - (5) Development of Alight database for improved budgeting
 - (6) Began assessment of overhead allocation and methodologies, and cross-subsidization
 - iii) Priorities for 2014-15:
 - (1) Finalize guidelines for financial processes & contracts/MOUs/Agreements
 - (2) Fully implement Alight database for improved budgeting
 - (3) Determine best practices for overhead allocation and methodologies, and cross-subsidization
 - (4) Explore a student account billing solution