



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## STRATEGIC PLAN

2025/26 – 2027/28

**B-CU**  
**RISING**  
*ALL of US, ALL IN.*



*Thoughts from Dr. Mary McLeod Bethune  
upon seeing a rose garden in Bern, Switzerland,  
with Eleanor Roosevelt.*

*"...This shall always be before me as a great  
...women of  
all tongues, all nations, all creeds, all classes  
blend together helping to send out sunshine  
and love and peace and brotherhood that  
makes a better world in which to live."  
Dr. Mary McLeod Bethune*

**Approved by the Board of Trustees, July 31, 2025**

Revised/Updated - OACIE, NHP/August 2025



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## TABLE OF CONTENTS

HISTORY.....	2
INTRODUCTION.....	3
STRATEGIC PLANNING MODEL .....	4
ASSUMPTIONS.....	5
THE UNIVERSITY .....	6
PHILOSOPHY .....	6
UNIVERSITY MISSION .....	6
VISION .....	6
CORE VALUES .....	6
B-CU's POINTS OF INTEGRITY.....	7
STRATEGIC PRIORITY GOAL 1: <i>Academic Excellence and Innovation</i> .....	8
STRATEGIC PRIORITY GOAL 2: <i>Enrollment and Student Success</i> .....	10
STRATEGIC PRIORITY GOAL 3: <i>Sustainable Operational Infrastructure</i> .....	12
STRATEGIC PRIORITY GOAL 4: <i>Financial Growth and Stability</i> .....	14
PLANNING-BASED BUDGETING PROCESS.....	16
INTEGRATION of STRATEGIC and ANNUAL ASSESSMENT PROCESS .....	20
CONCLUSION .....	23
BOARD OF TRUSTEES.....	24
CABINET.....	25



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## HISTORY

The year was 1904 when a very determined young black woman, Mary McLeod Bethune, opened the Daytona Educational and Industrial Training School for Negro Girls. The School underwent several stages of growth and development throughout the following years and, in 1923, as a result of a merger with the Cookman Institute of Jacksonville, Florida, became a co-ed high school. One year later, in 1924, the School became affiliated with The United Methodist Church and, in 1931, further evolved into a junior college known as Bethune-Cookman College. On February 14, 2007, Bethune-Cookman achieved university status.

In 1941, the Florida State Department of Education approved a 4-year baccalaureate program offering post-secondary and teacher education. Dr. Bethune retired in 1942 at which time James E. Colston became the College's second president, having served until 1946 when Dr. Bethune resumed the presidency for a year.

In 1947, Richard V. Moore Sr. was named as the third president of the institution. Under his tenure, the curriculum expanded; student enrollment increased; new buildings were constructed for residential housing and classrooms; the College became accredited by the Southern Association of Colleges and Schools (SACS); and, in 1970, joined the United Negro College Fund as well as other academic and professional organizations.

Oswald P. Bronson Sr., PhD, an alumnus of the College, served as the fourth and longest serving president of the College from 1975 to 2004. During his tenure, increased student enrollment led to continuous development and expansion of the College. A rapidly increasing student enrollment led to construction of additional student housing, classroom buildings, and a state of the art Performing Arts Center. Major fields of study increased from 12 in 1974 to 37 by 2003. In addition, seven continuing education centers for students began operating throughout the state of Florida. While maintaining accreditation by SACS, the Florida State Board of Education, and its affiliation with The University Senate of The United Methodist Church General Board of Higher Education and Ministry, the College added new accreditations in the Nursing and the Teacher Education programs.

In August 2004, Trudie Kibbe Reed, EdD, was appointed to the presidency by the Board of Trustees. The fifth president of the institution, Dr. Reed was the first woman to serve in this capacity since Dr. Bethune. Under her leadership, in 2006 the first Master's degree program was added, and in 2007 the College achieved university status, officially becoming Bethune-Cookman University. Further, Dr. Reed launched the International Institute for Civic Participation and Social Responsibility as a way to increase student learning about citizenship and leadership development. Additionally, the University's physical plan expanded and improved with the purchase of nearby properties and buildings, which included the Michael and Libby Johnson Center for Civic Engagement, the L. Gale Lemerand School of Nursing Building, Lee Rhyant Residential Life Center and the Alexis Pugh and Eugene Zimmerman Scholarship Houses.

In May 2012, the Board of Trustees appointed Edison O. Jackson, EdD, as Interim President and in March 2013 he was appointed to serve as the sixth president of Bethune-Cookman University. Under Dr. Jackson's leadership, the University increased enrollment; added new undergraduate and graduate degree programs as well as program accreditations; increased internship and study-abroad opportunities; established the Online College, the Center for Entrepreneurship & Economic Development (B-CU CEED), and the Mike Curb Institute; strengthened its town and gown relationships; and enhanced the infrastructure through new construction and expansive renovations. Upon Dr. Jackson's resignation in July 2017, the Board of Trustees appointed Judge Hubert L. Grimes (retired) as Interim President. Prior to this appointment, Judge Grimes served as the University's General Counsel and Director of the Center for Law and Social Justice.

On July 1, 2019, following a national search, the Board of Trustees appointed E. LaBrent Chrite, PhD, to serve as the seventh president of B-CU. Dr. Chrite, with extensive global and executive academic leadership experience, focused on the placement of talented and capable leaders as well as the reorganization of key departments in support of the University's vision. His strategic innovative efforts included an overhaul of the academic enterprise, enhanced student support systems, improved fiscal stability and constituent relationships. In April 2021, upon Dr. Chrite's resignation, the Board appointed Hiram C. Powell, PhD, Dean of Performing Arts and Communications to serve as the Interim President of B-CU. Dr. Powell retired in June 2022 and the Board appointed Lawrence M. Drake II, PhD, Dean of the College of Business and Entrepreneurship to serve as the Interim President of B-CU. After Dr. Drake's term ended in June 2023 the Board appointed William Berry, PhD, Senior Vice President for Academic Affairs/Provost to serve as the Acting President of B-CU. Dr. Berry retired in June 2025. On July 7, 2025, subsequent to a national search, the Board of Trustees appointed Albert Mosley, EdD, to serve as the eighth president of B-CU.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## INTRODUCTION

### ***Planning for Future: B-CU Rising***

Welcome to Bethune-Cookman University's 2025-26 – 2027-28 Strategic Plan: **B-CU Rising**. This three-year Strategic Plan reflects our collective vision, aspirations, and our dedicated commitment to a transformative educational experience conducive to lifelong learning and responsible citizenship. Grounded in our rich history and inspired by the legacy of our founder, Dr. Mary McLeod Bethune, we embrace the values of inclusivity, integrity, social responsibility, and student-centeredness through this Plan.

Using a multidisciplinary approach, our strategic planning process is an ongoing integrated and collaborative effort of all functional areas represented by every major constituent group of the University. Thus, this Plan is based on analysis of institutional research trend data, assessment of our internal strengths, weaknesses, opportunities, threats and challenges, external reports and environmental scanning relevant to an institution of higher learning.

While our Board of Trustees establishes and promotes the University's strategic plan priorities and goals aligned with our mission, this comprehensive and forward-thinking Plan is designed to guide B-CU and its constituents to navigate through the constant changing and evolving complexities of our diversified environment, seize future opportunities, and strive to achieve our desired outcomes. To that end, this Plan outlines strategic priorities, goals and strategies, and key performance indicators of success for making programmatic decisions and improvements, resource allocations, achievement and accountability.

The President executes and operationalizes the Strategic Plan through the leadership of his cabinet.

**The following strategic priorities will guide the execution of our strategic plan and budget allocation process:**

- Academic Excellence and Innovation
- Enrollment and Student Success
- Sustainable Operational Infrastructure
- Financial Growth and Stability

**The institutional impact of our efforts will be assessed through the following measures of success:**

- Redesigned Academic Programs and Scholarly Activities
- Increased Student Retention, Graduation and Placement
- Effective and Efficient Financial Management and Operations
- Improved University Marketing, Communication and Branding

The structure of this Plan was revised and updated by the Office of Institutional Effectiveness.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## ORGANIZATION OF THE PLAN

The strategic planning effort was organized around five key questions:

1. Who are we as an institution?
2. Where are we now?
3. Where do we want to go?
4. How can we get there?
5. How will we tell if we have arrived?

## STRATEGIC PLANNING MODEL

Strategic Targets	Our Business		Our Present		Our Future	
Strategic Questions	Why are we in business?	How do we do business?	Where are we now?	Where do we want to go?	How can we get there?	How will we know we have arrived?
Strategic Approach	Mission	Core Values	Environmental Assessment	Strategic Initiative	Action Plans	Coordination
	Vision	Culture	Strengths	Resources		Budgets
	Purpose	Climate	Weaknesses	People		Controls
			Opportunities	Property		Reports
			Threats	Time		Milestones
			Competition	Money		Performance Measures
			Constraints	Technology		
			Advantages			Monitoring & Tracking
		Gap Analysis				



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## ASSUMPTIONS

Over the next several years, it is anticipated that B-CU will continue to be challenged to:

### External

1. Increase enrollment at undergraduate and graduate levels.
2. Attract a diversified group of students including underrepresented and international learners.
3. Graduate more students prepared with real-world transferable knowledge, skills and disposition desired by employers.
4. Implement effective operational systems to enhance efficiency, productivity, and accountability at all levels.
5. Enhance ongoing faculty and staff development activities to close the skills gap.
6. Focus on the visibility of career-aligned academic programs and instructional modality.
7. Promote community outreach, fundraising and sustainability agendas.
8. Integrate emerging technologies in its curriculum design and daily operations.
9. Growing need for fiscal resources and alternate funding options.
10. Support student mental health and well-being initiatives.

### Internal

1. Student enrollment will grow at an average of 2% a year.
2. Female-male enrollment ratio will remain close to 2-1.
3. In-state student enrollment will remain around 75%.
4. Matriculation of admitted student will be around 15%.
5. Full-time students will remain around 92%.
6. Faculty-student ratio will remain at 1:15 and staff-student ratio will be steady at 1:10.
7. First-year undergraduate student retention rate will average 60%.
8. Six-year graduation rate will average 32%.
9. Student career placement rate after graduation will be around 50%.
10. Graduate and professional program education placement will be around 25%.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## THE UNIVERSITY

Founded on faith by Mary McLeod Bethune in 1904, Bethune-Cookman University (B-CU) formed in 1923, as a result of the merger of two independent institutions — the Daytona Educational and Industrial Training School for Negro Girls (1904) and Cookman Institute of Jacksonville (1872) — is a historically black United Methodist Church-related, private liberal arts, career-oriented, coeducational and residential university offering undergraduate, graduate and certificate programs.

## PHILOSOPHY

Bethune-Cookman University will exemplify the faith and values of its founder in educating every generation of students while building bridges of racial and cultural reconciliation, promoting economic and political empowerment as well as the dignity and self-worth of each through proper financial stewardship and use of cutting-edge technology.

## UNIVERSITY MISSION

The mission of Bethune-Cookman University is to educate a diverse community of learners to become responsible, productive citizens and solution seekers through the promotion of faith, scholarship, creative endeavors, leadership and service.

(Revised and approved by the B-CU Board of Trustees, January 17, 2020)

## VISION

To be a leading institution in the region, recognized for academic excellence, diversity, and innovation in preparing students to make significant contributions to society.

## CORE VALUES

Core values are defined as inviolable commitments that express, “who we are as an institution” and what principles or qualities should infuse all practices and activities within the institution.

**Bethune-Cookman University is guided by the following set of core values (F.I.R.S.T.):**

**F - FAITH:** We recognize and uphold the Christian tradition while welcoming the diversity of faiths.

**I - INTEGRITY:** We live in a way that reflects our deepest convictions.

**R - RESPECT:** We recognize the inherent dignity and worth of each person.

**S - SERVICE:** We seek social justice through civic engagement.

**T - THIRST FOR KNOWLEDGE:** We are engaged in the continuous pursuit of learning that transforms us and the world.

(Approved by the Board of Trustees, October 2013)



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## B-CU's POINTS OF INTEGRITY

From administrators to service staff, to outside contracted services, regardless of our personal responsibilities, everyone associated with Bethune-Cookman University is a representative of the total university and is expected to honor our points of integrity.

**Fulfill Regulatory Responsibilities:** Comply with all applicable federal, state, and local laws and regulations, being guided by the basic principles of honesty, integrity and fairness.

**Provide Excellent Customer Service:** Deliver necessary services in a compassionate, respectful and ethical manner without regard to race, creed, color, religion, national origin, sexual orientation, gender or disability while treating customers with dignity and respect at all times.

**Maintain Accurate Records:** Ensure accurate and reliable individual and institutional records; and prepare reports honestly and in accordance with established finance and accounting procedures.

**Ensure Appropriate Official Contacts:** Maintain contacts with, federal, state, local government and accrediting agency officials and personnel in a professional manner, affirming the high integrity of the University.

**Deliver Financially Responsible Service:** Maintain openness, honesty and accuracy in billing for services. Provide students with understandable explanations of services provided; hold responsible parties financially accountable only for services rendered; and seek to resolve conflicts in a fair and equitable manner. Follow sound accountability principles and ethically centered leadership practices.

**Advertise and Communicate Honestly:** Carry out our institution's public and commercial communications in a manner consistent with our mission; and ensure that our marketing and advertising statements are accurate, transparent and sensitive to community culture without false or misleading statements.

**Strive for Fairness in All Activities:** Continually examine our processes and practices to identify, avoid or eliminate potential conflicts of interest.

**Privacy of Employee and Student Information:** Maintain the privacy of our students' and our employees' information.

**Adherence and Fulfillment of Standards of Excellence:** Comply and meet with all required standards and regulations governed by federal, state, and regional accrediting bodies.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

With a clear focus on the Board of Trustees supported mission, vision, and core values, Bethune-Cookman University has identified the following four Strategic Priority Goals as essential components of our work moving forward:

## **STRATEGIC PRIORITY GOAL 1: Academic Excellence and Innovation**

### **Objective 1.1: Enhance academic programs through innovative curriculum design.**

#### **Strategies**

- 1.1.1: Incorporate AI learning, project-based assignments, and real-world experiential learning applications to majors.
- 1.1.2: Implement a standard template to revise curriculum content.
- 1.1.3: Review vertical curriculum course design, syllabi, content, and descriptions.
- 1.1.4: Explore and develop stackable credential certifications.
- 1.1.5: Explore and revise courses to include transferable soft skills required by employers.
- 1.1.6: Redesign General Education Core Curriculum.
- 1.1.7: Conduct periodic program reviews for planning, improvement and accountability.

#### **Selected KPIs**

- Revised academic degree programs.
- Academic program reviews.
- Updated online university catalog (UG/GM).
- Implemented General Education Core Curriculum.
- Faculty engagement in High Impact Practices (HIPs): courses designed with real-world experience.

### **Objective 1.2: Expand faculty development support for teaching-learning methods, scholarship and effective use of technology in the classroom.**

#### **Strategies**

- 1.2.1: Provide training opportunities and resources for faculty professional development.
- 1.2.2: Audit faculty credentials for teaching academic courses in all programs.
- 1.2.3: Provide faculty accommodation for conducting scholarship and service to the field.
- 1.2.4: Offer continuous training for using and implementing classroom technology.
- 1.2.5: Integrate university-wide faculty development initiatives.
- 1.2.6: Provide faculty support to conduct sponsored research and scholarly activities for funding and program improvement.

#### **Selected KPIs**

- Number and percent of faculty development activities, participation and presentations.
- Faculty engagement in the learning process, scholarly work, and contribution to academic and administrative community.
- Peer supported teaching, scholarship and service.
- Quality of teaching: Faculty credentials/qualifications and workload; Student Rating of Instructor (SRI) survey results; faculty-student engagement in research and service; graduates and employers satisfaction surveys.
- Number of sponsored grants applied, funded and amount awarded by source and purpose.

### **Objective 1.3: Improve and integrate digital technology to facilitate remote/hybrid program delivery modality.**

#### **Strategies**

- 1.3.1: Create campus-wide policies to promote remote academic program delivery modality.
- 1.3.2: Enhance the University's IT platform for remote learning program delivery.
- 1.3.3: Explore and introduce diverse instructional activities to promote digital teaching and learning styles.
- 1.3.4: Provide ongoing faculty training and development in teaching remote learning modality.
- 1.3.5: Market and communicate remote programs to attract students.
- 1.3.6: Update B-CU's website.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **Selected KPIs**

- Effective use of educational methods and practices: LMS platform; shared teaching experiences; technology enabled active and collaborative learning (lecture, experiment, and discussions).
- Fall enrollment headcount by academic degree program modality.
- Use of current digital LMS platform for remote/hybrid program delivery modality.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **STRATEGIC PRIORITY GOAL 2: Enrollment and Student Success**

**Objective 2.1: Enroll students who can graduate at higher rates and be placed in entry level careers and graduate/professional studies.**

### **Strategies**

- 2.1.1: Enhance academic and co-curricular programs for marketing, recruiting and matriculation activities.
- 2.1.2: Reduce time to process applications to target desired enrollment.
- 2.1.3: Optimize scholarships to attract high achieving students.
- 2.1.4: Integrate technology-based access to academic advisement/counseling, tutoring, and mentoring.
- 2.1.5: Expand student opportunities for experiential learning, study abroad, honors study, internships, and placement services related to degree programs.
- 2.1.6: Develop recruitment, retention, and placement plan with innovative intervention strategies to improve student achievement.
- 2.1.7: Implement faculty/staff programs to network and engage with prospective students and their families.

### **Selected KPIs**

- Improved student yield: Number and percent applied, admitted, matriculated; application processing and response turnaround time; number and percent of merit-based scholarships awarded.
- Published official Fall student demographic and housing occupancy profile over three-year period.
- Improved student performance: Annual learning gains; course passing rates; capstone course passing rates.
- Increased student retention, graduation and placement rates: Persistence; completions/time-to-degree; and placement in career and/or graduate/professional studies.
- Increased number of UG degree recipients, and average starting salary.
- Reduced graduating student cumulative debt; USDOE Cohort Default Rate (CDR).
- Increased partnership and networking with high schools, community organizations, and feeder colleges.

**Objective 2.2: Strengthen student support programs through intercollegiate athletics, intramural sports, civic and social organizations, clubs, and recreational extracurricular activities.**

### **Strategies**

- 2.2.1: Develop and publish student support programs, policies and procedures guide.
- 2.2.2: Review and align student engagement programs and extracurricular activities conducive to global higher learning.
- 2.2.3: Establish academic achievement standards for student-athletes.
- 2.2.4: Actively engage student-athletes to participate in campus organizations and recreational activities.
- 2.2.5: Offer opportunities for student participation in co-curricular programs, residential living/learning activities and financial literacy education.

### **Selected KPIs**

- Implemented revised student support program guide.
- Increased number of students participating in co-curricular learning activities.
- Student engagement in High Impact Practices (HIPs): placement in experiential learning, civic and community services, honors studies, internships, and study abroad.
- Achieve student-athlete average GPA of 3.0; overall Academic Progress Rate (APR) of 930; and Graduation Success Rate (GSR) of 85%.
- Increased number of student-athletes participating in recreational sports and extracurricular activities.

**Objective 2.3: Encourage collaborative experiential learning opportunities.**

### **Strategies**

- 2.3.1: Train faculty to incorporate active teaching/learning techniques to program content.
- 2.3.2: Enhance faculty opportunities to conduct scholarly research in collaborative experiential learning.
- 2.3.3: Increase faculty participation in the Center for Experiential Learning (CEL) projects.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **Selected KPIs**

- Faculty teaching, research and service workload analysis.
- Revised academic program syllabi to include CEL courses.
- Faculty participation rates: Number of faculty engaged in collaborative learning research; attendance in CEL projects.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **STRATEGIC PRIORITY GOAL 3: Sustainable Operational Infrastructure**

### **Objective 3.1: Implement emerging technologies to enhance administrative and instructional processes.**

#### **Strategies**

- 3.1.1: Explore and design a campus-wide technology infrastructure to include artificial intelligence, machine learning, virtual reality, and cloud computing.
- 3.1.2: Evaluate and optimize administrative data system operations, information security and services.
- 3.1.3: Align operational goals, technology capabilities and investments.
- 3.1.4: Upgrade wireless networking technology to enhance performance and reliability.
- 3.1.5: Modify and institute a shared IT operating services model.

#### **Selected KPIs**

- University data dashboards and reports.
- Implemented campus-wide WildCat Chatbot.
- Upgraded wireless technology network across campus.
- Implemented shared IT operating services model.

### **Objective 3.2: Build a campus-wide workforce capable of transforming the University.**

#### **Strategies**

- 3.2.1: Offer ongoing employee training and professional development activities.
- 3.2.2: Define core functions of the University and prepare job descriptions to include role, responsibility, required qualifications, and pay range.
- 3.2.3: Develop and publish organizational structure for each division/department of the University.
- 3.2.4: Update and publish personnel operating policies and procedures guide.
- 3.2.5: Develop University level functional succession plans and leadership development initiatives.
- 3.2.6: Conduct campus-wide staffing need and compensation analysis.

#### **Selected KPIs**

- Redesigned HR policies and processes for effective operating methodologies and guidance.
- Enhanced HR service delivery to support the current and emerging workforce.
- Number and percent of employees hired and trained annually.
- Number and percent of completed annual employee performance evaluation.
- Number and percent of faculty/staff relative to student enrollment, faculty and staff salary and fringe benefit comparison to benchmark institutions.

### **Objective 3.3: Design a multi-year comprehensive fundraising plan.**

#### **Strategies**

- 3.3.1: Re-align institutional advancement operations to support fundraising efforts.
- 3.3.2: Develop and publish the University's fundraising policies and procedures guide/handbook.
- 3.3.3: Explore and develop community stakeholder partnerships to raise funds.
- 3.3.4: Build strong relationships with potential donors to cultivate philanthropic giving.
- 3.3.5: Formulate a communication portfolio and project specific case statements to inspire and encourage donor support.
- 3.3.6: Prepare a communication plan to relay the University's impact, value proposition, and Return on Investment (ROI).

#### **Selected KPIs**

- Increased contributions from all donor sources (new and continuing).
- Number and amount of donor contributions by source and project type.
- Number of facilities constructed or renovated and amount spent.
- Number of equipment and software purchased and amount spent.
- Total value of proposals submitted and new awards received year over year.
- Impact of donations to support the University projects (scholarship, endowment, facilities, etc.).



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **Objective 3.4: Integrate marketing and communication initiatives to promote the university brand.**

### **Strategies**

- 3.4.1: Launch a comprehensive review of the University's current marketing, communicating and branding infrastructure, tools and activities.
- 3.4.2: Develop and publish marketing and communications policies and procedures guide.
- 3.4.3: Maximize communication flow using multiple traditional and digital platforms to reach and engage various stakeholders.
- 3.4.4: Improve the University's marketing and communication capability to support publicity and positive local, regional and national print and non-print news coverage.
- 3.4.5: Develop and expand community partnerships through positive publicity and timely distribution of campus events calendar.

### **Selected KPIs**

- Implemented campus-wide marketing and communication plan to promote the University.
- Number and percent of relationships established with influencers, community leaders, and media professionals.
- Number and percent of interaction and engagement with external audiences, alumni and affiliate groups, legislators, parents of prospective students, the media and community residents.
- Positive institutional image: Exposure by media, partnerships and collaborations with community groups and entities; frequency and type of news coverage.
- Use of university history, traditions, and official data as a foundation for enhancing marketing and branding.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **STRATEGIC PRIORITY GOAL 4: Financial Growth and Stability**

### **Objective 4.1: Implement university-wide financial controls, risk management and compliance protocols.**

#### **Strategies**

- 4.1.1: Develop and publish fiscal management policies, procedures, and training materials.
- 4.1.2: Employ sufficient number of trained and qualified staff to provide systems and procedures for adequate checks, balances, and control over assets.
- 4.1.3: Track key Composite Financial Index (CFI) ratios with a target of 3.0 or higher to maintain overall financial health, performance and credit worthiness of the University.
- 4.1.4: Increase and maintain cash reserves.
- 4.1.5: Focus on deferred maintenance and capital projects.
- 4.1.6: Implement plans to institutionalize restricted funded programs.

#### **Selected KPIs**

- Improved financial position: Lower risk of default; improved bond ratings; open line of credit.
- Healthy Composite Financial Index Ratios: Primary Reserve, Viability, Return on Net Assets and Net Operating Revenues; average per Full-Time Equivalent (FTE) student instructional expenditure.
- Developed balanced budget for actual spending and deferred maintenance; amount of unallocated reserves; contingency fund and debt capacity.

### **Objective 4.2: Leverage technology for automated administrative processes and shared services.**

#### **Strategies**

- 4.2.1: Operate a technology-based budget planning process for business continuity and improvement.
- 4.2.2: Evaluate the University's capacity to meet its financial obligations in full and on time.
- 4.2.3: Adjust financial plans to achieve profitability and long-term growth.
- 4.2.4: Conduct assessments of operational costs to identify areas for optimization and efficiency.

#### **Selected KPIs**

- Optimized revenue generating systems.
- Annual resources available for programs and project activities
- Funds generated by private and federal grants and contracts to support university operations.

### **Objective 4.3: Develop comprehensive revenue plan to generate additional income streams.**

#### **Strategies**

- 4.3.1: Design a Financial Forecasting Model to meet financial metrics and return on investment expectations.
- 4.3.2: Create and implement a cost-saving resource allocation process.
- 4.3.3: Identify and create new sources of diversified funding streams to enhance revenue mix.
- 4.3.4: Increase total value of investment portfolio over three years.
- 4.3.5: Develop a plan to stable tuition, fees, room and board structure.
- 4.3.6: Seek additional funding for scholarships, programs and projects, and faculty/staff salaries.

#### **Selected KPIs**

- Raised new revenues from various government and private sectors.
- Increased endowment portfolio year over year.
- Acquired funding from recurring revenue sources for current operations or capital purposes.
- Increased amount of annual funds available for university operations.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

**Objective 4.4: Provide strategic direction and effective risk management for all legal matters involving the University.**

## **Strategies**

- 4.4.1: Identify, assess, and mitigate legal risks associated with the University's operations.
- 4.4.2: Coordinate, manage and resolve all legal matters, litigation, disputes, regulatory and compliance issues.
- 4.4.3: Draft and review bylaws, charters, conflict-of-interest policies and other governance documents.
- 4.4.4: Select and collaborate work with outside counsel.
- 4.4.5: Safeguard the University's rights and interests in patents, trademarks, copyrights, and trade secrets.
- 4.4.6: Negotiate, draft and review University contracts, agreements, MOUs.

## **Selected KPIs**

- Contracts, agreements and MOUs efficiently negotiated, reviewed and drafted in time allotted.
- Number of court cases resolved in the University's favor.
- Amount of revenues saved verses expenses incurred.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## PLANNING-BASED BUDGETING PROCESS

A three-year planning outlook is an important part of the budgeting process that helps focus the budget decision-making on the structural match between revenues and expenditures. The annual planning-based budgeting is an important process for the operations of the University. This process is based on a sound approach to a multi-year plan that includes input from unit managers across the University. To this end, the resource allocation process, including the creation of the operating budget and the capital budget, is directed by the President who is responsible for leading the development of the University's annual budget plan that is submitted to the University Board of Trustees for review, action, and approval. The President works with the Cabinet to prepare the annual operating budget based on projected revenues and expenditures, University-wide budget parameters, priorities and policies regarding resource allocations. The Cabinet then makes budget recommendations to the President. It is through both the Cabinet's management of their budgets and the budget execution process that the expenditures of budgeted funds are matched with actual recurring revenues.

While the Board of Trustees is responsible for authorizing or appropriating the funds to be expended by each of the Cabinet supervised division programs of the University, the Office of Fiscal Affairs is responsible for updating, documenting and allocating appropriations. The intent is to have an open process – inclusive, fully documented, and most importantly, linked to the planning process of the University – as the planning and assessment processes have a direct impact on the budgeting process.

It is the responsibility of the division head to include the college/school, department/unit supervisors, faculty and staff in the development of the budget request process based on previous year's performance and ensuing year's priorities. Critical needs are identified for correction to enhance quality of programs and services. Each department/unit is expected to review current programs for potential improvements/reallocations prior to presenting a request for funds. Reallocations occur at two levels, institutional and departmental.

The institutional budget planning process is supported through the University's administrative computing services (the Jenzabar software with Wildcat Web interface) to facilitate a comprehensive system of relevant data collection and distribution of information related to all major aspects of the University for budget planning and decision-making.

### Program/Unit-Level Budgeting and Approval Process

Budgeting at the unit level is a decentralized process with each unit responsible for building its own budget. Inputs to the process begins with a budget preparation communication from the Office of Fiscal Affairs which includes prepopulated departmental budget templates with prior year's allocation amount; provision for budget increase justification for any additional need or adjustments; instructions for parties responsible to complete, approve, and load budget data into Wildcat Web by the due date.

The individual unit budgets are aggregated by the Office of Fiscal Affairs in order to produce the overall University budget that is submitted to the Board of Trustees for approval. Because the needs of the University change over time, this process has a built-in flexibility that allows the University to optimize its resources while allowing the unit managers to include all sources and uses of funds.

A planned budget process begins in the fall of each year. Each Division/College/School Head is responsible and accountable for developing, proposing, monitoring, and assessing annual action plans and financial strategies to support the Strategic Plan in reaching program goals. Each budgetary unit is provided access to digital budget worksheets, which includes preliminary allocations as the starting point for the upcoming budget year and the prior year's actual expenditures and the year-to-date expenditures. The vice presidents have latitude in allocating funds



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

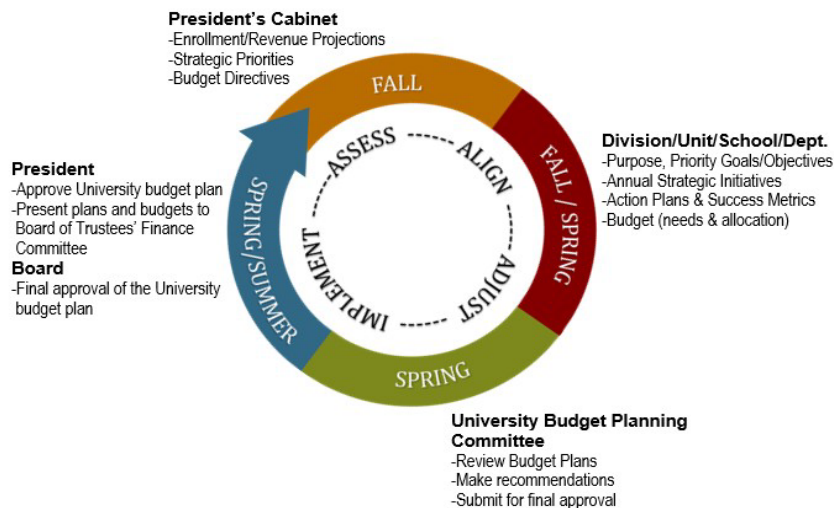
within their areas of responsibility. Each Division/College/School is expected to end the fiscal year with a balanced budget. Individual units within the Division/College/School may have positive or negative balances, but the overall Division/College/School spending cannot exceed its budget.

The Office of Fiscal Affairs holds budget reviews and hearings with each vice president and/or department head during the spring of each year to discuss the current year's expenditures, the future needs of the departments, and provide assistance with the planning and budget building process. The preliminary consolidated budget is reviewed by the CFO and the University President who presents it to the Board of Trustees for approval in April.

The Office of Fiscal Affairs constantly monitors and assesses financial performance through monthly review of budget to actual. Quarterly, the Office of Fiscal Affairs distributes reports to the President and the Board of Trustees. As a part of the quarterly reviews, significant variances are researched and explained and accounts are reconciled.

The University's annual planning-based budgeting cycle occurs over three semesters beginning in the Fall of the prior year and concluding in the President's and Board's approval.

## Annual Institutional Budget Planning Cycle





# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## Annual Institutional Budget Planning Steps

### 1. *Analysis of Prior Year's Results Comparing Budgets to Actuals*

- Confirm income and expense correctly classified
- Determine if current year budget requires adjustments

### 2. *Monitoring of Current Year Budget and Adjustments When Necessary*

- Weekly enrollment projections
- Monthly review of aggregate income and expense data
- Quarterly confirmation processes
- Controls

### 3. *Multiple Year Budget Forecasts*

- Enrollment related items
  - Tuition and Fees
  - Room and Board
  - Financial Aid
- Salaries and Fringe Benefits
- Academic Programmatic Enhancements
- External Overhead
- Physical Plant
- Establishment of Reserves for Contingencies

### 4. *Guide to Budget and Planning Decisions*

- Core Mission Critical Functions
- Historical and Actual Budgeted Income and Expense
- Detailed Organization Charts
- Staffing Level Analysis
- Faculty Assignment and Salary Study
- Budget Support Notebook

### 5. *University Funds Allocation Process*

- Tuition and Fees
- Research and Sponsored Programs' Facilities and Administration (Indirect Costs)
- Private Gifts and Grants
- Miscellaneous Revenue (other income)
- Auxiliary Revenue – Assigned directly to the unit



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## Annual Budget Planning Completion Timeline

Budget Process Steps	Timeline
<input type="checkbox"/> Develop initial revenue assumptions	Aug - Sept
<input type="checkbox"/> Update assumptions and revise allocations to be sent to units	
<input type="checkbox"/> Email unit heads to develop budgets for the upcoming fiscal year	
<input type="checkbox"/> Budget preparation guidelines, instructions, and due dates are communicated to Department/College/School heads for completion by units within the Division	
<input type="checkbox"/> Campus-wide budget workshop in collaboration with Fiscal Affairs	
<input type="checkbox"/> Department/College/School heads meet with VP for each division to determine final approved budget	Oct - Nov
<input type="checkbox"/> Department/College/School heads complete and consolidate budget plans and submit to the Office of Fiscal Affairs electronically via WildCat Web	
<input type="checkbox"/> The Office of Fiscal Affairs consolidates budgets by Divisions for review by CFO and the President	Dec - Jan
<input type="checkbox"/> The CFO conducts budget plan reviews/hearings with Division/ College/School heads and make recommendations to the President	Jan - Feb
<input type="checkbox"/> The Office of Fiscal Affairs approves budget plans	
<input type="checkbox"/> Preliminary operating budget documents and are prepared for Board approval	Mar - Apr
<input type="checkbox"/> Proposed budget plans presented to the Finance Committee of the Board	
<input type="checkbox"/> Board presentation and approval	Apr
<input type="checkbox"/> Budget distributed to departments by accounts	Jun - Jul
<input type="checkbox"/> Upload approved budget in Jenzabar/WildCat Web	



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## **INTEGRATION of STRATEGIC and ANNUAL ASSESSMENT PROCESS**

Assessment is a systematic, ongoing cycle of setting goals and initiatives, measuring attainment of these goals/initiatives, and using the results to make informed decisions for continuous improvement. Assessment data provides information that is necessary for making sound decisions about what the administration should do in the future to enhance effectiveness of the University. This may be in many areas, including programmatic changes, classroom teaching modifications, support service adjustments, policy or procedural revisions, campus climate improvements and structural reorganization. Most importantly, assessment is a process to be used for institutional improvement and enhancement in student learning. A successful assessment program must have dedication from faculty, staff, and administration. Therefore, the process of assessing and enhancing quality is a responsibility of the entire University community.

The Office of Assessment and Evaluation is responsible for coordinating the instructional and administrative program assessment process and organizing individuals, tools and resources within their respective program or unit for completing the responsibilities of annual program assessment. The Office also conducts an objective overview, monitors quality of the program outcomes and objectives assessment process, and ensures that the requirements and standards of institutional effectiveness are being addressed. This process includes reviewing program and unit reports to ensure the consistency and integrity of the assessment process, as well as helping respond to external requests for accountability.

Reporting on assessment activities and results is necessary to avoid sporadic assessment efforts. A regular reporting cycle provides the opportunity for feedback and easy compilation of accountability reports to accrediting agencies, other stakeholders, and decision-makers. The reporting of assessment activities and results need not be a lengthy and onerous process. The primary purpose of reporting is to facilitate discussion and provide feedback on the impact of academic and non-academic programs for use in planning, decision making and resource allocation.

The Office of Assessment and Evaluation uses electronic portfolio reporting designed as a repository for institutional effectiveness related data and reports. This centralized approach allows for the effective organization of all aspects of strategic planning, student learning assessment, program reviews, student support and administrative unit assessment, accreditation and compliance. The electronic portfolio structure further allows for all assessment reporting to be completed in a simple and user-friendly interface for easy access. The Office also provides each Program/Unit access to and training for managing their assessment plans and data input in the electronic portfolio system. The Office regularly audits the submission of assessments for validation and reliability as well as provides feedback to improve the plans and processes.

The Office of Institutional Research and Analysis supports all programs and units with developing their assessment plans through the ongoing administration of university-wide data collection and survey administration.

### **Assessment at the University Level**

Assessment plans are closely integrated with the University's mission, the strategic plan goals and initiatives, and operational budget. Therefore, individual program assessment and unit assessments start with institutional priority goals and initiatives. The University identifies expected outcomes, assesses the extent to which it achieves these outcomes, and provides evidence of improvement based on analysis of the results.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## Internal Assessment – Mission-Critical Internal Indicators of Performance

The University will identify mission critical internal Key Performance Indicators (KPI) to monitor the progress of its essential functions regularly for continuous improvement. These KPIs form a core “To Watch” list and focus on areas that are measurable and most likely to assure the long-term success of the University in fulfilling its mission.

The following 14 *internal mission-critical indicators* are identified as those the University assesses first and monitor regularly. They form the core of our “to watch” list and focus on areas that are measurable and most likely to assure the long-term success of the University in fulfilling our mission.

1. **Income Stability:** Tuition and Fees, Federal Grants and Contracts, Private Gifts and Grants as a percentage of Educational and General Revenue
2. **Academic Excellence:** Commitment to Instructional and Research Expenditures as a percentage of total Current Fund Expenditures
3. **Financial Resources:** Average annual spending per student on instruction, research, student services, and related educational expenditures
4. **Stewardship/Financial Sustainability:** Fiscal surplus to indicate budgetary goals are met and expenses are within the means
5. **Fiscal Viability/Stability:** Healthy core Composite Financial Index Ratios (Primary Reserve, Viability, Net Operating, and Return on Net Assets)
6. **Affordability:** University funded student financial aid and tuition discounting as percentage of tuition and fees (**Student Aid Expense Ratio**)
7. **Competitiveness and Selectivity:** Acceptance rate to measure selectivity and admissions “yield,” to determine the University’s attractiveness
8. **Student Success Rates:** First-year freshmen retention, persistence, graduation and career placement rates, time-to-degree and number of degrees awarded
9. **Productivity:** FTE Faculty-student and Staff-student ratios
10. **Faculty Resources:** Faculty by rank, terminal degrees in their fields, employment status (FT/PT), class load and size, student credit hours generated, average compensation
11. **Facility Maintenance/Maintenance Backlog:** Deferred maintenance backlog as percentage of total replacement value of plant
12. **Library and Technology Learning Resources Support:** Average annual spending per FTE student on technology and library learning resources, facilities and academic staff support services
13. **Annual Giving by Source:** Annual number and dollar amount of Alumni, Trustees, Individual, Corporation and Foundation giving
14. **Extramural Funding for Research/Sponsored Programs:** Grant proposals submitted and awarded by source and amount



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## External Assessment – Comparison Metrics for Peer and Aspirant Institutions

The University will utilize benchmarking practices of identifying the key metrics and leading indicators for the industry, defining a peer comparison group, and finding appropriate data analysis to assess the University's wellbeing, improve results and achieve a competitive advantage.

Data comparison from the following group of peer and aspirant institutions is used to provide a context for interpreting and guiding the University's decision-making.

### List of Peer Institutions

- Flagler College
- Florida Southern University
- North Central College
- Springfield College
- Tuskegee University
- Xavier University of Louisiana

### Selection Characteristics

Control or Affiliation Carnegie  
Classification Highest Degree  
Offered  
Student Demographics  
Enrollment Headcount and FTE

### List of Aspirant Institutions

- Clark Atlanta University
- Gannon University
- Hampton University
- High Point University
- Rollins College
- University of Richmond

**Source:** NCES/IPEDS Data Feedback Report  
Carnegie Classification of Institutions of Higher Education

### Performance Benchmark Metrics

Student Yield: Application to Admit Rates; Admit to Enrolled/Matriculation Rates  
Student Success: First-Year Returning Student Retention Rates; 4, 5 and 6-Year Graduation Rates; Degrees Completed/Awarded; Career Placement and Graduate/Professional Studies  
Faculty Resources: Full-time/Part-time Ratio, Class Size, Faculty-Student Ratio, Highest Degree Financial Resources: Revenues by Source, Expenses by Function, Expense per FTE Enrollment Endowment Growth  
Student Aid and Cost of Attendance  
Alumni Giving Rate  
Ranking in National Surveys



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## CONCLUSION

This Strategic Plan outlines a set of priority goals for Bethune-Cookman University that we can achieve if we work collaboratively and use discipline. With coordinated application of organizational development and utilization of appropriate operating processes, procedures and resources, B-CU will become efficient in its student enrollment, retention and academic performance; attain financial stability; excel in academic programs, faculty teaching, research and service. Some of the most important measures include:

- emphasizing our academic mission of instruction, research/creativity, and service
- preparing graduates for success and service in the main stream of the society
- providing student experiential learning opportunities regardless of career focus
- integrating emerging technologies in learning and administrative processes
- sustaining student access and affordability to various alternative modalities of learning
- enhancing on campus students' living-learning and social experiences
- cultivating donors, contributors and media relations for the benefit of the University

The structure of this Plan was revised and updated by the Office of Institutional Effectiveness.



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## BOARD OF TRUSTEES

The Board collaborates and partners with the President, senior leadership team, and faculty leaders to arrive at an understanding concerning the strategic direction and ensures that the University has the resources necessary to sustain core operations, compete in the educational marketplace, and achieve its mission by attaining the strategic priorities and goals of the University.

### **Executive Committee**

Joyours "Pete" Gamble, Chairperson  
Jeffrey E. Branch, Vice Chair  
Jennifer L. Adams, Secretary  
John Crossman, Chaplain  
Deveron Gibbons, Parliamentarian

### **At-large Members**

Admiral David Brewer III  
Belvin Perry Jr., Esq  
Courtney Rhodes  
John A. Williams  
Marc O'Ferrall  
Gregorio A. Francis, Esq.

### **Ex-officio Members**

Dr. Albert Mosley, B-CU President  
Dr. Wayne Shepard, B-CU Faculty Representative  
Sagal Buchanan, B-CU SGA Representative  
Rev. Geraldine McClellan, The Florida Conf. UMC Representative  
Derrick Scott III, The Florida Conf. Co-Lay Leader UMC Representative



# BETHUNE-COOKMAN UNIVERSITY

*Enter to learn. Depart to serve.*

## CABINET

The President's Cabinet provides leadership to the planning process, prepares specialized sub-plans, and evaluates their implementation and progress. The Cabinet also continually reviews and provides feedback for necessary revisions and budgeting implications to the plan. Led by the President of the University, the Cabinet is comprised of the following individuals:

Dr. Albert Mosley, B-CU President

Dr. Vernell A. Bennett, Provost and Senior Vice President for Academic Affairs

James Cleveland, Vice President for Fiscal Affairs and Chief Financial Officer

Daisey Grimes, Chief of Protocol

Dr. Julius John, Chief of Staff

Dr. Sherry Paramore, Executive Vice President and Chief Operating Officer

Dr. Narendra Patel, Senior Advisor to the President for Accreditation, Quality Control, Compliance and Institutional Effectiveness/SACSCOC Accreditation Liaison

Dr. Camaille Shepard, Vice President for Enrollment Management

Valencia Gallon-Stubbs, Esq., Vice President for Legal Services and General Counsel

Reggie Theus, Athletic Director and Head Men's Basketball Coach

Dr. Ronald Williams, Vice President for Student Success

As of 7-30-2025