



BETHUNE-COOKMAN UNIVERSITY

Enter to learn. Depart to serve.

STRATEGIC PLAN

2018/19 → 2020/21

Hubert L. Grimes, Esquire
Interim President



Pending Full Board Review & Approval by April 2019

BETHUNE-COOKMAN UNIVERSITY STRATEGIC PLAN 2018-19 – 2020-21

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The University of the Future

Managing People, Processes and Technologies to Mobilize Toward Stability and Growth

Bethune-Cookman University will strive with certainty to further reinvent itself coming to grips with our core processes; balancing cost and quality; and partnering of resources to ensure the preparation of clearly defined educational programs and support services will remain our niche for academic excellence and student success.

This three-year 2018-2021 Strategic Plan will propel B-CU forward and allow us to strengthen the foundation upon which we can continue to build and enhance the academic quality, student productivity, and sustainable resources of our historic University.

The following Strategic Drivers will guide the execution of our strategic planning and budgeting process:

- *Efficiency and Effectiveness in Campus Operations*
- *Students' Academic and Career Success*
- *University Relations and Reputation*

The impact of our efforts will be measured through the following standards of success:

- *Sound Business Model and Financial Stability*
- *Strong Academic Programs and Support Services*
- *Positive University Brand and Visibility*

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Preamble

Planning for the 2018-2021 Forward Plan

Strategic planning at Bethune-Cookman University is an ongoing integrated living learning process by which collaborative efforts of all functional areas represented by every major constituent group of the University are materialized. While the Board of Trustees establishes and promotes the University's Strategic Priorities in line with our mission, the President executes and operationalizes the Strategic Plan through the leadership of his Cabinet.

Using a multidisciplinary approach, this three-year ***2018-2021 Forward Plan*** is an extension of our present 2013-2018 Strategic Plan. The Forward Plan will continue to guide us through our Board directed administrative transition to achieve our stated mission by fully preparing and well-positioning Bethune-Cookman University to pursue opportunities to align processes, talent, and resources for building, serving and ameliorating our future interests and that of our stakeholders.

More importantly, having evolved from the current 2013-2018 Strategic Plan, this Forward Plan was created entirely by campus members and includes significant contributions by many individuals and the numerous conversations with students, faculty, staff and administrators clearly embodies shared governance. The resulting plan exemplifies B-CU's commitment to student success and inclusivity. The effort to develop and structure this Plan was overseen by the Office of Institutional Effectiveness and Compliance.

We thank you for taking part in the process of developing B-CU's strategic forward direction and look forward to your participation in its implementation.

Approved _____

Board of Trustees for Bethune-Cookman University

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Organization of the Plan

The strategic planning effort was organized around four 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?

2018 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 we want to be?	How can we get there?	How will we know we've arrived?
Strategies	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				

Assumptions

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

External

1. Increase and stabilize enrollment at undergraduate and graduate levels
2. Attract a better prepared diversified entering student body
3. Develop multiple programs of opportunity for students to acquire knowledge and skills
4. Graduate greater numbers of students who will enter and succeed in post graduate studies and/or the workplace
5. Demonstrate the strength of our curriculum and the academic proficiency of our graduates
6. Implement effective operational systems to enhance efficiency, productivity, accountability and customer service at all levels
7. Attend to the aging physical plant
8. Focus on faculty and staff development activities
9. Expand institutional capacity for faculty research, scholarship and creative works
10. Engage in initiatives to broaden our international presence and collaboration
11. Enhance the visibility of our graduate studies program
12. Promote community outreach and sustainability agendas
13. Provide alternative learning modalities for traditional and non-traditional students

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Internal

1. Student enrollment will grow at the average of 1.5 percent a year
2. Female-male enrollment ratio will remain close to two to one
3. In-state student enrollment will remain around 65%
4. Matriculation of admitted student will be around 30%
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. Undergraduate first year retention rate will be 70%
8. Six-Year graduation rate will be 40%
9. Student career placement rate after graduation will be around 32%
10. Graduate and professional program education placement will be 35%

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The University

Founded on faith by Mary McLeod Bethune in 1904, Bethune-Cookman University (B-CU) was formed in 1923 as a result of a merger of two independent institutions — Daytona Educational and Industrial Training School for Negro Girls (1904) and Cookman Institute of Jacksonville (1872), is an 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 individual through proper financial stewardship and use of cutting edge technology.

Mission Statement

The mission of Bethune-Cookman University is to develop global leaders committed to service, life-long learning and diversity by providing a faith-based environment of academic excellence and transformative experiences.

Revised by the Board of Trustees, October 2013

Vision for the Future

Bethune-Cookman University will define new standards for academic excellence and student success by educating and empowering learners who will seek their own solutions; advocate opportunities for all citizens to improve their quality of life; and inculcate global perspectives and realities to people worldwide.

Interim President Hubert L. Grimes

Implementation of the University Mission

In order to accomplish its Mission, Bethune-Cookman University is committed to:

1. Providing access to a range of integrated active learning educational programs, research, and service opportunities through a diverse community of teachers and scholars for continual professional growth and leadership vital to an increasingly advanced and interconnected global society. (**Teaching and Learning**)
2. Conducting high-quality research, scholarship, and problem solving activities through modern facilities and current technology to generate, preserve, and impart discovery of new knowledge and understanding conducive to all academic and professional disciplines that benefit students, scholars, and communities across the world. (**Research and Scholarship**)
3. Contributing time, expertise and professional services through collaborative partnerships, civic engagement, and outreach initiatives responsive to the needs of multicultural communities in a continuously changing world. (**Community Service**)
4. Continuing its historic dedication toward social responsibility, human justice and well-being that advance rigorous interdisciplinary inquiry, improve national and international affairs, and enhance civic dialogue in an atmosphere of open exchange of ideas, sound ethical and moral principles that promote personal integrity, responsibility, cooperation, mutual respect for individual beliefs, and understanding of others. (**Civic Engagement**)

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Core Values

The University is guided by its core values: **F.I.R.S.T.**

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. The resulting set of core values is as follows:

- 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

Mission	Vision	Core Values	Strategic Priorities/Goals
To develop global leaders committed to service, life-long learning and diversity, academic excellence and transformative experiences.	To educate and empower learners who will seek their own solutions; advocate opportunities for all citizens to improve their quality of life; and inculcate global perspectives and realities to people worldwide.	<ol style="list-style-type: none"> 1. Faith 2. Integrity 3. Respect 4. Service. 5. Thirst for Knowledge 	<ol style="list-style-type: none"> 1. Restore Financial Stability 2. Strengthen Academic Enterprise 3. Enhance University Brand & Visibility

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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 expected to honor our points of integrity.

1. **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.
2. **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.
3. **Maintain Accurate Records:** Ensure accurate and reliable individual and institutional records; and prepare reports honestly and in accordance with established finance and accounting procedures.
4. **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.
5. **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.
6. **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.
7. **Strive for Fairness in All Activities:** Continually examine our processes and practices to identify, avoid or eliminate potential conflicts of interest.
8. **Privacy of Employee and Student Information:** Maintain the privacy of our students' and our employees' information.
9. **Adherence and Fulfillment of Standards of Excellence:** Comply and meet with all required standards and regulations governed by federal, state, and regional accrediting bodies.

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Strategic Priority Goals, Initiatives and Success Measures

With a clear focus on Board reviewed mission, vision, and core values, Bethune-Cookman University has identified the following three priority goals as essential components of our work moving forward:

Priority Goal 1: Restore Financial Stability

Create and use a multi-year financial budget planning process that emphasizes greater transparency, realigns faculty and staffing levels, and enhances future financial strength and security.

Initiatives

- 1.1 Realign budget to reduce overhead expenses by at least 5% over three years
- 1.2 Resolve finance issues of residence hall Phase I & II
- 1.3 Increase cash reserves
- 1.4 Restore total investment portfolio value to 50 million dollars over three years
- 1.5 Identify and create new sources of revenue for the University
- 1.6 Improve campus facilities and reduce financial outlay through a comprehensive master plan
- 1.7 Develop innovative pricing and financial assistance strategies that will maximize opportunities for our diverse and historically underserved students for all levels and delivery models
- 1.8 Provide educational and professional development opportunities for faculty and staff
- 1.9 Ensure a quality education for our diverse populations by offering relevant, current, and rigorous undergraduate and graduate course work
- 1.10 Provide a responsive and professional education that fosters civic responsibility in a global culture
- 1.11 Strategically strengthen and expand the University's undergraduate and graduate degree programs
- 1.12 Enhance efforts to clearly communicate costs and resources to better utilize financial aid resources
- 1.13 Recruit and retain a diverse faculty and administration with experiences, skills, and personal attributes that foster inclusion and equity via targeted searches, endowed positions, or other viable means
- 1.14 Track key Composite Financial Index ratios with a target of 3 or higher to maintain overall financial health, financial performance and credit worthiness of the University

Success Outcomes

- Ongoing funding with recurring revenue sources for current operations or capital purposes: Annual funding available for scholarships, programs and projects, and faculty/staff salaries
- Enhanced revenue generating systems: Availability of revenues (federal/state/private, student tuition, etc.) for recurring operating expenses from new and ongoing revenue sources for current operations and capital purposes
- Stronger 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 with a 3 or higher target; Average per FTE student instructional expenditure
- Program cost effectiveness: Annual resources available for programs and project activities; funds generated by private and federal grants and contracts activities for instruction, research, scholarship and community service to support University operations
- Deferred maintenance budget and actual spending, balanced budget, amount of unallocated budget reserve, amount of contingency fund and debt capacity
- Number of faculty and staff relative to student enrollment, faculty and staff salary and fringe benefit comparison to benchmark institutions; Faculty and staff professional development opportunities and participation in professional organizations and administrative committees
- Customer satisfaction of needs and services

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Priority Goal 2: Strengthen Academic Enterprise

Redesign undergraduate and graduate degree programs and courses in terms of content, delivery format, and career prospects to attract talented students from around the world.

Initiatives

- 2.1 Prepare for reaffirmation by SACSCOC through assessment and system-wide evaluation of our educational product
- 2.2 Review of curriculum offerings to coincide with anticipated outcome requirements established by SACSCOC and the Department of Education
- 2.3 Increase on-line student population by 20% annually over the next three years
- 2.4 Increase the number of active student internships by 10% annually over the next three years
- 2.5 Identify and develop cutting edge areas such as Homeland Security, Forensics, and Cyber Security
- 2.6 Identify and develop “stackable credentials,” and other non-traditional programs that may not require a four-year college degree in line with the vision and proposed programming of the federal Department of Education
- 2.7 Offer varied learning opportunities and support services to address our diverse student needs and to achieve educational, personal, and career successes
- 2.8 Provide challenging and responsive curricula and delivery modalities to educate, serve, and inspire student learning
- 2.9 Increase faculty and staff development initiatives that foster and promote inclusive excellence
- 2.10 Provide opportunities for faculty to conduct research and seek extramural funding
- 2.11 Develop institutional policies, practices, and provisions to support professional development endeavors
- 2.12 Increase recruitment and support eligible transfer students
- 2.13 Enhance student advising to ensure it is accurate, timely, and supportive of the attainment of student goals
- 2.14 Provide all students with practical and hands-on experience supporting their learning and professional development
- 2.15 Promote and increase early student engagement as a means to graduate students with a strong sense of connection to B-CU
- 2.16 Identify and systematically remove obstacles to student success

Success Outcomes

- Student performance: Annual learning gains; Passing rates on standardized tests and licensure exams
- Student retention, graduation and placement rates: Persistence, progression and completions; Career and graduate/professional school placement
- Faculty and student engagement in high-impact lifelong teaching-learning opportunities: Research, civic and community service projects and activities; Religious life, cultural and artistic education
- Quality of academic programs and support services: Degree of faculty and student engagement in the learning process and contributions to academia and community
- Effective use of educational methods and practices: Shared teaching-learning experiences; technology enabled active and collaborative learning (lecture, experiment, & discussions)
- Documentation of activities used to improve the quality of teaching: Faculty qualifications; Evaluation of teaching by administration, students, faculty peers; student-faculty interaction; student satisfaction surveys; Satisfaction surveys of graduates and employers
- Supportive campus environment: Enriching educational, physical and spiritual experiences; Good customer service delivery
- On-line degree programs: Implementation of on-line master’s degree programs for working adults who have life experience; Non-traditional student inquiries, matriculation, retention, and completions; Effective faculty and staff training and development
- Customer Satisfaction

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Priority Goal 3: Enhance University Brand & Visibility

Execute a broad range of comprehensive brand identity initiatives and promotional projects to expand enrollment marketing and to communicate internal recognition events to all stakeholders.

Initiatives

- 3.1 Increase positive news being presented to the local, regional, and national media by 50% over next three years
- 3.2 Increase communication flow using multiple platforms – electronic, print media, social media, radio, television, billboards
- 3.3 Identify and promote university traditions as a fundamental enhancement for student learning
- 3.4 Maximize the use of university resources such as CatEye Network, 1380 the Cat Radio Station, Social Media in order to extend the reach of our fund-raising efforts
- 3.5 Increase annual fund campaign by 10 million dollars
- 3.6 Develop and extend positive community partnerships through the continued offering of campus events
- 3.7 Stimulate sustainable economic development opportunities for the community
- 3.8 Partner with community and business groups to foster strong unifying campus connections
- 3.9 Develop and cultivate relationships with alumni and supporters to benefit campus community and connection to the University
- 3.10 Promote opportunities for students' life-long learning

Success Outcomes

- New revenues raised from alumni, parents, other individuals, organizations, foundations, corporations, religious and other fund raising consortia
- Increased endowment for outstanding excellence in teaching, research and scholarships; Endowed chairs and academic programs
- Number and amount of funds awarded: Funding sources and grant applications funded; Programs and facilities (building and grounds) funded; Private scholarships funded
- Number of donor cultivation, participation and gift giving: Annual number of donors and amount of contributions; size of alumni association, number of alumni with current communication
- Positive institutional image: Exposure by media, partnerships and collaborations with community groups and entities; frequency of news coverage
- Customer Satisfaction

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Assessment of the Plan – “A framework for success”

Assessment Plan Implementation and Benchmarks

(“How will we know if we reach the strategic goals, and how will we prove it?”)

This Plan provides a framework for assessing progress that emphasizes the importance of:

- multiple measures for a given priority or objective
- combines quantitative metrics and qualitative indicators
- minimizes the staff time devoted to such measurements

The Plan further specifies a core set of initiatives for assessing institutional progress toward key priorities. The mechanisms of assessment for this Plan are developed in consultation with respective division units. In addition, this Plan includes a general approach to guide the development and use of metrics (baseline and benchmarks) and qualitative indicators supplemented by divisions for assessing the *Strategic Plan* priority goals and initiatives. This is intended to be a starting point from which appropriate groups of administrators, faculty, and staff can develop and further refine the success measures, metrics, and qualitative indicators relevant to the respective division and unit.

Approach

- Focus on university-wide (aggregated) metrics and qualitative indicators but include, where appropriate, unit-level ones.
- Organize metrics and qualitative indicators around priority goals and initiatives.
- Include both quantitative and qualitative indicators of success.
- Have multiple indicators for each goal, given the complexity of the assessment, but as few as possible to enhance focus.
- Make the metrics flexible and adaptable to be useful across a wide range of academic areas or units.
- Consider the need to minimize the amount of staff time or additional staff to implement the metrics.
- Use existing sources of data and information whenever possible.

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Core Metrics

Tracked over the next three years, our core metrics reflect the Strategic Plan’s key priorities and initiatives.

Key Strategic Priorities and Initiatives

The President and the cabinet will collaborate and develop a project management plan to address and implement the following key priorities and initiatives with specific timeline and deliverables.

Key Priorities & Initiatives	Timeline	Deliverables
1. Transparency <ul style="list-style-type: none"> ▪ Restore Public Trust/Confidence in the University ▪ Resolve SACSCOC Probation Issues 		
2. Organizational Structure <ul style="list-style-type: none"> ▪ Right-Size the University ▪ Align People, Processes & Technologies 		
3. Fiscal Stability <ul style="list-style-type: none"> ▪ Planning Based Budgeting Processes ▪ Cost Reduction/Savings & New Revenue Stream Initiatives ▪ Balanced Budget • Extramural Funding • Clean audits and improved bond ratings 		
4. Academic Enhancement <ul style="list-style-type: none"> ▪ Comprehensive Program Reviews ▪ Continuous Faculty Innovation & Professional Development ▪ Faculty Engagement in Research & Scholarly Work ▪ Professional Program Accreditations & Certifications 		
5. Economic Impact <ul style="list-style-type: none"> ▪ Economic Development Initiatives ▪ Community Service & Relations 		
6. Capital Projects <ul style="list-style-type: none"> ▪ Faculty Innovation & Training Facilities ▪ Ranslow Hall Artist in Residence 		
7. Enrollment Growth & Mix <ul style="list-style-type: none"> ▪ Racial diversity ▪ In-State, Out-of-State, International ▪ Tradition & Non-traditional ▪ Online & face to face 		
8. Niche Academic Programs <u>Existing</u> <u>New</u>		
9. University Branding <ul style="list-style-type: none"> ▪ Positive B-CU Image & Media Exposure ▪ National & International Recognition ▪ Community Awareness & Participation 		

NEXT THREE YEARS

With appropriate measures, structural changes and controls presented in this vision, the president expects to achieve the following deliverable outcomes:

- Recover from the financial challenges, ensure a financial surplus and increased revenue streams
- Stabilize enrollment to full capacity, increased enrollment growth, retention & graduation rates
- Improved programs, services and facilities that support student success
- Increase innovative, relevant and competitive including online degree courses and weekend classes
- University programs recognized and sought after by students both nationally and globally
- High level of diversity among students and employees
- Enhanced university visibility and relations among its stakeholders

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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 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 institutional budget plan that is submitted to the University Board of Trustees for review, action, and approval. The President works with the Cabinet and the University Budget Planning Committee to prepare the annual operating budget. The University Budget Planning Committee and the Cabinet meet as often as is required and advise on revenues and expenditures assumptions, budget parameters, University-wide priorities and policies regarding resource allocations. The University Budget Planning Committee then makes budget recommendations to the President.

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 Budget Planning Office is responsible for the allotment of appropriations. 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.

The University's Business Affairs division carries out the process of updating and documenting the institutional budget process. The intent is to have an open process – inclusive, fully documented, and most importantly, linked to the planning process of the institution 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.

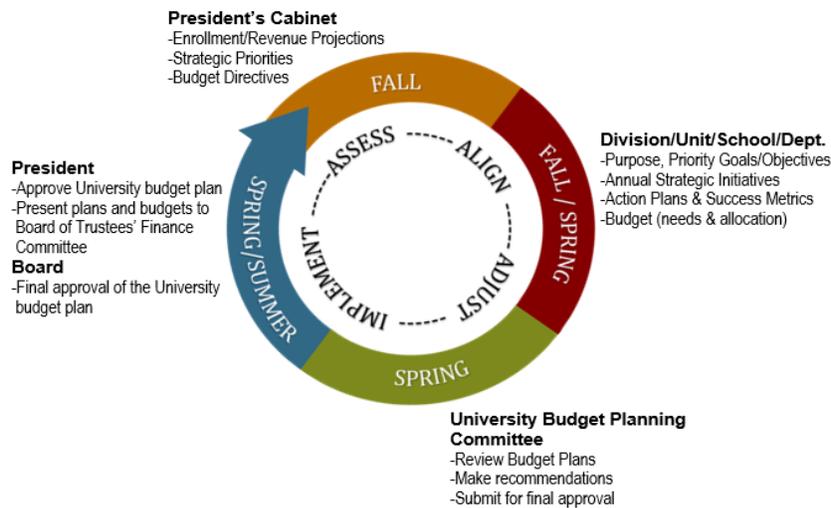
The institutional budget planning process is supported through the University's administrative computing services and a comprehensive system of data collection and distribution for all major aspects of the University. The Jenzabar software with Wildcat Web interface facilitates a data warehouse containing management information about courses, students, faculty, facilities, budgets and any other data needed for budget planning and decision-making.

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.

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.

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Annual Institutional Budget Planning Cycle



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 are the central administration's allocation letter, which includes the assumptions and initial allocation amount, and other data collected at the unit level. The individual unit budgets are aggregated by the Budget Planning Office in order to produce the overall University budget that is submitted to the Board of Trustees for approval. Because the needs of the University will 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 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 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 University Budget Planning Committee 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 president who presents it to the Board of Trustees for approval in April.

The Budget Planning Office constantly monitors and assesses financial performance through monthly review of budget to actual. Quarterly, the Budget Planning Office 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.

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Annual Budget Planning Completion Timeline

Budget Process Steps	Timeline
Develop initial revenue assumptions	Aug - Sept
Update assumptions and revise allocation letters to be sent to units	
Letters sent to units to develop budgets for the upcoming fiscal year	
Budget preparation guidelines, instructions, and completion forms submitted to Department/College/School Heads for distribution to various units within the Division	
Campus-Wide Budget Workshop in collaboration with Institutional Effectiveness	
Department/College/School Heads meet with Vice President for each division to determine final approved budget	Oct - Nov
Department/College/School Heads complete and consolidate budget plans and submit to the Office of Budget Planning electronically	
Office of Budget Planning consolidates budgets by Divisions for review by CFO and the President	Dec - Jan
The Budget Planning Committee of the University conducts Budget Plan Reviews/Hearings with Division/College/School Heads and make recommendations to the President	Jan - Feb
University Budget Planning Committee Approves Budget Plans	
Preliminary Operating Budget documents prepared for Board approval	Mar - Apr
Proposed Budget Plans Presented to the Finance Committee of the Board	
Board Presentation and Approval	Apr
Budget distributed to departments and accounts	Jun - Jul
Upload Approved Budget in Jenzabar	

Analysis of Prior Year's Results Comparing Budgets to Actuals

1. Confirm income and expense correctly classified
2. Determine if current year budget requires adjustments

Monitoring of Current Year Budget and Adjustments When Necessary

1. Weekly enrollment projections
2. Monthly review of aggregate income and expense data
3. Quarterly confirmation processes
4. Controls

Multiple Year Budget Forecasts

1. Enrollment related items
 - a. Tuition
 - b. Fees
 - c. Financial Aid
2. Salaries & fringe benefits
3. Academic Programmatic Enhancements
4. External Overhead
5. Physical Plant
6. Establishment of Reserves for Contingencies

Guide to Budget & 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

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University Funds Allocation Process

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

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PLANNING FOR INSTITUTIONAL EFFECTIVENESS

The philosophy of institutional effectiveness is based on the premise that the institution engages in an effective and recursive institutional process of self-examination that is comprehensive, systematic, and continuous. In order to create the most effective learning environment and experiences for students, a sound institutional effectiveness program occurs throughout the academic and administrative areas of the institution, and is part of the institution's ongoing functioning.

Bethune-Cookman University's Institutional Effectiveness Process consists of the following components:

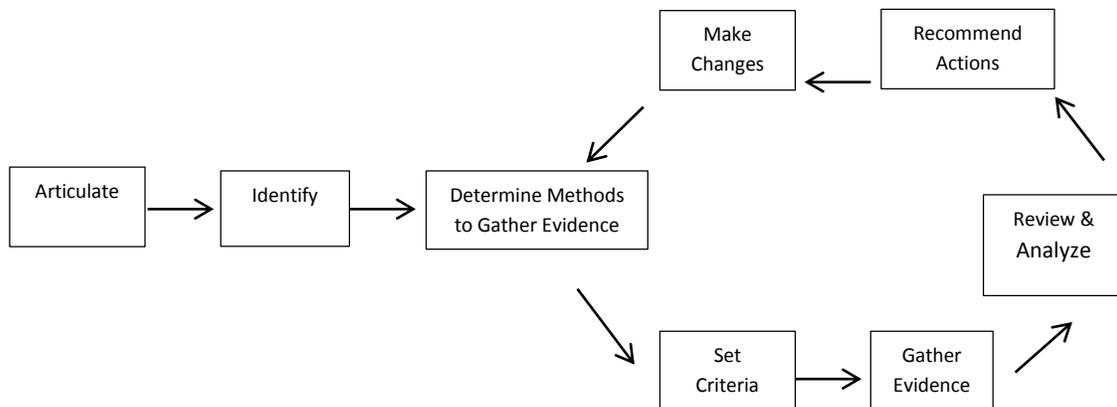
- strategic planning and resource projections,
- operational planning, budgeting and resource allocation,
- assessment and monitoring, including periodic reviews, and
- results and data-driven actions to improve programs and services.

The University's Strategic Plan consists of a mission, vision, core values, and priority goals. This plan further establishes the overall initiatives and success outcomes for the University and serves as the foundation for annual operations planning at all levels of the University. The planning-based budgeting process is closely tied to University goals and initiatives. Therefore, all functional cost centers prepare budget requests based on strategic priorities set for the upcoming year.

B-CU's Institutional Effectiveness Assessment considers the following four phases:

- Expected Outcome: a. Student Learning Outcomes; b. Program Objectives
- Means of Assessment: a. Success Criteria; b. Tool(s) and Method(s)
- Sound Assessment Practices: a. Results; b. Use of Results
- Continuous Improvement: a. Action Plans; b. Budgetary Considerations

The following Institutional Effectiveness feedback loop shows the recursive path of improvement where programs/units continually work through this cycle to refine academic programs as well as administrative and educational support unit planning and service delivery.



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This systematic, broad-based, interrelated process is designed to enhance and improve the quality of our academic programs and administrative and educational support services while carrying out the University's mission.

Institutional Effectiveness is the responsibility of all employees and requires a campus-wide commitment and participation.

Integration of Strategic and Annual Planning Process

The University's Institutional Effectiveness process integrates the strategic and annual operations planning and assessment cycles. The Institutional Effectiveness planning process is designed to permeate every facet of the University and focus on assessing three key elements: The Strategic Plan (Institutional Level); Program and Student Learning Outcomes (Department/Unit Level); and Periodic Program Reviews (Academic and Administrative/Educational Support Services). The components of both cycles are explained below.

The Strategic Planning cycle is divided into four major stages:

I. Pre-Planning – involves assessing of current conditions. This phase is comprised of activities such as an environmental scan, SWOT analysis, review of the University mission, vision, and core values, evaluation of the current strategic plan, and an examination of other internal audits such as the seven year periodic reviews, professional program accreditation recommendations, and/or external audits.

II. Plan Development – involves the development of a multi-year strategic plan. In this phase we evaluate and restructure, if necessary, the University's mission, vision, and core values in addition to the priority goals and objectives. Also, an annual work plan for each strategic initiative featuring measurable action steps and benchmarks, and budget forecast is created.

III. Plan Implementation – features the implementation of a comprehensive operation plan with fully developed key goals, initiative, and success measures.

IV. Plan Assessment – allows the University to revise the initial plan, as needed, and report findings and successes to University stakeholders.

Annual Operations Planning

Each year institutional priorities are set for the University by the President via the Board of Trustees. These priorities are specifically derived from the *Institutional Strategic Plan*. The University's Annual Operational Planning process provides the basis for implementing targeted portion of the Strategic Plan. Each division, college/school, and department/unit is required to develop a mission and vision statement, operating goals, initiatives, and success criteria in support of the institutional strategic plan and thus the institutional mission as part of the planning process.

The annual operational plan identifies specific results to be achieved within a given time period along with identification of the specific actions and resources required to achieve these results. Each annual priority/objective is evaluated at the end of the year to measure success with respect to its completion and to adapt to the next year's priorities/objectives. The units are required to submit an end-of-year report that summarizes the data collected, use of the results, and when necessary, an action plan for improvement. This process provides opportunities for the division, college/school, and department/unit to adjust their programs and services based upon the assessment results and relevant feedback.

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The information gathered by the annual planning and assessment activities also feed into the Annual Institutional Accountability Report prepared for submission to the Board of Trustees. The process of setting and evaluating annual institutional priorities continues until the strategic plan is completed, then a new 3-5 year planning and evaluation strategic cycle begins.

The Annual Operational Planning and Assessment Cycle includes the following four phases:

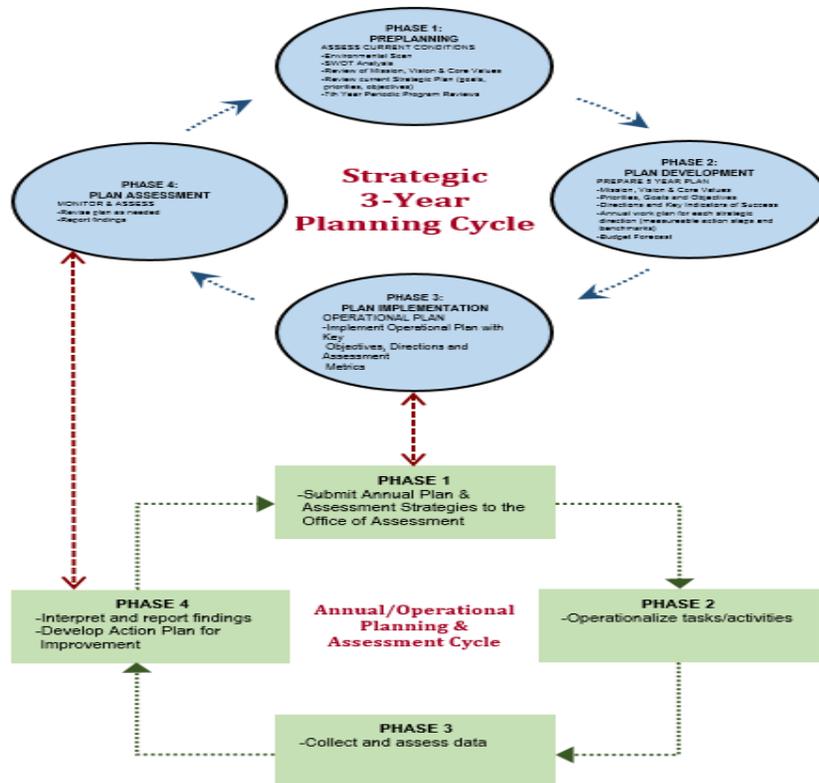
I. Academic Departments and Administrative and Education Support Units create an annual plan accompanied by progressive yet feasible assessment strategies. The plan and assessment strategies are then entered into Electronic Templates submitted to the Office of Assessment.

II. Academic Departments and Administrative and Education Support Units are given the opportunity to operationalize their specific tasks and activities.

III. Academic Departments and Administrative and Education Support Units assess data that has been collected throughout the year pertaining to the plan set forth in Phase I. Analyze data and interpret the findings.

IV. Academic Departments and Administrative and Education Support Units develop an action plan for improvement to address areas where the established criteria were not met. Develop an annual report providing copies to the appropriate faculty, staff, and university constituents.

Integrated Strategic and Annual Operational Planning and Assessment Cycle



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Stage III of the Strategic Plan (Plan Implementation) and Phase I of the Annual Operational Plan Assessment Process are interrelated. Each unit/department develops annual objectives that are specific to their functions and serves as a basis for implementing portions of their strategic plan. Collectively these objectives work in tandem to achieve the University's strategic goals.

Phase IV of the Annual Operational Plan Assessment Cycle serves as a formative means of assessment for the Strategic Plan and is directly linked to the Stage IV in the Strategic Plan.

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 to inform good decision making 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 University's Effectiveness Committee (UEC) is established to serve as a standing committee of shared governance. The members of UEC are generally assigned from academic program, administrative and educational support units of the University. These individuals are responsible for coordinating the assessment process and organizing individuals, tools and resources within their respective program or unit for completing the responsibilities of assessment. The UEC provides an objective overview and quality control of the outcomes 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 and other stakeholders. 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 University's Office of Assessment 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 of Assessment 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.

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Institutional Effectiveness and Assessment

Bethune-Cookman University's assessment practices and institutional effectiveness are linked to enhance student success by continuously improving instruction, support services, and administrative functions. Our institutional assessment efforts focus on what we want students to know, think, and do as well as how we will know that we have succeeded. Data gathered through a variety of diverse methods are used to make resource allocation, administrative, support and educational process and outcome decisions.

The process of data collection and analysis adheres to ethical standards and confidentiality. Assessment of the University's Strategic Plan is an ongoing, cyclical process of gathering, analyzing, and using data to ascertain how well we are accomplishing our institutional mission, vision, goals, initiatives and outcomes for the purpose of improving student learning, academic programs, administrative effectiveness, and institutional planning. Therefore, assessment is a systematic and dynamic process undertaken by each division, college/school, department and unit within the University for making continuous improvements based on our assessment results.

Levels of Assessment

Assessment occurs at different levels throughout the institution – at the mission level, at the program level, and at the classroom level:

- **Mission** - Assessment activities that measure institutional success in meeting the goals of the University as stated in the Mission Statement. Examples include evaluation of the Strategic Plan, performance evaluations of administrators and the governing board, and attitudinal surveys of our community constituents, transfer success, distance education, developmental education, etc.
- **Programs** - Assessment of B-CU programs address, on a college/school and department level, goals that are comprehensive yet clearly defined. As these goals change, the type of assessment tools must also change. Examples include program reviews, evaluation of degrees and certificates, and evaluation of internal and external services provided to students and staff.
- **Courses** - Assessment in the classroom where instructors clearly state course goals and measure the outcome of those goals. In addition, course assessment evaluates the effectiveness and relevance of courses by continuing to measure student goals, program and degree requirements, and student demand for courses. Examples include assessment of course content, general education core competencies, and curriculum mapping.

The University recognizes that assessment starts with the institution's mission, and must be tied to its *Strategic Plan*. Therefore, our assessment processes are designed to measure and improve the effectiveness of the University in meeting its mission. In other words, our mission-oriented assessment indicates *how we are doing, where we are heading*, as well as our alignment with our mission. It is also for understanding the institutional condition and for taking steps to improve our competitive position, relative to peers, past performance, and future goals.

Assessment at the University Level

As noted previously, 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.

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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

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External Assessment – Comparison Group of Peer Institutions and Metrics

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

List of Peer Institutions

- Ave Maria University
- Emory & Henry College
- Fisk University
- Furman University
- Hollins University
- Sewanee-The University of the South
- Spring Hill College
- University of Richmond
- Warren Wilson College
- Wesleyan College

Selection Characteristics

Control or Affiliation
Carnegie Classification
Highest Degree Offered
Enrollment Headcount & FTE
Student Diversity

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

Performance Benchmark Metrics

Student Application to Admit Rates

Admit to Enrolled/Matriculation Rates

First-Year Returning Student Retention Rates

4, 5 and 6-Year Graduation Rates

Degrees Completed/Awarded

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

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Assessment at Program/Unit Level:

Academic program (major) assessment and administrative/educational support (unit) assessment is an ongoing well-defined systematic process that uses measured results to improve student learning outcomes and service quality.

Achieving the highest quality, as well as being responsive to student learning needs, requires faculty and staff participation in and ownership of the assessment process. Therefore, the key players, committees and structures must be identified. One or more persons may lead the process, but it is essential for all faculty and staff within the program or unit to assume the responsibility for designing, implementing and carrying out the assessment process including reviewing the results and implementing improvements.

In addition, it is critical to define the scope of the assessment plan. The definition needs to outline what the assessment will and will not include: What resources will be assessed (e.g., facilities, faculty, equipment)? Will processes be assessed? What are those processes to assess (e.g., pedagogy, advising, procedures, feedback processes)? What is the type of evidence and feedback available?

To assist in the program review, academic and administrative/educational support units will address five key questions:

1. Is the University meeting outlined goals?
2. Is the University making improvements?
3. Does the University meet or exceed external standards?
4. Does the University compare favorably to others (as applicable)?
5. Is the University meeting outlined goals and realizing projected returns/benefits from its investment?

The cycle of review of all programs and units will be conducted annually. The University is accountable to both internal and external stakeholders for institutional effectiveness within each program/unit. Communicating the assessment plans, the evidence of assessment and improvement activities to enhance quality are critical for accountability. Planned communications include:

- End of Cycle Annual Report: Each year, following the end of the assessment cycle, each program/unit will develop an executive summary of the year's findings and actions taken. The Annual Report not only provides information on quality and effectiveness indicators, but reflects the progress against the articulated strategic goals and summarizes key performance data. This information supports the University's Annual Report to the Board of Trustees.
- The results of the assessment are organized and published on the University's website.
- Presentations may be appropriate for various stakeholders, including the Board of Trustees, Institutional Effectiveness Committee and program faculty.

The step-by-step planning and assessment cycles are outlined in the *B-CU's Institutional Effectiveness Manual*.

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ANNUAL ASSESSMENT 6-STEP PROCESS

Step 1a: Define the functional mission of the program or unit.

The program/unit mission is a broad statement of the directions, values and aspirations of the program/unit in support of its function. It is a clear description of the purpose of the program/unit and the learning environment. The program/unit mission should align with the University mission.

Step 1b: Define the goals of the program or unit.

Goals are broad statements that describe the long-term program/unit targets or directions of development. They provide the basis for assessment and drive the outcomes of student learning or the support service. Goals are used in planning and should help move the program/unit to attain its mission.

Step 2: Establish measurable Student Learning Outcomes or support service Objectives

Student learning outcomes (SLO) describe specific behaviors that students in a program demonstrate after having completed the program. These outcomes are measurable targets with a time limit that must be met on the way to attaining a goal. Administrative and educational support units typically have process or satisfaction oriented outcomes.

Step 3a: Identify appropriate means of assessing each Learning Outcome or support service objective and describe relevant assessment instruments/tools and methods.

The Means of Assessment includes selection of the tool(s) and method(s) considered to measure each program outcome or objective. The measures and target will allow the program/unit to determine if the expected results are achieved. The process of identifying the Means of Assessment is broken down into multiple steps. Here the program/unit must identify what data will be collected, where it will be collected from, and how it will be collected. It is also important to include who collects the data and when it is collected in the assessment plan.

Selecting the appropriate methods for assessment is an essential step to ensure the success of the assessment process. The assessment method will use direct measures of learning that specifically evaluate the competence of students in the program as well as indirect measures that are concerned with students' or customers' perceptions, experiences or opinions rather than knowledge and skills. A strong assessment methodology will ensure relevance, utility, reliability and validity. Determining how the data is collected, who collects the data, and where and how the data will be archived is also a part of the methodology plan.

Step 3b: Establish criteria for success/benchmark

The Criteria for Success, set as a reasonable benchmark/target using existing baseline data, serves as an indicator for the expected or overall levels of accomplishment for each outcome or objective. The Criteria should have a specific target number that indicates the level of accomplishment. This can include a level of proficiency, or number or percentage of people, activities, or items, or a combination of the two.

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Step 4: Data collection, analysis and interpretation of findings

Developing a timetable data analysis involves reviewing the data to determine whether or not the intended results have been accomplished. In the analysis phase, the goal is to identify patterns in the data and gain an understanding of what has occurred. Data analysis can take place once the appropriate data is collected, or at the end of the assessment period.

After the data has been collected, the results are analyzed, then summarized in a meaningful way to allow faculty and staff to review the results and determine what actions are needed to improve the program or unit. The details of the assessment results are retained by the program/unit, while the summarized data is documented within the assessment plan and retained by the Institutional Research and Assessment Office.

Interpretation of the data involves identifying how the result applies to the intended objective. In the interpretation phase, the goal is to make meaning of the results and determine the significance of the result for the program or service provided. In other words, the purpose of data interpretation is to determine how the information provided can aid in improving the program or service.

Step 5: Communicate results and apply the findings for improvement

The results of the assessment plan should be included in the final assessment report by clearly stating whether or not the program/unit outcomes or objectives are achieved. For example, the results can be used to demonstrate that the program has achieved the intended outcome/objective at the established performance level, or that the intended outcome/objective was not achieved. If the outcome is not achieved, an action plan for improving the program or service, and facilitating the achievement of the outcome/objective should be developed.

Step 6: Implement changes to enhance quality (Improvement Action Plan)

The final phase in the assessment plan is often referred to as *Closing-the-Loop*. The objective of this step is to use the evidence to implement improvements to the program or unit in order to improve student learning or service and to prepare for the subsequent assessment cycle. These changes could be to the content of the curriculum, staffing, facilities, among others. In some cases, the improvements are easy to implement, while in other instances the proposed changes will have to be implemented over a period of time or through a series of steps.

Here, the identified action to improve the program or services or the overall department/unit is implemented. The impact of the changes made should be evaluated and reported in the next assessment cycle to *Close-the-Loop*. If the action taken does not help the department/unit achieve the desired improvements or the intended outcome or objective, then further action toward improvement should be determined and implemented at the end of the assessment cycle.

The implementation of changes will be monitored to determine whether the changes have had the desired effect. One way of achieving this will be to use the same assessment plan for another cycle and compare the actual results to the intended results. The assessment plan will constantly be evaluated to see if any changes in the goals, initiatives, and/or methodology are providing the quantitative and/or qualitative information required to enhance the program/unit quality.

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Periodic Reviews

The Institutional Effectiveness process integrates internal periodic review of academic programs (AP) and Administrative and Education Support (AES) units as a central component of strategic planning and institutional effectiveness. While certainly motivated by standards and requirements established by the regional accrediting body, the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC), and other specialized accreditation bodies, the internal periodic program review at B-CU is recognized as a core requirement to achieve its institutional mission. The systematic assessment of all AP and AES units are essential for ensuring that a quality educational experience is provided to all students and to ensure the continuous enhancement and improvement of the programs and/or units in support of the University's mission of teaching, scholarly research/creativity, and community service.

Therefore, each department, unit, or program is expected to periodically assess the quality and effectiveness of its performance in fulfilling its functional mission, goals and outcomes/initiatives; identify areas for improving processes, outcomes, and/or satisfaction; and develop and implement a *Plan of Action* for improvement. All periodic reviews occur on a seven-year cycle. The periodic review schedule is maintained and distributed by the Office of Assessment on an academic year basis.

The Institutional Effectiveness Committee

The Institutional Effectiveness Committee (IEC) is charged to provide oversight and guidance with the development and implementation of the University's assessment framework and processes. The IEC is responsible for reviewing the effectiveness and soundness of the institutional assessment, planning, scholarly research activities, practices, and processes.

In fulfilling this charge, the IEC:

- Provides leadership for the assessment of institutional outcomes that foster sound university-wide assessment practices.
- Reviews annual assessment and strategic plan reports against plans submitted by academic programs, general education program, and administrative and educational support units, and recommend revisions as appropriate.
- Reviews and recommend the use of institutional assessment tools and instruments.
- Assures that all appropriated institutional constituents understand the process for "*closing the loop*" based on assessment results.
- Assures that assessment results are routinely communicated to all appropriate institutional constituencies.
- Reviews the implementation and evaluation of the University's strategic plan.
- Advises the academic programs (AP) and administrative and educational support (AES) units on situations relative to the institutional assessment and strategic planning process.
- Serves as a communication liaison to all University assessment, planning, and research related committees with reports and activities providing feedback when necessary.
- Assists related committees with establishing guidelines and procedures to ensure quality implementation of assessment and planning activities.

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Assessment Schedule

Because program and unit assessments are on-going and generally follow budget and academic programming, the following timeline represents a typical annual process for academic and unit assessments.

January - March:

- NSSE Survey (Student Engagement)
- FSSE Survey (Faculty-Student Engagement)
- Spring New Student Orientation Survey
- Spring Graduating Student Exit Survey
- Spring Student Rating of Instruction Survey
- Spring Institutional Data Collected for Programs/Services
- Spring Assessment Plan Data Collected
- Annual Report to BOT

April - July:

- Strategic Plan initiatives are aligned with strategies (action steps) and metrics
- Strategic plan goals/initiatives are measured and reported
- Spring assessment of instruction data collected
- Initial assessment plans are completed.
- Budgeting process ends
- Annual program or unit reports submitted
- BOT approves budget
- Work Plan Presented to BOT
- Budgeting process starts

August - December:

- CIRP (HERI) Freshman New Student Survey
- Fall New Student Orientation Survey
- Student Attrition survey (Non-Returning Students)
- Fall Student Rating of Instruction Survey
- Fall Graduating Student Exit Survey
- Rufallo Noel Levitz Student Success Inventory (SSI)
- Fall Institutional Data Collected for Programs/Services
- Fall Assessment Plan Data Collected

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Conclusion

With a plan for proper application of organizational leadership development and utilization of appropriate resources, Bethune-Cookman University will become more efficient and effective in enhancing its student enrollment, retention and academic performance; fiscal growth and stability; excellent learning programs and living facilities; effective faculty teaching and research; and responsive customer service. Bethune-Cookman University will move forward to become globally competitive university that prepares and produces quality graduates for success and service in the main stream of the society.

This *Strategic Plan* outlines a set of priority goals for B-CU that we can implement and meet if we work together and use discipline in our approach to operating processes, financial, physical and human resources. Some of the most important measures include:

- emphasizing our mission of instruction, research/creativity, and service
- providing a global outlook and capability for every graduate to possess, regardless of career focus
- sustaining student access to various alternative modalities of learning moving forward
- engaging students to enhance residential and social life on campus
- integrating a variety of technology where it strengthens face-to-face education, connects us to scholars and students in other parts of the world, and helps us engage our alumni more effectively
- bringing alumni closer to both the informal and the institutional life
- building bridges across socioeconomic, racial, national, religious, media and political differences through positive projects

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Membership of Strategic Planning

Board of Trustees

The Board collaborates and partners with the President, senior leadership team, and faculty leaders to arrive at an understanding concerning 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

Dr. Michelle Carter-Scott, Chairperson
Rev. Thom Shafer, 1st Vice Chair
Bishop Kenneth H. Carter Jr., 2nd Vice Chair
Belvin Perry Jr., Esquire, 3rd Vice Chair
Jennifer L. Adams, Secretary
Rev. Annette Stiles Pendergrass, Chaplain
John A. Rogers, Esquire, Parliamentarian

At-large Members

A. Ray Brinson
Dr. J. F. Bryan IV
Dr. Joyce Cusack
Wayne A. Davis
Gregorio "Greg" A. Francis, Esquire
Joyours "Pete" Gamble
Joyce Anne Hanks Moorehead, Esquire
Rev. Catherine Fluck Price
Linda F. Wells, Esquire
Dr. Renee' Forbes Williams
Rufus L. Wilson

Ex-officio Members

Derenzo Thomas, SGA Representative
Dr. Gary Spencer, District Superintendent
Paulette Monroe, Conference Lay Leader
Hubert L. Grimes, Esq., Interim President
Dr. Jeffery Haynes, Faculty Representative

As of 10-1-2018

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Cabinet

The President's Cabinet provides leadership to the planning process prepares specialized sub-plans, and evaluated their implementation and progress. The Cabinet also reviews and provides feedback for necessary revisions and budgeting implications to the plan on a continual basis. Led by the President of the University, the following individuals comprise the Cabinet.

Hubert L. Grimes, Esq., Interim President

Dr. Narendra H. Patel, Executive Vice President for Administration, Institutional Effectiveness and Compliance/SACSCOC Accreditation Liaison

Dr. Helena Mariella-Walrond, Provost and Vice President for Academic Affairs

Vacant, Vice President for Fiscal Affairs/CFO

Clifford Porter, Vice President for Institutional Advancement

Sharon Dudley, Esq., Vice President for General Counsel & Special Initiatives

Warren Heusner, Vice President for Enrollment Management

Jason E. Glenn, Vice President for Student Affairs

Franklin E. Patterson, Vice President for Information Technology/CIO

Lynn Thompson, Vice President for Intercollegiate Athletics

As of 10-1-2018