

Academic Excellence Committee

September 12, 2024



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

Academic Excellence Committee
Thursday, September 12, 2024
Highlands Room
1:00 p.m.

Agenda

1. Opening Remarks and Approval of Minutes for April 18, 2024*
2. Academic Affairs Divisional Update
Bob Kolvoord, Interim Provost and Vice President
3. Artificial Intelligence in Teaching and Learning Panel
Dr. Bob Kolvoord, Interim Provost and Vice President, Moderator
Dr. Phil Frana, Professor of Interdisciplinary Studies, University Studies
Sam Rooker, Intelligence Analysis major; Class of 2026
Dr. Emily York, Associate Professor of Integrated Science and Technology, College of Science and Engineering
Isaiah Martinez, Integrated Science and Technology major; Class of 2025
Dr. Simon Marland, Assistant Professor of Sound Design, Visual and Performing Arts
Stella Shoemaker, Theatre; Class of 2026
Jim Bywater, Assistant Professor of Learning, Technology and Leadership Education, College of Education
MacKinzie Morrison, Elementary Education; Class of 2025
4. Work-Based Learning Experiences Panel
Dr. Siân White, Associate Dean, College of Arts and Letters, Moderator
Marissa Hart, School Counseling MEd/EdS; Class of 2025
Bonnie Pohland, Economics and International Affairs double major; Class of 2026
Eric Shepard, Chemistry and Biology double major; Class of 2025
Brenden Trainer, Accounting major; Class of 2026
Abigail Valentin, Nursing major; Class of 2024
5. Topics of Interest for Future Meetings
Dr. Bob Kolvoord, Interim Provost and Vice President

*Action Required

Opening Remarks and Approval of Minutes



**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Minutes of the Academic Excellence Committee

The Academic Excellence Committee met on Thursday, April 18, 2024, in the Highlands Room of the Festival Conference and Student Center at James Madison University. Lara Major, Chair, called the meeting to order at 1:00 p.m.

Present:

Bell, Dickie
Major, Lara
White, Jack

Falcon, Chris
Palya Wood, Nicole

Others:

Coltman, Heather, Provost and Senior Vice President for Academic Affairs

Herod, Maribeth, Rector

Lee, John W., Strategic Leadership Studies, Ph.D. candidate

Maxwell, Paula, Associate Provost for Curriculum

O'Fallon, Michael, Associate Vice Provost, Academic Affairs Policy

Oldmixon, Elizabeth, Vice Provost for Faculty Affairs and Curriculum

Ott Walter, Kathy, Speaker, Faculty Senate

Ross, Cam, Cyber Intelligence Graduate Certificate candidate

Thomas, Linda, Dean, The Graduate School

Wilson-Nealy, Tahlia, Clinical and School Psychology, Psy.D. candidate

Approval of Minutes

On motion by Dickie Bell and seconded by Nicole Palya Wood, the Academic Excellence Committee minutes of February 15, 2024 were approved.

Academic Affairs Divisional Update

Provost Heather Coltman delivered the divisional update. After thanking committee members for their service over the past year, she acknowledged Administrative Professionals month and ways that the division thanked the over 200 administrative professionals that support the work of Academic Affairs every day.

The provost provided responses to questions raised by committee members since the last meeting. Her comments included positive updates on the College of Educations Grow Your Own program, the five-year funding of the lab school, and the newly approved Doctor of Education (Ed.D.) degree.

Dr. Coltman reported on the status of work-based learning opportunities, which continue to be a priority for the state and the university, highlighting three innovative internship opportunities, two of which span multiple colleges.

She also detailed some of the ways JMU is keeping its finger on the pulse of current work environments and preparing students for the modern-day workplace. Examples include professionalization in the classroom – such as COB 202 students formalizing their resumes, learning how to clean up their social media, and creating effective LinkedIn pages – and through extracurriculars. For example, colleges and departments, in partnership with the University Career Center, host career fairs, career conferences, employer panels, networking events, and career field trips.

Area Spotlight: The Graduate School

Linda Thomas, Dean for The Graduate School, provided a brief overview of the past, present and future of the school including the current three-year strategic goals. Dr. Thomas then spoke about how the strategic expansion of James Madison University's graduate enterprise has enhanced the university's national standing through increased research expenditures and the production of doctoral graduates from globally recognized programs. She also shared about the hybrid administrative model of The Graduate School which benefits graduate students by providing them with both support from the faculty within the colleges that house their programs and support from The Graduate School such as a specialized orientation to JMU, enhanced professional development and advocacy for the unique needs of graduate students.

The committee heard from three current students in the graduate program. Each of them shared about the value of their experiences in The Graduate School as well as the value they have been able to add to the JMU community.

Curriculum Updates

The committee heard from Paula Maxwell, Associate Vice Provost for Curriculum, who provided an overview of the request for the discontinuance of the Bachelor of Science in Teaching English to Speakers of Other Languages (TESOL). The program has had historically low enrollment that does not meet SCHEV productivity requirements. There are other options for students to receive their TESOL certification, including as part of a new TESOL concentration in the M.Ed. Program starting in Fall 2024. No new students will be enrolled after Summer 2024, and a teach out is planned for all remaining students.

On a motion by Nicole Palya Wood and seconded by Chris Falcon, the committee unanimously approved the discontinuation of the Bachelor of Science in Teaching English to Speakers of Other Languages (TESOL).

Faculty Handbook 2024-2025 Updates

The multi-phase review and suggestion process used by the faculty, the Faculty Senate speaker, the provost and the president for revisions to the 2024-25 Faculty Handbook was shared by Michael O'Fallon, Associate Vice Provost for Academic Affairs Policy. Twelve final recommended changes were proposed to the committee; all were part of the "Applicability of the Faculty Handbook and Procedures for Change" and "Faculty Employment Policies and Procedures" sections.

On a motion by Chris Falcon and seconded by Dickie Bell, the committee unanimously approved these changes to the 2024-2025 Faculty Handbook.

Faculty Handbook Revision Process

Elizabeth Oldmixon, Vice Provost for Faculty Affairs and Curriculum, shared that pending a vote of the Faculty Senate, the division is embarking on a major revision of the Faculty Handbook in response to a recommendation from last year's shared governance report. The revision will include substantive and organizational changes and will be conducted with openness and transparency, ensuring all stakeholders have the opportunity to participate.

Faculty Senate Speaker Report

Kathy Ott Walter provided the speaker's report and shared a synopsis of the February and March senate meetings, resolutions presented, and committee work. She highlighted continuing conversations and work around faculty workload, student accommodations, the faculty handbook revision process, campus safety, presidential search process and policy development. She concluded her report highlighting recent faculty achievements. Adjunct faculty senator Leslie Harlacker was elected to serve another term as Vice President of the Faculty Senate of Virginia. From the second round of grant proposals, the Faculty Senate Research and Scholarship Committee awarded 5 mini grants of \$16,285.

Topics of Interest for Future Meetings

The chair suggested that going forward the board consider having one joint meeting a year between the Academic Excellence and Student Affairs Committees to allow discussion of convergent topics.

The chair closed the meeting by thanking the provost and committee members, as this was her last meeting as a member of the Academic Excellence Committee.

There being no further business, on the motion of Nicole Palya Wood and seconded by Dickie Bell, the Academic Excellence Committee meeting adjourned at 2:35 p.m.

Respectfully submitted,

Nicole Palya Wood for Lara Major, Chair

Donna Harper, Secretary to the Board

Academic Affairs Divisional Update

Dr. Bob Kolvoord
Interim Provost and Vice President



Priorities for 2024-25

- Core Curriculum Reform
- Artificial Intelligence
- Reengineering Madison
- Shared Governance
- R2/National University Status



Artificial Intelligence in Teaching and Learning

Dr. Bob Kolvoord, Moderator
Interim Provost and Vice President





Panel Discussion Participants

Jim Bywater Assistant Professor of Learning, Technology and Leadership Education

MacKinzie Morrison Elementary Education; Class of 2025

Phil Frana Professor of Interdisciplinary Studies

Sam Rooker Intelligence Analysis major; Class of 2026

Simon Marland Assistant Professor of Sound Design

Stella Shoemaker Theatre; Class of 2026

Emily York Associate Professor of Integrated Science and Technology

Isaiah Martinez Integrated Science and Technology major; Class of 2025

Work-Based Learning Experiences

Dr. Siân White, Moderator
Associate Dean, College of Arts and Letters





Panel Discussion Participants

Marissa Hart	School Counseling MEd/EdS; Class of 2025
Bonnie Pohland	Economics and International Affairs double major; Class of 2026
Eric Shepard	Chemistry and Biology double major; Class of 2025
Brendan Trainer	Accounting major; Class of 2026
Abigail Valentin	Nursing major; Class of 2024

Topics of Interest

Dr. Bob Kolvoord
Interim Provost and Vice President



Advancement and Engagement Committee

September 12, 2024



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

Advancement and Engagement Committee
Thursday, September 12, 2024
Allegheny Room
2:45 p.m.

Agenda

1. Approval of Minutes* – April 18, 2024
2. Funds Raised to Date
Alex Marinelli, Athletics Director of Major Gifts
Cynthia Cline, Director of Strategic Gifts
3. VP Updates
Nick Langridge, Vice President for University Advancement
4. Transcendent Innovation – Reimagining Higher Ed and Industry Partnerships
Carrie Combs, Director of Corporate and Foundation Relations
Connie Frigo, Executive Director of X-Labs
5. Digital Advertising Efficiencies in Enrollment Marketing
Heather Davis, Associate Director for Enrollment Marketing

*Action Items

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Minutes of the Advancement and Engagement Committee

The Advancement and Engagement Committee met on Thursday, April 18, 2024. Mr. Michael Stoltzfus called the meeting to order at 2:47 p.m.

COMMITTEE MEMBERS PRESENT:

Edwards, Terrie
Rothenberger, John
Stoltzfus, Michael, Chair
Wood, Nicole Palya

ABSENT:

Fiorina, Carly

OTHERS PRESENT:

Bradley, Miriam, Associate Vice President of Principal Gifts
Campbell, Cannie, Associate Vice President of Constituent Engagement
Cline, Cynthia, Senior Director of Strategic Gifts
Coleman, Warren, CEO & President to the James Madison University Foundation
Davis, Heather, Associate Director of Enrollment Marketing
Fravel, Liz, Associate Director of Annual Giving
Gilligan, Jeff, Associate Vice President for Development
Jordan, Debbie, Associate Vice President for Advancement Information Systems
Langridge, Nick, Vice President for University Advancement
Lowry, Jared, Athletics Development Officer
Perrine, Andy, Associate Vice President for University Communications and Marketing
Read, Caitlyn, Director of State Government. Relations
Shala, Ahmet, Global Ambassador
Smith, Sheila, Associate Vice President for Advancement Planning and Operations
Stover, Lexi, Audiences Coordinator, Annual Giving
Vass, Mary Hope, Executive Director of Communications

APPROVAL OF MINUTES

The minutes of the February 15, 2024 meeting were brought before the committee and approved as presented on a motion by Nicole Palya Wood, seconded by John Rothenberger.

FUNDRAISING REPORT

Jared Lowry reported that the Duke Club Annual Fund has reached \$2,633,647, that is 55% of FY24 Annual Fund Goal. He also shared that earlier this week the donor number had increased to exceed their goal, current donor number is 6,100. Total athletics fundraising is at \$3,869,023.

Jeff Gilligan shared that through March 29, 2024 \$21.7 million has been raised for FY24. Our Gift Expectancies (below the line gifts) for the year is very strong at \$3.0 million. The pipeline holds 61 Pre-solicitation requests for \$34.3M and 117 Solicitations for \$19M. To date there are 134 Closed Major Gifts for \$16.6M.

VICE PRESIDENT'S UPDATE

Nick Langridge shared a recommendation for how to adjust of campaign planning given the presidential transition. He also reiterated the importance of continued prioritization for fund raising behind Carrier Library, the new CHBS building, scholarships, Valley Scholars Endowment and Proud and True fund during the interim period.

GIVING DAY WRAP-UP

Liz Fravel and Lexi Stover reported that on February 22, 2024, the Office of Annual Giving and partners across campus presented JMU's seventh Giving Day. The 24-hour event inspired more than 5,000 donors to give in excess of \$1M to over 100 campus causes.

CARRIER LIBRARY RENOVATION, NAMING INVENTORY OPPORTUNITIES AND FEASIBILITY

Bethany Nowvskie, Cynthia Cline and Sheila Smith shared an update on fundraising efforts for the Carrier Library renovation and expansion. The design of the new Carrier Library encourages the flow of people, ideas and creativity. There are over 80 opportunities to name premium spaces in the library and to date over \$300K has been committed. These funds will be used to outfit our 21st Century library with the newest educational technology, software systems, media creation studios, specialized labs and maker spaces and provide equipment and technology to support rotating exhibits from JMU's collections as well as from student and faculty groups.

ENROLLMENT MARKETING UPDATE

Andy Perrine and Heather Davis gave an Enrollment Marketing update. Among several insights, they provided a look into the university's top digital marketing priorities targeting prospective undergraduate students and their families, as well as how this program is helping to fuel JMU's recent surge in applications.

CLOSED SESSION

During the closed session, the Advancement and Engagement Committee discussed only matters lawfully exempted from open meeting requirements and only those types of matters identified in the motion for closed session.

RECORDED VOTE: the following is an affirmative recorded, member by member vote:

Terrie Edwards
Nicole Palya Wood
John Rothenberger

Mr. Stoltzfus then asked if there were any motions to come forward.

On a motion from Terrie Edwards, seconded by Nicole Palya Wood, committee action was approved.

The meeting adjourned at 4:10 p.m.

Respectfully submitted,

Michael Stoltzfus, Chair

Donna L. Harper, Secretary to the Board

Fundraising Report

Alex Marinelli, Athletic Director of Major Gifts
Cynthia Cline, Director of Strategic Gifts

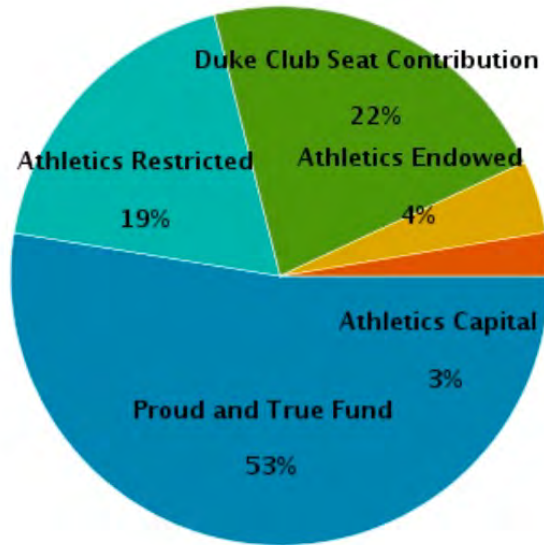




FY24 – Duke Club Fundraising Recap

Athletics FY24

Athletics Cash and Receipts by Fiscal Year



	2024	2023	2022	2021	2020
Duke Club Seat Contribution	\$1,403,255	\$1,542,589	\$1,364,056	\$641,549	\$659,199
Proud and True Fund	\$3,351,365	\$3,126,825	\$2,680,112	\$2,144,907	\$1,340,066
Athletics Restricted	\$1,179,876	\$811,162	\$389,992	\$416,393	\$410,233
Athletics Capital	\$166,778	\$387,257	\$400,324	\$1,050,488	\$951,742
Athletics Endowed	\$274,600	\$389,226	\$217,430	\$168,040	\$358,448
Event Contribution Restricted	\$168,529	\$13,632	\$15,340	\$77,840	\$36,836
Event Contribution Unrestricted	—	—	\$20,994	—	\$48,733
Total	\$6,544,403	\$6,270,691	\$5,088,248	\$4,499,216	\$3,805,257

(Includes Gifts, Matching Gifts, and Pledge Payments as of the Report Date in each Fiscal Year)

Athletics Donors by Fiscal Year

Includes unique spouseholds for all Athletics allocations

2024	2023	2022	2021	2020
8,665	5,632	4,701	3,769	3,411



Duke Club Report

Dollar Amounts and Donor Counts as of:
August 23, 2024

By Fiscal Year YTD

	2021	2022	2023	2024	2025
Duke Club Seat Contribution	\$69,737	\$168,079	\$202,205	\$193,750	\$184,833
Proud and True Fund	\$222,848	\$204,971	\$151,602	\$179,628	\$182,162
Athletics Restricted	\$37,035	\$59,692	\$70,695	\$56,994	\$116,059
Athletics Capital	\$17,060	\$65,120	\$19,585	\$11,638	\$304
Athletics Endowed	\$21,214	\$1,583	\$4,750	\$6,156	\$12,068
Event Contribution Restricted	\$0	\$0	\$0	\$29,651	\$0
Total	\$367,894	\$499,445	\$448,838	\$477,816	\$495,425

(Includes Gifts, Matching Gifts, and Pledge Payments as of the Report Date in each Fiscal Year)

Current FY Annual Fund Dollars*: \$366,995

Athletics Annual Fund FY Goal: \$4,800,000

Percent of Goal: 8%

Total Unique Athletics Donors by Fiscal YTD

Includes unique spouseholds

2021	2022	2023	2024	2025
513	1,052	1,458	2,137	1,918

FY24 Total Giving



Fund Raised Program - Compressed	FY 2024	FY2023	FY2022	FY2021	FY 2020
Principal Giving/Strategic Gifts	\$5,730,417	\$4,643,052	\$10,147,167	\$9,859,101	\$6,741,258
Corp/Found	\$6,212,696	\$9,819,728	\$11,450,336	\$3,602,967	\$3,455,106
All Athletics Charitable	\$5,059,709	\$5,448,565	\$4,747,681	\$3,489,405	\$2,238,746
Annual Giving	\$2,786,426	\$2,577,043	\$3,012,605	\$2,546,642	\$2,700,359
Organization Annual Gifts	\$499,278	\$473,804	\$367,507	\$328,878	\$384,609
Matching Gifts	\$445,075	\$393,156	\$471,659	\$443,382	\$504,145
Realized Planned Gifts	\$6,483,049	\$1,731,736	\$1,495,044	\$1,876,187	\$494,459
Above Sub-Total	\$27,216,650	\$25,087,085	\$31,691,999	\$22,146,561	\$16,518,682
WMRA Gifts	\$885,663	\$772,492	\$823,350	\$763,508	\$750,352
WMRA Total	\$885,663	\$772,492	\$823,350	\$763,508	\$750,352
Above	\$28,102,313	\$25,859,577	\$32,515,348	\$22,910,069	\$17,269,035
Conditional Pledges	\$5,990,003	\$4,965,820	\$7,705,412	\$18,803,701	\$6,134,828
Non-charitable Sponsorship Commitments	\$205,977	\$13,632	\$36,335	\$77,840	\$3,585,569
Athletics Non-charitable Proposal Commitments	\$0	\$0	\$0	\$50,000	\$0
Athletics Non-charitable Gifts	\$1,403,255	\$1,539,389	\$1,277,552	\$591,549	\$655,684
Below Sub-Total	\$7,599,235	\$6,518,841	\$9,019,298	\$19,523,090	\$10,376,081
Below	\$7,599,235	\$6,518,841	\$9,019,298	\$19,523,090	\$10,376,081



Donor Counts FY24

All Donor

	2024		2023		2022		2021		2020	
	Distinct Donor Count	New FY Donor Count	Distinct Donor Count	New FY Donor Count	Distinct Donor Count	New FY Donor Count	Distinct Donor Count	New FY Donor Count	Distinct Donor Count	New FY Donor Count
July	3,407	3,407	2,922	2,922	2,726	2,726	2,111	2,111	2,767	2,767
August	3,880	2,124	3,024	1,245	2,474	872	2,198	721	2,674	1,132
September	3,427	1,710	3,057	1,379	2,811	1,237	2,455	930	2,919	1,375
October	3,461	1,674	3,984	2,230	3,048	1,445	3,037	1,325	3,580	1,936
November	5,280	3,141	2,831	1,102	3,381	1,716	3,033	1,314	3,215	1,367
December	4,293	2,187	3,585	1,789	3,853	2,095	4,095	2,232	4,984	2,975
January	2,598	845	2,966	1,208	1,950	479	1,685	254	2,274	585
February	7,112	3,546	4,494	1,908	6,595	3,667	3,230	1,522	2,763	867
March	2,784	714	2,669	580	2,899	877	7,202	3,716	2,378	627
April	3,339	962	3,036	754	3,198	996	2,751	755	2,060	333
May	4,145	1,206	4,043	1,283	3,436	904	3,354	892	3,884	1,501
June	6,114	3,070	3,608	1,076	3,797	1,297	3,053	819	3,163	903
Distinct Count by FY		24,586		17,476		18,311		16,591		16,368



Pipeline

As of August 28, 2024

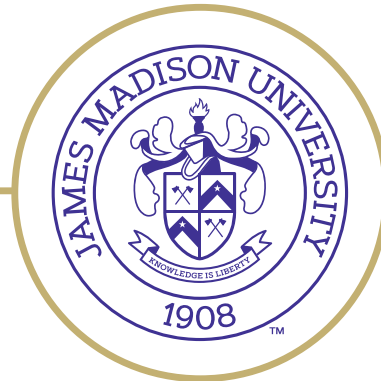
Pre solicitation: 61 proposals = \$47,425,000

Solicitation proposals: 104 proposals = \$46,870,872

Closed Major Gifts: 15 for \$830,500

Vice President's Update

Nick Langridge
Vice President, University Advancement





Impact from Recent Gifts

Transcendent Innovation

Reimagining Higher Ed and Industry Partnerships

Carrie Combs, Director of Corporate and Foundation Relations
Connie Frigo, Executive Director of JMU X-Labs





Welcome to JMU Corporate & Foundation Relations

- Carrie Combs, Senior Director
- Ryan Boals, Associate Director
- Debbi Long, Grant Writer
- Vacant, Operations Specialist



CFR Key Functions

- Facilitate holistic, strategic partnerships to bridge the gap between industry and academia
- Align company business objectives and private foundation funding priorities with the cutting-edge research, transformative projects, and impactful programs led by JMU faculty, staff, and students

Fueling the JMU research engine. Broadening experiential learning.
Expanding the economic ecosystem. Enhancing inclusive
excellence.



CFR Key Functions: Facilitate Strategic Partnerships

Industry/Corporations

- Strategic Synergy
- Access to talent
- Increased visibility
- Collaboration opportunities
- Professional development
- Philanthropic impact
- Community engagement

Private Foundations

- Strategic alignment
- Tailored engagement
- Streamlined reporting

CFR Key Functions: Support Faculty/Staff

- Identify funders and opportunities
- Strategic connection and relationship management
- Proposal development
 - Tailor to funder needs
 - Application editing and submission
- Gift management and stewardship
- Reporting and compliance support
- Company outreach and sponsorships
- Madison Trust funding event





Reimagining Collaboration

Where CFR and X-Labs came together

What is JMU X-Labs?



Cross-disciplinary, Design-thinking Courses



Maker Space & Think Tank



Esports



Collaborative Research & Creative Practice



Work-based Learning Experiences





Reimagining Collaboration



Meeting THEIR needs

- FALL 2024 Partnership Class
- Problem Statement
- Group Presentations: Thursday, December 5, 2024





Reimagining Collaboration

The Reimagined Internship with Ellucian

The Reimagined Internship: Pilot Program



Bringing Students
Closer to the
Workforce



JMU X-Labs + Ellucian are seeking
“whole brain” solutions that
require STEM + Humanities/Arts +
Business teams to solve problems

The Reimagined Internship: Partnership Process

Industry partner presents a challenge to X-Labs

We identify a holistic, cross-disciplinary student cohort to solve the problem (applications were open to all sophomores through graduate students)

We create a 15-week design thinking course co-taught by JMU faculty and industry experts

The cohort innovates a solution to the challenge

Upon course completion, the cohort operates as a cohesive unit in a paid internship experience with industry partner to put solution into action

The Reimagined Internship: Statistics

73 applicants in total, application live for 8 days

27 students selected to interview for 10 positions in cohort

Sophomores through graduate students

Cohort majors: computer science; economics; international affairs; writing, rhetoric, and technical communications; media arts & design; music

The Reimagined Internship: Problem Statement

Background

The ongoing devaluation crisis has led to students questioning the worth of degrees.

Increasingly, they are opting for certifications and bootcamps, which offer quicker routes to employment. To regain the trust and attention of students, educational institutions must ensure that their programs are more closely aligned with tangible outcomes and workforce needs.

Challenge

Create a methodology for institutions to utilize data in assessing the effectiveness of their educational programs. This approach should determine whether the curriculum is adequately equipping students for career readiness.

The JMU Students/Ellucian Interns

Reimagined Software Team

- Product Managers
- Designers
- Developers
- **Storyteller** – *allow the narrative idea to shine*
- **Ethicist** – *create humane technology right out of the gate*



Alex Furlich
Storyteller



Bonnie Pohland
Ethicist

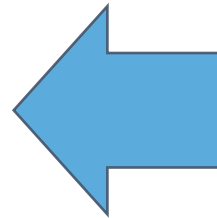
The JMU cohort at Ellucian to start their internship



Top (left to right) - Shane Malamut, Bonnie Pohland, Oriana Lukas, Alex Furlich,
Jess Pham, Naweed Yarzada
Bottom (left to right) - Kofi Karikari, Ewen Hives, Hamid Elias, Abdullah Alghoniemy

What's Next?

- Identifying new partners for The Reimagined Internship
- Sharing the story of the inaugural cohort with Ellucian
- Continue to reimagine and innovate collaborative partnerships



The Reimagined Internship

Thank you!



Dr. Connie Frigo

Executive Director
JMU X-Labs

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Carrie Combs

Senior Director
JMU Corporate and Foundation Relations

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[s](http://www.jmu.edu/corporatefoundationrelations)

Gained Efficiencies Through Innovation and Enrollment Marketing

Heather Davis

Associate Director for Enrollment Marketing



University-Wide Digital Marketing



- **JMU is making a difference in the digital space**
 - Undergraduate Programs
 - Graduate Programs
 - Professional and Continuing Education
 - Summer/Winter Course Enrollment

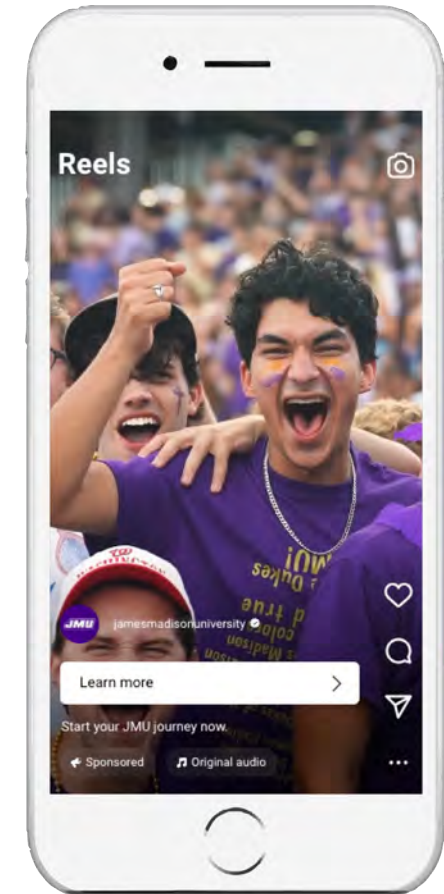


Undergraduate Programs

Digital advertising campaign highlights from FY24



- **18 million impressions**
 - **22% increase in impressions from FY23**
- **10% conversion rate**
- **Expanding our reach**





Graduate Programs

Digital advertising campaign highlights from FY24

- **European Union Policy Studies (EUPS):**
 - Most applications since 2011 and a 50% increase from FY23.
- **Graduate Nursing MSN and DNP:**
 - Prospect pool grew over 1000% compared to the previous year



Professional & Continuing Education

Digital advertising campaign highlights from FY24



- **Transition from Education Dynamics:**
 - **Hired in-house positions**
 - **Digital advertising through ad agency**
 - **This transition saved JMU \$100K in FY24**



Winter/Summer Session Enrollment

Digital advertising campaign highlights from FY24



- Winter session tried digital ads for first time.
 - **45% increase total revenue**
- Digital advertising actually cut their marketing budget in half but brought in more revenue.





University-Wide Digital Marketing

Undergraduate Admissions, Graduate Programs, SPCE, Course Enrollment

29M

Total impressions (the number of times ads were seen on screen).

216K

Clicks made by our target audience to our crafted landing pages and microsites on jmu.edu.

19K

Conversions contributing to new leads, enrollment and applications (8.8% conversion rate).



Athletics Committee

September 12, 2024



**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Athletics Committee
Thursday, September 12, 2024
Festival, Ballroom B
2:45 p.m.

Agenda

1. Approval of Minutes – April 18, 2024*
2. Introductions, NCAA, Sun Belt Conference, JMU Sports Update
Matt Roan, Director of Athletics
3. 2023-2024 Strategic Plan Accountability Measures
Geoff Polglase, Deputy Athletics Director
4. Compliance Update
Stephen LaPorta, Associate A.D. for Governance and NIL Strategy
5. Student-Athlete Focus
Cassidy Clements, Assistant A.D., Student-Athlete Leadership Program
6. Development Report
Scooter Renkin, Associate A.D. for Development
7. Future Agenda Items
Matt Roan, Director of Athletics

*Action Required

**Board of Visitors
September 12, 2024**

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Minutes of the Athletics Committee

The Athletics Committee met on April 18, 2024, in Ballroom B of the Festival and Student Center. The meeting was called to order at 2:48 p.m. by John Lynch, Chair.

Present:

Lynch, John, Chair
Bell, Dickie
Major, Lara
Smith, Steve
White, Jack

Others:

Ayamel, Julio, Student-Athlete
Bell, Marcus, Coordinator for Student-Athlete Leadership Development
Bourne, Jeffrey, Director of Athletics
Carter-Hoyt, Malika, VP, Diversity Equity & Inclusion
Clements, Cassidy, Assistant A.D. for Student-Athlete Leadership
Gorton, Eric, University Media Relations Coordinator
Hall, Hollie, Dean of Students
Knight, Jack, University Counsel
LaPorta, Stephen, Assistant A.D. for Compliance
Melton, Shane, DNR
Polglase, Geoffrey, Deputy Director of Athletics
Phillips, Jennifer, Senior Associate A.D. for Student-Athlete Development/SWA
Renkin, Scooter, Assistant A.D. for Development
Soenksen, Roger, Faculty Athletics Representative
Warner, Kevin, Associate A.D. for Communications and Strategic Initiatives
White, Kevin, Associate A.D. for Sports Programs

Mr. Lynch then called for a motion to approve the minutes. It was moved by Dickie Bell and seconded by Lara Major to approve the minutes of the February 15, 2024, meeting of the Athletics Committee.

Sports Update

Jeff Bourne, Director of Athletics provided an Athletics update. JMU teams have compiled a 187-112-13 cumulative record for a .620 winning percentage. At the completion of Winter sports, JMU stood in first place in the standings for The Bubas Cup, which is awarded by the Sun Belt to the best overall institution for competitive success, as measured by Sun Belt-

sponsored sports. Unofficially, JMU had perhaps its best year ever compiling wins against top-five, nationally-ranked programs. Men's Soccer defeated both No. 1 UCF and No. 3 Georgetown. Men's Basketball defeated No. 4 Michigan State on the road to open its season. In the spring, Lacrosse topped No. 3 UNC and Baseball downed No. 3 Arkansas. Men's Basketball posted the best season in program history at 32-4 overall and went 15-3 in the Sun Belt, and as the No. 2 seed, JMU captured the Sun Belt Championship, including 91-71 finals win over Arkansas State, to advance to its first NCAA Tournament since 2013. Women's Basketball compiled a record of 23-12 overall and 13-5 in the Sun Belt and advanced to the final of the Sun Belt Championship, eventually falling in overtime to Marshall. Swimming and Diving went 4-3 in dual meets and then went on to capture the 2024 Sun Belt Championship. This was the program's sixth conference title in its last seven tries. In final Sun Belt awards, Madison Cottrell and Alexa Holloway were named Swimming Performer of the Year and Diving Performer of the Year, respectively while Dane Pedersen was named Coach of the Year. Indoor Track and Field placed 10th at the Sun Belt Championship and the Dukes went on to finish as runner up at the ECAC Indoor Championships. Director of Track and Field and Cross Country, Delethea Quarles, was selected as part of Team USA coaching staff for the 2024 Paris Olympics as the jumps/multis coach. Men's Tennis went 7-13 during the regular season and Women's Tennis sits at 8-11 heading into the Sun Belt Championship. Softball opened its season with a 26-16 record and Baseball has a 21-15 record. Lacrosse sits at 10-4 and is ranked 16th nationally. In alum news, Neal Shipley (Men's Golf '22) made his first career appearance in The Master's, finishing in a tie for 53rd in the 89-player field at the 88th Master's. He earned the Silver Cup as the best finishing amateur during the event and was the only amateur to make the cut. JMU announced Preston Spradlin as its new Men's Basketball coach in late March of 2024. In JMU's annual Townebank Royal Rivalry with Old Dominion, JMU currently holds a 10.5-2.5 lead through March 18, 2024. There has been good and ongoing work within the Sun Belt Conference DEI Consortium; DEI at JMU is leading in this way and setting an example for other Sun Belt institutions by forming the consortium. Mr. Bourne concluded the Sports Update by asking and answering any questions related to the topic.

Title IX Participation Report

Jennifer Phillips, Senior Associate A.D. for Student-Athlete Development/SWA, explained that we have exceeded the 1% buffer in participation favoring the men by 1.5%. Unfortunately, the track and field program did not meet their roster management numbers which has led to the difference. We have shared with all of our coaches the importance of meeting their roster management numbers to ensure we match our participation numbers to the institution enrollment that is reviewed on a three-year average. In addition, our financial aid percentage exceeds the 1% difference to participation due to not fully awarding out scholarships within our track program. Due to not limiting how scholarships are distributed by programs, this meets the justification of nondiscriminatory reasons allowed. Jennifer Phillips then concluded the Title IX presentation by asking for and answering all questions on the matter.

Name, Image, Likeness (NIL) Update

Stephen LaPorta, Associate A.D. for Governance and Compliance reported that in the TN & VA antitrust suit against the NCAA court ruling, the following was decided; The recruiting restrictions (offers/inducements) suppresses price competition by limiting the student-athletes negotiation leverage and, as a result, knowledge of value which does not allow for institutional involvement. There are VA Law updates in process effective July 1, 2024 that include; protections for the institution and employees from penalties or lawsuits, allowance for student-athlete compensation from the institution, however will require the creation of institutional policies regarding compensation. NCAA proposal will be voted on April 18, 2024 and looks to allow institutional involvement but not student-athlete compensation. Stephen LaPorta then concluded the presentation on NIL by asking for and answering any questions on the topic.

SAAC Leadership Update

Cassidy Clements, Assistant A.D., Student-Athlete Leadership Program and Ayamel Julio, Student-Athlete and SAAC Diversity, Equity & Inclusion Chair, SAAC will add a council for revamping the Conference SAAC Awards process and place a greater focus on the Community impact Award as opposed to the Community Service Initiative in the 2024-2025 academic year. The JMU SAAC initiatives completed were Breast Cancer Awareness Month, NCAA Diversity and Inclusion Social Media Campaign, Black History Month, Women's History Month, and Read Across America during the academic year. JMU SAAC also plans to reorganize Executive Leadership to make a more effective governing body that includes Co-Presidents, an SBC Representative, a Public Relations Chair, a Community Service Chair, a Diversity, Equity, & Inclusion Chair, and a Wellness & Development Chair. One formal meeting will be held per month that includes one team building activity. Membership will no longer be open to all student-athletes, however membership will include two representatives per sport with voting rights and one trainee without voting rights. SAAC will promote a team led selection process for future team representatives. Cassidy Clements and Ayamel Julio concluded the presentation by asking for any feedback and answering any questions.

Development Update

Scooter Renkin, Associate Athletics Director for Development, shared the results of Giving Day, 2024 as of March 29, 2024. With the Annual Fund consisting of two funds; The Proud and True Gifts and Duke Club Seat Contribution, donations have reached the 55% mark. The Annual Fund has reached \$2.6M in donations from 5,900 donors while goals remain at \$4.8M in funds and 6,000 donors. Overall, donor numbers have increased to date by 1,700 and the Total Athletic fundraising has reached \$3.9M. Looking forward, the Duke Club Renewal Season is already well underway and will continue its campaign launch of 110%. Upcoming Duke Club events include the Duke Club Golf Classic this week and the JMU Coaches Caravan in May. Scooter Renkin concluded the presentation by asking and answering any questions.

Led by John Lynch, each Board of Visitors Committee Member concluded with remarks of gratitude and thanks toward Mr. Bourne for his impressive career, attained goals and forward-thinking ability. Mr. Bourne concluded the Athletics Committee meeting by thanking the Board Committee Members and visitors for their time and continued support of Athletics during his tenure and asking the Committee members for feedback concerning future agenda items they would like to be considered.

There being no further business, John Lynch, Chair, then called for a motion to adjourn. It was moved by Jack White and seconded Dickie Bell. The meeting was adjourned at 3:58 p.m.

Respectfully submitted,

Dickie Bell for John Lynch, Chair

Donna L. Harper, Secretary to the Board

**Introductions, NCAA,
Sun Belt Conference
Sports Update
Matt Roan, Director of Athletics**





Marlin Ikenberry, Head Baseball Coach

- JMU went 36-25 in 2024 and finished fourth in the Sun Belt, its best finish in a full season since Ikenberry's first year in 2016.
- The Dukes earned their first NCAA Regional appearance since 2011 and claimed their first at-large bid since 2002.
- It was JMU's second straight regional runner-up finish, falling to host NC State after also placing second at UNC in 2011. The runner-up finish placed JMU among the final 32 teams in the country.
- JMU finished with a final RPI of 46.
- Fenwick Trimble was a Second-Team All-American, and Wyatt Peifer was named to the ABCA Gold Glove Team as the best defensive third baseman.
- Three Dukes were drafted in the MLB Draft, led by Fenwick Trimble in the fourth round by the Marlins and followed by Jacon Schiavone in the 11th round by the Astros and Joe Vogatsky in the 19th round by the Pirates.
- Ikenberry earned his 500th career coaching victory late during the 2024 season and personally made his first appearance in an NCAA Regional.



**2023-2024 Strategic Plan
Accountability Measures
Geoff Polglase, Deputy Athletics
Director**





2023-2024 Strategic Plan Accountability Measures

- Questions

Compliance Update

**Stephen LaPorta, Associate A.D. for
Governance and NIL Strategy**





Name, Image, and Likeness Updates

- NCAA proposal was adopted and is effective (8/1)
 - Definition of NIL activity
 - Institutional involvement
 - Disclosure
 - Professional service providers
 - Education
- Virginia State Law is effective (7/1)
- Proposed House Settlement



Virginia Law Updates- Prohibitions

- Prohibits investigation or penalties for an institution/student for engaging in NIL activities
 - An institution that is subjected to an actual or threatened complaint may bring an action to recover actual damages and attorneys' fees and may seek injunctive relief
- Institutional employees cannot be liable for any damages to a student's ability to earn NIL



Virginia Law Updates- Compensation

- Allows an institution to compensate a student for use of their NIL
 - Students being compensated for NIL are not considered employees
 - Student fees may not be used to compensate
- Allows an institution to identify, create, negotiate, facilitate etc.
- Institution may provide assets, resources, or benefits as an incentive to support NIL opportunities



Virginia Law Updates- Policies

- BOV approval of institutional policies and procedures that govern compensation for students NIL



JMU Compensation Policy

- JMU athletics maintains the right to compensate pursuant to the law
- Compensation is not guaranteed
- Terms will be agreed upon in advance in writing
- Compensation will consider the value the activity brings to the University, but will be at the discretion of the AD or designee



JMU Compensation Policy

- Must have promotional activities release on file
- Compensation will be provided for activities that go above and beyond required athletically related activities
- Compensation will not trigger an employee/employer relationship

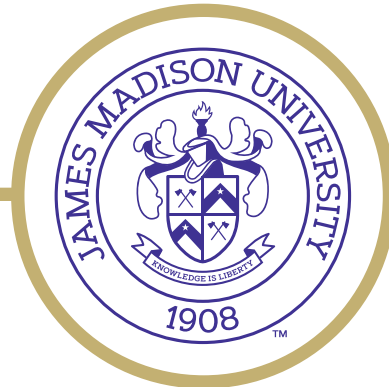


House Settlement

- Allows institutions to enter into agreements with athletes
- NCAA may adopt rules requiring third parties to pay fair market value in NIL deals to students
- Entities that are owned, controlled or operated by member institutions are not considered third parties
- Mandatory reporting

Student-Athlete Focus: Sun Belt Meeting & SAAC Engagement

**Cassidy Clements, Assistant A.D., Student-
Athlete Leadership**





Our Staff

Cassidy Clements, M.S.

Assistant Athletic Director for Student-Athlete
Leadership Development

-

James Madison University ('18, '20M)





Our Staff



Marcus Bell

Graduate Assistant/Coordinator for Student-Athlete Leadership Development

-

UNC-Pembroke ('22)

McLendon Future Leader ('23)





Key Areas of Focus



- Career Readiness
 - 1:1 Career Coaching Sessions
 - Dukes Lead Mentor Program
 - Networking and Career Placement Opportunities
- Civic and Community Engagement
 - Achieve top-15 status among NCAA Division I Helper Helper Schools
 - 2023-24 Figures:
 - 8th in the nation, 9,071 hours of service, \$288,610 in economic impact
 - Top Women's Team, All DI: Field Hockey (5)
 - Top Women's Teams by sport: Volleyball (6), Track & XC (1), Field Hockey (1), Lacrosse (8), Softball (6)
 - Top Men's Team by sport: Men's Soccer (6)
- Human Development
 - Team-based Programs: Self-awareness, self-esteem, and personal skills and traits
 - Rookie Symposium, Welcome Back
 - Six (6) Affinity Groups
- Leadership Development
 - Team-based Programs: Expert focus on key leadership traits
 - Dukes Leadership Academy
 - Enhance leadership abilities and increase effectiveness in team environments
 - Student-Athlete Advisory Committee
 - Two (2) representatives per sport



Student-Athlete Advisory Committee

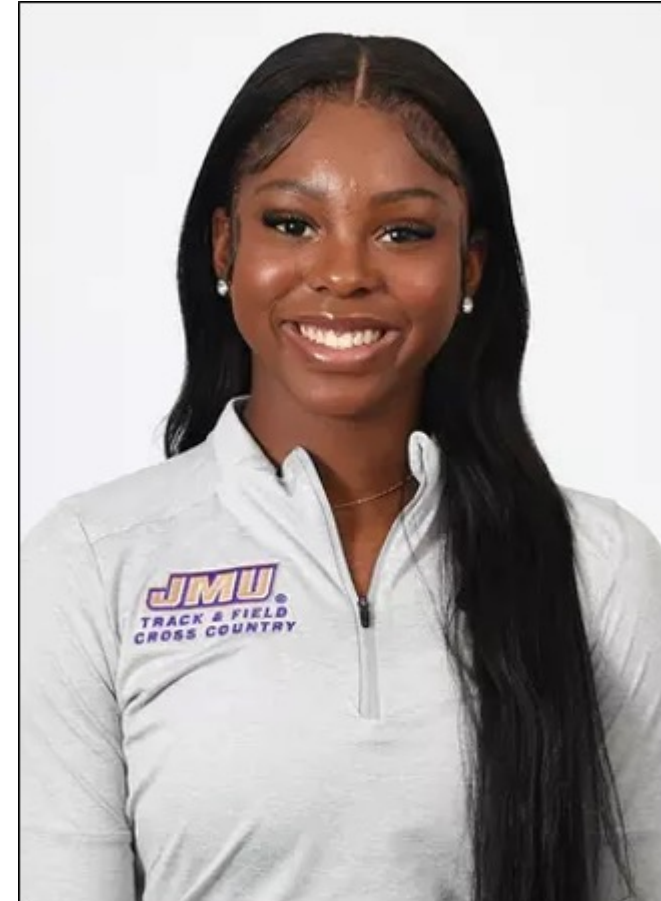


Esther Saint-Germain

SAAC Public Relations Chair | 2024-25

SAAC Representative | 2023-24

Track & Field

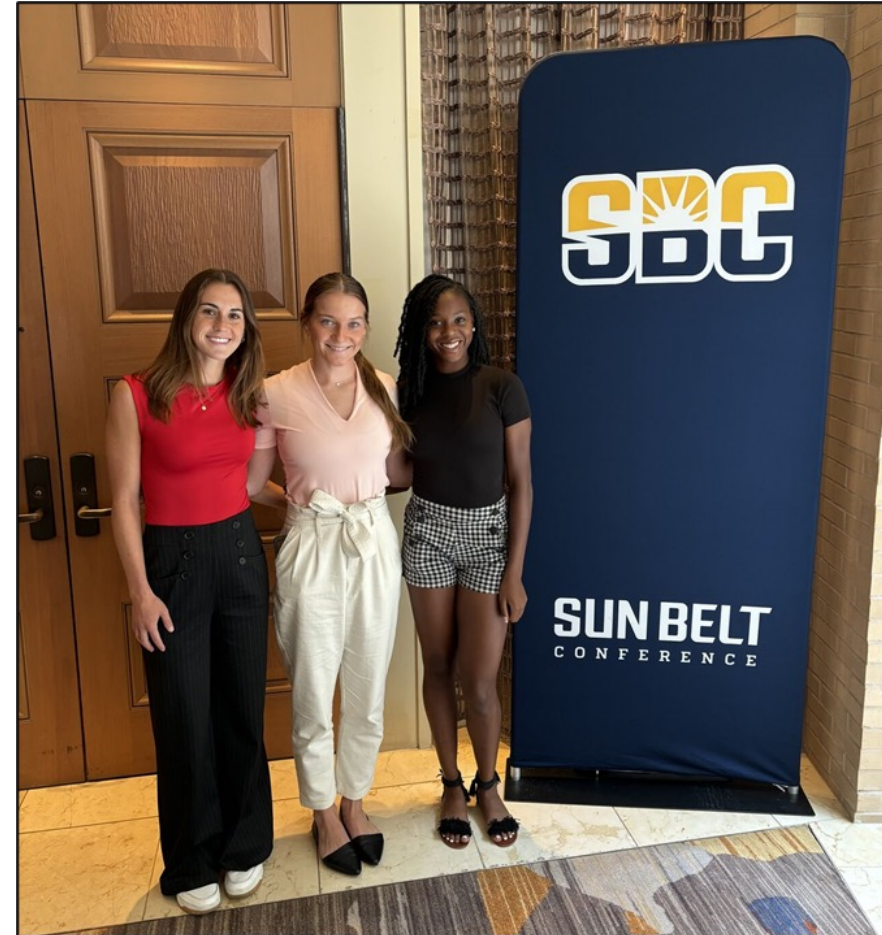




SAAC Executive Leadership 2024-25



- Co-Presidents
 - Kayleigh Reinke, Women's Golf
 - Cassidy Strittmatter, Field Hockey
- SBC Representative
 - Jamie Swartz, Women's Soccer
- Community Service Chair
 - Hope Moulin, Women's Tennis
- Diversity, Equity, & Inclusion Chair
 - Garrett Kuhla, Men's Golf
- Public Relations Chair
 - Esther Saint-Germain, Track and Field
- Wellness & Development Chair
 - Sierra Puleo, Cross Country/Track and Field





SAAC Programmatic Goals 2024-25



- Goals and Initiatives
- Monthly Initiatives
- Sub-Committee Planning
- Membership
- Two defined representatives with voting rights per sport program, one trainee
- Promote team-selected representatives as representatives graduate

- General Body Meetings
- One formal meeting per month
- One team-building meeting or activity per month
- September 6 Meeting Recap

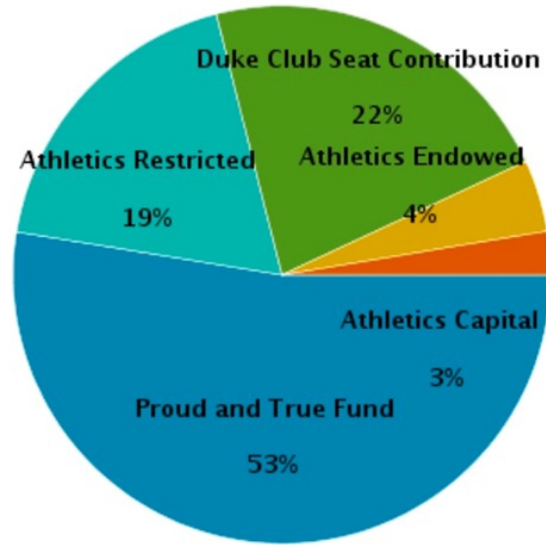


Development Update

**Scooter Renkin, Associate A.D. for
Development**



Development Update: FY24 Duke Club Fundraising Recap



Athletics FY24

Athletics Cash and Receipts by Fiscal Year

	2024	2023	2022	2021	2020
Duke Club Seat Contribution	\$1,403,255	\$1,542,589	\$1,364,056	\$641,549	\$659,199
Proud and True Fund	\$3,351,365	\$3,126,825	\$2,680,112	\$2,144,907	\$1,340,066
Athletics Restricted	\$1,179,876	\$811,162	\$389,992	\$416,393	\$410,233
Athletics Capital	\$166,778	\$387,257	\$400,324	\$1,050,488	\$951,742
Athletics Endowed	\$274,600	\$389,226	\$217,430	\$168,040	\$358,448
Event Contribution Restricted	\$168,529	\$13,632	\$15,340	\$77,840	\$36,836
Event Contribution Unrestricted	—	—	\$20,994	—	\$48,733
Total	\$6,544,403	\$6,270,691	\$5,088,248	\$4,499,216	\$3,805,257

(Includes Gifts, Matching Gifts, and Pledge Payments as of the Report Date in each Fiscal Year)

Athletics Donors by Fiscal Year

Includes unique spouseholds for all Athletics allocations

2024	2023	2022	2021	2020
8,665	5,632	4,701	3,769	3,411

Development Update



By Fiscal Year YTD

	2021	2022	2023	2024	2025
Duke Club Seat Contribution	\$69,737	\$168,079	\$202,205	\$193,750	\$184,833
Proud and True Fund	\$222,848	\$204,971	\$151,602	\$179,628	\$182,162
Athletics Restricted	\$37,035	\$59,692	\$70,695	\$56,994	\$116,059
Athletics Capital	\$17,060	\$65,120	\$19,585	\$11,638	\$304
Athletics Endowed	\$21,214	\$1,583	\$4,750	\$6,156	\$12,068
Event Contribution Restricted	\$0	\$0	\$0	\$29,651	\$0
Total	\$367,894	\$499,445	\$448,838	\$477,816	\$495,425

(Includes Gifts, Matching Gifts, and Pledge Payments as of the Report Date in each Fiscal Year)

Current FY Annual Fund Dollars*: \$366,995

Athletics Annual Fund FY Goal: \$4,800,000

Percent of Goal: 8%

Total Unique Athletics Donors by Fiscal YTD

Includes unique spouseholds

2021	2022	2023	2024	2025
513	1,052	1,458	2,137	1,918

**Dollar Amounts and Donor Counts as of August 23, 2024*

Future Agenda Items

Matt Roan, Director of Athletics



JMU Athletics Accountability Measures Report to the Board of Visitors September 12, 2024

The report reflects the results for the accountability measures for JMU Athletics as outlined in its strategic plan. As required in the plan, the BOV receives this report annually.

JMU Athletics experienced a number of internal departures during academic year 2023-24. At the same time, there were also several national dynamics impacting intercollegiate athletics on a major scale. This report includes references to these instances and their appropriate consideration in our outcomes.

Athletics Strategic Plan Themes

- Student-Athlete Well-Being
- Academic Achievement and Student-Athlete Development
- Sustainable Athletic-Generated Revenues
- Contemporary Athletic Competition and Training Facilities
- Competitive Sports Supporting a National Profile
- Access and Inclusivity
- Fiscal Accountability and Transparency

Academic Year (AY) 2023-24 Measures and Results

Theme - Student-Athlete Well-Being

Early in the 2023-24 academic year, our medical staff saw the departures of our team physician and the Associate Athletics Director for Sports Performance. As a result, these key functions are still under review and development.

Measures –

- Develop an updated model for mental health support by 10.31.23 (*ongoing*)
- Develop an updated model for nutrition by 10.31.23 (*ongoing*)
- Develop a funding model to meet NCAA recommendations for continued medical insurance coverage by 9.30.23 (*ongoing*)

Theme - Academic Achievement and Student-Athlete Development

Measures -

- Achieve an Institutional single year NCAA Graduation Success Rate of 90
 - **AY2022-23(most recent data available) Result = 90**
- Achieve a cumulative Student-Athlete Grade Point Average of 3.0
 - **AY2023-24 Result = 3.26**
- Achieve an Institutional single year NCAA Academic Progress Rate of 985. The most recent data reflects the 2021-22 academic year.
 - **AY2022-23 Result = 989**

- Achieve top 5 status among SBC institutions for Community Service annually
 - **AY2023-24 Result = 9,090 total hours; 3rd in SBC**
- Renew pursuit of an Athletics/Academics partnership to create a new academic program in sports broadcast productions. (*ongoing*)
- Attain annual goals for Student-Athlete leadership program
 - **AY2023-24 Result – Achieved**
- Develop a financial model for Student-Athlete financial awards (ALSTON) based on academic achievement by 9.30.23 - **Complete**

Theme - Achieve Annual Revenue Goals from Athletics 3-Year Financial Plan (by category) – *Game Guarantees impacted by not having a Power 5 football opponent in FY21& FY22

During this time there were also major developments with the NCAA as well as Legislative Changes within the Commonwealth of Virginia. It was evident that the ongoing efforts by the NCAA in response to a variety of legal challenges and the resulting financial considerations would have far-reaching impact on all Division 1 Athletics programs. At the same time, Virginia proposed and ultimately adopted (July 1, 2024) new legislation regarding Name, Image and Likeness as well as student-athlete compensation.

The 2023-24 academic year also saw the retirement of its Athletics Director and the departure of its Assistant Athletics Director for Business. The transition with these two positions resulted in the delay in pursuing long-term strategies involving staff compensation and the financial pro forma.

As a result, these key, long-term planning processes involving all elements of Athletics budget and finance are still under review and development.

Measures -

	FY18	FY19	FY20	FY21	FY22	FY23	FY24
Annual Fund	2,639,265	2,671,670	2,100,829	2,864,396	4,044,396	4,669,413.	4,754,895
Capital Fundraising	1,208,683	1,182,669	951,742	1,050,488	400,324	387,257	166,778
Ticket Sales	2,943,794	2,589,364	2,471,395	251,281	2,834,803	3,605,464.	4,378,645
Corporate Sponsorships	677,000	768,953	606,055	1,477,482	1,103,343	1,474,630.	1,656,038
Game Guarantees*	442,666	617,500	682,000	44,000	8,000	702,500.	996,500

- Develop 5-year growth model for Duke Club membership and financial goals by 10.31.23 (*ongoing*)
- Collaborate with campus partners to develop a 5-year plan for new revenue sources by 6.30.24 (*ongoing*)
- Collaborate with campus in updating the 5-year financial pro forma by 6.30.24 (*ongoing*)

Theme - Contemporary Athletic Competition and Training Facilities

Measures -

- Complete Convocation Center conversion – **Achieved**
- Complete renovations/expansion at Field Hockey, Softball, Sentara Park by 8.1.2023 – **Achieved**
- Update all Athletics major projects to University Masterplan – 6.30.2024

- To include Football practice facility, Tennis long-term competition space; relocation of Student-Athlete Services; Swim/Dive; Baseball enhancements (*ongoing & included in next phase planning*)

Theme - **Competitive Sports Supporting a National Profile**

Measures -

- Achieve top 3 status for Bubas Cup (Sun Belt overall team standings) annually
 - **AY2023-24 Result = 2nd in Bubas Cup Standings**
- Five (5) teams will win conference championships annually
 - **AY2023-24 Result = 2**
- Seven (7) teams will be represented in NCAA post-season annually
 - **AY2023-24 Result = 10**
- Expansion and enhancement of broadcast production capabilities with ESPN platform by 6.30.24 (*ongoing*)
- Collaborate with campus to develop a program for Athletics staff compensation and retention by 12.31.23 (*see above statement regarding ongoing work*)

Theme - **Access and Inclusivity**

Measures -

- Completion of Annual Gender Equity Report and program initiatives
 - **AY2023-24 Result = Completed**
- Completion of Annual Title IX Report by external consultant
 - **AY2023-24 Result = Completed**
- Completion of Annual Athletics Diversity Report and program initiatives
 - **AY2023-24 Result = Completed**
- Completion of Diversity, Equity, Inclusion and Belonging Report on defined NCAA timeline (2025) – (*ongoing*)

Theme - **Fiscal Accountability and Transparency**

Measures -

- Meet all University and NCAA reporting deadlines to ensure Commonwealth financial management standards
 - **AY2023-24 Result = completed as outlined**
- Distribute *Engaged in Excellence* report card annually to key constituents
 - **AY2023-24 Result = completed as outlined**
- Meet Annual Athletics funding requirements for the Commonwealth of Virginia
 - **AY2023-24 Result = completed as outlined**
- Complete annual Athletics Program Reviews for continuous improvement
 - **AY2023-24 Result = completed as outlined**

- Complete annual student-athlete exit surveys and reports for continuous program improvement and planning.
 - ***AY2023-24 Result = completed as outlined***

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Finance and Physical Development Committee
Thursday, September 12, 2024
Meeting Room 3
1:00 p.m.

Agenda

1. Approval of Minutes* – April 18, 2024
2. Introduction of New Committee Members and Administration and Finance Team
3. Financial Review
Mark Angel, Associate Vice President, Finance
4. Bond Rating Update
Mark Angel, Associate Vice President, Finance
5. 2023-2024 Receivables Write-Offs
Mark Angel, Associate Vice President, Finance
6. 2025-2026 Budget Requests
Caitlyn Read, Assistant Vice President, State Government Relations
Diane Stamp, Associate Vice President, Budget Management
7. Six-Year Plan Update*
Towana Moore, Vice President, Administration and Finance
Diane Stamp, Associate Vice President, Budget Management
8. Campus Security Update
Anthony Matos, Chief of Police
9. Workforce Planning
Rick Larson, Associate Vice President, Human Resources, Training and Performance
10. Closed Session*

*Action Items

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Minutes of the Finance and Physical Development Committee

The Finance and Physical Development Committee met on Thursday, April 18, 2024 at 7:00 p.m. The meeting was called to order by Mr. John Rothenberger.

Present:

Rothenberger, John, Chair
Bolander, Jeff
Obenshain, Suzanne
Smith, Steven

Also Present:

The Honorable Richard “Dickie” Bell
Edwards, Teresa
Falcon, Christopher
Herod, Maribeth, Rector
James, Kay Coles
Lynch, John
Major, Lara
Stoltzfus, Michael
White, Jack
Wood, Nicole

Cannella, Abigail, Student Representative to the Board of Visitors
Harper, Donna, Secretary

Alger, Jonathan, President
Moore, Towana, Vice President, Administration and Finance
Angel, Mark, Associate Vice President, Finance
Read, Caitlyn, Assistant Vice President, Government Relations

Absent:

Fiorina, Carly

It was moved by Ms. Suzanne Obenshain, and seconded by Mr. Jeff Bolander to approve the minutes of the February 15, 2024 meeting of the Finance and Physical Development Committee. The motion was approved.

Financial Review:

Mr. Mark Angel, Associate Vice President for Finance, reviewed the financial report and reported the university's revenue and expenditures were appropriate for the period July 1, 2023 through February 29, 2024.

2022-23 Audit Review:

Mr. Mark Angel provided an update on the university's financial statements audit. The university will receive an unmodified opinion on the statements. The university received two written comments related to the Auditor of Public Accounts (APA's) internal control testing. One comment has been remediated and the second comment is currently being corrected.

General Assembly Update:

Ms. Caitlyn Read, Assistant Vice President, Government Relations provided an update that the House and Senate agreed on a budget and sent it to the Governor on April 8, the Governor handed down 233 amendments to the budget. The General Assembly reconvened on April 17 to consider the budget and other legislative amendments. The House voted to set aside the Governor's amendments to the budget. The General Assembly and Governor have agreed to work together on a new two year budget. 2,599 bills were filed in the 2024 General Assembly session, 60 bills passed with a direct impact to JMU.

2024-2025 Proposed Tuition and Fees:

Ms. Towana Moore, Vice President for Administration and Finance, presented the proposed 2024-25 tuition and fees for the academic year and the proposed tuition and fees for the 2025 summer sessions. Factors affecting tuition and fees such as employee compensation, benefits costs, unavoidable inflationary costs and unfunded mandates were discussed.

2024-2025 Proposed Budget:

Ms. Towana Moore presented the proposed 2024-2025 university budget. The proposed university budget of \$775 million, reflects a total increase of \$51.2 million or 7.1% over the current budget. The committee discussed the proposed 2024-25 budget.

Mr. Steve Smith made the following motion: "I move the Finance and Physical Development Committee go into closed session to discuss the following matters: pursuant to Virginia Code Section 2.2-3700A-3 of the Code of Virginia to discuss the acquisition/disposal of real property."

The motion was seconded by Mr. Jeff Bolander and the committee moved into closed session.

Following the closed session. Mr. John Rothenberger stated the following:

During the closed session, the committee discussed only matters lawfully exempted from open meeting requirements and only those types of matter's identified in the motion for the closed session.

RECORDED VOTE: the following is an affirmative recorded, member by member vote:

Rothenberger, John, Chair
Bolander, Jeff
Obenshain, Suzanne
Smith, Steven

The meeting adjourned at 8:55 p.m.

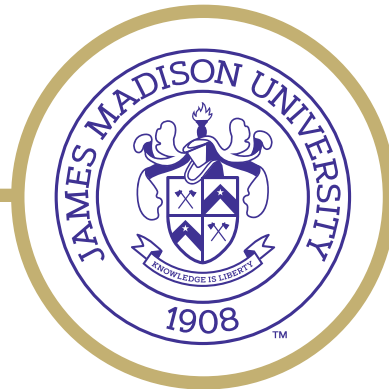
Respectfully submitted,

John Rothenberger, Chair

Donna Harper, Secretary to the Board

Finance and Physical Development Committee

Towana Moore
Vice President



Introductions

Towana H. Moore
Vice President
Administration & Finance



Financial Review

Mark Angel
Associate Vice President
Finance



2023-24 Revenue Review



	FY2024				FY2023		
	Revised Revenue Budget	Actual Revenue as of 6/30/2024	Uncollected Budget Balance as of 6/30/2024	Percentage Collected as of 6/30/2024	Percentage Collected as of 6/30/2023	Revised Budget as of 6/30/2023	Actual as of 6/30/2023
Educational and General							
State General Fund Appropriations - Operations (2)	175,083,528	143,350,404	31,733,124	82%	85%	153,931,515	130,766,781
State General Fund Appropriations - Financial Aid	22,823,804	22,827,805	(4,001)	100%	100%	14,541,127	14,541,127
Tuition and Technology Fee (1)	264,188,387	266,818,740	(2,630,353)	101%	101%	250,226,906	253,172,388
Non General Fund Transfer to State (1)	(3,098,291)	(3,098,291)	-	100%	100%	(3,098,291)	(3,098,291)
Undergraduate and Graduate Application Fees	1,577,715	2,149,312	(571,597)	136%	133%	1,568,250	2,091,407
Miscellaneous Revenue	2,565,873	4,656,036	(2,090,163)	181%	130%	2,480,999	3,214,945
Total Education and General	463,141,016	436,704,006	26,437,010	94%	95%	419,650,506	400,688,357
Auxiliary Enterprises							
Dining Services	79,911,084	85,014,760	(5,103,676)	106%	108%	70,670,775	76,087,146
Retail Services	1,587,000	1,581,131	5,869	100%	94%	1,600,000	1,499,588
Residential Facilities	41,728,556	40,199,748	1,528,808	96%	99%	39,209,504	38,624,220
Parking and Transportation	8,259,034	8,832,790	(573,756)	107%	108%	7,691,135	8,296,030
Telecommunications	2,007,117	2,022,112	(14,995)	101%	99%	2,007,117	1,993,942
Health Center	6,726,580	6,801,985	(75,405)	101%	101%	6,139,669	6,182,903
Student Union and Student Services	8,273,113	8,294,428	(21,315)	100%	100%	7,979,129	8,001,249
Recreation Center	14,950,428	14,950,080	348	100%	100%	13,283,311	13,270,891
Athletics	70,180,697	70,340,372	(159,675)	100%	100%	63,901,455	63,732,179
Other	20,169,604	38,156,235	(17,986,632)	189%	171%	18,484,942	31,583,559
Total Auxiliary Enterprises	253,793,213	276,193,641	(22,400,428)	109%	108%	230,967,037	249,271,707
TOTAL REVENUE	716,934,229	712,897,647	4,036,582	99%	100%	650,617,543	649,960,064

(1) Budgeted revenue includes a reduction of \$3,098,291 for non-general fund cash transferred back to the State. This, in effect, is a transfer of tuition, fee and other Educational and General revenue collected. The State makes this transfer for standard items such as debt service on state bond issues to finance equipment and capital fee assessments on out-of-state students.

(2) The Appropriation Act specifies that unexpended appropriations that remain on the last day of the fiscal year shall be reverted to the State and re-appropriated in the next year. The 2023 reversion was re-appropriated in 2024, and we expect the 2024 reversion to be re-appropriated in 2025.

2023-24 Tuition and Other Fee Revenue



Description	Budget	Actual Revenue 6/30/24	Uncollected Budget Balance	Percentage Collected as of 6/30/24
Regular Undergraduate In-State Tuition	\$114,892,435	\$115,137,055	(244,620)	100%
Summer Undergraduate In-State Tuition	11,563,989	11,672,835	(108,846)	101%
Graduate In-State Tuition	11,199,647	10,865,037	334,610	97%
Regular Undergraduate Out-of-State Tuition	106,109,331	108,276,338	(2,167,007)	102%
Summer Undergraduate Out-of-State Tuition	6,843,976	6,892,181	(48,205)	101%
Graduate Out-of-State Tuition	5,019,662	5,390,848	(371,186)	107%
Instruction - Off Campus	7,508,000	7,517,753	(9,753)	100%
Course and Other Fees	1,051,347	1,066,693	(15,346)	101%
Total Tuition & Technology Fee Revenue	\$264,188,387	\$266,818,740	(2,630,353)	101.0%

2023-24 Expense Review



	FY2024				FY2023		
	Revised Expenditure Budget	Actual Expenditures as of 6/30/2024	Unexpended Budget 6/30/2024	Percentage Expended as of 6/30/2024	Percentage Expended as of 6/30/2023	Revised Budget as of 6/30/2023	Actual as of 6/30/2023
Education and General							
Instruction	222,117,850	212,539,606	9,578,244	96%	97%	208,781,046	202,526,693
Research and Public Service	2,216,631	2,159,814	56,817	97%	92%	1,919,992	1,766,753
Academic Support	53,179,081	49,733,083	3,445,998	94%	93%	50,134,219	46,421,133
Student Services	31,013,089	31,134,518	(121,429)	100%	101%	29,051,670	29,301,489
Institutional Support	65,917,508	60,451,662	5,465,846	92%	89%	56,973,003	50,422,975
Operation and Maintenance of Plant	53,082,156	44,522,543	8,559,613	84%	93%	46,600,818	43,271,557
Student Financial Assistance - University and State GF	35,614,701	35,054,387	560,314	98%	99%	26,189,758	25,814,864
Total Education and General	463,141,016	435,595,613	27,545,403	94%	95%	419,650,506	399,525,464
Auxiliary Enterprises							
Dining Services	78,386,484	76,998,682	1,387,802	98%	100%	69,056,753	69,198,654
Retail Services	1,271,973	1,168,630	103,343	92%	94%	1,284,973	1,207,082
Residential Facilities	42,631,274	39,222,583	3,408,691	92%	91%	39,698,995	36,269,126
Parking and Transportation	8,259,034	7,965,220	293,814	96%	95%	7,691,135	7,290,666
Telecommunications	2,007,117	1,394,494	612,623	69%	63%	2,007,117	1,263,756
Health Center	6,710,594	6,359,821	350,773	95%	97%	6,247,946	6,087,915
Student Union and Student Services	8,724,393	8,172,123	552,270	94%	91%	8,549,857	7,819,411
Recreation Center	15,548,803	15,333,802	215,001	99%	95%	13,511,189	12,782,701
Athletics	72,096,695	69,848,235	2,248,460	97%	94%	65,836,540	62,144,293
Other	18,487,263	14,475,189	4,012,074	78%	70%	17,078,768	11,883,354
Auxiliary Reserve Projects (1)	23,977,048	9,913,405	14,063,643	41%	62%	30,550,494	18,899,360
Total Auxiliary Enterprises	278,100,678	250,852,184	27,248,494	90%	90%	261,513,767	234,846,318
TOTAL EXPENDITURES	741,241,694	686,447,797	54,793,897	93%	93%	681,164,273	634,371,782

(1) Auxiliary Reserve Projects are generally short-term projects funded from Auxiliary Cash Reserves. Because these projects are funded from reserves accumulated over prior years, there is NO related auxiliary operating revenue budget. Budgets and actual expenses fluctuate based on the nature, timing, and extent of the individual projects. Unspent budgets are generally carried forward to the next fiscal year.

2023-24 Restricted Fund Review



	FY2024			Comments	FY2023		
	Appropriation/ Allotment	Actual Expenditures as of 6/30/2024	Unexpended Appropriation		Appropriation/ Allotment	Actual Expenditures as of 6/30/2023	Unexpended Appropriation
Sponsored Programs, Grants and Contracts							
Virtual Library Of Virginia	10,590,774	10,590,774	-	The University manages procurement for the VIVA program. VIVA benefits all the state's higher education institutions. The program provides shared access to programs, services and collections, including electronic resources such as e-books and journals, research databases, etc.	10,301,968	10,301,968	-
Federal grants and contracts	28,000,000	25,827,072	2,172,928	\$16,830,346 and \$14,908,174 in financial aid for FY2024 and FY2023 respectively (mostly PELL grants).	26,014,500	25,990,757	23,743
State and nongovernmental grants and contracts	20,500,000	18,702,604	1,797,396		19,000,000	18,601,287	398,713
Indirect costs	3,000,000	40,317	2,959,683		5,000,000	88,862	4,911,138
All Other grants and contracts	2,645,078	930,890	1,714,188	Includes Work-Study, Eminent Scholars, Excess Indirect Costs, Commonwealth Innovative Internship Fund, College Lab School Fund, and Surplus Property. Work-Study and Eminent Scholars are recorded near year-end by moving incurred expenses in E&G to these funds.	995,078	703,797	291,281

Appropriations - the legal spending authority for State agencies to incur expenditures. Basic appropriation authority is established by the General Assembly through the biennial Appropriation Act. The Department of Planning and Budget has administrative responsibility for managing the process of appropriating and allotting funds. Agencies submit requests for appropriation and allotment actions and adjustments approval to DPB.

Allotments - method under authority of the Governor to manage the rate of agency spending against its appropriation.

Unexpended Appropriation - Nongeneral fund unexpended appropriations do not automatically carry forward to the next fiscal year. While nongeneral fund cash balances do carry forward, those balances must be reappropriated to be available for expenditure.

Note 1 - The appropriation/allotment amount in Sponsored Programs, Grants and Contracts represents an estimate of the maximum amount of spending that could occur in the fiscal year. For the other categories, the appropriation/allotment amount is the actual award or revenue.



Financial Terms

- *Education and General* – Those activities which embrace the three programs directly related to the higher education mission: (1) instruction, (2) research and (3) public service. These activities encompass support programs (1) academic support, (2) institutional support and (3) operation and maintenance of physical plant.
- *Financial Assistance for Education and General* – Those activities which provide resources for education and general services through (1) state scholarships and fellowships, (2) sponsored programs and (3) eminent scholars.
- *Auxiliary Enterprises* – Those activities which are supported entirely through sales of services and use fees, such as housing, dining services, telecommunications, and bookstore.
- *Instruction* – Expenditures for the primary mission of the university, including teaching faculty, support staff, instructional equipment, and related routine operating costs.
- *Research* – Encompasses expenditures for activities such as support for research faculty but does not include sponsored research. Activities include summer faculty research and faculty assistance.
- *Public Service* – Activities include university supported workshops and institutes (Community Engagement & Volunteer Center, Student Theatre and Music productions).
- *Academic Support* – This program encompasses the Carrier Library, student computer labs, activities of the deans of colleges and schools, honors program, and other related expenditures.
- *Student Services* – This program's primary purpose is to contribute to the students' emotional well-being and to their intellectual, cultural, and social development outside the classroom.
- *Institutional Support* – Primary purpose is to support the financial, administrative, logistical, and development activities of the university.
- *Operation and Maintenance of Plant* – Activities related to the operation and maintenance of the physical plant of the university, net of amounts charged to auxiliary enterprises.
- *Student Financial Assistance* – University-funded scholarships and fellowships.

Bond Rating

Mark Angel
Associate Vice President
Finance



2023-2024 Receivables Write-Offs

Mark Angel
Associate Vice President
Finance





Write-Off Criteria

- Student no longer attends James Madison University
- Student has not responded to JMU collection procedures, and
- Student has not responded to either the State Attorney General's collection efforts or James Madison University's contracted collection agencies



Write-Off Review

CLASSIFICATION	FY24 Write-Off	FY23 Write-Off	FY22 Write-Off
Tuition/Fees/Room /Board	\$ 390,238	\$ 474,784	\$ 362,748
Parking	1,146	2,583	2,233
Clinics/Grants/Univ Conf/Other	4,095	10,311	4,324
Total	\$ 395,479	\$ 487,678	\$ 369,305



Write-Off Comparison

Institution	FY24 Write-Off	FY23 Write-Off	FY22 Write-Off
JMU	\$ 395,479	\$ 487,678	\$ 369,305
VT	642,662	375,586	294,305
GMU		3,000,000	3,800,000
ODU	9,052,231	6,557,563	3,648,103



Write-Off vs. Authorization

	FY24	FY23	FY22
Total Write-Off	\$ 395,479	\$ 487,678	\$ 369,305
Total Billings	\$ 560,071,230	\$ 512,469,148	\$ 476,903,553
Write-Off Percentage	.071%	.095%	.077%

- The Board of Visitors has approved the University to write-off up to one-half of one percent (.5%) of total billings, which would amount to a total of \$2,800,356 for FY24.



Debt is not forgiven...

- Write-Off is performed for Financial Statement purposes only
- Hold is placed on the individual's account
- Collection efforts by outside agencies continue
- Amount is sent to the State Treasurer's office to be included in the debt set-off program



FY24 Collection Payments

- Precollect – \$426,232
- Attorney General – \$72,997
- Debt Set-Off – \$98,942
- Outside Collection Agencies – \$158,971

2025-2026 Budget Requests

Caitlyn Read
Assistant Vice President
State Government Relations

Diane Stamp
Associate Vice President
Budget Management



2025-2026 Budget Requests - Operating

- \$4.9 million – Support Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP)
- \$997,816 – Produce More Nurses Through the New “Fast Flex” Bachelor of Science in Nursing program



2025-2026 Budget Requests - Capital

Renovate Johnston Hall



General Fund Request

- **\$26,820,000** *(One-time funds)*

New Residence Hall



9© Debt Request

- **\$86,085,243** *(One-time funds)*

Six-Year Plan Update

Towana Moore
Vice President
Administration and Finance

Diane Stamp
Associate Vice President
Budget Management





Six-Year Planning Process

- Vice President for Administration & Finance, Provost and Six-Year Plan Working Group convene, begin planning and create initial draft
- President and Senior Leadership Team review and approve draft
- Commonwealth representatives review the submission, including:
 - Director of Planning and Budget
 - Executive Director of SCHEV
 - House Appropriations Representative
 - Secretary of Education
 - Secretary of Finance
 - Senate Finance Representative
- Board of Visitors reviews and approves
- Final report is submitted



Six-Year Financial Plan Assumptions

- Emphasis on 2024-26 biennium, focus 2025-26
- Strategies related to JMU Madison Plan and Virginia Higher Education Plan
- Projected enrollment
- Projected tuition and fees



Six-Year Financial Plan – Revenue & Expense Estimate Assumptions

- Tuition and fee revenue estimate
 - Based on projected enrollments by degree level & residency
- Expenditures include state mandated compensation, financial aid and targeted institutional strategies



FY 2023 Six-Year Plan – Implemented Strategies in FY 2024-25

- Salary & Benefit Increases for Existing Employees
- Faculty Promotions & Other Employee Pay Adjustments
- Student Financial Assistance & Scholarship
- Expanded Academic Programs
 - Physician Assistant (PA) Program
 - Computer Science Major
 - Information Technology Major
- Academic & Student Support Strategies
 - Early Alerts: Student Success System
 - Reengineering Madison
 - Research Infrastructure





Six-Year Financial Plan – Costs Summary

Academic & Financial Plan Strategies	2025-26 Incremental Expense Change		
	Reallocation	Nongeneral Funds	Total
Faculty and Staff Authorized Salary Increases (net costs/3%)		4,151,775	4,151,775
Increase Funding Faculty Promotions & Other Pay Adjustments		1,050,000	1,050,000
Contractual Services & Utilities	1,000,000	362,120	1,362,120
Additional Undergraduate Student Financial Assistance		468,461	468,461
Expansion of Physician Assistant Program		150,000	150,000
Improving Retention and Closing the Equity Gap (Early Student Success System)		244,389	244,389
Supporting Growth of the Computer Science & IT Majors		573,186	573,186
Meet the Commonwealth's Mental Health Needs		615,786	615,786
Reengineering Madison		993,234	993,234
Carrier Library Renovation & Expansion		641,652	641,652
Total Academic & Financial Operating Strategies	\$1,000,000	\$9,250,603	\$10,250,603



Six-Year Financial Plan E&G – Nongeneral Fund Revenue Estimate

Tuition & Fees Change – Planning Purposes Only

	2024-25	2025-26	\$ Change
Undergraduate Virginia Student			
Tuition & Fees	8,150	8,550	400
Comprehensive Fee	5,816	5,990	174
TOTAL COMMUTER COSTS	\$ 13,966	\$ 14,540	\$ 574

Undergraduate Non-Virginia Student			
Tuition & Fees	25,496	25,994	498
Comprehensive Fee	5,816	5,990	174
TOTAL COMMUTER COSTS	\$ 31,312	\$ 31,984	\$ 672

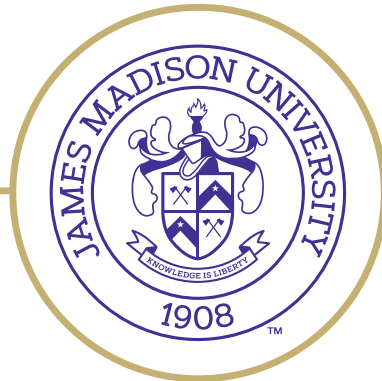


Anticipated Outcomes

- Increase Employee Recruitment and Workforce Retention
 - Compensation Adjustments
 - Faculty Promotions & Other Employee Pay Adjustments
- Additional Health Care Personnel in the Commonwealth
 - Expansion of PA Program
 - Mental Health Needs
- Contributing to the Virginia Technology Workforce
 - Growth of the Computer Science Major
 - Growth of the Information Technology Major
- Improve Student Experience & Retention
 - Early Student Success System
 - Reengineering Madison

Six-Year Plan

Reference Materials



Summary of Six-Year Planning Process

The State Council of Higher Education for Virginia (SCHEV), in cooperation with public two- and four-year institutions, develops six-year plans each year that support institutional commitments to the Statewide Higher Education Strategic Plan and objectives of the Higher Education Opportunity Act (HEO) of 2011. The HEO Act requires all public higher education institutions to prepare and submit a six-year plan annually.

Based on the template provided by the state, JMU's senior administrators work in collaboration with Budget Management and the Office of Planning, Analytics and Institutional Research to prioritize initiatives and determine appropriate financial requests. In odd-numbered years, each institution's governing board adopts a six-year plan; that plan is either amended or affirmed in even-numbered years. As the title suggests, this document is strictly for planning purposes and involves projections based on available information which can then be amended and updated over time as more current data is available.

The 2024 six-year plan consists of the following components:

- Cover Letter: Contains specific questions from the plan reviewers
- Part 1: Financial Plan
 - Undergraduate Tuition and Fees
 - Revenue
 - Financial Aid
 - Academic and Financial strategies
 - Six-Year Pro Forma
 - State General Fund Budget Requests
- Part 2: Narrative
 - Mission & Priorities
 - Enrollment Volume & Composition
 - Program Alignment and Performance
 - Post-Completions
 - Work Force Alignment
 - Financial Effectiveness and Sustainability
 - Cost Effectiveness
 - Budget Requests
 - Economic Development
 - Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought
 - New Schools, Sites and Mergers
 - Optional Sections: Research, Collaboration, State Policy, Additional Information

James Madison University Six-Year Plan Response (Cover Letter)

How you have used the Fact Pack data provided last year with the public, your governing board, students, faculty, etc.

JMU is committed to providing constituents with up-to-date and accurate data visualizations that highlight the university's strengths and demonstrate accountability for trends showing further work is needed to achieve its aims. The information contained in the Fact Pack is an important part of that narrative, and the university has aligned much of its data communications and use strategy with the areas contained within the Fact Pack.

JMU provides a link to the current Six-Year Plan and corresponding Fact Pack through its [strategic planning website](#). The Fact Pack contains much information that is also tracked and reported publicly by JMU's Planning, Analytics and Institutional Research (PAIR) office. JMU's PAIR office maintains a comprehensive university [Fact Book](#), which has been part of the office's deliverables since the 1970s. As a result, much of the information contained in the Fact Pack, such as change over time in enrollment, admissions, demographics, completions, graduation, and retention rates, is already available publicly. These visualizations are interactive and provide additional ways of viewing trend data beyond what is included in the Fact Pack.

Additionally, the JMU Board of Visitors has access to a set of publicly available [key performance measures](#) that align with institutional strategic priorities. Several metrics, such as E&G instructional expenditures over time, budget trends over time, and numerous other financial and enrollment metrics also found within the Fact Pack, are provided on the site with contextual information that aid the reader's interpretation.

Other metrics from the Fact Pack, such as those related to financial health, are regularly monitored by the [Finance Office](#) and [Office of Budget Management](#). Quarterly financial updates are provided throughout the year to JMU board members as the latest information is available. [Post-graduation outcomes](#) are tracked by the University Career Center, who shares data related to graduation and employment outcomes annually with the Board of Visitors; this report is also publicly available.

Changes in admissions, enrollment, and retention due to disruptions of the new FAFSA form and your plan to mitigate the impact.

The 2024-25 congressionally mandated changes to the FAFSA and underlying federal methodology excluded the *number in college* from the Student Aid Index (SAI) calculation. As a result, a segment of currently enrolled low- to middle-income in-state undergraduate students returning in 2024-25 will lose their eligibility for federal and/or state grants.

Through modeling and data analysis, the university identified this outcome prior to 2024-25. Campus partners secured funding that will allow JMU to replace a portion of what students are losing with an alternative financial aid award. This will help these students return to JMU and complete their education.

Explain any changes in the "Key Metrics at a Glance" and other changes your Fact Pack that you feel are important to highlight.

Enrollment volume and composition continue to show a modest increase in enrollment over Fall 2023 data. JMU has seen record applications over the past four years, which has led to declining acceptance rates.

Yield rates continue to show a decline, which is to be expected in our attempt to keep first-year enrollment stable. Even with a declining yield rate first-year enrollment was at a record high in 2023, and increasing retention rates continue to lead to modestly increasing enrollment.

Please include detailed updates on your cost control measures as noted in the Six- Year Plan follow up including new/ongoing initiatives and where your per student overall expenditure and institutional/administrative expenditures are trending as a result of your efforts.

The university continues to focus on achieving higher education efficiency through strategic resource allocation, process optimization, and cost containment. As part of the university's annual process, JMU consistently identifies opportunities for resource reallocations and actively seeks information on efficiency improvements. This approach ensures that the university streamlines resource use, enhances operational effectiveness, and maintains a focus on achieving strategic goals. By regularly reviewing and adjusting the allocation of resources, JMU strives to create a more efficient and effective educational environment.

While the university's E&G expense per student was higher in FY 2022-23, 83% of the increase over FY 22 was for direct support of educating JMU students in the areas of instruction and academic support. Total institutional and administrative expenditures per student decreased by over 9% from FY 2022. The university's total E&G expense per student is 33%, less than the Virginia public four-year institution median.

JMU continues a focus on efficiency and cost containment strategies in multiple areas, including:

- *Energy Efficiency:* Investment in utility infrastructure upgrades, technologies, and practices to reduce utility costs and promote sustainability.
- *Technology Integration:* Increased use of technology to augment student advising and assist with data-driven decision making through the Reengineering Madison project.
- *Partnerships and Collaborations:* Continued collaborative procurement partnerships with the Virginia Higher Education Procurement Consortium (VHEPC) and the Virginia Association of State College and University Purchasing Professionals (VASCUPP) to ensure efficient use of resources and contract negotiation power of volume and enhance educational opportunities. Manages procurement for the 39 state-assisted colleges and universities involved in the Virtual Library of Virginia (VIVA) consortium, which brings \$5 of value for every \$1 spent through VIVA's cooperative purchasing of resources.

Describe the anticipated impact of any new federal or state legislative or regulatory requirements on the institution's finances (e.g., Financial Value Transparency and Title IX regulations).

JMU anticipates the legislative/regulatory requirements below will impact the university's finances.

- *Executive Order 30:* Executive Order 30 requires a level of compliance to VITA policies standards that JMU has historically been exempt from as a Tier 3 institution. Compliance with the EO would require at least two new full-time staff positions for an expected fiscal impact of about \$200,000 per year.
- *Online Virginia Network:* Online Virginia Network annual funding for JMU was cut by \$600,000. These funds were being used to support online learning developers and specialists who were primarily supporting JMU's College of Education to ensure online pathways to teacher licensure. As the university sees this function as vital to the commonwealth's workforce needs, we intend to retain these positions using institutional funding sources.

- *Title IX*: Regulations previously passed, which were intended for implementation Aug. 1, have been challenged and are on hold. Until a decision is made, the university does not know the possible costs of addressing Title IX legislation regarding issues including pregnancy and related conditions.

James Madison University Six-Year Plan Narrative (Part II)

Section A: Mission & Priorities

A1. What is your institutional mission? Please share any plans you have to change your mission over the six-year period.

The JMU mission statement is woven throughout the culture of the institution. It states:

We are a community committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives.

The statement directly addresses educating students and is designed to reiterate the university's long-standing commitment to meeting the needs of its undergraduate and graduate students. It is intentionally concise, allowing it to be commonly recited and referred to by the JMU community.

To further emphasize teaching and to incorporate the research, service, and planning aspects of the institution, the mission is complemented by the JMU Vision and Values statements, as well as the core qualities and university goals of the strategic plan.

The vision statement and values statements reaffirm the university's long-standing commitment to meeting the needs of its students. They are:

- JMU Vision Statement: To be the national model for the engaged university: engaged with ideas and the world.
- JMU Values Statement: Our student-centered community values academic quality, community, diversity, innovation, integrity and student focus.

In Spring 2016, the university began a broad review of the university's mission statement. This review began with the University Planning Team (UPT), a representative body of leaders from all university divisions, including the Faculty Senate and Student Government Association.

The president and vice presidents then discussed the UPT report to determine whether any of the university's context, aspirations, or purposes had changed significantly enough to warrant a change in the mission. They determined no changes were needed at that time.

The mission statement was reaffirmed by the JMU Board of Visitors in April 2022, and there are no plans to modify the mission in the next six years.

A2. What are your institution's greatest strengths and areas of distinctiveness that it should continue to invest in? What are your institution's greatest opportunities for improvement?

James Madison University offers a high-quality student experience for undergraduates in its bachelor's level programs and for post-graduates in its array of distinguished master's, educational specialist, and doctoral programs. Following a teacher-scholar model, JMU faculty are scholars, teachers, and mentors engaged in a broad array of creative and intellectual endeavors across disciplines and emerging fields of study. Their research and scholarship drive innovation, shape our educational approaches, and provide student learning opportunities in and beyond the classroom.

JMU provides a total education to students – one that has a broad range of the liberal arts as its foundation and encompasses an extensive variety of professional and pre-professional programs, augmented by a multitude of learning experiences outside the classroom. For over 110 years, JMU served the Commonwealth of Virginia by providing students with a range of academic programs that provide intellectual stimulation, promote critical thinking, and help to meet the needs of the state. The university plans to continue investing in the people and programs that have helped to define JMU with an eye toward sustainability and accessibility.

The institution is making a significant investment to increase access and affordability for all learners, including historically under-represented student populations, in keeping with the Guiding Principles for Virginia Education. For example, the JMU Early Student Success System was created as a data-informed, formal, feedback system that sends proactively reaches out to targeted student segments at the first signs they are not meeting their goals so that JMU practitioners can take action to intervene. The university will continue to invest in and support two academic support and leadership programs—Valley Scholars and Centennial Scholars—that provide opportunities for students from underrepresented backgrounds and first-generation college students. A key component of increasing access and affordability means taking a close look at addressing base adequacy, philanthropic giving, and tuition moderation. In addition, JMU is an efficient user of financial and need-based aid. While the institution has a high number of Pell graduates, it does not have the funding it needs to meet the demand of students.

JMU has been recognized as the best university for getting a job in Virginia, and this is a strength in which investment will continue. The university currently boasts post-graduate placement rates for both bachelor's and advanced degree candidates at over 95% and consistently outpaces the outcomes rates published by the National Association of Colleges and Employers relative to overall outcomes, by region, by school size, and by Carnegie Classification. The university's commitment to North Star objective 1-3. Increase student exposure to and experiences with the world of work, includes taking an active leadership role in the commonwealth's initiative to promote internships and other work-based experiential learning opportunities. To promote Post-Secondary Readiness, JMU will continue collaborations with businesses in the local community, such as Merck, to create workforce development partnerships that lead to employment for graduates.

An area of improvement for the university is the sustainable growth of the infrastructure needed to continue as an R2, high research doctoral university. This classification reflects JMU's significant level of research-active faculty, often providing research opportunities for JMU students, as well as our excellent doctoral programs and acquisition of external funding. Maintaining high standards for JMU's first-rate, research-focused and professional graduate programs is a critical need for the university.

A3. What are the top 3-5 strategic priorities you are currently pursuing or planning to pursue in the next six years? Please explain how each strategy relates to the strengths and/or opportunities for improvement mentioned above and will ultimately drive better outcomes for students.

Over the next six years, James Madison University's top priorities include:

1. Advancing access and affordability for qualified students from all backgrounds, diligently removing obstacles to success.
 - The university will:
 - Offer more access for under-represented students by pursuing funding to raise the number of Pell-eligible students admitted.
 - Increase student success of identified student groups to close equity gaps through the Early Student Success System.
 - Add to the number of out-of-state and international students.
2. Meeting the needs of the Commonwealth of Virginia by providing students with a high-quality education that leads to employment in areas that benefit both the graduate and the commonwealth.
 - The university will:
 - Focus on refining practices related to internships and work-based learning experiences to ensure students have exposure to the workplace and tangible career experience.
 - Increase the number of academic programs that will produce graduates in high-need employment areas in Virginia, including health-related professions and education.
 - Modify successful existing academic programs in high-need areas such as nursing and education to graduate more students quickly and at more affordable costs.
 - Emphasize Virginia workforce needs and preparation through innovative efforts including creation of the Lab School for Innovation and Career Exploration and a "Grow Your Own" program to speed time to degree for paraprofessionals in the schools.
3. Developing innovative solutions to support mental health and wellness, at JMU and in Virginia.
 - The university will:
 - Adapt academic programs to produce more graduates that can serve as K-12 school counselors and mental health professionals.
 - Increase the counseling services currently available to students and expand the service to faculty, and staff.
4. Embarking on Reengineering Madison, a multi-year, high-resource project that will change how JMU uses and thinks about data.
 - The university will:
 - Use shared data to improve student success outcomes.
 - Develop shared data systems as a university good.
 - Increase operational efficiency at all levels of the university.
 - Strengthen JMU's relationship and communication with all constituents.
5. Establishing our distinctive identity within the R2 Community.
 - The university will:
 - Elevate the university's academic mission while expanding research and scholarship opportunities for faculty and students in ways that benefit the commonwealth.
 - Seek sustainable ways to grow and support the infrastructure needed to successfully maintain this status.

- Continue emphasizing the university's core commitments of providing close faculty and student interactions and extraordinary teacher-scholars who provide opportunities that are collaborative, interdisciplinary, and engaging within the community.

A4. What support can OpSix provide to help you achieve those strategies? Please include both budget and policy requests and reference Part I of your submission where appropriate.

JMU is an excellent steward of commonwealth resources and appreciates the funding received.

- Operating Requests (General Fund)
 - The Virginia Military Survivors and Dependents Education Program (VMSDEP) has experienced significant growth in recent years and is expected to continue growing. The requested amount of \$4.9 million reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less the State Council of Higher Education of Virginia's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the commonwealth to bolster the long-term sustainability of this crucial program.
 - JMU is the top producer of nurses in the state among public four-year colleges and universities. JMU is seeking \$1M per year in ongoing funding to launch the "Fast Flex" nursing program. This non-traditional program would graduate 30 more undergraduate nurses per year and would allow students to complete core nursing course work in one calendar year. Course work would be partially online and would take place on nights and weekends, as would clinical placements.
- Capital Requests (General Fund)
 - Johnston Hall is a 94-year-old academic building on campus that currently houses Graduate Psychology. The building is currently not accessible to individuals with disabilities and lacks an elevator. A significant renovation of the current space (18,700 gsf) is needed to ensure ADA compliance and to meet building code standards. A small addition of 11,000 gsf is also being requested to accommodate an elevator as well as house additional academic space. JMU was successful in securing planning funding for the project in the 2024 General Assembly session and will be seeking state support for the project's construction phase in 2025.
- Other Policy Requests
 - State Code Section [23.1-1309](#) was enacted in 2015 in response to concerns over the amount of mandatory student fees used to subsidize athletic programs at Virginia institutions. In the nine years since this language was enacted, the NCAA has passed 750 new rules, laws, and regulations on member institutions, which have driven up costs for institutions not foreseen when the legislation was enacted. For that reason, we will consider seeking changes to that code section that would allow schools to adequately respond to the changing landscape of college athletics.
 - Campus law enforcement officers are the foundation keeping our university community safe. However, campus law enforcement officers are not allowed access to enhanced retirement benefits offered to other qualified law enforcement officers, such as state or local police. They specifically do not receive a monthly "hazardous duty supplement" as part of their retirement package, which is currently valued \$1,222 per month. Campus law enforcement duties are recognized as "hazardous duty," but the supplement is not available to campus law enforcement through their pension plan. We are asking the commonwealth to explore these inequities in law enforcement pensions as it poses significant challenges to the recruitment and retention of campus law enforcement officers.

Section B: Strategic Deep Dive – Enrollment Volume & Composition

B1. What do you see as the primary drivers of recent enrollment trends for your institution? Please reference any specific academic programs that have had a significant (positive or negative) effect on enrollment, if relevant.

Over the past decade, JMU's enrollment has increased by roughly 2,000 students, a 10% increase and an annual growth rate of just over 1%.

- On the undergraduate level, much of that growth occurred in the first part of the decade as JMU's first-year targets increased by 50-100 in-state students every year.
 - Over the past three years, the university has maintained the first-year class enrollment target and as such, JMU undergraduate enrollment has largely stabilized.
 - Though JMU has kept first-year enrollment targets stable, overall enrollment has surpassed 22,000 each of the last three years, largely through first-year cohorts that exceeded targets.
- Graduate enrollment has grown for much of the last decade and is expected to remain stable over the next six years.
 - Although new graduate programs are being developed, the advent of the four-year Bachelor of Science degree in Education has affected JMU's graduate enrollment as the university no longer enrolls a substantial number of students into the fifth-year Master of Arts in Teaching (MAT) program. New graduate programs, such as a recently approved Doctor of Education, are at various stages of development and as their impact on enrollment is realized, the university will adjust projections accordingly.

B2. Please summarize your enrollment management strategy moving forward and the specific actions (if any) you are taking to implement that strategy.

Undergraduate Enrollment

James Madison University anticipates maintaining the current undergraduate enrollment target moving forward, after accounting for several disruptions in recent years.

The university began using the Common App in 2022, leading to record applications for 2022, 2023, and 2024.

- As the institution moves farther from the unpredictability in projecting applications and subsequent enrollment caused by COVID, JMU intends to reevaluate the current first-year target of 4,650 to accommodate new trends established after the advent of the Common App.
- Once this target has been reevaluated, JMU intends to maintain enrollment targets for new undergraduate students over the next six years.
- JMU is working to increase retention rates of returning students to improve student success and strengthen the student base to hedge against any challenges to enrolling new students that may be caused by changing demographic trends.
 - JMU's primary strategy is described in the Early Student Success System (ESSS) program, which aims to increase retention rates by identifying and improving equity gaps among under-represented student groups with lower-than-average retention rates.
 - The full [Early Student Success System](#) proposal is available online.
 - The ESSS also served as the Quality Enhancement Plan (QEP) for JMU's reaffirmation of accreditation with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). The program was approved in April 2023 with no revisions from the SACSCOC visiting team.

Graduate Enrollment

JMU anticipates maintaining overall graduate enrollment targets, with growth in targeted areas.

- The institution is focusing on ways to stabilize and sustainably grow graduate degree and certificate program enrollments in areas of high need and demand to support the workforce needs and priorities of the university and commonwealth.
- Identifying and developing new graduate degree and certificate programs in high growth and high demand workforce education that are currently underserved by existing program offerings, such as healthcare programs, in the region and the commonwealth are also top priorities.

The university regularly evaluates tuition and fee rates for graduate programs to ensure that these programs remain cost competitive both for in-state and out-of-state students, helping to ensure retention and growth.

B3. How ambitious/realistic/conservative are the enrollment projections you most recently submitted to SCHEV? What are the greatest unknowns or risks that could lead enrollment to differ significantly from your projections? Please reference national and statewide enrollment trends/projections and cite any other data (e.g. regional trends, performance of prior enrollment strategies) that informed your projections.

JMU traditionally takes a conservative approach to projecting enrollments to ensure estimates account for regional and statewide trends while incorporating historical data gleaned from previous years.

- Actual enrollments are consistently within 1-1.5% of initial projections, indicating a process that yields realistic projections.

Projections remain conservative, anticipating smaller first-year cohorts than what the institution has seen in the past three years. Overall projections call for stable or slight declines in enrollment over the next six years.

JMU anticipates exceeding targets for first-year enrollment in Fall 2024, with much of this growth projected to be out-of-state students.

- The greatest unknowns at this point are related to how changing demographic trends may affect JMU's ability to attract and enroll both in-state and out-of-state students over the next four to six years.
 - To account for declining out-of-state populations and increasing competition for out-of-state students, the institution lowered targets for out-of-state students (while raising by an equal number of in-state students) beginning in Fall 2022 to maintain realistic projections. Over the past two years, however, targeted recruitment strategies and increased efforts to retain student groups, including out-of-state students, has led to an increase in out-of-state students. We continue to anticipate increasing challenges in recruiting and enrolling out-of-state students over the next several years; thus, the institution's current plan is to maintain lower targets for out-of-state students to ensure fiscal health.
- JMU has lowered projections for graduate enrollment to account for the growing popularity of the four-year Bachelor of Science in Education degree.
 - The advent of four-year programs that allow students to apply for teacher licensure with a bachelor's degree has resulted in a decline in the number of JMU undergraduates that previously progressed directly to a Master of Arts in Teaching, lowering the graduate population as a whole.
- With the initial disruptions to in-person instruction caused by COVID largely resolved, the university anticipates on-campus projections will remain strong.
 - JMU continues to explore opportunities to provide quality instruction through multiple modalities.
 - The institution is committed to providing the core of instruction through in-person means, and the university is not projecting substantial growth in its distance learning population, relative to the on-campus projections, over the next six years.

B4. Explain the implications of your enrollment strategy on your institution’s financials. Please consider impacts on both revenues (e.g., discounting, financial aid, net tuition revenue) and expenditures (e.g., costs to implement enrollment management strategies, costs of enrolling more students or students with different needs, cost-per-student impact of flat/decreased enrollment).

Overall enrollment projections are anticipated to stabilize over the next few years and, as a result, the revenue generated by student growth which the university has experienced in the past will stabilize. Concurrently, JMU anticipates a need for additional assistance to support incoming students, particularly as the institution is able to admit more Pell Grant students.

- Over the past several years, the university has monitored the demographic trends and their impact on institutional revenues, with a specific focus on addressing the decline of out-of-state students and resulting revenue implications.
 - Continuing to monitor demographic trends allows the university to anticipate potential changes in student populations and take proactive measures to adapt. It enables JMU to make informed decisions, allocate resources effectively, and maintain financial sustainability in a dynamic higher education landscape.

Beginning with AY 2022-23, JMU moved to the Common Application for undergraduate admissions. This change has increased the number of Pell Grant students applying to the university, as shown below.

Fall 2024 (Third Year of Common App)		
Residency	Number of Pell Admits	% Increase from Prior Year
In-State	2,407	7.26%
Out-of-State	1,450	1.26%
Total	3,857	4.92%

As part of the Free Application for Federal Student Aid (FAFSA) and associated Federal Methodology (FM) changes for AY 2024-25, the Expected Family Contribution (EFC) is being replaced by the Student Aid Index (SAI). FAFSA filing among high school seniors for the 2024-25 school year was down nationwide due to challenges with the process, and many of the FAFSA’s received by schools could not be administered during the recruitment period.

- The number of Pell eligible FAFSAs received from first-year admitted students in 2023-24 increased 26%. That did not translate into a 26% increase in Pell Grant offers as many of the FAFSA’s received for 2024-25 could not be processed due to problems with the applications.
- The SAI is expected to create more financial aid across the student body. For first-year students offered aid in the Preliminary Financial Aid awarding process (recruitment period):
 - 2023-24: 43.72% of those offered a federal Pell Grant had a \$0 EFC.
 - 2024-25: 62.25% of students offered a federal Pell Grant had an SAI equal to -\$1500 to \$0.
 - This data only includes first-year students admitted to JMU for the applicable school year. Additional data will be analyzed that includes all undergraduates enrolled during the 2024-25 school year.

In the future, JMU anticipates an increase in

- The number of Pell Grant students applying and being accepted to the university.
- The number of matriculating Pell Grant students based solely on changes to the FAFSA and the new SAI.
- The percentage of enrolled Pell Grant students who are at the neediest level due to the new SAI.

The institution continues to focus on external resources and institutional fundraising to increase opportunities for student financial aid and scholarship programs.

Section C: Strategic Deep Dive – Program Alignment & Performance Completion Outcomes

C1. What are your highest-priority completion outcomes targets, both overall and for particular student segments? Please include aspirational targets, realistic expectations, and qualitative targets and specify by when you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030).

JMU boasts one of the highest six-year graduation rates among the four-year public institutions in Virginia in which the 2017 cohort yielded an 81% six-year graduation rate.

- Over the past 10 years, JMU's six-year graduation rate ranged between 80% and 84%. The threshold of acceptability (80%) and aspirational goal (84%) is informed by national trends among public universities and JMU's peers, and regular review of JMU's graduation rates over the preceding five to ten years.
 - Because JMU aspires for all students to graduate, the university sets high targets for this metric.

JMU has traditionally served a population that has under-represented the diversity of the population.

- Over the past 10 years, the university has devoted substantial efforts to increasing the percentage of under-represented students, as evidenced by the Fact Pack.
- As JMU works to improve in this area, it is important to ensure equity in success for students who identify as Black, Indigenous, or Persons of Color (BIPOC). Therefore, JMU tracks success rates of BIPOC students on retention and graduation.
- JMU aspires for its BIPOC students to achieve success at the same rate as the overall population, thus setting the same threshold for acceptability (80%) and aspirational target (84%).

JMU is also focused on improving retention rates for multiple student segments, believing that retaining more students from their first to second year will lead to greater completion rates.

- In the upcoming years, the university is prioritizing retention and completion for multiple distinct student groups, including first-generation students, veterans, and BIPOC students, as detailed in C2.

C2. What specific strategies/actions are you planning to take to achieve those goals? How will you draw on successes/challenges from your prior completion outcome improvement strategies?

JMU's overall six-year graduation rate has remained relatively stable over the past twenty years, fluctuating between 80% and 84%. To support retaining all students through graduation, the institution provides an array of academic and student services.

- Student academic support programs like the Learning Centers, Learning Strategies Instruction, Madison Advising Peers, and University Advising are designed to help all students with enrollment, academic success, and retention at JMU. Examples include:
 - Learning Strategies Instruction: Provides support to students on developing important non-cognitive domains like time management and organization.
 - Madison Advising Peers: Offers peer-to-peer support to students to help manage enrollment processes, scheduling, degree mapping, and more.

Many of these programs assist students in developing a sense of community, fostering belonging and engagement on-campus, and connecting students with other student success resources. The university also provides focused programming to support under-represented students, as detailed below.

- JMU defines **first-generation** (first-gen) students as a student whose parent(s) or guardian(s) did not graduate from a four-year institution.
 - The [Reddix Center for First Generation Students](#) welcomes any student with limited prior exposure to or knowledge of the college experience. The center is a hub of information and activity designed to increase the sense of belonging for students by providing space and programming that create a shared connection to the university experience.
 - The center has also partnered with the University Career Center to offer additional sections of UNST 102, a course that provides a structured group format for exploring potential majors and careers, which are specifically marketed to Centennial Scholars, Valley Scholars, and the larger first-gen demographic.
 - Moving forward, the center plans to leverage successful existing programming, such as the Centennial Scholar Program and Valley Scholars, to expand programming for the larger first-gen student body.
- To create a community of support and service to all military-connected students, faculty, and staff, the university established JMU Valor.
 - [JMU Valor](#) provides resources, programming, and advocacy for active military, veterans, dependents, and military-connected faculty and staff to optimize resources on campus that will best serve them as they navigate JMU and surrounding communities.
 - In Fall 2023, JMU opened a dedicated on-campus office for staff from the Virginia Department of Veteran Services as well as Virginia Veterans and Family Services, which will provide veterans in the community with a local resource.
 - Valor's highly visible and accessible location in [The Union](#) will appeal to potential new students and the current student body by highlighting the visibility and use of resources available.
- Other under-represented students may include those who identify as Black, Indigenous, or Persons of Color (BIPOC).
 - Compared to the overall undergraduate population, students who identify as BIPOC are only slightly at risk for lower graduation rates with a maximum gap of 4.6%, which has narrowed to less than 3% in the last five years.

In addition to the [Early Student Success System](#) described in section B2, the university provides focused programming to support all categories of under-represented students. Future plans include:

- Grow the Centennial Scholars and Valley Scholars programs
 - Centennial Scholars and Valley Scholars are two cohort-based academic support and leadership programs that are specifically for historically under-represented and first-generation college students.
 - The Centennial Scholars program has been active on campus for almost 20 years, graduating 730+ students and sustaining a recent six-year graduation rate of 87% for the last three cohorts.
 - Valley Scholars identifies potential first-gen college students in the community and begins programming for them in the eighth grade. Those who graduate high school and meet certain academic and community service expectations are then eligible for tuition-free education at JMU.
- Provide and promote centers that provide services to historically under-represented students
 - The Center for Multicultural Student Services is home to 46 multicultural student organizations, including many focusing specifically on academics.

C3. How will you use existing/recently provided resources to execute those strategies? Will you be requesting incremental state resources? Please state the request and rationale and explicitly tie to Part I of your planning template.

JMU will use general fund resources received as part of the commonwealth's 2024-26 biennium budget to maintain student affordability, provide additional financial aid resources to those families most in need, and support JMU employees, as well as continuing development of Reengineering Madison.

The resources are reflected as a surplus on Tab 5 – Six-Year Pro Forma in Part I of the planning template, representing the state portion of salary/benefits increases and additional financial aid. The surplus also includes general fund resources provided for affordable access and unavoidable costs. These resources were allocated to cover inflationary costs for the university and continued funding for Reengineering Madison.

Inflationary costs include:

- Utilities
- Library materials
- Teacher education field experiences
- Advising costs
- Contractual software price increases
- Travel costs
- Other contractual obligations

Reengineering Madison is a multi-year, high-resource project that will change how JMU uses and thinks about data, which will allow better planning and alignment of resources supporting all students. As part of Reengineering Madison, the university will:

- Use shared data to improve student success outcomes
- Develop shared data systems as a university good
- Increase operational efficiency at all levels of the university
- Strengthen JMU's relationship and communication with all constituents

As further outlined in Section E, the university will request additional general fund resources to support the costs of the Virginia Military Survivors and Dependents Education Program and increase the number of nursing graduates in the "Fast Flex" program.

C4. Please explain how you monitor post-completion outcomes (e.g., employment rates, wage attainment, debt load, upward mobility). What data do you collect? What metrics are you monitoring most closely? What do the data reveal about your institution's greatest strengths and areas for improvement with respect to post-completion outcomes? Please include any relevant data/reports in the appendix or as a separate attachment, including any data that captures outcomes by school/department/program.

JMU regularly monitors a variety of post-completion outcomes as metrics to assess graduates' preparation for employment and life beyond the university.

- Since 2014, JMU's graduates have seen annual growth of wages outpace Virginia high school graduates.
 - Pell graduates earn roughly 90% of the median income of non-Pell graduates, but their income has risen at the same level as those who did not earn Pell and at a greater rate than Virginia high school graduates.
 - Over 70% of JMU lower-income graduates achieved upward mobility within five years of graduating. This percent has increased since 2010, illustrating that JMU is successfully preparing students, particularly low-income students, for well-paying jobs following their graduation.
- The university monitors student debt and default rates to help determine how well students manage debt both during and after graduating from JMU.
 - Annually, the Financial Aid Office (FAO) monitors the:
 - Average in-state student loan debt of spring graduating borrowers
 - Average out-of-state student loan debt of spring graduating borrowers
 - Cohort default rate
 - The FAO looks for trends in borrowing as it pertains to federal loans, private loans, and a combination of federal/private loan borrowing.
 - The office also monitors for fluctuations in the JMU cohort default rate (CDR).
 - Due to the pause on federal loan repayments for the past three years, default rates all across the country have significantly decreased. For example, JMU's FY 20 CDR is 0.0. The university's default prior to the repayment pause hasn't exceeded 2.3% since FY 12.
 - Student loan interest resumed Sept. 1, 2023, with payments due in October.
 - JMU contracted with a third-party servicer to conduct borrower outreach for students who had loans and left JMU during the repayment pause (2019-20, 2020-21, and 2022-23). The servicer will help on-board these borrowers into the federal student loan repayment system.
 - Because of the Department of Education's 12-month on-ramp for the resumption of loan repayment, borrowers who do not make payments during that period will not be subject to default, and all borrowers will be extended 12-months of forbearance during this period.
 - As referenced in the Fact Pack, JMU bachelor's degree earners from 2018 took on a median debt of \$24,200 in three years post-graduation.
 - This amount was approximately \$1,000 less than the median debt of bachelor's degree earners across other Virginia publics over the same time.

The University Career Center annually compiles data on post-graduation pursuits following the *NACE First Destinations* guidelines outlined by the National Association of Colleges and Employers (NACE).

- For 2022 graduates, 96.1% and 97.2% of bachelor's and advanced degree candidates, respectively, achieved a career outcome.
 - JMU consistently outpaces the outcomes rates published by NACE relative to overall outcomes, by region, by school size, and by Carnegie Classification.
- Of the 2022 graduates with bachelor's degrees, 74.6% went to work full time or part time or were active in the military, and 21.5% continued their education.

- The most popular areas for undergraduates working included Virginia; Washington, DC; and New York.
- Of those undergraduates working in Virginia, 44.5% were working in Northern Virginia, 24.4% were in Central Virginia, and 16.8% were working in the Shenandoah Valley.
- Education, health professions, business, management and marketing were the most popular continuing education programs pursued.
- For those without an outcome, 3.5% were still seeking employment or education, and the remaining 0.4% were not engaged or not seeking.
- Of the 2022 graduates with advanced degrees, 97.2% achieved a career outcome.
 - Of these, 93.3% were working full time or part time or were active in the military, and 3.9% pursued additional education.
 - Virginia and Washington, DC were the most popular areas for advanced degree candidates to work.
 - Of those working in Virginia, 39.7% worked in Northern Virginia, 34.1% worked in the Shenandoah Valley, and 15.6% worked in Central Virginia.
 - 2.8% of graduates without a career outcome were still seeking employment or education.
- A full report on post-graduation pursuits and individual reports by college and department are available online.
 - [Full Career Outcomes Report](#)
 - [College of Arts and Letters Career Outcomes](#)
 - [College of Business Career Outcomes](#)
 - [College of Education and University Studies Career Outcomes](#)
 - [College of Health and Behavioral Studies Career Outcomes](#)
 - [College of Integrated Science and Engineering Career Outcomes](#)
 - [College of Science and Mathematics Career Outcomes](#)
 - [College of Visual and Performing Arts Career Outcomes](#)

C5. What specific strategies/actions, including potential changes to your program portfolio or curriculum, are you planning to take to maximize the career readiness and job attainment of all students across programs of study, including increasing early career exposure for students (e.g., internships) during their time at your institution? How will you draw on successes/challenges from prior initiatives?

Increasing career readiness is a high priority for JMU. The Work-Based Learning Experience (WBLE) Task Force, established in Fall 2022, was charged to investigate the landscape of internships and other related, similarly-named high impact practices (HIPs) at the university—student teaching, clinical placement, experiential learning experience, applied learning experience, field experience, etc.—to understand how they are currently operating so that they can be consistently tracked, assessed, given appropriate support (resources and personnel), and expanded to strengthen their value and ensure all students have the opportunity to participate.

- In its second year, the task force:
 - Reviewed the ongoing work of the SCHEV SB1280 work group and made recommendations that highlight JMU experiences and concerns.
 - Assisted in preparing responses to additional requests from SCHEV and the Governor's office related to expanding WBLE opportunities.
 - Positioned itself to assist with submissions for funding that may be available from SCHEV and other entities in the future. In AY 2023-24, JMU was awarded a SCHEV Institutional Internship Data Collection Grant and a SCHEV Institutional Award for Student Internship Support Grant for 2024-25.
 - Continued to investigate and recommend ways to better centralize, formalize, document, and grow our WBLE operations.
 - Crafted a white paper for developing a comprehensive Work-based Learning Experience initiative at JMU that will create capacity for every enrolled student to have access to a WBLE.

C6. How do you intend to use existing/provided resources to execute those strategies? Will you be requesting incremental state resources? Please explicitly tie to Part I of your planning template.

JMU will continue the foundational work of the initial task force, comprised of administrators and faculty from Academic Affairs; Research, Economic Development, and Innovation; and Students Affairs. The university will also leverage its existing strengths, such as an actively involved University Career Center and academic departments with strong WBLE programs and connections to industry.

As work continues, anticipated resources needed to strengthen these efforts would include:

- *Compensation for work-based learning experience coordinators in each program.* This could be course releases through units.
- *More full-time staff in the University Career Center to help students and faculty identify opportunities, reach out to more employers, and help with auxiliary arrangements such as housing and transportation.* This funding is essential should completing internships/WBLEs be a state-mandated requirement for all students. This could be a full-time staff position.
- *Funds to subsidize unpaid summer or semester opportunities, housing, and transportation needs.* These could be internal grants to students, on the order of \$5,000-\$10,000 per student per opportunity.
- *Additional staff in the Registrar's Office to implement course attributes for WBLE.* JMU was awarded a SCHEV Innovative Internship Program Round 3 award for FY 24, totaling \$25,000. A similar amount likely would be needed in subsequent years.
- *Funds to upgrade the university's online career services management system subscription.* This would include purchase of the Experiences module and its tracking system to increase the functionality of the *Handshake* software.

C7. For which specific workforce needs is your institution best positioned to supply talent, based on regional, industry, or occupation alignment?

Historical alignment between JMU's degree programs and high-growth occupations in the Commonwealth of Virginia is noted in JMU's Fact Pack.

- The data indicate that, since 2016, approximately 34% of JMU graduates graduate with degrees aligned with occupations that are expected to see high growth in the next five years.
- Feedback from regional employers indicates workforce needs across all occupation domains, including those in which JMU is recognized for providing excellent preparation.
 - Regional industry strengths in food and beverage manufacturing and biopharmaceutical manufacturing create workforce talent demands across technology and computing, business operations, and financial specialist occupations.
 - Economic growth across these sectors also increases demand for healthcare, education, and social services in the region.
- Recent innovations at JMU will build on the noted positive historical alignment and provide additional workforce numbers to the commonwealth and the Shenandoah Valley region in the areas below.
 - *Healthcare Diagnosing or Treating Practitioners*. JMU is currently expanding its successful nursing programs, leading to a more rapid education and certification for nurses with BSNs and PhDs.
 - *Preschool, Elementary, Middle, Secondary, and Special Education Teachers*. JMU created a Virginia-wide "Grow-Your-Own" pathway for classroom assistants to complete their undergraduate BS education degree and be eligible for teaching licensure. Recruitment focuses on school districts in low-wealth areas of Virginia, and the program provides online instruction and covers tuition for qualified students.
 - *Computer Occupations*. JMU implemented an undergraduate Information Technology major, providing the knowledge and skills needed to meet the ever-evolving computer technology needs of business, government, healthcare, education, and other organizations.
- JMU's alignment with local and regional employer needs has been augmented by receipt of a grant from SCHEV.
 - The funded program will provide coordination among educational institutions, employers, and students in the region to expand regional internship opportunities in the Shenandoah Valley in support of the Virginia Talent + Opportunity Partnership (V-TOP) initiative.

C8. What specific strategies/actions is your institution planning to take to better align your program offerings or degree conferrals to current and projected workforce needs? Please provide a list of specific programs you intend to sunset or grow in the next 6 years to increase alignment, partnerships/initiatives you intend to launch or deepen, etc. If you intend to launch any new programs, please explain why your institution is particularly well-suited to succeed in that area.

In the next six years, JMU anticipates undertaking the curriculum actions listed below in order to best offer students degrees that are relevant, innovative, and in demand to meet the existing and anticipated needs of the commonwealth. These modifications and programs are built on JMU's strong faculty expertise and successful current academic offerings.

In some areas, as noted below, JMU currently offers broad degree programs that successfully incorporate the discipline's concepts, academic offerings, and faculty. The institution proposes creating stand-alone programs for some more highly-targeted degrees to make their relevance more apparent.

- JMU has a significant history of offering academic programs in the **health and behavioral studies** arena that led to successful careers for graduates while meeting the growing physical and mental healthcare needs of the commonwealth. Anticipated proposals include:
 - Applied Behavioral Analysis (graduate)¹
 - Health Analytics (undergraduate)¹
 - Integrated Biomedical Sciences (graduate)¹
- Innovative academics that cross disciplinary lines are what JMU is known for, from its novel degree programs, like Integrated Science and Technology, to the development of X-Labs, JMU's innovative space and ecosystem for shared learning. JMU's successful record of developing **interdisciplinary academic programs in both the sciences and the humanities** provides a solid foundation to establish new degrees that leverage the best of the institution's strong, existing programs. At the same time, these new degrees are designed to address anticipated workplace needs in Virginia.
 - Civic Engagement (undergraduate)²
 - Data Science (undergraduate and graduate)¹
 - Environmental Earth Science (undergraduate)¹
 - Leadership and Data Analytics (graduate)¹
- Students interested in the arts and humanities complete programs that merge high-level artistic training with entrepreneurial action so that students are ready for the professional world. Existing **fine arts and communications programs** each boast an impressive employment or continuing education rate of 95% post graduation. The programs listed below are current popular majors that the university proposes become stand-alone degree programs to allow for enhanced curriculum design that will better align with accreditation requirements and more adeptly meet employer needs.
 - Dance (undergraduate)²
 - Graphic Design and Architectural Design (undergraduate)²
 - Industrial Design, BFA (undergraduate)²
 - Musical Theatre (undergraduate)²

¹ Proposing a new degree program

² Proposing a new certificate

- JMU has a strong history of serving the commonwealth and preparing future teachers through its **education programs**. The institution has developed responsive and creative program options for beginning and experienced educators and education administrators. JMU is continuing its commitment to addressing the state's teacher shortage by preparing administrators who can lead and mentor new teachers to help prevent attrition.
 - Educational Leadership (Graduate, current concentration)¹
 - Teacher Leadership (Graduate, current concentration)¹
 - Learning Design and Technology (Graduate, current concentration)¹
 - Transition Services in Special Education and Self-Determination (Graduate, current concentration)¹

Section D: Strategic Deep Dive – Financial Effectiveness & Sustainability

D1. What specific strategies/actions do you plan to take to improve affordability moving forward across your overall student body and priority subpopulations, and what is the expected impact? Please account for a broad range of factors including the full cost of attendance, net price, time to degree, debt load, etc.

To increase access to higher education for Virginia students and families, JMU strives to improve affordability through multi-faceted plans that increase funding for low- and middle-income in-state and out-of-state students.

- JMU has made the changes required by federal regulation changes regarding the creation of housing and food allowances and licensure exam costs in the cost of attendance (COA), to begin with the 2023-24 award.
 - The institution continues to use a weighted average when it comes to developing the tuition/fee components of the COA.
 - The consumer price index continues to be a factor as it pertains to setting many other non-direct allowances in the COA.

Goals to increase funding for low- and middle-income students were met in 2021-22 when JMU provided state and/or university grants to in-state undergraduates who met the FAFSA Priority Filing Date and had an Expected Family Contribution (EFC) equal to 50% of the Cost of Attendance (COA).

- The EFC (and subsequent Student Aid Index that replaces the EFC in 2024-25) will be increased each year as needed to ensure it continues to equal 50% of the COA.
- JMU offered up to 42% in state or university grants to qualifying students that equal 50% of their remaining need for the 2024-25 school year. Additional increases will be made in future years, as funding allows, until the 50% measure is met.
- JMU extended the FAFSA Priority Filing deadline beyond the current March 1 date. Future increases in state and university grant funding will be applied toward extending that date, which will increase the number of low- and middle-income students considered for this type of funding support.
- The Centennial Scholars program provides funding to pay 100% of tuition/fees and housing/food for approximately 150 Pell Grant students on an annual basis.
- The Valley Scholars Program provides funding to pay 100% of tuition/fees for approximately 80 students.
- JMU received two Pell Initiative Grants through the Commonwealth of Virginia for 2024-25, enabling the university to add an additional 56 Pell Grant students.
- A new four-year scholarship—the Building the Future Scholarship—begins in 2024-25 and will provide a \$6,000 award to 50 students who are also receiving Federal Pell Grant and state/university grants,

As a public institution with a relatively small scholarship endowment, JMU's options are more limited pertaining to out-of-state students due to the lack of direct state financial aid support for this population.

- While JMU offers traditional scholarships to this population of students (i.e., from endowments), the institution is making strides in this area using unfunded scholarships and waivers.
 - The Madison Recognition Award is a \$9,500 award offered to qualifying first-year, out-of-state undergraduate students. The award can be renewed for an additional three years, making it a four-year award.
 - In 2024-25, JMU offered 229% more Madison Recognition Awards than were offered three years ago, in 2021-22 (579 compared to 176).
 - This Two-Year Room Award pays 100% of a qualifying first-year, out-of-state student's housing charges while living on campus. This covers housing for the first two years and is not refundable should the student decide to live off campus in year two.

- In 2024-25, JMU offered 330% more Two-Year Room Awards than were offered in 2021-22 (800 compared to 186).

The Division of University Advancement continues to make fundraising for low-income students a high priority, allowing JMU to provide more grant and scholarship dollars to lower the net price for students and reduce the debt they will incur.

D2. Please explain the rationale behind your full pricing (i.e. published tuition & fees, including mandatory non-E&G fees) and financial aid award strategy (i.e. net tuition revenue projections). What data informed your assessment of T&F increase feasibility (e.g., market comparisons, student capacity to pay) and estimates of discounts/ waivers/unfunded scholarships? What informed your strategy around financial aid awards, merit and need-based, particularly for various student segments by income level and academic preparation?

The university's proposed 2024-26 biennium tuition and fees are based on planning assumptions that include enrollment projections, the higher education market, and projected costs of university investments.

- The most recent market data available for both in-state and out-of-state student costs were used for comparison purposes.
- Of the 15 Virginia public institutions of higher education:
 - JMU's FY 23-24 in-state tuition is lower than all but four schools.
 - JMU's FY 23-24 combined in-state tuition, E&G fees, and mandatory non-E&G fees are lower than all but five schools.
- JMU continues to diversify and enhance revenue streams. Recent efforts include:
 - Expanding online programs in targeted areas.
 - Using consulting services to identify new areas of opportunities for program offerings/expansion.
 - Providing professional certificate offerings aligned with workforce development needs.

D3. What do you expect to be the impact of your pricing/discounting approach on enrollment numbers/mix (if any) and net tuition revenue moving forward and why?

JMU developed a new strategic plan for awarding recruitment scholarships to coincide with JMU's move to the Common Application for undergraduate admissions.

- The institution is offering more scholarships, waivers, and unfunded scholarships to new students than ever before.
 - With the implementation of the Madison Award for Academic Excellence, Madison Recognition Awards, and Two-Year Room Awards (detailed in D1), JMU made 224% more offers from these three programs in 2024-25 than in 2021-22 (1,847 compared with 570).
 - Each scholarship program has a yield goal, which is evaluated on an annual basis to determine if changes need to be made for the next awarding cycle.

The six-year plan does not provide additional financial aid to students beyond adjustments for increases in tuition and fees and state mandates associated with the Virginia Military Survivors and Dependents Education Program (VMSDEP).

D4. Reflect on the categories/subcategories of cost that have recently experienced the most significant increases on an absolute or per-student basis. What have been the primary drivers of those increases? Please be specific and include supporting data.

Below is a listing of cost categories and subcategories with the most significant increases for the 10-year timeframe.

General Academic (10110)

General academic instruction has had an annual growth rate or compound annual growth rate (CAGR) of 4.5% (PS 4.2% / NPS 6.5%), for a 55.5% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Strategic Initiatives and Enrollment Growth (35%; includes PS+NPS)
 - Established the College of Integrated Science and Engineering (launched 2012).
 - Established the College of Health and Behavioral Studies (launched 2012).
 - Established the Hart School of Hospitality, Sports and Recreation Management (launched 2015).
 - Expanded the College of Business (building completed 2020).
 - Expanded College of Education undergraduate degree offerings and moved from a five-year degree to a four-year degree (effective 2019).
 - Expanded Biology and Biosciences building (completed 2012).
- Average annual salary increases provided per state guidelines plus compression/inversion adjustments to remain competitive and retain faculty (PS 3-3.5%) (79%).
- Facility updates and renovations (NPS) (6%)
 - Renovations to several academic facilities that were funded with university reallocations to afford necessary modifications to address enrollment growth constraints and strategic growth initiatives in specific areas.
 - College of Education (Memorial Hall)
 - College of Integrated Science and Engineering (EnGeo Building)
 - Computer Science (EnGeo Building, Tech Talent)
 - Hart School of Hospitality, Sports and Recreation Management (Godwin Hall)
 - Nursing and Health Disciplines (Health and Behavioral Studies)
 - X-Labs (Lakeview Hall)
- Operating and research expenditures (NPS) (15%)
 - Equipment and furniture replacement costs not covered by Equipment Trust Fund (ETF).
 - Operating budget expenditures associated with enrollment growth and inflationary costs.
 - Continued investments in research and professional development opportunities for faculty.
 - Implementation of supplemental tuition programs (differential tuition) in specific disciplines to better align tuition revenues with degree costs and remain competitive in highly compensated disciplines.

Libraries (10410)

JMU Libraries has had an annual growth rate or CAGR of 4.3%, for a 53% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Increase salaries and fringe benefits (PS; 52%).
- Increases in NPS

- VIVA Program: JMU serves as procurement for all higher education institutions – increase \$3.1 million (37%).
- Library Materials: Increase of \$745,827 (9% of total change in this category).

Academic Administration, Personnel Development, and Course and Curriculum Development (10460)

Academic administration, personnel development, and course and curriculum development has had an annual growth rate or CAGR of 5% (PS 4.1% / NPS n/a), for a 63.4% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Infrastructure/Administrative support of enrollment increases and research (95%)
 - Enrollment growth: 2013 = 19,713 to 2022 = 21,822; 10.7%
- Strategic enrollment growth in high demand fields (38%)
 - Engineering, Health Care, Business, Education
- Research infrastructure (5%)
 - Office of Research Integrity
- Strategic Initiatives and Accreditation Support (27%)
 - Quality Enhancement Plan (The Madison Collaborative)
 - Honors College and The Graduate School (Carnegie Classification)
 - Center for Assessment and Research and the School of Strategic Leadership Studies (Graduate Programs of Distinction)
- Student & Faculty Success (22%)
 - Center for Faculty Innovation
 - Center for Global Engagement
 - Library Information Technology and Learning Systems

Counseling (10530)

This category encompasses academic and student services operational areas, including the Counseling Center, disability services, and advising. As the university experienced a notable increase in the demand for mental health and counseling services, JMU has invested significantly in student success and student mental health to ensure that students have the necessary guidance to achieve their educational and career goals.

Counseling has had an annual growth rate or CAGR of 11.0%, for a 185% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Investments included:
 - Office of Disability Services (7.4%)
 - Counseling Center (36%)
 - Entered into a system-wide agreement for virtual health and well-being resources in partnership with VCU and Virginia Tech.
 - University Advising & Pre-Professional Health Advising (44%)
 - Student Success Center (7.9%)
 - Created the Student Success Center in 2014

Fiscal (10620)

Fiscal operations have had an annual growth rate or CAGR of 2.2%, for a 24.4% increase over a 10-year timeframe.

Expenditure growth from FY 12 to FY 22 was mainly driven by the need to enhance financial stewardship of resources and ensure compliance with federal and state accounting standards, regulations, and reporting practices.

This growth encompassed various areas, including salary and fringe benefit increases.

- New areas of investment included:
 - Cash & Investments (24.1%)
 - PCI Compliance (3.2%)
- Other areas of finance and budget investment over the 10-year period:
 - Audit & Management Services, Budget Management, Payroll Services, Space Management, and University Business Office (70%)

General Administrative Services (10630)

General Administrative Services shows an annual growth rate or CAGR of 22.2%, which is inflated due to the flexibility of financial policy during the COVID pandemic.

The general expense data is skewed and showed a significant increase and credit expense (recovery from auxiliary) for indirect costs that the institution was not required to charge during FY 20-22 Covid pandemic years. In addition, the university has invested in information technology, human resources, federal compliance, data stewardship, and data analytics.

This growth encompassed various areas, including salary and fringe benefit increases.

- Information Technology (17.5%)
 - Technology expenditure growth was driven by the need to enhance teaching and learning, streamline administrative processes, ensure cybersecurity, and improve student support services.
- Human Resources (6.19%)
- Planning Analytics, Institutional Research (2.33%)
- Title IX Compliance (1.1%)

Logistical Services (10640)

Logistical Services has had an annual growth rate or CAGR of 3.3%, for a 39% increase over a 10-year timeframe.

The change includes university investments in staffing for risk management compliance as well as student and employee safety.

This growth encompassed various areas, including salary and fringe benefits increases.

- Risk Management (32%)
 - Reported in program 10610 in FY 12 (\$401,300).
 - Shown increase of \$918,291.
 - Actual increase is \$516,991 due to subprogram change.
- Campus Police (50%)
 - Resources were allocated for the Police Department to ensure the safety and security of the campus community while demonstrating a commitment to creating a safe environment for students, faculty, staff, and visitors.
- Procurement (13%)

Public Relations (10650)

Public Relations operations have had an annual growth rate or CAGR 6.0%, for a 78.5% increase over a 10-year timeframe.

Expenditure growth from FY 12 to FY 22 was mainly driven by implementation and completion of the university's largest ever fundraising campaign, [Unleashed](#). At the culmination of eight-years, over 63,000 donors contributed a record-breaking \$251 million—\$51 million over the original goal—to fund scholarships, facilities, and various campus programs at JMU.

Other increases were related to JMU's new classification as R2 Doctoral University with high research activity through the Carnegie Commission. The division of Research, Economic Development, and Innovation made investments in infrastructure and staffing to better enhance and support the high-quality student-centered undergraduate education featuring a strong research, scholarship, and creative activities culture that JMU offers.

This growth encompassed various areas, including salary and fringe benefit increases.

- University Advancement
 - Principal Giving (8%)
 - Strategic Gifts (7%)
 - Advancement Planning Operations (7%)
 - Enrollment Marketing (6%)
- Academic Affairs
 - Research and Scholarship (19%)

Building Repair (10730)

Building Repair has had an annual growth rate or CAGR of 2.0%, for a 22.3% increase over a 10-year timeframe.

This growth encompassed various areas, including salary and fringe benefits increases over the period.

- Landscaping (58.3%)
 - The increase includes both additional FTE positions and additional operational costs attributed to the addition of new facilities on campus.

Utilities (10740)

Utilities has had annual growth rate or CAGR of 3.0%, for a 34% increase over a 10-year timeframe.

- The majority of the utility cost increases are attributed to new and renovated facility capital projects from FY 12 to FY 22 which include the following buildings:
 - Bioscience Building
 - College of Health and Behavioral Studies
 - DHub Academic Storage (a 700,000+ building square footage increase)
 - Hartman Hall (College of Business Learning Complex)
 - Holland Yates Hall (formerly Madison Hall)
 - Student Success Center

D5. What specific strategies/actions do you plan to take to contain/reduce key costs and improve fiscal health going forward while improving student outcomes? What are your objectives and what have been your results to date of any already-launched initiatives? What is the expected impact and timeframe of these strategies? Include any short-term costs that would need to be incurred to implement the strategies.

JMU is determined to continue improving student outcomes while taking steps to reduce costs and improve the institution's fiscal health. The institution is making significant investments in resources as well as taking opportunities to reallocate resources and streamline processes as much as possible.

- Reengineering Madison: This seven-year initiative involves implementing significant technology platforms such as an enterprise CRM (Customer Relationship Management) and new data solutions for managing and visualizing JMU's data.
 - Goals for Reengineering Madison include:
 - Improving student success outcomes, such as increasing retention and graduation rates across all demographics along with increasing academic achievement and tracking soft skill development.
 - Developing shared data systems as a university good.
 - Increasing operational efficiency at all levels of the university.
 - Strengthening JMU's relationship and communications with all constituents.

Multiple areas across the institution have developed efficiencies to help constrain costs.

- Facilities Management (FM)
 - *Bluestone Chiller Loop*: Seven buildings will be added together on a loop which will provide better load control and save energy costs due to chiller efficiency.
 - *East Campus Power Plant Project*: The university is in the design process to expand the East Campus Power Plant to provide chilled water and steam to additional buildings including the East Campus Dining Hall, Atlantic Union Bank Center, and Shenandoah Hall. This project will result in cost savings through decreased natural gas purchase costs and operational efficiencies through the use of centralized equipment.
 - *Demand Response*: FM has participated in the Virginia Energy Emergency Demand Response & Energy Efficiency programs since 2017, which helps reduce the load on the electric grid during peak demand times. Participation in these programs has resulted in payments to the university totaling over \$387,000 since joining the program.
 - *LED Lighting*: Over the last 10 years, FM has installed over 10,000 LED lamps across campus that have resulted in an estimated cumulative energy savings of over \$1.3 million. These projects included replacing over 360 pole lights on East Campus and converting the Grace Street and Champions Drive Parking Decks to high efficiency LED fixtures.
 - *Utility Submetering*: FM is actively utilizing data from the recently installed utility submeters across campus to better understand building energy performance and identify opportunities to increase their efficiency. This data was instrumental in identifying methods for decreasing the campus utility budget by \$3 million for the upcoming year.
- Academic Affairs (AA)
 - *Faculty Recruiting Partnerships and Creative Hiring Strategies*: Academic Affairs continue to use novel and established programs, partnerships, and creative hiring strategies to recruit post-doctoral and new PhD faculty to JMU. The university is developing reliable recruiting pipelines to create candidate pools that are highly qualified, talented, and represent a diverse range of disciplines.
 - *Leveraging Course Load Efficiencies*: The division established an oversight group to manage large classroom scheduling, which continues to explore both renovation opportunities and better space utilization techniques to identify cost reduction strategies that larger classrooms provide.

- *Open Educational Resources (OER)*: Leveraging custom-made, high-quality, free or low-cost textbooks helps to contain the costs of a JMU education while opening possibilities for faculty to improve student engagement and learning outcomes. Through efforts beginning in 2022, more than 10% of courses were recently listed as low- or no-cost, and JMU has achieved over \$2 million in student cost avoidance.
- *Retirement Incentive Programs*: These programs provide a mutually beneficial opportunity for continuously employed senior faculty to retire over time (phased retirement) or early (buyout), creating options for the college/department to re-purpose/reallocate the position at a lower cost.
- *Strategic Allocation of Faculty Resources*: All vacant full-time instructional positions are reviewed by the Office of the Provost and re-allocated based on data-informed enrollment growth demands and strategic interests of the university.
- **Research, Economic Development, and Innovation (REDI)**
 - *Research Centers Strategy*: Research, Economic Development, and Innovation identified distinctive areas of research so that they could be supported in a coordinated way, avoiding duplication of research infrastructure across colleges. This approach enhances collaboration and an interdisciplinary focus while creating world-renowned expertise and recognition in the field.

D6. Provide information about your institution's highest-priority E&G capital projects and requests (including new construction as well as renovations) over the six-year plan period and how they align to your enrollment trajectory, student outcomes improvement plans, or other strategic priorities. Please also reflect on your current E&G facilities utilization (especially classrooms, labs and student service areas), particularly in light of any recent trends that might impact space needs (e.g., enrollment trends, shifting learning modalities). How has square footage per student changed over time and why? What efforts have you made to reassess and further optimize the use of your existing facilities, and what has been the impact of those efforts to date? What do you intend to do in the next six years to increase utilization?

JMU is committed to maximizing the efficiency of its classrooms, labs, and other spaces to effectively use resources.

- To assist in optimizing space utilization, the institution is:
 - Integrating classroom and class lab scheduling into the Event Management System (EMS) to capture ongoing academic use of spaces beyond regular class hours. In the fall, JMU will pilot the EMS for scheduling to exceed current utilization standards and better accommodate student scheduling.
 - Continuing efforts to maximize the effectiveness of academic scheduling through a partnership between Academic Resource and Space Management staff. They actively engage with the deans and academic course schedulers to thoroughly review SCHEV utilization standards in the post-pandemic landscape. Additionally, staff generate bi-annual utilization reports to ensure classrooms and class labs are being used with maximum efficiency and effectiveness.
 - Surveying JMU students during University Assessment Day regarding the quality and effectiveness of classrooms and class labs as an integral part of their learning experience.

The six-year capital outlay plan primarily emphasizes renovations and upgrades to existing building systems and infrastructure with the goals of creating spaces that are in alignment with the university's strategic plan while meeting the technology, health, and safety needs of students, faculty, and staff. However, there is a pressing need to expand space specifically for disciplines within the College of Health and Behavioral Studies, JMU's largest college.

The university is very appreciative of the commonwealth's support and appropriated funding for the Carrier Library Renovation and Expansion furnishings and equipment, East Campus Infrastructure Phase 3 project, planning for Johnston Hall Renovation, and planning for the College of Health and Behavioral Studies Expansion.

The following projects are included in the university's six-year capital outlay plan. Their continued advancement in the phased processes of planning and construction remains a top E&G funding priority for the university, listed in priority order.

- Johnston Hall Renovation and Addition
 - This project involves 29,700 gsf (18,700 in renovations and 11,000 in additions) to a building that was originally constructed in 1929 and converted into academic space in early 1970.
 - Significant modifications are required to meet program requirements, building code standards, and ADA accessibility requirements.
 - A feasibility study in 2023 determined that an 11,000 gross square foot addition was needed to house the Center for Assessment and Research Studies (CARS), which allows for a better collaboration among the Department of Graduate Psychology, which is currently located in Johnston, and other programs.
 - After renovation, the space will continue to provide faculty offices, labs, and multiuse instructional spaces for Graduate Psychology and CARS that will better serve the students, faculty, and staff using the academic building.

- If possible, timing of the project will provide synergies with the renovation of Spotswood Hall, which is taking place directly across the street in Summer 2025. Those opportunities include shared laydown space; singular closing of the shared alley between the two, providing a smaller window of inconvenience and disruption to students/faculty/staff who travel through and occupy nearby spaces; and the potential of combining heating/cooling production facilities to create shared resources resulting in significant energy savings for outyears.
 - Total planning and construction project budget is \$26,820,000.
- College of Health and Behavioral Studies Expansion
 - The original 147,033 gsf College of Health and Behavioral Studies building was constructed in 2016 and did not fully meet the square footage requirements determined by college leadership.
 - As a result, some departments, including the Institute for Innovation in Health and Human Services and Psychology, are located in other buildings on campus. The proposed addition will relocate the scattered academic departmental entities into a new professional academic facility.
 - As degree requirements and demand for health professionals continue to increase, especially post-COVID, simulation class lab space is in higher demand to enrich the learning and readiness of nursing students for immediate impact in healthcare settings.
 - In particular, Nursing, Physician Assistant Studies, and other medical-related programs are growing rapidly.
 - JMU has maximized the lab space within the original building.
 - The addition is a five-story, 120,000 gsf project added to the southeast of the existing Health and Behavioral Studies building.
 - Program spaces in the project include community-oriented, state-of-the-art clinic space, along with administrative support spaces.
 - Total planning and construction project budget is \$109,630,000.

Section E: Budget Requests

E1. Provide additional information for any budget requests in Part I of your planning template that are not described elsewhere in your narrative.

The JMU E&G budget is constituted 75% by personnel costs. JMU continually reviews existing positions and reallocates those that are vacated, as well as carefully considering potential positions, to ensure staffing needs are met within current operational funding. Required adjustments to salary and benefits makes it difficult to reduce personnel costs while maintaining the experienced and talented employees that are essential to continue to meet the high standards for student success and satisfaction that the university has demonstrated and continually strives to improve upon.

As a result, the institution has focused its reduction efforts primarily on the remaining 25% of the budget related to non-personnel cost to identify operational efficiencies, especially within facilities and the use of technology. Part 1 of the plan includes a \$1.0 million annual reallocation of resources FY 2026.

Nongeneral Fund Support (partial list)

1. Salary and Benefit Increases for Existing Employees

Increase Institutional Instructional Faculty Salaries, Administrative and Professional Faculty Salaries and Classified Salaries. The university is very appreciative of the commonwealth's support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-2025: \$3,593,937 2025-26: \$7,294,133

Increase Adjunct Faculty & Graduate Assistantships Pay. As competition for adjunct faculty increases, compensation continues to be a challenge for the university. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-25: \$154,689 2025-26: \$314,019

Health Insurance Premiums. Medical insurance increased 6.3% percent for fiscal year 2024-25 and anticipated to remain flat in FY 2025-26

Nongeneral Fund Support

2024-25: \$1,517,741 2025-26: \$1,517,741

Faculty Promotions and Classified In-Band Adjustments: Recognize faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks helps us to attract and retain high-quality professors. In response to changes in the classified workforce and labor market, JMU plans to provide additional resources for employee retention, changes in job duties, internal alignment and salary compression.

Nongeneral Fund Support

2024-25: \$0 2025-26: \$1,050,000

Reallocations

2024-25: \$921,000 2025-26: \$921,000

2. Inflationary Non-Personnel Cost Increases

Inflation has had a significant financial effect on the university's budget development over previous years. With significant resources being used for required costs such as increases in salary and benefits, minimum wage adjustments, and VMSDEP waivers, the university has become more efficient and prioritizes its needs to reallocate funding for unchangeable priorities and inflationary costs.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$362,120

Reallocations

2024-25: \$0

2025-26: \$1,000,000

4. New and Expanded Academic Programs

Expansion of Physician Assistant Program: In 2024 we increased our cohort size from 32 to 36 with no additional funding from outside of the institution. We plan to increase our cohort size to 48 in Fall 2028, an increase of 50% compared to current cohort size. Additional funding will be needed for lab space, faculty, and expenses related to clinical rotations.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$150,000

Reallocations

2024-25: \$201,787 (1.0 FTE)

2025-26: \$201,787 (1.0 FTE)

Supporting Growth of the Computer Science and Information Technology Majors: This initiative supports the build-out of the Information Technology major and the continued growth of the Computer Science major in response to both the demands of JMU students and the needs of employers across the commonwealth.

- Interest in Computer Science continues to remain extremely high, and the IT major is growing according to predictions.
- The IT major has been supported with reallocated funds from programs within the College of Integrated Science and Engineering that are also seeing high student interest, such as Engineering and Intelligence Analysis.

Nongeneral Fund Support

2024-25: \$0 (0.00 FTE)

2025-26: \$573,186 (5.96 FTE)

Reallocations

2024-25: \$379,080 (3.00 FTE)

2025-26: \$379,080 (3.00 FTE)

Meet the Commonwealth's Mental Health Needs: JMU will maintain and grow its existing Counseling and Supervision (K-12 School Counselors) PhD program and increase the number of mental health professionals and clinicians produced to support community wellness and meet the needs of the commonwealth. James Madison University's Graduate Psychology program serves a critical commonwealth need by training K-12 school counselors and mental health professionals (psychologists, counselors, service providers, etc.).

JMU can continue to serve the commonwealth by producing well-qualified counselor and other mental health professionals in two distinct ways:

1. *Maintain and Grow JMU's Ph.D. program in Counseling and Supervision (K-12 School Counselors)*
 - While counselors can largely practice with only a master's degrees, the faculty who teach and train master's-level counseling students must have doctoral degrees.
 - Producing more individuals who are qualified to teach future counselors will help build up the pipeline of K-12 school counselors.

- JMU offers a doctorate degree in Counseling and Supervision through an online and in-person hybrid model that allows students to enroll without leaving their jobs.
 - The program is currently operating at its maximum capacity of 20 students.
 - Accreditation standards changed in 2024 for doctoral-level counseling education to require more program credit hours while maintaining required faculty-to-student ratios.
 - By hiring an additional faculty member, JMU can maintain the current size of the program (20 graduates per year), meet the new accreditation standards, and allow for modest growth in the program cohort size and graduates who will go on to serve the K-12 community in this capacity.
- 2. *Increase the number of Mental Health Professionals and Clinicians in support of community wellness and meeting the needs of the commonwealth*
 - As part of requirements for its Clinical and School Psychology program, JMU doctoral students provide mental health services to individuals (children, adolescents, and adults) and couples in the local community through the JMU Counseling and Psychological Services (CAPS) clinic.
 - The clinic offers affordable outpatient mental health services including counseling, testing, and psychological assessment to the JMU community while providing graduate students in psychology experience in counseling and psychological assessment.
 - Current wait times for an appointment at the clinic are about one year.
 - Funding for a clinical faculty member would allow the clinic to conduct an additional 120 psychological and learning assessments per year and reduce waiting times.
 - Additional funding is also requested to provide assistantships to students in the program.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$615,786 (5.0 FTE)

Research Initiatives: Supporting the Growth of Research, Economic Development and Innovation: This initiative supports the infrastructure for research efforts in support of the university's current Carnegie designation of an R-2 institution.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$0 (0 FTE)

Reallocations

2024-25: \$230,722 (2.00 FTE)

2025-26: \$230,722 (2.00 FTE)

5. Other Academic and Student Support Strategies and Initiatives

Early Student Success System: The Early Student Success System (ESSS) is designed to improve retention and close the current equity gap affecting under-represented students.

- The system prioritizes a positive, proactive, and asset-based framework which understands that student success is not something done to students but is a collaborative goal.
- The ESSS will combine current and new data insights with the university's new CRM platform to identify students not meeting their goals and connect them with people, offices, and resources on campus so that they are empowered and more likely to reach their goals.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$244,389 (2 FTE)

Reallocations

2024-25: \$329,412 (3.00 FTE)

2025-26: \$329,412 (3.00 FTE)

Reengineering Madison. Annual technology cost resources will be required for the university's digital transformation project. Funding to address on-going costs will be needed during the multiple phases of project implementation. This project will provide university-wide service delivery and web-based technology integration.

- The resulting system will help to improve retention and graduation rates across all demographics, along with increasing academic achievement and tracking soft skill development.
- The modernization of JMU's technology will demonstrate improvements to the user experience along with improved usability metrics.
- Data in the new system will facilitate increased use of information for decision-making by increasing the quantity of universally understood and trusted metrics.

Nongeneral Fund Request Support

2024-25: \$0	2025-26: \$993,234
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Reallocations

2024-25: \$88,879	2025-26: \$88,879
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Additional Academic/Student Initiatives. Provide resources in support of academic support of libraries, education technologies, and learning centers. Resource expansion in the area of student support services will provide educational support for the Office of Disability Services and student well-being initiatives.

Nongeneral Fund Request Support

2024-25: \$0	2025-26: \$0
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Reallocations

2024-25: \$1,098,255 (6 FTE)	2025-26: \$1,098,255 (6 FTE)
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6. Other Non-academic Strategies & Initiatives

Information Technology Security & Institutional Operational Initiatives. Provide resources to support and expand information technology, focusing on security, compliance, and operational personnel investments.

Nongeneral Fund Request Support

2024-25: \$0	2025-26: \$0
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Reallocations

2024-25: \$841,344 (4 FTE)	2025-26: \$841,344 (4 FTE)
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General Fund Requests

1. Support Growth for the Virginia Military Survivors and Dependents Education Program

JMU requests funding to address the increased cost of funding the Virginia Military Survivors and Dependents Education Program (VMSDEP) waivers as the number of participants grows.

- This critically important program has experienced significant growth in recent years and is expected to continue growing. The requested amount reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less the State Council of Higher Education of Virginia's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the commonwealth to bolster the long-term sustainability of this crucial program.

General Fund Request

2024-25: \$0	2025-26: \$4,904,791
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2. Produce More Nurses through New “Fast Flex” BSN Program

JMU requests funding to increase the number of nursing graduates by launching a new non-traditional Bachelor of Science in Nursing (BSN) program while maintaining the existing traditional four-year BSN program.

- JMU is the top producer of nurses in the state among public four-year colleges and universities and produced nearly 300 nurses in 2022-23.
 - However, the program only has capacity to accept approximately half of qualified applicants due, in large part, to the common challenges associated with educating nursing students: a shortage of nursing faculty, competition for clinical placements, and space constraints in on-campus facilities.
- The commonwealth is expected to face an average shortfall of 412 nurses a year over the coming decade, and JMU understands the need for an innovative, fast-moving degree option to develop more nurses.
- The new BSN program would graduate 30 nurses per year and place nurses in the field more quickly by allowing students to complete their core nursing course work in one calendar year.
 - Classes will be delivered in a hybrid of on-campus and online formats while clinical placements will take place on nights and weekends.
 - The program will be open to those who have earned 36 credit hours, completed certain prerequisite courses, and met other criteria.
- In addition to traditional students, it is anticipated the program will appeal to transfer students and practicing nurses with a two-year degree who would like to earn a BSN.
- Requested resources to launch this program will cover expenses related to program faculty, support staff, supplies, technology needs, and student stipends to the program.
 - JMU’s ability to operate this program long-term and to its full potential is largely dependent on the approval of the expansion of the College of Health and Behavioral Studies proposed in the university’s 2024-26 capital budget proposal. The expansion would provide laboratory space vital to the growth of the health programs.
 - The program may also be contingent upon curriculum approval from SCHEV.

General Fund Request

2024-25: \$997,816 (14.69 FTE) 2025-26 \$997,816 (14.69 FTE)

Section F: Economic Development Annual Report

F1. Provide a link to any report your institution has produced about its economic development contributions. You may also share it in the appendix or as an attachment.

- [JMU Economic Development Task Force Report \(2022\)](#)

Section G: Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought

G1. Provide a copy of any policy or reports your institution has produced and provide information about annual training or orientation related to this topic.

James Madison University is committed to protecting and promoting the freedom of speech guaranteed by the United States Constitution as well as the Constitution of Virginia and applicable Virginia law. JMU's mission clearly states the institutional intent to prepare students to "be educated and enlightened citizens," and open debate of ideas and civil discourse are foundational to that preparation.

The university strives to uphold a welcoming and inclusive campus environment for all students, staff, faculty, and visitors so that every person can "reach their full potential," as stated in the commonwealth's *Guiding Principles for Virginia Education*. The institution also makes members of the JMU and surrounding communities aware of the concomitant individual responsibilities that freedom of speech carries.

JMU regularly demonstrates its strong commitment to free speech and freedom of expression and inquiry by encouraging the exploration of diverse ideas and educating students, staff, and faculty on their rights and responsibilities as citizens. A list of various programs and initiatives related to the topic is provided below.

- VA Code §23.1-401.1: Constitutionally Protected Speech
 - JMU annually complies with the statute requirement of generating [a report related to issues of constitutionally protected speech](#), which is submitted to the Governor and the Chairs of the House Committee on Education and the Senate Committee on Education and Health.
 - In addition to the summary of resources, the report verifies that JMU is not aware of any complaint that has been filed in a court of law since December 1, 2020, to initiate a lawsuit against JMU or an employee of JMU in his or her official capacity for an alleged violation of the First Amendment to the United States Constitution.
- University Policy
 - Policy 1121. [Public Expression on Campus](#) addresses speech that is constitutionally protected as well as the process to report incidents of disruption of such constitutionally protected speech.
 - The policy applies to staff, faculty, students, and all other members of the university community.
- Faculty Policy
 - Early in the [JMU Faculty Handbook](#), the Faculty Rights and Responsibilities section provides an overview and explanation of academic freedom for faculty, clearly stating that "A faculty member who is acting in the course and scope of their employment at the university is protected by the tenets of academic freedom as long as such action is performed in good faith and in a manner consistent with their responsibilities."
 - This section is followed by the responsibilities inherent in exercising academic freedom.
- Student Policy
 - The [JMU Student Handbook](#) addresses freedom of speech and related issues within the Students' Rights section, stating that "[t]he student, as a citizen, has the rights of freedom of speech, freedom of the press, freedom of peaceful assembly and association, [and the] freedom of political beliefs[.]"
 - As part of orientation, students are made aware of University Policy 1121 and informed that it explains how to file a complaint if students feel their freedom of speech rights have been violated.
- University Resources
 - The mission of the [James Madison Center for Civic Engagement](#) (CCE) is to "educate and inspire people to address public issues and cultivate the common good in our democracy," and the center serves as hub of resources and programming relevant and applicable to all employees and students.

- The CCE maintains a [free speech website](#) that captures and promotes free speech-related resources.
- The center regularly offers, often in collaboration with other offices, programming to educate various constituencies on free speech and to generate civil discourse. A recent example is the [Freedom of Expression Virtual Event Series](#) featuring multiple speakers.
- First-year and transfer students participate in [Better Conversations Together](#), a free speech and free expression orientation, upon their campus arrival in a session jointly offered by CCE and the divisions of Student Affairs and Diversity, Equity, and Inclusion. The initial orientation is supplemented with videos and digital content to equip students with resources on these topics.
- JMU often welcomes speakers to discuss issues of freedom of speech and expression as well as provide a wide array of viewpoints on important current public policy issues. Both the [Common Good Conversations](#) and the [Madison Vision Series](#) are designed to help the entire JMU community develop educated opinions on the challenging and complex issues society faces today.
- The Office of University Counsel maintains a [website of freedom of speech resources](#).

Section H: New Schools, Sites, And Mergers

H1. Provide information on any new instructional sites, schools, or mergers supported by all types of funding that your institution is considering or planning to undertake during the six-year period.

JMU anticipates expanding site offerings for several of its existing graduate teacher education programs in response to requests from various school systems.

Location	Programs
Albemarle/Charlottesville	MEd with a concentration in Literacy
Richmond	MEd and Graduate Certificate: Educational Leadership
Prince William	MEd and Graduate Certificate: Educational Leadership
Roanoke	MEd and Graduate Certificate: Educational Leadership
Winchester	MEd and Graduate Certificate: Educational Leadership

- With the exception of Roanoke, all programs above will be offered in a hybrid format, with the in-person portion occurring in the location specified.
- JMU does not anticipate any additional schools or mergers.

[Optional] Section I: Research

11. [OPTIONAL] Highlight any strategic research priorities, programs, or key areas of investment (e.g., hiring plans, critical research agendas, interdisciplinary centers, business partnerships, commercialization efforts) and IP dissemination and commercialization priorities you intend to pursue over the next 6 years that have not already been mentioned in this narrative. What are the anticipated benefits to your faculty attraction/retention strategy, student value proposition, and the economic competitiveness of the commonwealth?

Academic Institutes and Centers (AIC)

JMU's R2 Carnegie Classification status offers new opportunities to enhance collaborative research networks. In response, [Research, Economic Development, and Innovation \(REDI\)](#) created the [Research Academic Institute and Center Plan](#) to incentivize the establishment of self-sustaining centers of research excellence that enhance JMU's national and global reputation while increasing research production and expenditures.

- By 2029, the Division of Research, Economic Development, and Innovation (REDI) plans to establish six fully functional, self-sustaining, high-research AICs that will promote interdisciplinary innovation and enhance a culture of research that responds to urgent local and global issues and opportunities.
- The first cohort of research centers launched in 2023:
 - African, African American, and Diaspora (AAAD) Studies Center: The epicenter of Africana Studies at JMU, AAAD offers an international conference, a thriving academic minor, workshops and guest speakers, and a range of research and instructional activities.
 - JMU Center for Advancement Research in Education (JMU CARE™): JMU CARE™ is a hub for longitudinal studies in early childhood development, a resource for JMU faculty members to create partnerships and include students in their research and study, and a vehicle for building stronger connections with community partners.

Research Development

The [Office of Research Development](#) (RD), established in Fall 2022, strategically supports efforts by JMU constituents related to pursuing external funding. RD provides external funding opportunity support at the college, program, and individual level.

RD will continue to offer and expand the following services and programs:

- Consult with college faculty and leadership.
- Coordinate virtual and on- and off-campus site visits
- Provide Research development presentations, trainings, and workshops
- Increase awareness of the external funding landscape in addition to the resources available at JMU within colleges by supporting individual faculty interest in external funding.
- Managing sponsored programs databases for faculty and staff. There was an 87% increase in new Sponsored Programs Information Network (SPIN), a searchable database of 40,000+ funding opportunities, database profiles.
- Support external funding proposals.

JMU X-Labs and Industry Partnerships

JMU X-Labs facilitates ecosystems that catalyze and cultivate high-impact engaged learning and research experiences, hosts interdisciplinary courses, and serves as a hub for innovative collaboration through converging transdisciplinary teams, networks, and initiatives that respond to complex and grand challenges.

- JMU X-Labs collaborates with distinguished community, government, and industry organizations to provide solutions while preparing students with real-world experience, just one example of how JMU leverages community partnerships for the mutual benefit of regional economic development and student development.
- Since launching in 2015, JMU X-Labs has engaged with 118 external partners. During the 2022 academic year, 13 X-Labs courses enrolled over 210 students from 55 different majors who worked directly with 15 community partners. In Spring 2024, X-Labs launched the Re-Imagined Internship, partnering with Ellucian Corporation, a global higher education technology company in which a cohort of undergraduate and graduate students in roles such as developer, ethicist, designer, and storyteller. Students spent a semester working on a problem offered by Ellucian, then entered a cohort-based internship. In Fall 2024, X-Labs will partner with Dynamic Aviation in a similar fashion.
- X-Labs will continue to strategically collaborate in opportunities that create local economic impact and the creation of new knowledge and technologies to establish a pathway to the Office of Community and Economic Development for intellectual property protection and commercialization.
- REDI is focusing on building research relationships with small businesses to pursue Small Business Innovation Research and Small Business Technology Transfer funding opportunities. REDI organized efforts to submit one of these in spring 2024 and anticipate submitting at least two in fall 2024.

Economic Development and Commercialization

JMU's priorities related to economic development include:

- Attaining the APLU Innovation and Economic Prosperity (IEP) designation
- Supporting talent pipelines and retention in the region and Commonwealth
 - Continue to serve as the Region 8 (Shenandoah Valley) coordinating office for the Commonwealth's V-TOP initiative.
- Supporting the campus and regional innovation ecosystems by:
- Partnering with Commonwealth of Virginia initiatives to enhance partnerships with regional businesses and non-profit groups to grow research commercialization activities, including
 - Virginia Innovation Partnership Corporation (VIPIC): Develop Entrepreneur in Residence (EIR) and Eminent Researcher Recruitment (ERR) partnerships. Support researchers pursuing VIPIC Commonwealth Commercialization Fund (CCF) and related research commercialization project opportunities.
 - Commonwealth Cyber Initiative (CCI): Create and expand researcher recruitment and retention funds. VP Tongen has recently been added to the advisory board
- Fostering and supporting development of research grants that engage small businesses with JMU research efforts (e.g., SBIR/STTR collaborations)
- Growing and supporting a research-to-implementation pipeline with community partners
- Supporting campus and community collaborations that contribute to enhancing the quality of life in our communities (Placemaking)

International Research Support Services

International research is a critical component of academic exploration, yet defining its scope and functions can be challenging. As an R2, the institution is broadening its research profile and infrastructure through the implementation of an international research support unit. This unit will offer support toward

- Export controls and international compliance
- Enhancement of JMU's global research reputation
- Growth of faculty and student research and collaborations globally
- Local international research support
- Publications and publishing on the global scene
- International faculty associate and student support

- Virtual and physical global exchange
- Cross-university partnerships

Office of Research Integrity

[The Office of Research Integrity](#) upholds the university's research programs by promoting a culture of compliance, fostering collaborations, and ensuring research excellence. The office will continue to offer service and support in university-wide areas including

- University Compliance Committee
- General Data Protection Regulation (GDPR) Working Group
- Data Manager - Data Stewardship and Information Security Working Group
- Institutional Review Board (IRB)
- Institutional Animal Care and Use Committee (IACUC)
- Institutional Biosafety Committee (IBC)
- Financial Conflict of Interest (COIC – Conflict of Interest Committee)

Office of Federal Relations and Communications

The Office of Federal Relations and Communications (FRC) enhances the university's academic standing and strives for inclusive excellence by promoting faculty and student research, scholarship, and creative accomplishments while liaising with federal entities to advance university priorities and connect faculty expertise to issues of national importance. FRC serves REDI and the JMU community by

- highlighting JMU accomplishments and communicating updates to congressional offices; advocating
- Advocating on behalf of JMU constituents on a variety of federal issues (e.g., immigration, athletics-Name-Image-Likeness (NIL), Department of Education negotiated rulemaking)
- Managing the annual Congressionally Directed Spending request process
- Responding to inquiries and facilitate campus visits for elected officials and staff
- Serving on the Association of Public & Land-grant University's Council on Governmental Affairs

[Optional] Section J: Collaboration

J1. [OPTIONAL] Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions (and other state agencies as appropriate) in furthering the goals outlined in sections B-D. What is the expected impact and in what timeframe? What is the timeline for the initiative and how far along is it? What (if anything) would be required from a budget or policy perspective to facilitate the success of the initiative?

JMU is highly committed to working across the commonwealth to leverage the best opportunities for all students. Included here are several significant initiatives.

Higher Education Technical Systems

With Reengineering Madison, JMU is implementing significant technology platforms, including an enterprise CRM and new data solutions for managing and visualizing data, as well as replacing current PeopleSoft Enterprise Resource Management Finance, Human Resources, and Student Administration applications that are reaching the end of their useful life, through a seven-year, multiphase project.

To explore the potential for collaboration, we are involved in conversations with other Virginia higher education institutions. These discussions aim not only to achieve potential cost savings but also to leverage mutual benefits and shared efficiencies.

Grow Your Own: Licensing Paraprofessionals with Degrees

To move more teachers into classrooms more quickly and at a greatly reduced cost than traditional teacher preparation programs, JMU has partnered with VDOE to launch an innovative teacher preparation program. JMU has engaged two strong teacher-producing universities (Old Dominion University and Longwood University) to offer the same online module-based learning.

Open Educational Resources (OER)

JMU focuses on providing students with the [most affordable textbook options](#) available through multiple programs for students and faculty.

Leveraging custom-made, high-quality, free, or low-cost textbooks helps to contain the costs of a JMU education while opening possibilities for faculty to improve student engagement and learning outcomes. Through OER efforts led by the JMU Libraries beginning in 2022, more than 10% of courses for Fall 2022 were listed as low- or no-cost, and saved 5,259 students an estimated \$1,062,000 in out-of-pocket expenses in FY 2022.

To help ensure faculty buy-in, the university offers many opportunities for them to learn about the benefits of free and low-cost textbooks. JMU Libraries has [provided grants](#), similar to those offered by VIVA, for faculty to try OER options and makes available multiple resources for finding and evaluating OER sources.

SCHEV/ Virginia Talent + Opportunity Partnership (V-TOP) Partnership Grant

JMU was awarded a SCHEV Innovative Internship Program Round 3 award for FY 24 to develop regional (Region 8) pathways to grow business/non-profit participation in work-based learning and internship programming. The funded program will provide coordination among educational institutions, employers, and students in the region to expand local internship opportunities in the Shenandoah Valley.

With this funding, JMU has hired an internship coordinator to facilitate and manage the Region 8 Valley Internship Experience Workgroup, a partnership of representatives from regional educational institutions, economic development and business support organizations, and employers. Other project deliverables include:

- Data collection efforts to inventory existing regional internship and work-based learning opportunities.

- Provision of a primary contact and connector among employers, educational institutions, the Virginia Talent and Opportunity Partnership, and the VIEW.
- Prioritization of opportunities for expansion of regional programs, establishment of career readiness resource programming, coordination of a regional internship recruitment event, development of a multi-year program implementation plan, and a compilation of yearly project progress reports for SCHEV and stakeholders.

However, this award is limited to two years.

Virtual Library of Virginia

Membership in the Virtual Library of Virginia (VIVA) consortium and participation in interlibrary loan agreements with partner institutions extends the reach of library collections and provides students at participating institutions with access to a larger universe of information. Contracts are also negotiated to allow the general public access to licensed resources on public stations in the libraries. In addition, cooperative agreements with other Virginia universities provide access to an expanded collection of e-journals.

As a leader for VIVA, JMU manages procurement for the 39 state-assisted colleges and universities involved. Membership in VIVA brings \$5 of value for every \$1 spent through VIVA's cooperative purchasing of resources, saving the institution money and personnel hours by avoiding duplication of collections and enabling shared agreements and central invoicing.

[Optional] Section K: State Policy

K1. [OPTIONAL] Use this section to outline any state policy changes you have not already mentioned in this narrative that would enhance your ability to achieve greater success on the topics, strategies, and initiatives referenced in this narrative. What existing policies, if any, are hindering your ability to maximize outcomes and value for students? What new policies might create conditions that are more conducive to achieving those goals? What strategies or initiatives would these policy changes enable your institution to do or try that you are not yet able to do today? Please be as specific as possible.

JMU appreciates the opportunity to highlight possible state policy and procedure changes that would enhance success at JMU.

Budgeting and Financial Aid

- Allow institutions to allocate funding toward cloud-based software purchases through the Higher Education Equipment Trust Fund program. Guidelines need to be revised to include the increasing changes of technology to meet the needs of academic programs and students.
- JMU would benefit from a modification to the SCHEV financial aid funding model that results in enhancing state support.

Increased State Funding

- As with other higher education institutions in Virginia, JMU would greatly benefit from additional resources and options to fund ongoing mental health support.

SCHEV Policies

- JMU seeks clarification of its place in institutional groupings within the commonwealth. As an R2, we would like to be considered a research institution by Virginia. In addition, we would like to be able to offer an increased number of doctoral degrees, which is currently limited (SCHEV curriculum policy, VIII. Degree Level Authorization, pgs. 9-10).

Tech Talent Investment Program

- The Tech Talent Investment Program (TTIP) at JMU has had a significant impact on the growth of the Computer Science program, increasing the number of graduates by 43% from FY19 to FY23. Based on our current JMU-CS enrollment trends, the TTIP investment and associated investments by JMU will continue to produce increasing numbers of graduates well into the future, sufficient to achieve and exceed our TTIP commitments.
 - JMU kindly requests that the state consider reimplementing TTIP funding once colleges have reached our stated goals and consider expanding the program to include Information Technology degrees.

[Optional] Section L: Additional Information

L1. [OPTIONAL] Use this final section to provide any additional context and/or supporting materials you feel should be incorporated into the six-year planning process.

Economic Impact

- JMU is largest employer in northern Shenandoah Valley.
- The university is a catalyst for economic development and innovation in the region through hosting or partnering with entities such as the Shenandoah Valley Partnership, Shenandoah Valley Technology Council, Small Business Development Center, and the Valley Makers Association. JMU's Center for Entrepreneurship also plays a key role.

Community Impact

- JMU is active in the local community and dedicated to intentional engagement that supports those in the region. Two substantial examples are included here.
- The university provides significant public health services for the local community through programs including the Institute for Innovation in Health and Human Services (IIHHS).
 - The institute offers 19 community-based programs and partners with academic units to support ten clinics. In 2022-23, 999 students engaged in IIHHS programs, representing 39 undergraduate and graduate degree programs. During this time, 15,465 community clients received institute services.
- JMU annually offers the Volunteer Income Tax Assistance (VITA) program, providing free tax preparation and e-filing for low-income community members.
 - A joint collaboration between the School of Accounting and the Department of Foreign Languages, Literatures and Cultures, services are delivered in English and Spanish. In 2023, over 500 taxpayers were assisted.
- JMU's role as a community-engaged anchor institution has expanded.
 - A recent focus on co-creating new services for the local and regional communities in response to their priorities and the receipt of a substantial grant resulted in advancement in early childhood development programming through JMU's Early Childhood Initiatives.
- JMU is a national leader in civic education, [celebrating free speech](#), and drawing attention to our role as citizens, led by the nonpartisan Madison Center for Civic Engagement
 - The university's work in elevating free speech to counter threats to democracy was highlighted in a recent highly favorable [Associated Press article](#). JMU has joined a national coalition of universities dedicated to developing resources on these topics, the Institute for Citizens & Scholars.

James Madison University

2024 Six Year Financial Plan
Part I

Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2024-26 Biennium

James Madison University

Instructions: Provide annual planned increases in undergraduate tuition and mandatory E&G fees and mandatory non-E&G fees for both in-state and out-of-state students in 2024-26 biennium. The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the mission, market capacity and other factors with the assumption of no new state general fund support.

	Undergraduate Tuition and Mandatory Fees					
	2023-24 Charge (BOV approved)	2024-25			2025-26*	
		Board Approved Charge	% Increase		Planned Charge	% Increase
In-State UG Tuition	\$7,914	\$8,150	3.0%	\$8,550	4.9%	
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%	
In-State UG Mandatory non-E&G Fees	\$5,662	\$5,816	2.7%	\$5,990	3.0%	
In-State UG Total	\$13,576	\$13,966	2.9%	\$14,540	4.1%	
Out-of-State UG Tuition	\$24,542	\$24,910	1.5%	\$25,408	2.0%	
Out-of-State UG Mandatory E&G Fees	\$586	\$586	0.0%	\$586	0.0%	
Out-of-State UG Mandatory non-E&G Fees	\$5,662	\$5,816	2.7%	\$5,990	3.0%	
Out-of-State UG Total	\$30,790	\$31,312	1.7%	\$31,984	2.1%	

Institutional Notes:

* The tuition and fee rates shown for FY 2025-26 are based on planning costs and for modeling purposes only.

Part 2: Revenue: 2022-23 through 2029-30
James Madison University

Instructions: Based on assumptions of no new general fund, enrollment changes and other institution-specific conditions, provide total collected or projected to collect revenues (after discounts and waivers) by student level and domicile (including tuition revenue used for financial aid), and other NGF revenue for educational and general (E&G) programs; and mandatory non-E&G fee revenues from in-state undergraduates and other students as well as the total auxiliary revenue.
 In line 25, enter E&G GF revenues for the current biennium and 2024-26 biennium if there is the final budget. The formulas will automatically hold that constant for the remaining years of 2026 to 2030.

Instructions: Provide a pro forma analysis of total tuition revenue in years 2026-2030 by holding T&F constant at the planned 2025-26 rate while incorporating your institution's submitted enrollment projections for each year through 2030. These columns are NOT meant to be a projection and do NOT make any assumption about GF support. The calculations will be used to support the pro forma analysis in tab 5.

Items	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Estimate)	Chg	2025-2026 (Planned)	Chg	2026-2027 (Pro Forma)	Chg	2027-2028 (Pro Forma)	Chg	2028-2029 (Pro Forma)	Chg	2029-2030 (Pro Forma)	Chg	2022-2030 Chg	CAGR
	Total Collected Tuition Revenue	Total Collected Tuition Revenue		Total Projected Tuition Revenue		Total Projected Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue			
E&G Programs																	
Undergraduate, In-State	\$123,308,572	\$131,706,611	6.8%	\$138,203,564	4.9%	\$142,720,282	3.3%	\$141,513,152	-0.8%	\$140,756,257	-0.5%	\$140,576,612	-0.1%	\$140,692,369	0.1%	14%	1.9%
Undergraduate, Out-of-State	\$107,066,748	\$114,965,647	7.4%	\$115,149,846	0.2%	\$119,433,768	3.7%	\$120,167,348	0.6%	\$119,446,295	-0.6%	\$119,200,861	-0.2%	\$119,206,035	0.0%	11%	1.5%
Graduate, In-State	\$12,847,174	\$12,321,652	-4.1%	\$11,531,414	-6.4%	\$11,804,504	2.4%	\$11,786,629	-0.2%	\$11,910,540	1.1%	\$11,856,561	-0.5%	\$11,946,454	0.8%	-7%	-1.0%
Graduate, Out-of-State	\$8,917,302	\$6,440,895	-27.8%	\$5,603,036	-13.0%	\$5,713,190	2.0%	\$5,735,645	0.4%	\$5,859,131	2.2%	\$5,843,447	-0.3%	\$5,914,163	1.2%	-34%	-5.7%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Other NGF	\$6,574,488	\$6,551,421	-0.4%	\$6,859,542	4.7%	\$6,926,261	1.0%	\$6,993,642	1.0%	\$7,061,698	1.0%	\$7,130,437	1.0%	\$7,199,864	1.0%	10%	1.3%
Total E&G NGF Revenue	\$258,714,284	\$271,986,226	5.1%	\$277,347,402	2.0%	\$286,598,005	3.3%	\$286,196,416	-0.1%	\$285,033,921	-0.4%	\$284,607,918	-0.1%	\$284,958,885	0.1%	10%	1.4%
E&G GF Revenue (assume flat after 2026)	\$163,805,747	\$184,623,850	12.7%	\$196,147,227	6.2%	\$200,724,184	2.3%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	23%	2.9%
Total E&G Revenue	\$422,520,031	\$456,610,076	8.1%	\$473,494,629	3.7%	\$487,322,189	2.9%	\$486,920,600	-0.1%	\$485,758,105	-0.2%	\$485,332,102	-0.1%	\$485,683,069	0.1%	15%	2.0%

Auxiliary Revenue	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Estimated)	Chg	2025-2026 (Planned)	Chg
	Total Revenue	Total Revenue		Total Revenue		Total Revenue	
In-State undergraduates	\$76,306,955	\$81,681,552	7.0%	\$82,624,263	1.2%	\$84,110,999	1.8%
All Other students	\$24,361,851	\$26,077,751	7.0%	\$25,469,697	-2.3%	\$26,841,665	5.4%
Total non-E&G fee revenue	\$100,668,806	\$107,759,303	7.0%	\$108,093,960	0.3%	\$110,952,664	2.6%
Total Auxiliary Revenue	\$248,106,904	\$270,452,096	9.0%	\$276,172,539	2.1%	\$299,774,060	8.5%

Part 3: Financial Aid Plan: 2022-23 through 2029-30
James Madison University

Instructions: Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid for the revenue numbers in Tab 2. To ensure compliance with the state prohibition that in-state students not subsidize out-of-state students and to provide the review group with a scope of the strategy, projections must be made for each of the indicated categories. Please be aware that this data will be compared with similar data provided by other institutional offices in order to ensure overall consistency. (Please do not alter shaded cells that contain formulas.)

"Other Discounts and Waiver" means the totals of any unfunded full or partial tuition waiver reducing the students' charges, including Virginia Military Survivors and Dependent Education Program and the Senior Citizens Tuition Waiver. Do not include the tuition differential for the tuition exceptions.

Note: If you do not have actual amounts for Tuition Revenue for Financial Aid by student category, please provide an estimate. If values are not distributed for Tuition Revenue for Financial Aid, a distribution may be calculated for your institution.

Allocation of Tuition Revenue Used for Student Financial Aid

*2022-23 (Actual) Please see footnote below									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid**	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$123,308,572	\$5,521,006	4.5%	\$11,121,150	\$4,750	\$7,548,253	\$130,861,575	10.0%	-\$5,032,488 Compliant
Undergraduate, Out-of-State	\$107,066,748	\$4,793,795	4.5%	\$157,904	\$1,693,524	\$155,055	\$108,915,327	6.1%	
Graduate, In-State	\$12,847,174	\$575,218	4.5%	\$7,562	\$0	\$642,094	\$13,489,268	9.0%	
Graduate, Out-of-State	\$8,917,302	\$399,262	4.5%	\$2,665	\$714,280	\$53,359	\$9,684,941	12.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$252,139,796	\$11,289,281	4.5%	\$11,289,281	\$2,412,554	\$8,398,761	\$262,951,111	8.4%	

2023-24 (Actual)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$131,706,611	\$5,459,347	4.1%	\$10,656,083	\$0	\$6,156,831	\$137,863,442	8.4%	-\$4,685,993 Compliant
Undergraduate, Out-of-State	\$114,965,647	\$4,765,421	4.1%	\$346,408	\$2,339,938	\$184,811	\$117,490,396	6.2%	
Graduate, In-State	\$12,321,652	\$510,743	4.1%	\$0	\$0	\$668,135	\$12,989,787	9.1%	
Graduate, Out-of-State	\$6,440,895	\$266,980	4.1%	\$0	\$0	\$68,833	\$6,509,728	5.2%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$265,434,805	\$11,002,491	4.1%	\$11,002,491	\$2,339,938	\$7,078,610	\$274,853,353	7.4%	

2024-25 (Estimated)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$138,203,564	\$6,255,718	4.5%	\$11,858,023	\$0	\$6,086,733	\$144,290,297	8.6%	-\$5,080,341 Compliant
Undergraduate, Out-of-State	\$115,149,846	\$5,212,203	4.5%	\$385,481	\$2,809,022	\$124,293	\$118,083,161	6.9%	
Graduate, In-State	\$11,531,414	\$521,964	4.5%	\$0	\$0	\$571,709	\$12,103,123	9.0%	
Graduate, Out-of-State	\$5,603,036	\$253,619	4.5%	\$0	\$0	\$86,978	\$5,690,014	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$270,487,860	\$12,243,504	4.5%	\$12,243,504	\$2,809,022	\$6,869,713	\$280,166,595	7.8%	

2025-26 (Planned)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$142,720,282	\$6,487,088	4.5%	\$12,311,735	\$0	\$6,336,025	\$149,056,307	8.6%	-\$5,288,095 Compliant
Undergraduate, Out-of-State	\$119,433,768	\$5,428,642	4.5%	\$400,230	\$3,396,116	\$126,721	\$122,956,605	7.3%	
Graduate, In-State	\$11,804,504	\$536,552	4.5%	\$0	\$0	\$599,789	\$12,404,293	9.2%	
Graduate, Out-of-State	\$5,713,190	\$259,683	4.5%	\$0	\$0	\$88,663	\$5,801,853	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,671,744	\$12,711,965	4.5%	\$12,711,965	\$3,396,116	\$7,151,198	\$290,219,058	8.0%	

2026-27 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$141,513,152	\$6,443,025	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,849,177	8.6%	-\$5,332,071 Compliant
Undergraduate, Out-of-State	\$120,167,348	\$5,471,160	4.6%	\$400,230	\$3,396,116	\$126,721	\$123,690,185	7.3%	
Graduate, In-State	\$11,786,629	\$536,639	4.6%	\$0	\$0	\$599,789	\$12,386,418	9.2%	
Graduate, Out-of-State	\$5,735,645	\$261,141	4.6%	\$0	\$0	\$88,663	\$5,824,308	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,202,774	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$289,750,088	8.0%	

2027-28 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$140,756,257	\$6,436,933	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,092,282	8.7%	-\$5,330,120 Compliant
Undergraduate, Out-of-State	\$119,446,295	\$5,462,406	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,969,132	7.3%	
Graduate, In-State	\$11,910,540	\$544,682	4.6%	\$0	\$0	\$599,789	\$12,510,329	9.1%	
Graduate, Out-of-State	\$5,859,131	\$267,944	4.6%	\$0	\$0	\$88,663	\$5,947,794	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$277,972,223	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,519,537	8.1%	

2028-29 (Pro Forma)								
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,576,612	\$6,440,180	4.6%	\$12,311,735	\$0	\$6,336,025	\$146,912,637	8.7%
Undergraduate, Out-of-State	\$119,200,861	\$5,460,901	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,723,698	7.3%
Graduate, In-State	\$11,856,561	\$543,180	4.6%	\$0	\$0	\$599,789	\$12,456,350	9.2%
Graduate, Out-of-State	\$5,843,447	\$267,704	4.6%	\$0	\$0	\$88,663	\$5,932,110	6.0%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,477,481	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,024,795	8.1%

2029-30 (Pro Forma)								
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,692,369	\$6,438,950	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,028,394	8.7%
Undergraduate, Out-of-State	\$119,206,035	\$0	%	\$400,230	\$3,396,116	\$126,721	\$122,728,872	2.9%
Graduate, In-State	\$11,946,454	\$0	%	\$0	\$0	\$599,789	\$12,546,243	4.8%
Graduate, Out-of-State	\$5,914,163	\$0	%	\$0	\$0	\$88,663	\$6,002,826	1.5%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,759,021	\$6,438,950	2.3%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,306,335	5.9%

* Please note that the totals reported here will be compared with those reported by the financial aid office on the institution's annual S1/S2 report. Since the six-year plan is estimated and the S1/S2 is "actual," the numbers do not have to match perfectly but these totals should reconcile to within a reasonable tolerance level. Please be sure that all institutional offices reporting tuition/fee revenue used for aid have the same understanding of what is to be reported for this category of aid.

Institutional Note:

** "Tuition Revenue for Financial Aid" distributed based on proportionality of total revenue collections by category.

Education and General revenues are pooled and are not allocated by revenue type per expense.

Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30
James Madison University

Instructions: The Academic Plan should contain academic, finance, and support service strategies the institution intends to employ in meeting state needs/goals as found in the Virginia Plan. (Please see the main instructions sheet in this workbook for more detailed information about The Virginia Plan. Please provide short titles to identify institutional strategies and other expenditure increases. Provide a concise description in the "Notes" column (column O), including a % increase where relevant and a specific reference as to where more detailed information can be found in the Narrative document.

Complete the lines appropriate to your institution, adding lines within the relevant categories as needed. As completely as possible, the items should represent a complete picture of your anticipated use of projected tuition revenues and strategic focus areas. Categories are listed in bold; you may not change the categories but you may add lines where indicated. Please update total cost formulas if necessary. For every line, the total amount and the sum of the reallocation and tuition revenue should equal one another.

Funding amounts in the first year should be incremental. However, if the costs continue into the second year and beyond, they should be reflected cumulatively (i.e. cost increases vs. 2023-24). Please update total cost formulas if necessary. Institutions should assume no general fund (GF) support in 2024-26 in this worksheet. A separate worksheet (Part 6) is provided for institutions to request additional GF support for 2024-26. Strategies for student financial aid, other than those that are provided through tuition revenue, should not be included on this table; they should be included in Part 6, General Fund Request, of the plan.

Also, given the long standing practice that agencies should not assume general fund support for operation and maintenance (O&M) of new facilities, O&M strategies should not be included in an institution's plan, unless they are completely supported by tuition revenue.

Lines 5 and 6 are newly added to collect the estimated E&G expenditures of 2022-23 and 2023-24 as baselines for Tab 5 Pro Forma.

For the 2026-28 biennium and 2028-2030 biennium, total amounts should be provided as estimates of future expenditures on these items but delineation of reallocation vs. tuition revenue vs. GF does not need to be provided by the institution.

Please estimate total E&G expenditures for 2022-23 and 2023-24

Total Estimated 2022-23 E&G Expenditures	\$422,520,031
Total Estimated 2023-24 E&G Expenditures	\$456,610,076

Short Title	Incremental amounts relative to 2023-24 estimated baseline											Explanation Please be brief; reference specific narrative question for more detail.
	2024-2025			2025-2026			2026-2027	2027-2028	2028-2029	2029-2030		
	Total Amount	Reallocation	Amount from Tuition Revenue	Total Amount	Reallocation	Amount from Tuition Revenue	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)		
Salary & benefit increases for existing employees												
Increase T&R Faculty Salaries	\$1,974,218	\$0	\$1,974,218	\$4,006,396	\$0	\$4,006,396	\$5,400,749	\$6,822,334	\$8,271,421	\$9,748,977	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Admin. Faculty Salaries	\$683,545	\$0	\$683,545	\$1,387,292	\$0	\$1,387,292	\$1,870,209	\$2,362,463	\$2,864,243	\$3,375,964	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Classified Staff Salaries	\$936,174	\$0	\$936,174	\$1,900,445	\$0	\$1,900,445	\$2,562,570	\$3,237,959	\$3,926,846	\$4,629,491	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase University Staff Salaries	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Increase GTA Salaries	\$54,225	\$0	\$54,225	\$110,077	\$0	\$110,077	\$167,046	\$225,154	\$284,424	\$344,879	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Adjunct Faculty Salaries	\$100,464	\$0	\$100,464	\$203,942	\$0	\$203,942	\$309,490	\$417,149	\$526,961	\$638,969	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Health Insurance Premiums	\$1,517,741	\$0	\$1,517,741	\$1,517,741	\$0	\$1,517,741	\$2,205,144	\$2,913,779	\$3,643,647	\$4,394,747	Represents JMU net cost related to salary/benefit Increases (6.3% FY25 & 3% FY27-30)	
Minimum Wage & Other Salary/Benefit Changes	\$682,046	\$587,237	\$94,809	\$974,295	\$587,237	\$387,058	\$1,247,178	\$1,247,178	\$1,247,178	\$1,247,178	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Minimum wage cost increase to \$13.50 on January 1, 2025, and to \$15.00 on January 1, 2026.	
Faculty Promotion/IBA	\$921,000	\$921,000	\$0	\$1,971,000	\$921,000	\$1,050,000	\$2,671,000	\$3,371,000	\$4,071,000	\$4,771,000	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Recognize faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks. In response to changes in the classified workforce, provide additional resources for employee retention, changes in job duties, and salary compression. Reference E1.	
Inflationary non-personnel cost increases												
Contractual services	\$0	\$0	\$0	\$1,136,000	\$1,000,000	\$136,000	\$2,272,000	\$3,408,000	\$4,544,000	\$5,680,000	Annual 3% inflation adjustment in select contractual nonpersonal services.	
Utilities	\$0	\$0	\$0	\$226,120	\$0	\$226,120	\$473,053	\$915,504	\$1,383,563	\$1,851,622	Average 2% increase in utility costs.	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Financial aid expansion												
Add'l In-State Student Financial Aid from Tuition Rev	\$1,201,940	\$1,201,940	\$0	\$1,655,652	\$1,201,940	\$453,712	\$1,655,652	\$1,655,652	\$1,655,652	\$1,655,652	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	
Add'l Out-of-State Student Financial Aid from Tuition Rev	\$39,073	\$39,073	\$0	\$53,822	\$39,073	\$14,749	\$53,822	\$53,822	\$53,822	\$53,822	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	

Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30
James Madison University

New/expanded academic programs												
Expansion of Physician Assistant Program	\$201,787	\$201,787	\$0	\$351,787	\$201,787	\$150,000	\$351,787	\$351,787	\$351,787	\$351,787	\$351,787	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Expansion of Physician Assistant Program to help meet shortages in PAs within the Commonwealth. Reference E1.
Supporting Growth of the Computer Science and Information Technology Majors	\$379,080	\$379,080	\$0	\$952,266	\$379,080	\$573,186	\$952,266	\$952,266	\$952,266	\$952,266	\$952,266	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the growth of the computer science and information technology majors to help meet the needs of employers across the Commonwealth and meet student demand. Reference E1.
Meet the Commonwealth's Mental Health Needs	\$0	\$0	\$0	\$615,786	\$0	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	Maintain and grow the institution's Ph.D. program in counseling and supervision, plus increase the number of mental health professionals and clinicians in support of community wellness and needs of the Commonwealth. Reference E1.
Research Initiatives	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$230,722	\$230,722	\$230,722	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
Other academic & student support strategies & initiatives												
Early Student Success System	\$329,412	\$329,412	\$0	\$573,801	\$329,412	\$244,389	\$665,306	\$756,583	\$756,583	\$756,583	\$756,583	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Implement the Early Student Success System (ESSS), which is designed to improve retention and close the current equity gap affecting under-represented students. Reference E1.
Reengineering Madison	\$88,879	\$88,879	\$0	\$1,082,113	\$88,879	\$993,234	\$1,832,113	\$2,582,113	\$3,332,113	\$4,082,113	\$4,082,113	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Annual subscription cost for information technology infrastructure to replace current software that is approaching end of life. Includes customer relationship management (CRM), data warehouse, identity management and enterprise resource planning (ERP) expenses. Reference E1.
Academic/Student Support Initiatives	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives												
Carrier Library Expansion	\$0	\$0	\$0	\$380,057	\$0	\$380,057	\$782,898	\$806,399	\$830,616	\$855,549	\$855,549	Staffing and utility costs associated with the expanded square footage of Carrier Library. Expected completion date is January 2026.
Carrier Library Renovated Space	\$0	\$0	\$0	\$261,595	\$0	\$261,595	\$571,690	\$588,850	\$606,534	\$624,741	\$624,741	Staffing and utility costs associated with the renovation section of Carrier Library. Expected completion date is January 2026.
Information Technology Security and Institutional Operational Initiatives	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$841,344	\$841,344	\$841,344	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Additional Funding Need	\$11,279,905	\$5,918,729	\$5,361,176	\$21,530,508	\$6,918,729	\$14,611,779	\$28,830,080	\$35,454,099	\$42,088,763	\$48,801,447	\$48,801,447	

Must not be greater than incremental Tuit Rev in Part 2	
2024-2025	2025-2026
\$0	\$0

Part 5: Six-year Pro Forma Calculations: 2022-23 through 2029-30

James Madison University

Instructi

From FY23-FY30

Baseline Pro Forma Surplus/Deficit	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Est.)	Chg	2025-2026 (Plan)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Total E&G GF Revenue from Tab2, flat after 2025-26	163,805,747	184,623,850	13%	196,147,227	6%	200,724,184	2%	200,724,184	0%	200,724,184	0%	200,724,184	0%	200,724,184	0%	23%	3%
Tuition discount rate	8.4%	7.4%	-0.975pt	7.8%	0.395pt	8.0%	0.19pt	8.0%	0.013pt	8.1%	0.034pt	8.1%	0.014pt	5.9%	-2.184pt	-2.513pt	%
Total E&G NGF Revenue	258,714,284	271,986,226	5%	277,347,402	2%	286,598,005	3%	286,196,416	0%	285,033,921	0%	284,607,918	0%	284,958,885	0%	10%	1%
Incremental E&G NGF Revenue vs. prior yr		13,271,942		5,361,176	-60%	9,250,603	73%	(401,589)	-104%	(1,162,495)	189%	(426,003)	-63%	350,967	-182%	-97%	
Total E&G Revenue	422,520,031	456,610,076	8%	473,494,629	4%	487,322,189	3%	486,920,600	0%	485,758,105	0%	485,332,102	0%	485,683,069	0%	6%	1%
Implied GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	%
Total E&G Expenditures	422,520,031	456,610,076	8%	461,971,252	1%	471,221,855	2%	478,521,427	2%	485,145,446	1%	491,780,110	1%	498,492,794	1%	18%	3%
Incremental E&G Expenditures vs. 2023-24		11,279,905		21,530,508	91%	28,830,080	34%	35,454,099	23%	42,088,763	19%	48,801,447	16%	333%			
Reallocation of existing dollars (flat after 2025-26)		5,918,729		6,918,729	17%	6,918,729		6,918,729		6,918,729		6,918,729		6,918,729			
Pro Forma Surplus/Deficit	-	-	%	11,523,377	%	16,100,334	40%	8,399,173	-48%	612,659	-93%	(6,448,008)	-1152%	(12,809,725)	99%	-211%	-30%
Incremental Surplus/Deficit	-	-	%	11,523,377	%	4,576,957	-60%	(7,701,161)	-268%	(7,786,514)	1%	(7,060,667)	-9%	(6,361,717)	-10%	-155%	-22%

Surplus does not represent actual available funds but is General Fund revenue with associated expenses not reflected in the template. Associated expenses include: GF portion of salary/benefit increases, financial aid and inflationary and other necessary/planned costs.

What would a constant GF/NGF ratio at 2023-24 levels imply for T&F and GF increases?																	
	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	2.7pt	0.4pt
Implied incremental T&F increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)			<< Input percentages here	
Expenditure reductions	0%			
T&F increases	0%			
GF increases	0%			
TOTAL	0%			

	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Implied E&G Expenditure Reduction (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental T&F increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	0.4pt

**Part 6: General Fund (GF) Request: 2024-2026 Biennium
James Madison University**

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2024-26 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 4 and place it in bold print to draw attention to its connection to Part 6. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	Biennium 2024-2026 (7/1/24-6/30/26)				
			2024-2025		2025-2026		
			Total Amount	GF Support	Total Amount	GF Support	
1	Support Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP)	Enrollment management	\$0	\$0	\$4,904,791	\$4,904,791	Request state general funds for the Virginia Military Survivors and Dependents Education Program (VMSDEP). This critically important program has experienced significant growth in recent years and is expected to continue growing. The requested amount reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less SCHEV's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the Commonwealth to bolster the long-term sustainability of this important program. Reference E1.
2	Produce More Nurses Through New "Fast Flex" BSN Program	Degree Pathways	\$0	\$0	\$997,816	\$997,816	Request state general funds to grow the university's number of nursing graduates by launching a new non-traditional Bachelor of Science in Nursing (BSN) program while maintaining our existing traditional four-year BSN program. Reference E1.
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$5,902,607	\$5,902,607	

Campus Security Update

Anthony Matos
Chief of Police





Campus Security Update

- Updated policy for public expression and implemented new policy for tents on campus
- Obtained personal protection equipment for officers
- Officers completed classroom and hands-on training to work with large gatherings
- Solidified agreements with Harrisonburg PD, Rockingham County Sheriff's Office, and Virginia State Police to provide institutional assistance
- Staff reassigned for enhanced flexibility and increased officers on campus

Workforce Planning

Rick Larson
Associate Vice President
Human Resources, Training
and Performance





2024 Workforce Planning and Development Report

- DHRM requires all agencies to report
- JMU must share the report with the BOV; no action is required
- JMU completed the previous year's objectives
- DHRM required less data from JMU this year
- Data gathered in 2024 shows improvements over the previous year
- Six new objectives for 2024-25 are listed in the report

James Madison University (JMU)

Workforce Planning and Development Summary 2024

As requested by the Department of Human Resource Management (DHRM)

INTRODUCTION

Background

- Since 2018, JMU has prepared and submitted to DHRM workforce planning and development summaries that include human resource data and associated action plans.
- Each public institution of higher education must prepare a Workforce Planning Development Summary for DHRM.
- JMU must share the JMU report with the BOV before obtaining a signed statement of commitment from President King.
- Commonwealth of Virginia line agencies must submit their Workforce Planning Development Summary to their respective cabinet secretary.
- Once shared with the BOV, the JMU document must be signed by the president and sent to DHRM by Sept 30.
- This year, DHRM reduced the number of metrics JMU was required to submit to complete the report.
- ***No action is required by the James Madison University Board of Visitors (BOV).***

Purpose of this Process

- To assist agencies with workforce planning to ensure continuity of operations across the Commonwealth of Virginia.

Steps Required for JMU and other agencies

STEP 1: Gather data requested by DHRM

STEP 2: Summarize findings and identify objectives to ensure Continuity of Operations

STEP 3: Implement plans

Possible Planning Areas

- Organizational Resilience
- Recruitment
- Employee Retention and Engagement
- Workforce Development
- Future Direction of the Agency

EXECUTIVE SUMMARY

James Madison University is well-regarded among job seekers, making it a desirable workplace. The university's culture, work-life quality, facilities, wellness programs, compensation packages, professional development opportunities, and academic standards positively affect employee retention.

Despite the ongoing challenge of retirements, JMU has effectively maintained its workforce through planning, professional development, various retention efforts, identifying internal candidates for open positions, and smoothly transitioning faculty, staff, and executives into open positions.

We have observed positive changes regarding DHRM-requested workforce metrics compared to last year. Voluntary separations have decreased, job applications have risen by 25%, and the average time to fill positions has been reduced by two days. Additionally, the overall number of job postings has declined. However, we continue to observe elevated voluntary separation and mobility rates (movement to other positions at JMU or other state agencies) among employees within their first five years of employment.

Our critical roles have significantly increased as we identified gaps in the criteria outlined by DHRM, particularly in recognizing mission-critical employees. Fortunately, the voluntary separation and mobility rates for these roles remain low. Retirement eligibility stands at 6%, and we anticipate a significant decrease in retirement eligibility between 2025 and 2028, with a slight uptick expected in 2029. Notably, we face higher retirement eligibility rates in critical positions, including those within the executive team who report directly to the president. It is common for our longest-tenured employees, such as those in critical roles and who report to the president, to have higher rates of retirement eligibility.

The SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis that includes internal strengths and weaknesses and external threats and opportunities we were asked to conduct focuses on workforce sustainability. It highlights several strengths and opportunities, such as JMU's strong professional development programs for faculty and staff, its reputation as a preferred employer, the university's high-quality benefits package, enhanced name recognition, and employment-related partnerships with various state agencies. Conversely, the SWOT identified weaknesses and external threats, including a decentralized recruitment process, the DHRM-mandated seven-day posting rule for classified positions, competition from other agencies who offer higher pay to our employees, local housing costs, and limited childcare options.

DHRM requested that we align our objectives with the relevant goals of JMU's strategic plan and the priorities outlined in our existing Employment Opportunities Plan. Our objectives are well-aligned with both documents and include increasing the number of qualified job applicants by 20%, establishing a fully electronic onboarding process, developing additional resources for supervisor success, creating a mid-level managers institute, and expanding our employee well-being program.

Completing these low-cost objectives will increase job applications and employee retention, leading to a more sustainable workforce.

DATA REQUESTED BY DHRM

DHRM Key Terms for the Following Data Table

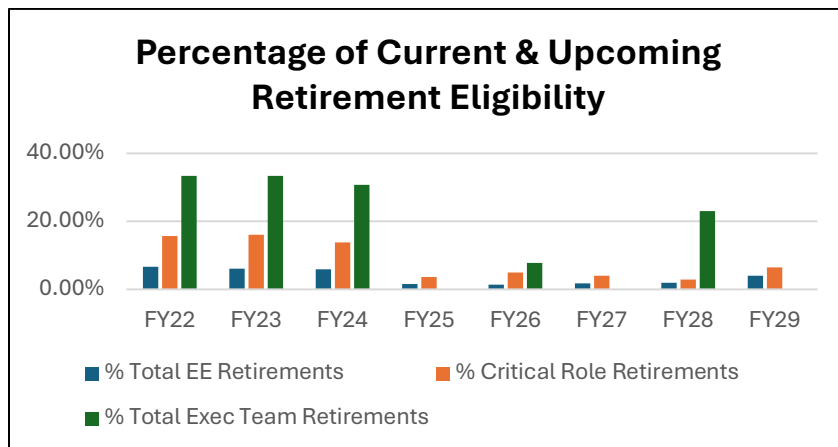
Total Employees	Total Employees include the following classifications: Classified, Instructional Faculty, A&P Faculty, Wage, Adjunct Faculty.
Hire Rate	The Hire Rate is the total number of hires during the fiscal year divided by the total number of employees.
Internal Mobility Rate	The Internal Mobility Rate is the total number of internal promotions and transfers divided by the total number of employees.
Voluntary Separation Rate	The Voluntary Separation Rate is the total number of external transfers and voluntary separations divided by the total number of employees.
Critical Roles Definition and/or Identification Process	Using DHRM's critical position assessment tool, HR reviewed positions with the following critical position definition: Leaving this position vacant would severely impact the organization's ability to meet commitments, achieve goals, comply with regulations, and ensure workplace safety. Additionally, the role demands specialized expertise and knowledge transfer, making it challenging to fill.

Data Table (as of June 30, 2024, per DHRM)

ALL EMPLOYEES	FIRST 5-YEAR EMPLOYEES	FIRST-YEAR EMPLOYEES	CRITICAL ROLLS
3,925 Total Employees	1,423 Total Employees	780 Total Employees	245 Total Critical Roles
11.3% Hire Rate	N/A Hire Rate	N/A Hire Rate	.2% Hire Rate
7.7% Internal Mobility Rate	9.9% Internal Mobility Rate	11.3% Internal Mobility Rate	.3% Internal Mobility Rate
8.6% Voluntary Separation Rate	15.5% Voluntary Separation Rate	15.8% Voluntary Separation Rate	.3% Voluntary Separation Rate

There were 91 fewer voluntary separations in FY24, resulting in a separation rate of 8.6% compared to FY23's 11%. The number of job applicants from FY 23 to FY 24 increased by over 25%, and the average days to fill positions decreased to 50 days for FY 24; previously, our average was 52 days.

Percentage of Current and Upcoming Retirement Eligibility



It is impossible to know precisely when specific employees will retire. Therefore, DHRM requested that we calculate the percentage of employees eligible for retirement based on age and years of service. Eligible retirements account for approximately 6% of the total employees, but those numbers will decrease to around 2% through FY 28. The university has managed retirements effectively and consistently fills vacancies with qualified people. Critical role and executive team retirement eligibility is elevated compared to the entire employee population. The people who fill critical roles and executive team positions tend to be older.

Workforce SWOT Analysis

DHRM asked that we develop a SWOT analysis as we developed our Workforce Planning and Development Summary. JMU identified items on this SWOT analysis to help assess JMU’s ability to meet its workforce needs.

As you probably know, a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) is one of many tools organizations can use to analyze their internal and external environments to provide a more holistic view of factors impacting an agency. In this case, the items noted are in the context of the JMU workforce. Strengths and weaknesses are internal to the organization, and opportunities and threats are external.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Robust professional development opportunities are available to JMU employees. • JMU employs an experienced HR recruitment team. • JMU is perceived as a stable and preferred employer. • JMU provides a highly competitive benefits package. • For some applicants, JMU’s geographic location is attractive. • JMU utilizes a decentralized recruitment model, meaning all departments play a role and are engaged in recruiting new employees. 	<ul style="list-style-type: none"> • JMU utilizes a decentralized recruitment model, meaning all departments play a role in recruiting new employees. • It is possible for various search committees to yield inconsistent results during screening and interview processes. • The ability of departments to build long-range candidate pipelines and engage directly with future applicants in anticipation of future openings varies. • For some applicants, JMU’s relatively rural geographic location is not desired. • DHRM requires that we post our open classified positions for a minimum of 7 days while other employers can make hiring decisions immediately for entry-level workers.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • As a large employer, JMU has many internal applicants for open positions. • JMU can capitalize on its national name recognition due to academic and nonacademic efforts. • Improved technology options, such as JMU’s recent acquisition of Page Up recruitment software and LinkedIn Recruitment, can help increase applicant pools. • Existing partnerships with the Department of Aging and Rehabilitative Services (DARS), the Department for the Blind and Visually Impaired (DBVI), and the Virginia Employment Commission (VEC) can provide applicants for JMU. • JMU can reach out to veterans to seek qualified employees. 	<ul style="list-style-type: none"> • Some employees are targeted and hired by other state agencies who can pay more. • JMU is unable to consider counteroffers for employees who other state agencies recruit. • Local business growth and the associated competition for employees enhance demand for low-wage workers, forcing increased salaries. • Local housing cost and lack of childcare threatens JMU’s ability to attract and retain employees. • Low turnover rates may stifle the career growth at JMU of some employees.

Existing University Planning Priorities to Consider

The following goals are part of the [JMU Strategic Plan](#) and relate directly to workforce planning and development, which DHRM asked JMU to consider.

- Goal 3C: The university will attract and retain top faculty, staff, and students from across the Commonwealth, nation, and the world.
- Goal 8A: The university will continue its commitment to the investment of resources to support a wide array of professional development opportunities for faculty and staff.
- Goal 8C: The university will be known as a preferred employer for higher education, attracting and retaining highly qualified faculty and staff.

The following action items are part of the current JMU Human Resources Employment Opportunity Plan, which DHRM has asked JMU to consider.

- Continue collaboration with the Virginia Department for Aging and Rehabilitative Services (DARS) and other partners to create new training opportunities that educate hiring managers and search committees on their responsibility during the recruitment process, their role in retaining individuals with a disability, and the benefits of hiring those individuals.
- Partner with other organizations, such as DARS, to help connect us with qualified individuals with a disability.
- Incorporate additional information about disability awareness and available resources into our onboard and orientation programs.

RESULTING 2024 JMU WORKFORCE PLANNING OBJECTIVES

Increased Number of Qualified Applicants—JMU will expand outreach efforts to increase the number of applicants applying to positions at JMU by 20% using technology (e.g., LinkedIn) and partnerships, particularly with veteran and disability-related organizations. (Planning Area: Recruitment)

Electronic Onboarding—JMU will implement an electronic onboarding system to increase efficiency and shorten the time to fill positions by automating reminder emails, welcome letters, etc. (Planning Area: Recruitment)

Supervisor Success Resources—JMU will develop additional online resources (e.g., documents, web pages, videos, etc.) listing information critical to supervisor success, incorporating all areas of Human Resources and Talent Development. Such resources will assist supervisors with new employee recruitment efforts. (Planning Area: Employee Retention and Engagement)

Contingency Planning for Critical Positions—JMU will consider establishing contingency plans for critical positions. These plans would include the identification and professional development of employees who could serve in interim roles in case of an employee's sudden absence. (Planning Area: Organizational Resilience)

Mid-level Managers Institute—JMU will administer a Mid-Level Management Institute from January 6 through January 10, 2025. The program is designed to build the competencies needed for a successful mid-level manager at JMU. It will focus on supervision, management, leadership, interpersonal skills, team building, DEIAB+, and personal development. This program will improve employee retention. (Planning Area: Workforce Development)

Expanded Balanced Dukes Well-being Programs – JMU will expand programs and offerings through the Balanced Dukes well-being programs, including collaborating with other campus partners. This effort will help improve the JMU employees' quality of work life. (Planning Area: Employee Retention and Engagement, Future Direction of the Agency)

STATUTE

2.2-1209. Policy of the Commonwealth regarding workforce planning issues with a submission of a succession plan for agency/institution in alignment with our annual strategic planning cycle. To ensure that workforce planning is occurring in tandem with agency strategic planning and to support the acquisition and sustainment of a resilient workforce, agencies and institutions of higher education must execute, continuously evaluate, and submit an annual workforce planning and development report to executive leadership. The plan template was designed by the Department of Human Resources Management (DHRM) and vetted by a state human resources advisory committee. As directed by the legislative mandate, the plan has a threefold focus: mission-critical positions, employees nearing retirement, and executive positions.

This Workforce Planning and Development Summary serves as a continual assessment of workforce risks and accomplishments surrounding the areas of continuity of operations, recruitment, retention and engagement, and workforce development. It will enable informed executive-level workforce decisions. Plans must be submitted to an agency's Cabinet Secretary or **Board of Visitors** annually, no later than September 30th of each year.

Governance Committee Meeting



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

Governance Committee
Thursday, September 12, 2024
Meeting Room 2
12:00 p.m.

Agenda

1. Approval of Minutes – April 18, 2024*
2. JMU Board Self-Evaluation
3. Board Retreat, June 5-6, 2025
4. Review of JMU Board Manual Protocols

*Action Required

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

GOVERNANCE COMMITTEE

Minutes of the Meeting of April 18, 2024

The Governance Committee of the James Madison University Board of Visitors met on Thursday, April 18, 2024 in the Festival Conference and Student Center at James Madison University. Jack White, chair, called the meeting to order at 12:00 pm.

PRESENT:

Falcon, Chris
Fiorina, Carly
Harper, Donna, liaison
James, Kay Coles

Herod, Maribeth
Major, Lara
White, Jack, Chair

ABSENT:

Fiorina, Carly

ALSO PRESENT:

Alger, Jonathan, President
Knight, Jack, University Legal Counsel

On motion by Lara Major, seconded by Kay Coles James, approved the minutes of the February 15, 2024 meeting.

The committee discussed the possibility of a two-day, off-site retreat for 2025 as the board will not have any new members appointed. The committee proposed June 5-6, 2025 and will share the date with the full board.

The committee asked for the appropriate review of the Board Manual for any revisions/changes for review at the September board meeting.

With no further business, the committee adjourned at 12:20 pm.

Jack White, Chair

Donna L. Harper, Secretary to the Board

Student Affairs Committee

September 12, 2024



**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Student Affairs Committee
Thursday, September 12, 2024
Ballroom B
1:00 p.m.

Agenda

1. Opening Remarks and Approval of Minutes for April 18, 2024*
Terrie Edwards, Chair
2. Student Affairs Update
Tim Miller, Vice President for Student Affairs
3. Student Government Association Report
Brielle Lacroix, President
4. Summer Orientation and Community Impact
Kim Davidson, Director, Community Engagement and Volunteer Center
Casey Ouren, Director, Office of Orientation and Transition
Myles Surrett, Associate Vice President for Career, Experiential Learning, and Transitions

*Action Required

Opening Remarks and Approval of Minutes

Terrie Edwards, Chair





Student Life Committee Responsibilities

1. Gain an understanding of the student experience and the work of student affairs
2. Review matters and policies relating to student rights, responsibilities, conduct and discipline
3. Provide advice and counsel to Student Affairs on all aspects of their efforts to create and support the student experience
4. Hear reports from the president of the Student Government Association **and the student representative to the Board of Visitors**
5. Review topical areas of interest related to the student experience

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Minutes of the Student Affairs Committee

The Student Affairs Committee met on Thursday, April 18, in Ballroom B of the Festival Conference and Student Center at James Madison University. Terrie Edwards, Chair, called the meeting to order at 1:00 p.m.

Present:

Edwards, Terrie, Chair
James, Kay Coles
Lynch, John
Stoltzfus, Michael

Others:

Alger, Jonathan, President
Allen, Dirron, Associate Vice President for Student Life and Involvement
Blyer, Kristina, Associate Vice President for Health and Well-Being
Brenneman, Anne, Director of University Health Center
Cannella, Abigail, Student Representative to the Board of Visitors
Carter-Hoyt, Malika, Vice President, Diversity, Equity and Inclusion
Hazen, Nate, President, Student Government Association
Mann, Tia, Director of Health Promotion
Miller, Tim, Vice President for Student Affairs
Mitchell, Bruce, Associate Vice President for Accessibility and Belonging
Molina, Rudy, Vice Provost for Student Academic Success and Enrollment Management
Schoolcraft, Valerie, Director of Disability Services
Walther, Annie, University Counsel

Approval of Minutes

On the motion of Kay Coles James and seconded by John Lynch the minutes of February 15, 2024, were approved.

Opening Remarks

Terrie Edwards welcomed members and guests. Terrie honored two directors in Student Affairs who are retiring in the coming months. Valarie Ghant has been at JMU since 2006 as the Director of the Center for Multicultural Student Services. She had many accomplishments during her tenure which included the establishment of the Intercultural Greek Council, educational programming, and the opening of The Yard. Next, Valerie Schoolcraft has served as the Office of Disability Services Director since 2009. Valerie has expanded the office to meet the increase in students needing accommodations, she has worked through countless legislative changes and established the Disability Advocacy Week.

President Alger joined the committee meeting. He shared a reflection on his past 12 years at JMU. He acknowledged seniors and noted that JMU is stronger than ever. He shared that he and his family will continue to bleed purple.

Student Affairs Update

Dr. Miller began his update with an overview of trends from the Common App around applications nationwide. He shared that there has been an increase in international student applications with 53% of applicants from India and China. He provided statistics on first-generation students and how that demographic is predicted to grow in the coming years. As he talked about the FAFSA (Free Application for Federal Student Aid) updates, he thanked the Financial Aid Office and Brad Barnett for his leadership at JMU across the country.

He shared the value of education and how a bachelor's degree can impact starting salary and can create change for the student as well as their whole family throughout their lives.

He provided an overview of the breakdown of full-time staff and budget allocation within Student Affairs. As he wrapped up his presentation, he acknowledged and commended the significant contributions made by Student Affairs staff on a state, regional, and national level through publications, leadership roles, and presentations.

Efficiencies in Student Affairs

Jonathan Stewart presented on various budget types within the departments, highlighting efforts over the past five years to streamline operations and reallocate resources across the division for greater efficiency. He shared that the division was able to do 100 salary adjustments and establish or repurpose 12 positions to address identified needs, all without relying on new or external funding.

Jonathan elaborated on initiatives in Student Affairs: innovation grants and educational leave. These opportunities allow Student Affairs staff members the space to create and continue their professional development. These initiatives are new each year and when successful, are embedded into Student Affairs, these initiatives are funded centrally.

He shared the work around assessment and the cycle of assessment work in Student Affairs. He reported on a rubric developed by his team and Center for Assessment and Research Studies that will likely be a national model for assessment and measurement.

He outlined the Student Affairs Program Review process, emphasizing the external review component. He shared that each department completes a program review, including an external review, every five years. This structure allows continued improvement within each department and the division.

Student Affairs Communication and Marketing

Carson Lonett opened with an acknowledgement of the team, including recognition for Ann Simmons, who has served with JMU for 39 years and is retiring this fall. Carson provided a timeline on the creation and development of Student Affairs Communication and Marketing (SACM). She introduced Angela Ritchie who spoke to the multi-faceted approach with their communication strategy and an overview of project requests.

Angela continued and shared highlights of their work including Potty Mouth, Dukes Weekly, Campus Packs. Carson added information around their approach to communicating with students and families through a monthly newsletter that both populations receive. She stressed the importance of collaborating with families early on and shared appreciation to the Family Engagement Team who have been essential partners.

Carleigh Rittenhouse facilitated a student panel of four students who discussed how SACM has prepared them for life after college, how they've grown through their jobs in SACM, and their favorite projects. The students shared how they have made hobbies into future professions, grown in their work with clients, and the access they've received to important and special events.

Student Government Association Report

Nate Hazen reflected on his year as Student Body President. He shared some of his memories and how much JMU has meant to him. He spoke about the improvements of the student body, SGA, and JMU. He shared appreciation for SGA members in the room and how they worked well together throughout the year. He also shared appreciation for President Alger, Dr. Dirron Allen, and Dr. Miller for their support throughout the year. He then introduced Brielle Lacroix, the 2024-2025 Student Body President.

Brielle shared an introduction, a tradition she started within SGA that described her intentionality with how she presents herself and how this day is meaningful to her.

Student Representative to the Board of Visitors Report

Abigail Cannella, Student Representative to the Board of Visitors, began with a quote from Taylor Swift. She shared about her leadership and community at JMU and how much she has gained from the SRBOV position. She appreciated working with students and thanked her parents, who were present at the Board Meeting. Additionally, she thanked the administrators at JMU, her friends, and Dr. Miller for their support.

She shared a brief update on Student Advocacy Day in Richmond, success during an Instagram Takeover, and a video from students sharing what they wanted the Board of Visitors to know about them. She introduced Sydney Stafford, the new Student Representative to the Board of Visitors.

Sydney provided an introduction and shared she is excited to share what the BOV does and is passionate about sustainability and helping students be aware of resources.

All Board Members thanked Nate and Abby for their leadership and welcomed Brielle and Sydney.

Terrie Edwards asked for future agenda items for the committee.

There being no further business, on the motion of John Lynch and seconded by Kay Coles James the Student Affairs Committee meeting adjourned at 2:27 p.m.

Respectfully submitted,

Terrie Edwards, Chair

Donna Harper, Secretary to the Board

Vice President for Student Affairs Update

Dr. Tim Miller





Looking Back and Looking Forward





Division and Department Priorities for 2024-2025



Update on Student Affairs Strategic Plan

Themes

- Student Learning and Development
- Belonging
- Health and Well-Being
- Being the Best Place to Work



Student Affairs Strategic Plan in Action: Career Experiential Learning and Transition

Student Life Experience

- Pre Weeks of Welcome programming
- Residence Life move-in success
- Weeks of Welcome attendance and participation
- Getting involved





Campus Codes of Conduct Update

- Disruptions of school functions
- Violations of federal, state and local law ordinance
- Unlawful masking
- Erection of encampments/tents
- Facility usage by affiliated and non-affiliated persons/groups



Campus Codes of Conduct Communications

- Student Handbook during Summer Orientation
- New Student Convocation speech
- Campus Pack insert from OSARP
- Residence Life door signs and hall meetings
- Email communication from OSARP and full-campus message from Dr. Miller and Chief Matos
- Student communication platforms: Dukes Weekly, Potty Mouth and digital messaging



Trends in Student Conduct the Previous 3 Years

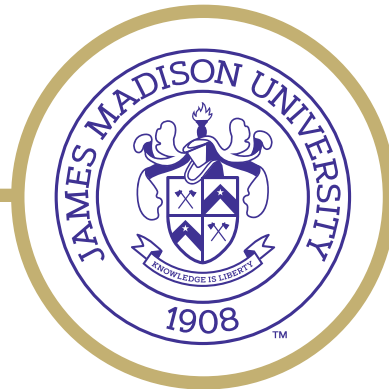


Questions?



Student Government Association Report

Brielle Lacroix



Brielle Lacroix

- Senior, Public Administration major
- Personal Goals:
 - Grow as a leader and follower
 - Learn more about JMU and the environment it exists in
 - Provide students with a positive example of an elected official that works for them
 - Hold myself accountable and open to change



My Team



- Executive Leadership Team
- Senior Leadership Team
- Leadership Team
- Advising Team

-
- JMU Mentors
 - Friends and Family



The Agenda

My Platform

- Sustainability
- Community Engagement
- Student Awareness of Support Services

Additional Responsibilities

- Overseeing Student Government Association operations and teams
- Seeking out, collecting and analyzing student feedback
- Representing students to university administration



My Summer Job

Career, Experiential Learning and Transition

- ★ ■ First-Year Seminar planning and instruction
- ★ ■ Student Affairs survey coding and ENA analysis
- Work-Based learning initiatives & growth-mindset independent research

Health and Wellbeing

- ★ ■ Okanagan charter adoption and long-term planning
- ★ ■ Sensory room set-up and advertisement

Summer Meetings

Various Campus Partners

- ★ ○ Institute for Stewardship of the Natural World
- ★ ○ Alternative Transportation
- ★ ○ Madison Center for Civic Engagement
- ★ ○ Accessibility and Belonging
- ★ ○ Orientation and Transition
 - Annual Giving
- **Various Community Partners**
 - ★ ○ Harrisonburg Mayor Deanna Reed
 - ★ ○ Harrisonburg Downtown Renaissance





August

August 2024

08

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16 FIRST YEAR MOVE-IN	17 FIRST YEAR MOVE-IN
18 TRANSFER STUDENT MOVE-IN	19	20	21	22	23 FIRST LEADERSHIP TEAM	24
25	26 SGA INFO TABLING	27	28	29	30	31 ROCK THE LAKE

Welcoming Dukes to Campus

- ★ Faculty Welcome
- ★ Mosaic Connections
- ★ FROG-ing
- ★ Student Org Night
- ★ Back to School Bash &
- ★ Pep Rally
- & ★ Rock the Lake



September

Creating Community & Developing Students:

- Election Day
- Mentor/Mentee
- Mentor/Mentee Week
- Retreat
- Weekly leadership team meetings
- Preparation for independent events

September 2024

09

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2 CAMPUS KICKOFF- & ELECTIONS INFORMATION	3 BRING A FRIEND SENATE	4	5	6	7 SGA TAILGATE
8	9 ELECTIONS TABLING	10 ELECTION DAY	11	12 STUDENT AFFAIRS BOV	13 FULL BOARD BOV & CAMPING TRIP	14
15	16	17	18 SGA WORLD TOUR	19 USERV TRIVIA	20 OFFICE MOVE NIGHT	21
22 RETREAT	23	24 PICTURE & CERTIFICATE SENATE	25	26	27	28 RING PREMIERE
29 MENTOR MENTEE REVEAL	30					

Questions?



Career, Experiential Learning and Transitions

Kim Davidson, Director, Community Engagement and Volunteer Center
Casey Ouren, Director, Office of Orientation and Transition
Myles Surrett, Associate Vice President





Career, Experiential Learning and Transitions (CELT)

CELT is comprised of:

- University Career Center
- Office of Orientation and Transition
- Community Engagement and Volunteer Center

During 2023-2024, we completed a strategic planning process in concert with the Student Affairs plan. Highlights include:

- Vision for area - In CELT, students will find their purpose in learning, community and careers
- Dashboard for monitoring KPIs
- Strategies for growth and achievement over the next five years

Orientation and Transition

Casey Ouren



Orientation and Transition

Three phases:

- *The One Book*
- Orientation
- Weeks of Welcome



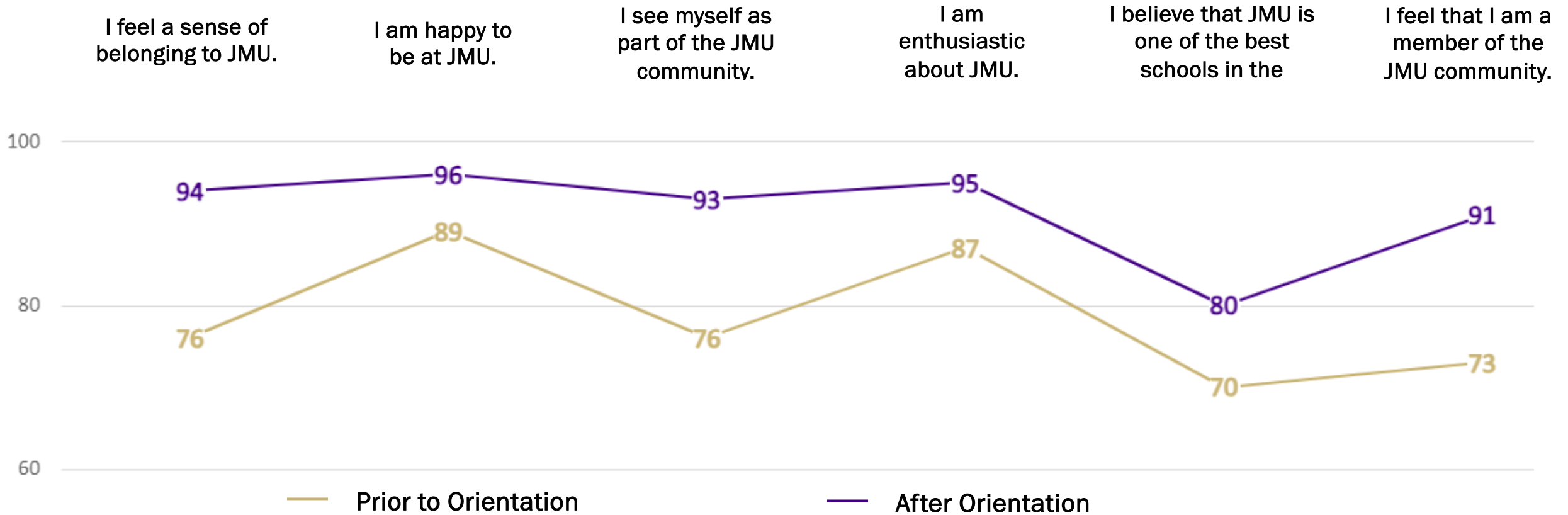
Orientation

- Familiar with campus
- Making connections
- Knowledge about resources
- Immerse themselves





First-Year Sense of Belonging





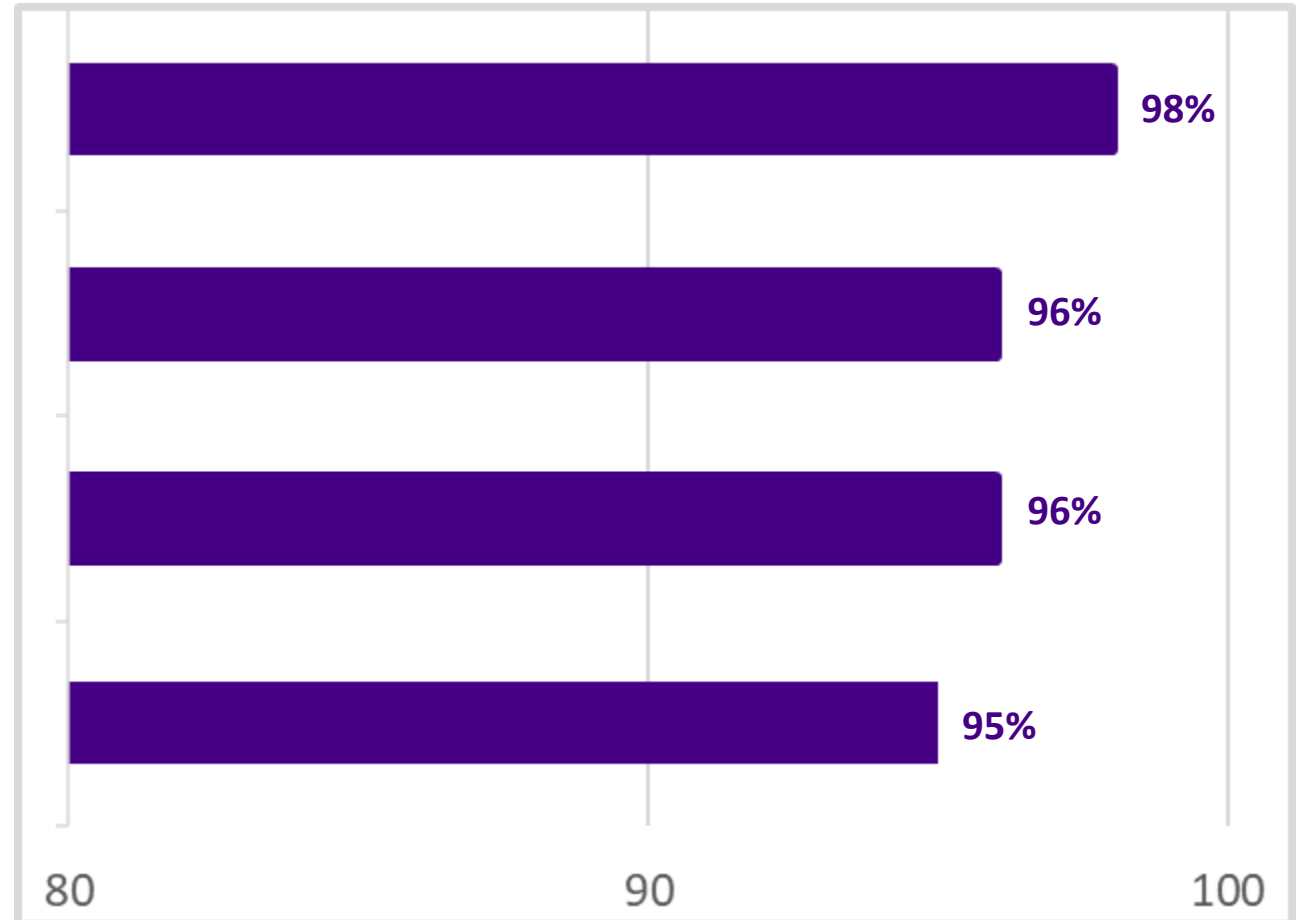
Family & Supporter Experience

I feel confident about my student's next steps in the transition process.

I feel like a valued partner in my student's transition to JMU.

I feel more prepared with strategies to support my student now and during their first semester.

I have been connected with resources available to support my student's success.





Family & Supporter Experience

“My heart was full as I attended Orientation for my college-bound son. As a parent and professional, I could not have been more thrilled at the messages we heard throughout the day on topics such as:

Emphasizing sleep, exercise, healthy eating, and cutting back on social media as essential components of **time management** for students.

How parents can empower our young adult’s **self-sufficiency, independence, and resilience** by taking a step back and letting them take the drivers seat of their own lives – and emphasizing **growth mindset, using open-ended questions, and expressing confidence in their abilities** (rather than jumping in, giving instructions, and/or rushing to fix problems for them!)

Specific steps students can take from Day 1 to access **resources from academic guidance to mental health to career steps** – not to mention “adulthood” overall – and emphasizing that **mistakes and bumps in the road are a normal part of the process** and to be expected.”

- Parent of incoming first-year student

Community Engagement and Volunteer Center (CEVC): Madison Community Scholars

Kim Davidson



About CEVC

CEVC co-creates just and sustainable communities...

...through collaborative, mutually-beneficial partnerships.

We offer opportunities that enhance student learning and advance community priorities.



CEVC's Work

2023-2024: 3,551 unique students contributed 57,000+ hours in the community

Faculty

Course development, community connections and student support.

96 courses, 45 faculty, 2,276 students

Community Partnership

Campus connections, resource sharing and capacity building.

141 organizations





CEVC's Work

Student Opportunities



EXPLORE
the possibilities



IMMERSE
in community



LEAD
your peers

Average student engagement: 16 hours per year

Madison Community Scholars

About the Program

Students work ~8 hours/week with a local non-profit, school or government agency.

Aims:

- Gain work experience
- Improve leadership, professional and interpersonal skills
- Partake in a cohort experience
- Earn money while making a social impact

Eligibility:

- Receive a Federal Work Study Award
- MCS Scholarship



2023-2024:

82 Students

55 Community Partners

10,156 Hours

Madison Community Scholars

Significance and Impact

Both students and community partners:

- Build talent pathways
- Develop networks and resources
- Increase capacity
- Make an impact



Madison Community Scholars

Feedback from Community Partner Organizations

“The student was serious, mature, and trustworthy. We hope they will join our team as an employee.”

- *Bridgewater Retirement Community*



“Great professionalism and creative mindset. Our MCS has been a self-starter and has been an excellent contributor. She has built capacity, brought consistency, and evolved our communications program.”

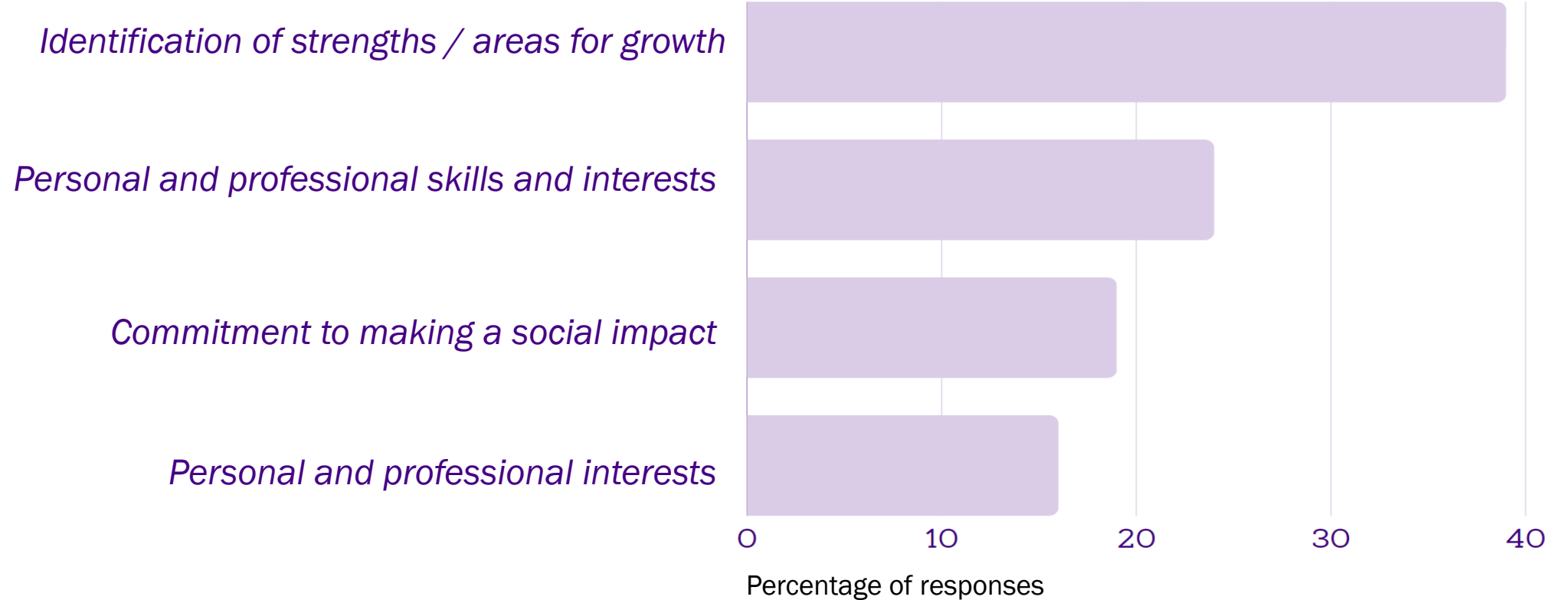
- *Open Doors Shelter & Support*



Madison Community Scholars

Student Reflections

What did you learn from this experience?

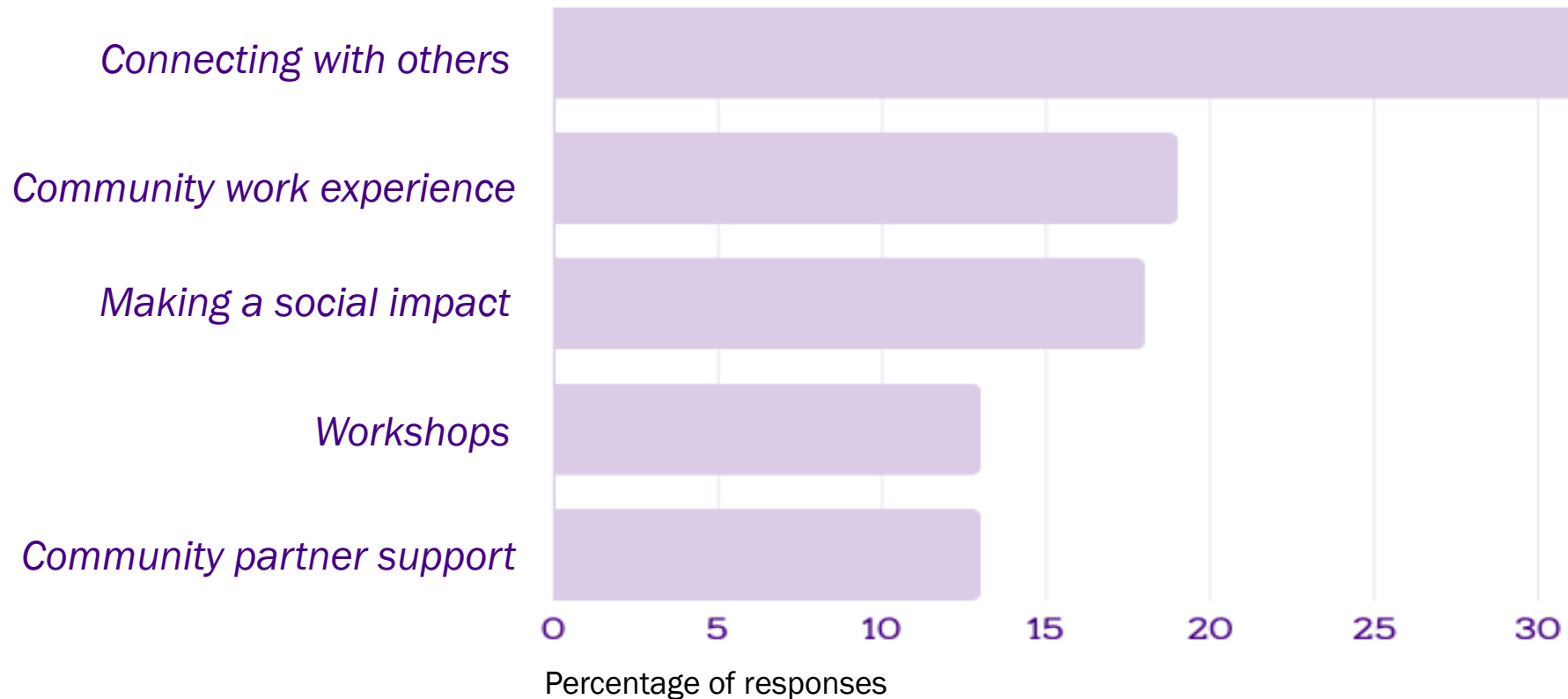




Madison Community Scholars

Student Reflections

What was the best part about your experience?





“My community partnership was amazing! Assisting at the school was a great learning experience. I made such meaningful connections with staff and with the students. I got to know the school counselor really well. As a result, I will be doing my internship for my major at the school next year.”

- *Student at Cub Run Elementary*

Student Panel

Brevin Bugauisan
Jedi Ragas
Izzy Rhodes



Questions?



Full Board Meeting

September 13, 2024



ITINERARY
September 12-13, 2024

PLEASE NOTE THE COMMITTEE START TIMES.

Thursday, September 12, 2024:

9:15 a.m. – 11:30 a.m.	New Board Orientation – Board Room
12:00 pm – 1:00 pm	Lunch - Board Dining Room
12:00 pm – 1:00 pm	Governance Committee – Meeting Room 2
1:00 pm – 2:30 pm	Academic Excellence Committee - Highlands Room
1:00 pm – 2:30 pm	Finance & Physical Development Committee – Meeting Room 3
1:00 pm – 2:30 pm	Student Affairs Committee – Ballroom B
2:45 pm – 4:15 pm	Advancement and Engagement Committee – Allegheny Room
2:45 pm – 4:15 pm	Athletics Committee – Ballroom B
2:45 pm – 4:15 pm	Audit, Risk and Compliance Committee - Meeting Room 1
Check in to Hotel	
5:45 pm	Load shuttle to Oakview Hotel Madison front entrance
6:00 pm – 8:00 pm	Reception & Dinner Oakview

Friday, September 13, 2024:

7:45 am	Breakfast – Board Dining Room
8:15 am	Board Picture
8:30 am – 11:30 am	Full Board Meeting – Board Room
12:00 pm	Board Lunch – Boxed Lunches

Board of Visitors
September 12-13, 2024

**THE VISITORS OF JAMES MADISON UNIVERSITY
THE COMMONWEALTH OF VIRGINIA
BOARD MEETING AGENDA
FRIDAY, SEPTEMBER 13, 2024
8:30 a.m.**

1

CALL TO ORDER

2

***CONSENT AGENDA:**

**Approval of Minutes: April 18, 2024; Approval of Minutes: April 19, 2024
Approval of Executive Committee Minutes: August 21, 2024**

3

***COMMITTEE REPORTS**

**Academic Excellence – Nicole Palya Wood
Advancement and Engagement– Terrie Edwards
Athletics – Dickie Bell
Audit, Risk and Compliance – Jeff Bolander
Finance & Physical Development – Steve Smith
Governance Committee - Jack White
Student Affairs – Terrie Edwards**

4

FACULTY SENATE UPDATE

Kathy Ott Walter, Speaker, Faculty Senate

5

STUDENT REPRESENTATIVE TO THE BOARD UPDATE

Sydney Stafford, Student Representative

6

JMU FOUNDATION UPDATE

Warren Coleman, President & Chief Executive Officer

7

PRESIDENT'S REPORT

Charles W. King

8

PRESIDENTIAL SEARCH FIRM – RUSSELL REYNOLDS

**Kay Coles James, Chair, Presidential Search Committee
Jett Pihakis, Steve Newton, Joi Hayes - Russell Reynolds Search Firm**

9

SUN BELT MEDIA VALUATION

Sam Knehans, Sr. Associate Commissioner, Chief Communications & Branding Officer

10

IMPACT OF FAFSA

Brad Barnett, Associate Vice President, Enrollment Management/Financial Aid Director

11

CAREER OUTCOMES

**Myles Surrett, Associate Vice President, Career, Experiential Learning & Transitions
Libby Westley, Director, University Career Center**

12
CLOSED SESSION*

13
ADJOURNMENT

*Action Required

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Volume LX No. 5

Minutes of the Meeting of April 18 2024

The Visitors of the James Madison University met on Thursday, April 18, 2024 in the Festival Conference and Student Center Board Room on the campus of James Madison University. Maribeth Herod, Rector, called the meeting to order at 4:00 pm.

PRESENT:

Bell, Dickie	Major, Lara
Bolander, Jeff	Obenshain, Suzanne
Edwards, Terri	Rothenberger, John
Falcon, Chris, Vice Rector	Smith, Steve
Herod, Maribeth, Rector	Stoltzfus, Michael
James, Kay Coles	White, Jack
Lynch, John	Wood, Nicole Palya

Alger, Jonathan, President
Knight, Jack, University Legal Counsel

John Lynch made the following motions: “I move the Board go into closed session to discuss the following matters: 1) Pursuant to Section 2.2-3711.A.1 of the Code of Virginia, I move we go into closed session to discuss personnel matters involving promotions, performance, retirements, hiring, resignations, salary adjustments, and status changes of faculty members, university administrators and appointees; and (2) pursuant to Section 2.2-3711.A.8 to consult with legal counsel for the provision of legal advice by such counsel.” The motion was seconded by Suzanne Obenshain and the Board moved into Closed Session.

Following Closed Session, the Rector then asked the following:

“During the closed session, the committee discussed only matters lawfully exempted from open meeting requirements and only those types of matters identified in the motion for the closed session.”

Bell, Dickie	Obenshain, Suzanne
Bolander, Jeff	Rothenberger, John
Edwards, Terri	Smith, Steve
Falcon, Chris, Vice Rector	Stoltzfus, Michael
Herod, Maribeth, Rector	White, Jack
James, Kay Coles	Wood, Nicole Palya
Lynch, John	
Major, Lara	

The Rector then asked if there were any motions to come before the board.

On motion by Chris Falcon, seconded by Kay Coles James, approved the resolutions

ADJOURNMENT

With no further business, the meeting adjourned at 4:29 pm.

Suzanne Obenshain for Maribeth Herod, Rector

Donna L. Harper, Secretary

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY**

Volume LX No. 6

Minutes of the Meeting of April 19, 2024

The Visitors of James Madison University met on Friday, April 19, 2024 in the Festival Conference and Student Center Board Room on the campus of James Madison University. Maribeth Herod, Rector, called the meeting to order at 8:30 am.

PRESENT:

Bell, Dickie	Major, Lara
Bolander, Jeff	Obenshain, Suzanne
Edwards, Terri	Rothenberger, John
Falcon, Chris, Vice Rector	Smith, Steve
Herod, Maribeth, Rector	Stoltzfus, Michael
James, Kay Coles	White, Jack
Lynch, John	Wood, Nicole Palya

Cannella, Abby Student Representative to the Board, 2023-24
Harper, Donna, Secretary

ABSENT:

Fiorina, Carly

ALSO PRESENT:

Alger, Jonathan, President
Carter-Hoyt, Malika, Vice President for Diversity, Equity and Inclusion
Coltman, Heather, Provost and Senior Vice President for Academic Affairs
Langridge, Nick, Vice President for University Advancement
Miller, Tim, Vice President for Student Affairs
Moore, Towana, Vice President for Administration and Finance
Tongen, Anthony, Vice President for Research, Economic Development, and Innovation

Vass, Mary-Hope, Executive Director of Communications
Ott-Walter, Kathy, Speaker, Faculty Senate
Knight, Jack, University Counsel

The Rector recognized the outgoing Student Government Association President, Nate Hazen and welcomed Brielle LaCroix, the new SGA president. The Rector recognized the outgoing Student Representative to the Board of Visitors, Abby Canella and welcomed Sydney Stafford . The Rector recognized the Faculty Senate representative, Kathy Ott Walter and thanked all of them for their service to the university.

CONSENT AGENDA

On motion of Lara Major, seconded by Chris Falcon, the Consent Agenda was approved which included the minutes of the February 16, 2024 board meeting and the Public Comment Meeting held on April 3, 2024.

COMMITTEE REPORTS

Academic Excellence

Lara Major, Chair, presented the report of the Academic Excellence Committee. The minutes of the February 15, 2024 meeting were approved. (Attachment A)

Ms. Major reported on the following topics from the committee meeting:

- 1) Divisional update from the Provost, Heather Coltman;
- 2) Area Spotlight on the Graduate School;
- 3) Curriculum updates from Paula Maxwell, Associate Vice Provost for curriculum;
 - a. On motion from committee, approved the discontinuance of the Bachelor of Science in Teaching English to Speakers of Other Languages (TESOL).
- 4) Faculty Handbook 2024-25 Updates;
 - a. On motion from committee, approved the proposed changes to the Faculty Handbook.
- 5) Report from the Faculty Senate Speaker, Kathy Ott Walter; and
- 6) Topics of Interest were shared to consider holding one joint meeting with the Student Affairs Committee.

On motion of Ms. Major, seconded by Chris Falcon, the report of the Academic Excellence Committee was accepted.

Advancement and Engagement Committee

Michael Stoltzfus, Chair, presented the report of the Advancement and Engagement Committee. The minutes of the February 15, 2024 meeting were approved. (Attachment B)

Mr. Stoltzfus reported on the following topics from the committee meeting:

- 1) Fundraising Report from the Duke Club Annual Fund and Advancement;
- 2) Vice President Update from Nick Langridge;
- 3) Giving Day Wrap-Up report;
- 4) Carrier Library Renovation and Expansion from Bethany Nowviskie, Dean of Libraries and Sheila Smith and Jeff Gilligan on fundraising efforts; and
- 5) Enrollment Marketing update.

On motion of Mr. Stoltzfus, seconded by Nicole Palya Wood, the Advancement and Engagement report was accepted.

Athletics Committee

John Lynch, Chair, presented the report of the Athletics Committee. The minutes of the February 15, 2024 meeting were approved. (Attachment C)

Mr. Lynch reported on the following topics from the committee meeting:

- 1) Sports Update;
- 2) Title IX Participation Report;
- 3) Name, Image, Likeness (NIL) Update;
- 4) Student-Athlete Advisory Committee (SAAC) Update; and
- 5) Development Update.

On motion of Mr. Lynch, seconded by Steve Smith, the Athletics report was accepted.

Audit, Risk and Compliance Committee

Chris Falcon, Chair, presented the report of the Audit, Risk and Compliance Committee. The minutes of the February 15, 2024 meeting were approved. (Attachment D)

Mr. Falcon reported on the following topics from the committee meeting:

- 1) JMU Financial Audit – the preliminary results were shared by Megan Richard, Auditor of Public Accounts;
- 2) WMRA Financial Review – Matt Bingay, WRMA Station Manager, shared the PB Mares, CPA unmodified opinion on the stations' finances;
- 3) Students from ACTG 677, Advanced Assurance and Analysis and their instructor, Nicole Wright, Associate Professor of Accounting, shared the analysis of their project on business continuity planning; and
- 4) Becky Holmes, Director of Audit and Management Services, presented the draft 2024-25 audit plan and reviewed mandatory disclosures.

On motion of Mr. Falcon, seconded by Suzanne Obenshain, the Audit, Risk and Compliance report was accepted.

Finance and Physical Development Committee

John Rothenberger, Chair, presented the report of the Finance and Physical Development Committee. The minutes from the February 15, 2024 meeting were approved. (Attachment E)

Mr. Rothenberger reported on the following from the committee meeting:

- 1) Financial Review;
- 2) Audit Review for 2022-23 with an unmodified opinion on the financial statements;
- 3) General Assembly Update from Caitlyn Reed, Assistant Vice President for State Government Relations;
- 4) 2024-25 Tuition and Fees were presented by Towana Moore, Vice President for Administration and Finance; and
- 5) 2024-25 Proposed Budget was presented by Towana Moore, Vice President for Administration and Finance.

On motion of Mr. Rothenberger, seconded by Terrie Edwards, the Finance and Physical Development report was accepted.

Governance Committee

Jack White, Chair, presented the report of the Governance Committee. The minutes of the February 15, 2024 meeting were approved. (Attachment F)

Mr. White reported on the following from the committee meeting:

- 1) 2025 Board Retreat – June 5-6, 2025; and
- 2) The Board Manual will be reviewed and updated as appropriate for consideration at the September meeting.

On motion of Mr. White, seconded by Chris Falcon, the Governance report was accepted.

Student Life Affairs Committee

Terrie Edwards, Chair, presented the report of the Education and Student Life Committee. The minutes from the February 15, 2024 meeting were approved. (Attachment G)

Ms. Edwards reported on the following topics from the committee meeting:

- 1) Student Affairs Update from Tim Miller, Vice President for Student Affairs;
- 2) Student Affairs Finance and Assessment Efficiencies from Jonathan Stewart, Director of Finance, IT, and Assessment;
- 3) Student Affairs Communication and Marketing report from Carson Lonett, Executive Advisor to the Vice President and Angela Ritchie, Associate Director for Communications and Marketing;
- 4) Student Government Report from Nate Hazen, President; and
- 5) Student Representative to the Board of Visitors Report from Abby Canella.

On motion of Ms. Edwards, seconded by Michael Stoltzfus, the Student Affairs report was accepted.

PRESIDENT'S REPORT

Mr. Alger presented information on the following: (Attachment H)

- Introductions of Matt Roan, director of athletics; Preston Spradlin, men's basketball coach; and Bob Chesney, football coach;
- The Career Fair will move from Festival Ballroom to AUBC due to an increase of 110.5% from 2021-2023. The total for all career fair attendance from 2023-2024 was 6,150, with 20.6% of the student population attending all career fairs in 2023;
- 75 students conducted sustained service with community partners using Federal Work Study or Madison Community Scholar funds. Those students provided service with 55 unique community partners and completed 9,901 hours with an average of 131 hours per student;
- JMU has partnered through Dr. Ken Rutherford, Fulbright Scholar with the University of Foreign Languages –Hue University (HUFLIS) in Spring 2024. The partnership creates new relationships and collaboration between JMU and HUFLIS, as well as Vietnam and the United States;
- The State Council of Higher Education for Virginia (SCHEV) formally approved the Doctor of Education (Ed.D.) degree program in Education, effective Spring 2025. The proposed program will require 60 credit hours, be delivered in a hybrid format and will not require additional state resources;
- The FY24 Appropriations Bill included a \$1 million congressionally directed spending award to JMU;
- The Early Healthcare Workforce Pipeline Development Project (PDP) is a partnership between JMU's AAAD, CHBS, Virginia public schools and medical districts, and African American communities. The PDP will offer community-based, experiential solutions to address disparities in representation in the profession and in health outcomes;
- The JMU Brass Band finished in first place in the Champions Section of the North American Brass Band Association Championships (NABBA). Many of their competitors included university faculty talent. The Massanutten Brass Band placed first in the second section of the competition;
- The JMU Speech Team finished 16th in the nation at the American Forensic Association's National Speech Tournament at the University of Wisconsin–Eau Claire. The 16th place finish marked their second highest placement since 2000 and their first time placing in the top 20 since 2011. For the first time ever, JMU students were named to the 16-person 2024 All-American Team, Lexie Burns and Arina Drovetskaya;
- In April, several Latino students from JMU and Harrisonburg High School visited the White House to screen "The Long Game" film, accompanied by CAL Assistant Dean, Karina Kline-Gabel. Students

met the cast and participated in a discussion at the White House event organized by Sol Ortega, the White House engagement senior advisor for public engagement;

- On March 20th, Dr. Richard Mitchell, commissioner of the Virginia Department for Blind and Vision Impaired (DBVI), was the keynote speaker at the JMU Diversity Conference highlighting access and inclusion. Appointed by Governor Youngkin, Dr. Mitchell emphasized the importance of tenacity and adaptability while encouraging the audience to partner with individuals who have disabilities;
- On April 9, Virginia Secretary of Education Aimee Guidera visited JMU for a conversation on bridging political divides and the importance of civic education. This conversation, which included audience Q&A, was facilitated by President Alger and Democracy Fellow Valeria Lopez-Postigo;
- Chief of Staff David Kirkpatrick joined a small group of higher ed leaders at Georgetown University to discuss national efforts at improving free speech and bridging divides on college campuses;
- The Madison Center celebrated Civics Education Week with a panel on equipping K-12 students as civic leaders, featuring HCPS board chair, RCPS and HCPS teachers, and the Director of Education from the Morven Park Center for Civic Impact;
- President Alger spoke at the Advancing Campus Pluralism conference in D.C. on intellectual diversity and JMU's national leadership on these themes.

The Rector thanked the search committee for the Athletic Director for their work in finding the right person to replace Jeff Bourne.

AI TASK FORCE

Robin Bryan, Associate Vice President for IT/CIO; David Kirkpatrick, Chief of Staff; Bob Kolvoord, Dean of the College of Integrated Science and Technology; and Bethany Nowviskie, Dean of the Libraries presented the findings of the AI Task Force and their recommendations. (Attachment I)

CENTER FOR GLOBAL ENGAGEMENT

Jiangyuan Zhou, Executive Director for the Center provided an overview of the role and programs of the Center for Global Engagement. Griffin Hullinger and Tingzhe Jack Zhao, international students, shared their experiences at JMU. (Attachment J)

2024-25 PROPOSED TUITION AND FEES

Towana Moore, Vice President for Administration and Finance, presented the proposed tuition and fees. She explained the considerations that impact the proposal. On motion from John Rothenberger, seconded by Nicole Palya Wood, the board approved the following: (Attachment K)

VIRGINIA STUDENT	
Tuition & Fees	8,150
Comprehensive Fee	5,816
TOTAL COMMUTER COSTS	\$ 13,966
Room & Board	12,540
TOTAL ON-CAMPUS COSTS	\$ 26,506

NON-VIRGINIA STUDENT	
Tuition & Fees	25,496
Comprehensive Fee	5,816
TOTAL COMMUTER COSTS	\$ 31,312
Room & Board	12,540
TOTAL ON-CAMPUS COSTS	\$ 43,852

GRADUATE (Per Credit Hour)	
Virginia	\$ 561
Non-Virginia	\$ 1,291

Summer School 2025

Tuition and Education & General Fees (Per Credit Hour)	
Virginia Undergraduate	\$420
Non-Virginia Undergraduate	\$1,000
Virginia Graduate	\$489
Non-Virginia Graduate	\$1,134
Student Services Fee (Per Credit Hour)	
Virginia Undergraduate	\$28
Non-Virginia Undergraduate	\$28
Virginia Graduate	\$28
Non-Virginia Graduate	\$28
Room & Board (Per Week)	
Room	\$119
Board - 19 Meals No Dining Dollars	\$146

2024-25 PROPOSED BUDGET

Towana Moore, Vice President for Administration and Finance, presented the proposed 2024-25 budget. She explained the mandates and costs that must be taken into consideration. On motion from John Rothenberger, seconded by John Lynch, the board approved the following budget: (Attachment L)

2024-25 Budget Summary (Millions)

Education & General		423.0
Auxiliary Enterprises		258.6
<u>Financial Aid</u>		<u>35.1</u>
E&G, F/A & Auxiliary	\$	716.7
Sponsored Programs	\$	<u>58.3</u>
Total Operating*	\$	<u><u>775.0</u></u>

* Excludes Equipment Trust Fund

INTERIM PRESIDENT

The Rector requested characteristics/qualities for consideration for the interim president from various constituencies. The Board reviewed and discussed those. On motion by Chris Falcon, seconded by Lara Major, the board approved the appointment of Charles King as Interim President to serve from July 1, 2024 to June 30, 2025 or until a new president is duly hired and in place.

ELECTION OF OFFICERS

Lara Major, Chair of the Nominating Committee, shared the slate of officers for 2024-26. On motion from committee, the board approved the following slate with an abstention by Chris Falcon:

Rector-Suzanne Obenshain
 Vice Rector-Terrie Edwards
 Secretary-David Kirkpatrick

Maribeth Herod, Rector, then shared the following resolutions and presented the resolutions to the respective individuals:

WHEREAS, Jeffrey T. Bourne served faithfully and with great distinction as Athletics Director of James Madison University for the past 25 years, a run that put JMU on the national map; and
 WHEREAS, AD Bourne led JMU to 3 NCAA National Championships, 77 Conference Team Championships, 60 Conference Regular Season Titles, 151 Teams Represented in the NCAA Postseason Competition, 181 All-Americans, 83 Conference Coaches of the Year, 15 Academic All-Americans and consistently the highest winning percentage across all sports in Virginia; and
 WHEREAS, Bourne wisely navigated the turbulent waters of intercollegiate athletics during times of great uncertainty, successfully landing JMU at the Sun Belt Conference where success moving from FCS to FBS was immediate and unprecedented; and
 WHEREAS, Bourne never took his eyes off the university's mission to prepare students to become educated and enlightened citizens, with JMU student athletes graduating at high rates and winning conference academic distinctions; and
 WHEREAS, JMU athletic facilities blossomed during Bourne's tenure into world-class spaces for competition and top fan experiences that are the envy of programs across the country; and
 WHEREAS, Bourne cultivated a culture of success aligned with care for the individual embedded in every aspect of the program, allowing JMU to succeed consistently despite turnover among coaches and student athletes, which will be his greatest legacy.
 THEREFORE, BE IT RESOLVED that the Visitors of James Madison University, collectively and individually, express deepest thanks to Jeffrey T. Bourne for his loyal service to James Madison

University and especially for his service as Athletic Director, and the Visitors further extend their best wishes to Mr. Bourne and hope for happiness in all he undertakes in the future.

WHEREAS, Donna L. Harper ('77, '81M, '86Ed.S.) served faithfully and with great distinction in countless positions at James Madison University for the past 47 years, most recently as the Vice President of Access and Enrollment and Secretary to the Board of Visitors; and

WHEREAS, Harper epitomized and proliferated the practice of challenging yet supporting students in her many roles in the Division of Student Affairs, which has become a foundation of JMU's distinct culture; and

WHEREAS, Harper helped lead the effort to move Sororities and Fraternities onto Greek Row, and was instrumental in building the policies and procedures foundational to Office of Fraternity and Sorority Life at JMU; and

WHEREAS, Harper successfully led the Health Center during an era of change when the importance of wellness came into clearer focus, transforming the unit from an infirmary to one offering a multitude of services improving the lives of the JMU student body; and

WHEREAS, Then President Linwood H. Rose, recognizing Harper's many talents, selected her to become his Executive Assistant and Secretary of the Board of Visitors; and

WHEREAS, Harper became Vice President of Access and Enrollment leading with distinction the Offices of Financial Aid, University Events and Admissions, most recently during a time when applications to JMU surged; and

WHEREAS, Harper broadened access to JMU through her leadership oversight of initiatives including Professors in Residence, Centennial Scholars, Valley Scholars and the new First-Generation Student Center, now named the Reddix Center; and

WHEREAS, a most ardent fan of JMU Athletics, Harper enthusiastically supported teams with her near ubiquitous attendance.

THEREFORE, BE IT RESOLVED that the Visitors of James Madison University, collectively and individually, express deepest thanks to Donna L. Harper for her loyal service to James Madison University and especially for her service as Vice President of Access and Enrollment and Secretary of the Board of Visitors, and the Visitors further extend their best wishes to Ms. Harper and hope for happiness in all she undertakes in the future.

WHEREAS, Jonathan R. Alger served faithfully and with great distinction as sixth President of James Madison University for the past 12 years, an era of great flourishing at JMU; and

WHEREAS, President Alger thoughtfully and inclusively developed and executed The Madison Plan, realizing the strategic plan's vision to become a national model of the engaged university; and

WHEREAS, hundreds of local middle and high school students who might not otherwise have imagined attending college received the opportunity through the Valley Scholars program established by President Alger shortly after his arrival at JMU; and

WHEREAS, President Alger elevated and consolidated JMU's national reputation by sitting on numerous national higher education boards, committees and panels, and as an recognized leader in civic education and engagement, more solidly connected JMU's culture to the legacy of James Madison; and

WHEREAS, the Carnegie Commission on Higher Education changed JMU's classification from Master's level to Doctoral/High Research during his tenure; and

WHEREAS, JMU Intercollegiate Athletics joined the Sun Belt Conference and enjoyed unprecedented success on fields and in arenas of competition and academically; and

WHEREAS, Unleashed: The Campaign for James Madison University succeeded stunningly, raising a quarter-billion dollars from nearly 64,000 investors; and

WHEREAS, applications to JMU rose nearly 80 percent during the last three years at a time when many institutions are experiencing declines as student-aged populations decrease; and

WHEREAS, Mary Ann Alger served the institution faithfully in numerous roles including as a co-founder of Women for Madison, board member for the JMU Gilliam Center for Entrepreneurship and on several community organization boards.

THEREFORE, BE IT RESOLVED that the Visitors of James Madison University, collectively and individually, express deepest thanks to Jonathan R. Alger for his loyal service to James Madison University and especially for his service as President, and the Visitors further extend their best wishes to Mr. and Mrs. Alger and hope for success and happiness in all their future undertakings.

RECOGNITION OF BOARD MEMBERS

Jon Alger, President, recognized the board members that were completing their respective terms and presented them with a gift: Chris Falcon, John Lynch, John Rothenberger, Lara Major and Maribeth Herod.

Rector Herod then called for the board to move into Closed Session. Chris Falcon made the following motion:

“Pursuant to Section 2.2-3711.A.1 of the Code of Virginia, I move we go into closed session to discuss personnel matters involving promotions, performance, retirements, hiring, resignations, salary adjustments, and status changes of faculty members, university administrators and appointees; 2) pursuant to Section 2.2-3711.A.8 to consult with legal counsel for the provision of legal advice by such counsel; and 3) pursuant to Section 2.2-3711A.9 for discussion and consideration of matters relating to gifts, bequests and fund-raising activities.”

The motion was seconded by John Rothenberger and the Board moved into closed session. Following the closed session, Ms. Herod then stated the following:

During the closed session, the board discussed only matters lawfully exempted from open meeting requirements and only those types of matters identified in the motion for the closed session.

RECORDED VOTE: the following is an affirmative recorded, member by member vote:

- | | |
|----------------------------|--------------------|
| Bell, Dickie | Major, Lara |
| Bolander, Jeff | Obenshain, Suzanne |
| Edwards, Terrie | Rothenberger, John |
| Falcon, Chris, Vice Rector | Smith, Steve |
| Herod, Maribeth, Rector | Stoltzfus, Michael |
| James, Kay Coles | White, Jack |
| Lynch, John | Wood, Nicole Palya |

Ms. Herod then asked if there were any motions to come forward.

On motion from Suzanne Obenshain, seconded by Nicole Palya Wood, approved the Personnel Action Report.

On motion from the Advancement Committee the board approved the following naming opportunities: East Campus Drive be renamed Jeff Bourne Way in honor of Director of Athletics Jeffrey T. Bourne; the Greek Row pedestrian lane be named Donna Harper Lane in honor of Vice President for Enrollment Management Donna Harper; Spotswood Hall be renamed, upon its renovation and reopening as a civic learning community and the home for the Madison Center for Civic Engagement, as Alger Hall, in honor of President Jonathan R. Alger.

The board then recessed at Noon. The board reconvened at 1:00 pm to discuss the presidential search.

The Rector gave an overview of the topics for the meeting to include learning the best practices of presidential searches, understanding how the previous JMU presidential search was conducted, and the potential composition of the search committee.

Rod McDavis, from AGB Search, provided considerations for conducting a positive search.

Nick Langridge, Vice President for Advancement, shared the process used to select the last president.

Maribeth then shared the search process that George Mason University and Radford University used for their respective presidential search processes.

The board members then shared their recommendations for the constituencies to potentially be represented on the search committee for the new president with 12-15 members on the committee.

The Rector announced that Suzanne Obenshain, Jonathan Alger, Charlie King, Donna Harper and the Rector would meet to develop the search committee.

ADJOURNMENT

There being no further business, on motion of Chris Falcon, seconded by John Rothenberger, the Board voted to adjourn. The meeting was adjourned at 2:45 pm.

Suzanne Obenshain for Maribeth Herod, Rector

Donna L. Harper, Secretary

**THE COMMONWEALTH OF VIRGINIA
THE VISITORS OF JAMES MADISON UNIVERSITY
EXECUTIVE COMMITTEE MEETING**

Minutes of the Meeting of August 21, 2024

The Executive Committee of the Visitors of James Madison University met on Wednesday, August 21, 2024 by electronic communication. Suzanne Obenshain, Rector, called the meeting to order at 3:00 p.m.

PRESENT:

Bell, Dickie
Edwards, Terrie, Vice Rector
Obenshain, Suzanne, Rector
Smith, Steve
White, Jack
Wood, Nicole Palya

ALSO PRESENT:

Kirkpatrick, David, Secretary
Knight, Jack, University Counsel

Rector Obenshain called for the board to move into Closed Session. Dickie Bell made the following motion:

“I move the committee go into closed session to discuss the following matter: Pursuant to Section 2.2-3711-A-1 of the Code of Virginia to discuss personnel matters including the assignment and performance of specific public officers or employees.”

The motion was seconded by Nicole Palya Wood and the Executive Committee moved into closed session.

Following the closed session, the Rector then stated the following:

During the closed session, the board discussed only matters lawfully exempted from open meeting requirements and only those types of matters identified in the motion for the closed session.

RECORDED VOTE: the following is an affirmative recorded, member by member vote:

Bell, Dickie
Terrie Edwards, Vice Rector
Obenshain, Suzanne

Smith, Steve
White, Jack
Wood, Nicole Palya

Rector Obenshain called on Dickie Bell for a motion.

“I move that the faculty representative to the Board of Visitors be given full voting rights at the appropriate time for selection of the new University president.”

Nicole Palya Wood seconded the motion.

The executive approved that the faculty representative can participate in the finalist interviews and selection of our next president.

ADJOURNMENT

There being no further business, the meeting was adjourned at 3:50 pm.

Suzanne S. Obenshain, Rector

David C. Kirkpatrick, Secretary

Motions from Committee



Six-Year Plan Update

Towana Moore
Vice President
Administration and Finance

Diane Stamp
Associate Vice President
Budget Management





Six-Year Planning Process

- Vice President for Administration & Finance, Provost and Six-Year Plan Working Group convene, begin planning and create initial draft
- President and Senior Leadership Team review and approve draft
- Commonwealth representatives review the submission, including:
 - Director of Planning and Budget
 - Executive Director of SCHEV
 - House Appropriations Representative
 - Secretary of Education
 - Secretary of Finance
 - Senate Finance Representative
- Board of Visitors reviews and approves
- Final report is submitted



Six-Year Financial Plan Assumptions

- Emphasis on 2024-26 biennium, focus 2025-26
- Strategies related to JMU Madison Plan and Virginia Higher Education Plan
- Projected enrollment
- Projected tuition and fees



Six-Year Financial Plan – Revenue & Expense Estimate Assumptions

- Tuition and fee revenue estimate
 - Based on projected enrollments by degree level & residency
- Expenditures include state mandated compensation, financial aid and targeted institutional strategies



FY 2023 Six-Year Plan – Implemented Strategies in FY 2024-25

- Salary & Benefit Increases for Existing Employees
- Faculty Promotions & Other Employee Pay Adjustments
- Student Financial Assistance & Scholarship
- Expanded Academic Programs
 - Physician Assistant (PA) Program
 - Computer Science Major
 - Information Technology Major
- Academic & Student Support Strategies
 - Early Alerts: Student Success System
 - Reengineering Madison
 - Research Infrastructure





Six-Year Financial Plan – Costs Summary

Academic & Financial Plan Strategies	2025-26 Incremental Expense Change		
	Reallocation	Nongeneral Funds	Total
Faculty and Staff Authorized Salary Increases (net costs/3%)		4,151,775	4,151,775
Increase Funding Faculty Promotions & Other Pay Adjustments		1,050,000	1,050,000
Contractual Services & Utilities	1,000,000	362,120	1,362,120
Additional Undergraduate Student Financial Assistance		468,461	468,461
Expansion of Physician Assistant Program		150,000	150,000
Improving Retention and Closing the Equity Gap (Early Student Success System)		244,389	244,389
Supporting Growth of the Computer Science & IT Majors		573,186	573,186
Meet the Commonwealth's Mental Health Needs		615,786	615,786
Reengineering Madison		993,234	993,234
Carrier Library Renovation & Expansion		641,652	641,652
Total Academic & Financial Operating Strategies	\$1,000,000	\$9,250,603	\$10,250,603



Six-Year Financial Plan E&G – Nongeneral Fund Revenue Estimate

Tuition & Fees Change – Planning Purposes Only

	2024-25	2025-26	\$ Change
Undergraduate Virginia Student			
Tuition & Fees	8,150	8,550	400
Comprehensive Fee	5,816	5,990	174
TOTAL COMMUTER COSTS	\$ 13,966	\$ 14,540	\$ 574

Undergraduate Non-Virginia Student			
Tuition & Fees	25,496	25,994	498
Comprehensive Fee	5,816	5,990	174
TOTAL COMMUTER COSTS	\$ 31,312	\$ 31,984	\$ 672



Anticipated Outcomes

- Increase Employee Recruitment and Workforce Retention
 - Compensation Adjustments
 - Faculty Promotions & Other Employee Pay Adjustments
- Additional Health Care Personnel in the Commonwealth
 - Expansion of PA Program
 - Mental Health Needs
- Contributing to the Virginia Technology Workforce
 - Growth of the Computer Science Major
 - Growth of the Information Technology Major
- Improve Student Experience & Retention
 - Early Student Success System
 - Reengineering Madison

Summary of Six-Year Planning Process

The State Council of Higher Education for Virginia (SCHEV), in cooperation with public two- and four-year institutions, develops six-year plans each year that support institutional commitments to the Statewide Higher Education Strategic Plan and objectives of the Higher Education Opportunity Act (HEO) of 2011. The HEO Act requires all public higher education institutions to prepare and submit a six-year plan annually.

Based on the template provided by the state, JMU's senior administrators work in collaboration with Budget Management and the Office of Planning, Analytics and Institutional Research to prioritize initiatives and determine appropriate financial requests. In odd-numbered years, each institution's governing board adopts a six-year plan; that plan is either amended or affirmed in even-numbered years. As the title suggests, this document is strictly for planning purposes and involves projections based on available information which can then be amended and updated over time as more current data is available.

The 2024 six-year plan consists of the following components:

- Cover Letter: Contains specific questions from the plan reviewers
- Part 1: Financial Plan
 - Undergraduate Tuition and Fees
 - Revenue
 - Financial Aid
 - Academic and Financial strategies
 - Six-Year Pro Forma
 - State General Fund Budget Requests
- Part 2: Narrative
 - Mission & Priorities
 - Enrollment Volume & Composition
 - Program Alignment and Performance
 - Post-Completions
 - Work Force Alignment
 - Financial Effectiveness and Sustainability
 - Cost Effectiveness
 - Budget Requests
 - Economic Development
 - Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought
 - New Schools, Sites and Mergers
 - Optional Sections: Research, Collaboration, State Policy, Additional Information

James Madison University Six-Year Plan Response (Cover Letter)

How you have used the Fact Pack data provided last year with the public, your governing board, students, faculty, etc.

JMU is committed to providing constituents with up-to-date and accurate data visualizations that highlight the university's strengths and demonstrate accountability for trends showing further work is needed to achieve its aims. The information contained in the Fact Pack is an important part of that narrative, and the university has aligned much of its data communications and use strategy with the areas contained within the Fact Pack.

JMU provides a link to the current Six-Year Plan and corresponding Fact Pack through its [strategic planning website](#). The Fact Pack contains much information that is also tracked and reported publicly by JMU's Planning, Analytics and Institutional Research (PAIR) office. JMU's PAIR office maintains a comprehensive university [Fact Book](#), which has been part of the office's deliverables since the 1970s. As a result, much of the information contained in the Fact Pack, such as change over time in enrollment, admissions, demographics, completions, graduation, and retention rates, is already available publicly. These visualizations are interactive and provide additional ways of viewing trend data beyond what is included in the Fact Pack.

Additionally, the JMU Board of Visitors has access to a set of publicly available [key performance measures](#) that align with institutional strategic priorities. Several metrics, such as E&G instructional expenditures over time, budget trends over time, and numerous other financial and enrollment metrics also found within the Fact Pack, are provided on the site with contextual information that aid the reader's interpretation.

Other metrics from the Fact Pack, such as those related to financial health, are regularly monitored by the [Finance Office](#) and [Office of Budget Management](#). Quarterly financial updates are provided throughout the year to JMU board members as the latest information is available. [Post-graduation outcomes](#) are tracked by the University Career Center, who shares data related to graduation and employment outcomes annually with the Board of Visitors; this report is also publicly available.

Changes in admissions, enrollment, and retention due to disruptions of the new FAFSA form and your plan to mitigate the impact.

The 2024-25 congressionally mandated changes to the FAFSA and underlying federal methodology excluded the *number in college* from the Student Aid Index (SAI) calculation. As a result, a segment of currently enrolled low- to middle-income in-state undergraduate students returning in 2024-25 will lose their eligibility for federal and/or state grants.

Through modeling and data analysis, the university identified this outcome prior to 2024-25. Campus partners secured funding that will allow JMU to replace a portion of what students are losing with an alternative financial aid award. This will help these students return to JMU and complete their education.

Explain any changes in the "Key Metrics at a Glance" and other changes your Fact Pack that you feel are important to highlight.

Enrollment volume and composition continue to show a modest increase in enrollment over Fall 2023 data. JMU has seen record applications over the past four years, which has led to declining acceptance rates.

Yield rates continue to show a decline, which is to be expected in our attempt to keep first-year enrollment stable. Even with a declining yield rate first-year enrollment was at a record high in 2023, and increasing retention rates continue to lead to modestly increasing enrollment.

Please include detailed updates on your cost control measures as noted in the Six- Year Plan follow up including new/ongoing initiatives and where your per student overall expenditure and institutional/administrative expenditures are trending as a result of your efforts.

The university continues to focus on achieving higher education efficiency through strategic resource allocation, process optimization, and cost containment. As part of the university's annual process, JMU consistently identifies opportunities for resource reallocations and actively seeks information on efficiency improvements. This approach ensures that the university streamlines resource use, enhances operational effectiveness, and maintains a focus on achieving strategic goals. By regularly reviewing and adjusting the allocation of resources, JMU strives to create a more efficient and effective educational environment.

While the university's E&G expense per student was higher in FY 2022-23, 83% of the increase over FY 22 was for direct support of educating JMU students in the areas of instruction and academic support. Total institutional and administrative expenditures per student decreased by over 9% from FY 2022. The university's total E&G expense per student is 33%, less than the Virginia public four-year institution median.

JMU continues a focus on efficiency and cost containment strategies in multiple areas, including:

- *Energy Efficiency:* Investment in utility infrastructure upgrades, technologies, and practices to reduce utility costs and promote sustainability.
- *Technology Integration:* Increased use of technology to augment student advising and assist with data-driven decision making through the Reengineering Madison project.
- *Partnerships and Collaborations:* Continued collaborative procurement partnerships with the Virginia Higher Education Procurement Consortium (VHEPC) and the Virginia Association of State College and University Purchasing Professionals (VASCUPP) to ensure efficient use of resources and contract negotiation power of volume and enhance educational opportunities. Manages procurement for the 39 state-assisted colleges and universities involved in the Virtual Library of Virginia (VIVA) consortium, which brings \$5 of value for every \$1 spent through VIVA's cooperative purchasing of resources.

Describe the anticipated impact of any new federal or state legislative or regulatory requirements on the institution's finances (e.g., Financial Value Transparency and Title IX regulations).

JMU anticipates the legislative/regulatory requirements below will impact the university's finances.

- *Executive Order 30:* Executive Order 30 requires a level of compliance to VITA policies standards that JMU has historically been exempt from as a Tier 3 institution. Compliance with the EO would require at least two new full-time staff positions for an expected fiscal impact of about \$200,000 per year.
- *Online Virginia Network:* Online Virginia Network annual funding for JMU was cut by \$600,000. These funds were being used to support online learning developers and specialists who were primarily supporting JMU's College of Education to ensure online pathways to teacher licensure. As the university sees this function as vital to the commonwealth's workforce needs, we intend to retain these positions using institutional funding sources.

- *Title IX*: Regulations previously passed, which were intended for implementation Aug. 1, have been challenged and are on hold. Until a decision is made, the university does not know the possible costs of addressing Title IX legislation regarding issues including pregnancy and related conditions.

James Madison University Six-Year Plan Narrative (Part II)

Section A: Mission & Priorities

A1. What is your institutional mission? Please share any plans you have to change your mission over the six-year period.

The JMU mission statement is woven throughout the culture of the institution. It states:

We are a community committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives.

The statement directly addresses educating students and is designed to reiterate the university's long-standing commitment to meeting the needs of its undergraduate and graduate students. It is intentionally concise, allowing it to be commonly recited and referred to by the JMU community.

To further emphasize teaching and to incorporate the research, service, and planning aspects of the institution, the mission is complemented by the JMU Vision and Values statements, as well as the core qualities and university goals of the strategic plan.

The vision statement and values statements reaffirm the university's long-standing commitment to meeting the needs of its students. They are:

- JMU Vision Statement: To be the national model for the engaged university: engaged with ideas and the world.
- JMU Values Statement: Our student-centered community values academic quality, community, diversity, innovation, integrity and student focus.

In Spring 2016, the university began a broad review of the university's mission statement. This review began with the University Planning Team (UPT), a representative body of leaders from all university divisions, including the Faculty Senate and Student Government Association.

The president and vice presidents then discussed the UPT report to determine whether any of the university's context, aspirations, or purposes had changed significantly enough to warrant a change in the mission. They determined no changes were needed at that time.

The mission statement was reaffirmed by the JMU Board of Visitors in April 2022, and there are no plans to modify the mission in the next six years.

A2. What are your institution's greatest strengths and areas of distinctiveness that it should continue to invest in? What are your institution's greatest opportunities for improvement?

James Madison University offers a high-quality student experience for undergraduates in its bachelor's level programs and for post-graduates in its array of distinguished master's, educational specialist, and doctoral programs. Following a teacher-scholar model, JMU faculty are scholars, teachers, and mentors engaged in a broad array of creative and intellectual endeavors across disciplines and emerging fields of study. Their research and scholarship drive innovation, shape our educational approaches, and provide student learning opportunities in and beyond the classroom.

JMU provides a total education to students – one that has a broad range of the liberal arts as its foundation and encompasses an extensive variety of professional and pre-professional programs, augmented by a multitude of learning experiences outside the classroom. For over 110 years, JMU served the Commonwealth of Virginia by providing students with a range of academic programs that provide intellectual stimulation, promote critical thinking, and help to meet the needs of the state. The university plans to continue investing in the people and programs that have helped to define JMU with an eye toward sustainability and accessibility.

The institution is making a significant investment to increase access and affordability for all learners, including historically under-represented student populations, in keeping with the Guiding Principles for Virginia Education. For example, the JMU Early Student Success System was created as a data-informed, formal, feedback system that sends proactively reaches out to targeted student segments at the first signs they are not meeting their goals so that JMU practitioners can take action to intervene. The university will continue to invest in and support two academic support and leadership programs—Valley Scholars and Centennial Scholars—that provide opportunities for students from underrepresented backgrounds and first-generation college students. A key component of increasing access and affordability means taking a close look at addressing base adequacy, philanthropic giving, and tuition moderation. In addition, JMU is an efficient user of financial and need-based aid. While the institution has a high number of Pell graduates, it does not have the funding it needs to meet the demand of students.

JMU has been recognized as the best university for getting a job in Virginia, and this is a strength in which investment will continue. The university currently boasts post-graduate placement rates for both bachelor's and advanced degree candidates at over 95% and consistently outpaces the outcomes rates published by the National Association of Colleges and Employers relative to overall outcomes, by region, by school size, and by Carnegie Classification. The university's commitment to North Star objective 1-3. Increase student exposure to and experiences with the world of work, includes taking an active leadership role in the commonwealth's initiative to promote internships and other work-based experiential learning opportunities. To promote Post-Secondary Readiness, JMU will continue collaborations with businesses in the local community, such as Merck, to create workforce development partnerships that lead to employment for graduates.

An area of improvement for the university is the sustainable growth of the infrastructure needed to continue as an R2, high research doctoral university. This classification reflects JMU's significant level of research-active faculty, often providing research opportunities for JMU students, as well as our excellent doctoral programs and acquisition of external funding. Maintaining high standards for JMU's first-rate, research-focused and professional graduate programs is a critical need for the university.

A3. What are the top 3-5 strategic priorities you are currently pursuing or planning to pursue in the next six years? Please explain how each strategy relates to the strengths and/or opportunities for improvement mentioned above and will ultimately drive better outcomes for students.

Over the next six years, James Madison University's top priorities include:

1. Advancing access and affordability for qualified students from all backgrounds, diligently removing obstacles to success.
 - The university will:
 - Offer more access for under-represented students by pursuing funding to raise the number of Pell-eligible students admitted.
 - Increase student success of identified student groups to close equity gaps through the Early Student Success System.
 - Add to the number of out-of-state and international students.
2. Meeting the needs of the Commonwealth of Virginia by providing students with a high-quality education that leads to employment in areas that benefit both the graduate and the commonwealth.
 - The university will:
 - Focus on refining practices related to internships and work-based learning experiences to ensure students have exposure to the workplace and tangible career experience.
 - Increase the number of academic programs that will produce graduates in high-need employment areas in Virginia, including health-related professions and education.
 - Modify successful existing academic programs in high-need areas such as nursing and education to graduate more students quickly and at more affordable costs.
 - Emphasize Virginia workforce needs and preparation through innovative efforts including creation of the Lab School for Innovation and Career Exploration and a "Grow Your Own" program to speed time to degree for paraprofessionals in the schools.
3. Developing innovative solutions to support mental health and wellness, at JMU and in Virginia.
 - The university will:
 - Adapt academic programs to produce more graduates that can serve as K-12 school counselors and mental health professionals.
 - Increase the counseling services currently available to students and expand the service to faculty, and staff.
4. Embarking on Reengineering Madison, a multi-year, high-resource project that will change how JMU uses and thinks about data.
 - The university will:
 - Use shared data to improve student success outcomes.
 - Develop shared data systems as a university good.
 - Increase operational efficiency at all levels of the university.
 - Strengthen JMU's relationship and communication with all constituents.
5. Establishing our distinctive identity within the R2 Community.
 - The university will:
 - Elevate the university's academic mission while expanding research and scholarship opportunities for faculty and students in ways that benefit the commonwealth.
 - Seek sustainable ways to grow and support the infrastructure needed to successfully maintain this status.

- Continue emphasizing the university's core commitments of providing close faculty and student interactions and extraordinary teacher-scholars who provide opportunities that are collaborative, interdisciplinary, and engaging within the community.

A4. What support can OpSix provide to help you achieve those strategies? Please include both budget and policy requests and reference Part I of your submission where appropriate.

JMU is an excellent steward of commonwealth resources and appreciates the funding received.

- Operating Requests (General Fund)
 - The Virginia Military Survivors and Dependents Education Program (VMSDEP) has experienced significant growth in recent years and is expected to continue growing. The requested amount of \$4.9 million reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less the State Council of Higher Education of Virginia's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the commonwealth to bolster the long-term sustainability of this crucial program.
 - JMU is the top producer of nurses in the state among public four-year colleges and universities. JMU is seeking \$1M per year in ongoing funding to launch the "Fast Flex" nursing program. This non-traditional program would graduate 30 more undergraduate nurses per year and would allow students to complete core nursing course work in one calendar year. Course work would be partially online and would take place on nights and weekends, as would clinical placements.
- Capital Requests (General Fund)
 - Johnston Hall is a 94-year-old academic building on campus that currently houses Graduate Psychology. The building is currently not accessible to individuals with disabilities and lacks an elevator. A significant renovation of the current space (18,700 gsf) is needed to ensure ADA compliance and to meet building code standards. A small addition of 11,000 gsf is also being requested to accommodate an elevator as well as house additional academic space. JMU was successful in securing planning funding for the project in the 2024 General Assembly session and will be seeking state support for the project's construction phase in 2025.
- Other Policy Requests
 - State Code Section [23.1-1309](#) was enacted in 2015 in response to concerns over the amount of mandatory student fees used to subsidize athletic programs at Virginia institutions. In the nine years since this language was enacted, the NCAA has passed 750 new rules, laws, and regulations on member institutions, which have driven up costs for institutions not foreseen when the legislation was enacted. For that reason, we will consider seeking changes to that code section that would allow schools to adequately respond to the changing landscape of college athletics.
 - Campus law enforcement officers are the foundation keeping our university community safe. However, campus law enforcement officers are not allowed access to enhanced retirement benefits offered to other qualified law enforcement officers, such as state or local police. They specifically do not receive a monthly "hazardous duty supplement" as part of their retirement package, which is currently valued \$1,222 per month. Campus law enforcement duties are recognized as "hazardous duty," but the supplement is not available to campus law enforcement through their pension plan. We are asking the commonwealth to explore these inequities in law enforcement pensions as it poses significant challenges to the recruitment and retention of campus law enforcement officers.

Section B: Strategic Deep Dive – Enrollment Volume & Composition

B1. What do you see as the primary drivers of recent enrollment trends for your institution? Please reference any specific academic programs that have had a significant (positive or negative) effect on enrollment, if relevant.

Over the past decade, JMU's enrollment has increased by roughly 2,000 students, a 10% increase and an annual growth rate of just over 1%.

- On the undergraduate level, much of that growth occurred in the first part of the decade as JMU's first-year targets increased by 50-100 in-state students every year.
 - Over the past three years, the university has maintained the first-year class enrollment target and as such, JMU undergraduate enrollment has largely stabilized.
 - Though JMU has kept first-year enrollment targets stable, overall enrollment has surpassed 22,000 each of the last three years, largely through first-year cohorts that exceeded targets.
- Graduate enrollment has grown for much of the last decade and is expected to remain stable over the next six years.
 - Although new graduate programs are being developed, the advent of the four-year Bachelor of Science degree in Education has affected JMU's graduate enrollment as the university no longer enrolls a substantial number of students into the fifth-year Master of Arts in Teaching (MAT) program. New graduate programs, such as a recently approved Doctor of Education, are at various stages of development and as their impact on enrollment is realized, the university will adjust projections accordingly.

B2. Please summarize your enrollment management strategy moving forward and the specific actions (if any) you are taking to implement that strategy.

Undergraduate Enrollment

James Madison University anticipates maintaining the current undergraduate enrollment target moving forward, after accounting for several disruptions in recent years.

The university began using the Common App in 2022, leading to record applications for 2022, 2023, and 2024.

- As the institution moves farther from the unpredictability in projecting applications and subsequent enrollment caused by COVID, JMU intends to reevaluate the current first-year target of 4,650 to accommodate new trends established after the advent of the Common App.
- Once this target has been reevaluated, JMU intends to maintain enrollment targets for new undergraduate students over the next six years.
- JMU is working to increase retention rates of returning students to improve student success and strengthen the student base to hedge against any challenges to enrolling new students that may be caused by changing demographic trends.
 - JMU's primary strategy is described in the Early Student Success System (ESSS) program, which aims to increase retention rates by identifying and improving equity gaps among under-represented student groups with lower-than-average retention rates.
 - The full [Early Student Success System](#) proposal is available online.
 - The ESSS also served as the Quality Enhancement Plan (QEP) for JMU's reaffirmation of accreditation with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). The program was approved in April 2023 with no revisions from the SACSCOC visiting team.

Graduate Enrollment

JMU anticipates maintaining overall graduate enrollment targets, with growth in targeted areas.

- The institution is focusing on ways to stabilize and sustainably grow graduate degree and certificate program enrollments in areas of high need and demand to support the workforce needs and priorities of the university and commonwealth.
- Identifying and developing new graduate degree and certificate programs in high growth and high demand workforce education that are currently underserved by existing program offerings, such as healthcare programs, in the region and the commonwealth are also top priorities.

The university regularly evaluates tuition and fee rates for graduate programs to ensure that these programs remain cost competitive both for in-state and out-of-state students, helping to ensure retention and growth.

B3. How ambitious/realistic/conservative are the enrollment projections you most recently submitted to SCHEV? What are the greatest unknowns or risks that could lead enrollment to differ significantly from your projections? Please reference national and statewide enrollment trends/projections and cite any other data (e.g. regional trends, performance of prior enrollment strategies) that informed your projections.

JMU traditionally takes a conservative approach to projecting enrollments to ensure estimates account for regional and statewide trends while incorporating historical data gleaned from previous years.

- Actual enrollments are consistently within 1-1.5% of initial projections, indicating a process that yields realistic projections.

Projections remain conservative, anticipating smaller first-year cohorts than what the institution has seen in the past three years. Overall projections call for stable or slight declines in enrollment over the next six years.

JMU anticipates exceeding targets for first-year enrollment in Fall 2024, with much of this growth projected to be out-of-state students.

- The greatest unknowns at this point are related to how changing demographic trends may affect JMU's ability to attract and enroll both in-state and out-of-state students over the next four to six years.
 - To account for declining out-of-state populations and increasing competition for out-of-state students, the institution lowered targets for out-of-state students (while raising by an equal number of in-state students) beginning in Fall 2022 to maintain realistic projections. Over the past two years, however, targeted recruitment strategies and increased efforts to retain student groups, including out-of-state students, has led to an increase in out-of-state students. We continue to anticipate increasing challenges in recruiting and enrolling out-of-state students over the next several years; thus, the institution's current plan is to maintain lower targets for out-of-state students to ensure fiscal health.
- JMU has lowered projections for graduate enrollment to account for the growing popularity of the four-year Bachelor of Science in Education degree.
 - The advent of four-year programs that allow students to apply for teacher licensure with a bachelor's degree has resulted in a decline in the number of JMU undergraduates that previously progressed directly to a Master of Arts in Teaching, lowering the graduate population as a whole.
- With the initial disruptions to in-person instruction caused by COVID largely resolved, the university anticipates on-campus projections will remain strong.
 - JMU continues to explore opportunities to provide quality instruction through multiple modalities.
 - The institution is committed to providing the core of instruction through in-person means, and the university is not projecting substantial growth in its distance learning population, relative to the on-campus projections, over the next six years.

B4. Explain the implications of your enrollment strategy on your institution’s financials. Please consider impacts on both revenues (e.g., discounting, financial aid, net tuition revenue) and expenditures (e.g., costs to implement enrollment management strategies, costs of enrolling more students or students with different needs, cost-per-student impact of flat/decreased enrollment).

Overall enrollment projections are anticipated to stabilize over the next few years and, as a result, the revenue generated by student growth which the university has experienced in the past will stabilize. Concurrently, JMU anticipates a need for additional assistance to support incoming students, particularly as the institution is able to admit more Pell Grant students.

- Over the past several years, the university has monitored the demographic trends and their impact on institutional revenues, with a specific focus on addressing the decline of out-of-state students and resulting revenue implications.
 - Continuing to monitor demographic trends allows the university to anticipate potential changes in student populations and take proactive measures to adapt. It enables JMU to make informed decisions, allocate resources effectively, and maintain financial sustainability in a dynamic higher education landscape.

Beginning with AY 2022-23, JMU moved to the Common Application for undergraduate admissions. This change has increased the number of Pell Grant students applying to the university, as shown below.

Fall 2024 (Third Year of Common App)		
Residency	Number of Pell Admits	% Increase from Prior Year
In-State	2,407	7.26%
Out-of-State	1,450	1.26%
Total	3,857	4.92%

As part of the Free Application for Federal Student Aid (FAFSA) and associated Federal Methodology (FM) changes for AY 2024-25, the Expected Family Contribution (EFC) is being replaced by the Student Aid Index (SAI). FAFSA filing among high school seniors for the 2024-25 school year was down nationwide due to challenges with the process, and many of the FAFSA’s received by schools could not be administered during the recruitment period.

- The number of Pell eligible FAFSAs received from first-year admitted students in 2023-24 increased 26%. That did not translate into a 26% increase in Pell Grant offers as many of the FAFSA’s received for 2024-25 could not be processed due to problems with the applications.
- The SAI is expected to create more financial aid across the student body. For first-year students offered aid in the Preliminary Financial Aid awarding process (recruitment period):
 - 2023-24: 43.72% of those offered a federal Pell Grant had a \$0 EFC.
 - 2024-25: 62.25% of students offered a federal Pell Grant had an SAI equal to -\$1500 to \$0.
 - This data only includes first-year students admitted to JMU for the applicable school year. Additional data will be analyzed that includes all undergraduates enrolled during the 2024-25 school year.

In the future, JMU anticipates an increase in

- The number of Pell Grant students applying and being accepted to the university.
- The number of matriculating Pell Grant students based solely on changes to the FAFSA and the new SAI.
- The percentage of enrolled Pell Grant students who are at the neediest level due to the new SAI.

The institution continues to focus on external resources and institutional fundraising to increase opportunities for student financial aid and scholarship programs.

Section C: Strategic Deep Dive – Program Alignment & Performance Completion Outcomes

C1. What are your highest-priority completion outcomes targets, both overall and for particular student segments? Please include aspirational targets, realistic expectations, and qualitative targets and specify by when you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030).

JMU boasts one of the highest six-year graduation rates among the four-year public institutions in Virginia in which the 2017 cohort yielded an 81% six-year graduation rate.

- Over the past 10 years, JMU's six-year graduation rate ranged between 80% and 84%. The threshold of acceptability (80%) and aspirational goal (84%) is informed by national trends among public universities and JMU's peers, and regular review of JMU's graduation rates over the preceding five to ten years.
 - Because JMU aspires for all students to graduate, the university sets high targets for this metric.

JMU has traditionally served a population that has under-represented the diversity of the population.

- Over the past 10 years, the university has devoted substantial efforts to increasing the percentage of under-represented students, as evidenced by the Fact Pack.
- As JMU works to improve in this area, it is important to ensure equity in success for students who identify as Black, Indigenous, or Persons of Color (BIPOC). Therefore, JMU tracks success rates of BIPOC students on retention and graduation.
- JMU aspires for its BIPOC students to achieve success at the same rate as the overall population, thus setting the same threshold for acceptability (80%) and aspirational target (84%).

JMU is also focused on improving retention rates for multiple student segments, believing that retaining more students from their first to second year will lead to greater completion rates.

- In the upcoming years, the university is prioritizing retention and completion for multiple distinct student groups, including first-generation students, veterans, and BIPOC students, as detailed in C2.

C2. What specific strategies/actions are you planning to take to achieve those goals? How will you draw on successes/challenges from your prior completion outcome improvement strategies?

JMU's overall six-year graduation rate has remained relatively stable over the past twenty years, fluctuating between 80% and 84%. To support retaining all students through graduation, the institution provides an array of academic and student services.

- Student academic support programs like the Learning Centers, Learning Strategies Instruction, Madison Advising Peers, and University Advising are designed to help all students with enrollment, academic success, and retention at JMU. Examples include:
 - Learning Strategies Instruction: Provides support to students on developing important non-cognitive domains like time management and organization.
 - Madison Advising Peers: Offers peer-to-peer support to students to help manage enrollment processes, scheduling, degree mapping, and more.

Many of these programs assist students in developing a sense of community, fostering belonging and engagement on-campus, and connecting students with other student success resources. The university also provides focused programming to support under-represented students, as detailed below.

- JMU defines **first-generation** (first-gen) students as a student whose parent(s) or guardian(s) did not graduate from a four-year institution.
 - The [Reddix Center for First Generation Students](#) welcomes any student with limited prior exposure to or knowledge of the college experience. The center is a hub of information and activity designed to increase the sense of belonging for students by providing space and programming that create a shared connection to the university experience.
 - The center has also partnered with the University Career Center to offer additional sections of UNST 102, a course that provides a structured group format for exploring potential majors and careers, which are specifically marketed to Centennial Scholars, Valley Scholars, and the larger first-gen demographic.
 - Moving forward, the center plans to leverage successful existing programming, such as the Centennial Scholar Program and Valley Scholars, to expand programming for the larger first-gen student body.
- To create a community of support and service to all military-connected students, faculty, and staff, the university established JMU Valor.
 - [JMU Valor](#) provides resources, programming, and advocacy for active military, veterans, dependents, and military-connected faculty and staff to optimize resources on campus that will best serve them as they navigate JMU and surrounding communities.
 - In Fall 2023, JMU opened a dedicated on-campus office for staff from the Virginia Department of Veteran Services as well as Virginia Veterans and Family Services, which will provide veterans in the community with a local resource.
 - Valor's highly visible and accessible location in [The Union](#) will appeal to potential new students and the current student body by highlighting the visibility and use of resources available.
- Other under-represented students may include those who identify as Black, Indigenous, or Persons of Color (BIPOC).
 - Compared to the overall undergraduate population, students who identify as BIPOC are only slightly at risk for lower graduation rates with a maximum gap of 4.6%, which has narrowed to less than 3% in the last five years.

In addition to the [Early Student Success System](#) described in section B2, the university provides focused programming to support all categories of under-represented students. Future plans include:

- Grow the Centennial Scholars and Valley Scholars programs
 - Centennial Scholars and Valley Scholars are two cohort-based academic support and leadership programs that are specifically for historically under-represented and first-generation college students.
 - The Centennial Scholars program has been active on campus for almost 20 years, graduating 730+ students and sustaining a recent six-year graduation rate of 87% for the last three cohorts.
 - Valley Scholars identifies potential first-gen college students in the community and begins programming for them in the eighth grade. Those who graduate high school and meet certain academic and community service expectations are then eligible for tuition-free education at JMU.
- Provide and promote centers that provide services to historically under-represented students
 - The Center for Multicultural Student Services is home to 46 multicultural student organizations, including many focusing specifically on academics.

C3. How will you use existing/recently provided resources to execute those strategies? Will you be requesting incremental state resources? Please state the request and rationale and explicitly tie to Part I of your planning template.

JMU will use general fund resources received as part of the commonwealth's 2024-26 biennium budget to maintain student affordability, provide additional financial aid resources to those families most in need, and support JMU employees, as well as continuing development of Reengineering Madison.

The resources are reflected as a surplus on Tab 5 – Six-Year Pro Forma in Part I of the planning template, representing the state portion of salary/benefits increases and additional financial aid. The surplus also includes general fund resources provided for affordable access and unavoidable costs. These resources were allocated to cover inflationary costs for the university and continued funding for Reengineering Madison.

Inflationary costs include:

- Utilities
- Library materials
- Teacher education field experiences
- Advising costs
- Contractual software price increases
- Travel costs
- Other contractual obligations

Reengineering Madison is a multi-year, high-resource project that will change how JMU uses and thinks about data, which will allow better planning and alignment of resources supporting all students. As part of Reengineering Madison, the university will:

- Use shared data to improve student success outcomes
- Develop shared data systems as a university good
- Increase operational efficiency at all levels of the university
- Strengthen JMU's relationship and communication with all constituents

As further outlined in Section E, the university will request additional general fund resources to support the costs of the Virginia Military Survivors and Dependents Education Program and increase the number of nursing graduates in the "Fast Flex" program.

C4. Please explain how you monitor post-completion outcomes (e.g., employment rates, wage attainment, debt load, upward mobility). What data do you collect? What metrics are you monitoring most closely? What do the data reveal about your institution's greatest strengths and areas for improvement with respect to post-completion outcomes? Please include any relevant data/reports in the appendix or as a separate attachment, including any data that captures outcomes by school/department/program.

JMU regularly monitors a variety of post-completion outcomes as metrics to assess graduates' preparation for employment and life beyond the university.

- Since 2014, JMU's graduates have seen annual growth of wages outpace Virginia high school graduates.
 - Pell graduates earn roughly 90% of the median income of non-Pell graduates, but their income has risen at the same level as those who did not earn Pell and at a greater rate than Virginia high school graduates.
 - Over 70% of JMU lower-income graduates achieved upward mobility within five years of graduating. This percent has increased since 2010, illustrating that JMU is successfully preparing students, particularly low-income students, for well-paying jobs following their graduation.
- The university monitors student debt and default rates to help determine how well students manage debt both during and after graduating from JMU.
 - Annually, the Financial Aid Office (FAO) monitors the:
 - Average in-state student loan debt of spring graduating borrowers
 - Average out-of-state student loan debt of spring graduating borrowers
 - Cohort default rate
 - The FAO looks for trends in borrowing as it pertains to federal loans, private loans, and a combination of federal/private loan borrowing.
 - The office also monitors for fluctuations in the JMU cohort default rate (CDR).
 - Due to the pause on federal loan repayments for the past three years, default rates all across the country have significantly decreased. For example, JMU's FY 20 CDR is 0.0. The university's default prior to the repayment pause hasn't exceeded 2.3% since FY 12.
 - Student loan interest resumed Sept. 1, 2023, with payments due in October.
 - JMU contracted with a third-party servicer to conduct borrower outreach for students who had loans and left JMU during the repayment pause (2019-20, 2020-21, and 2022-23). The servicer will help on-board these borrowers into the federal student loan repayment system.
 - Because of the Department of Education's 12-month on-ramp for the resumption of loan repayment, borrowers who do not make payments during that period will not be subject to default, and all borrowers will be extended 12-months of forbearance during this period.
 - As referenced in the Fact Pack, JMU bachelor's degree earners from 2018 took on a median debt of \$24,200 in three years post-graduation.
 - This amount was approximately \$1,000 less than the median debt of bachelor's degree earners across other Virginia publics over the same time.

The University Career Center annually compiles data on post-graduation pursuits following the *NACE First Destinations* guidelines outlined by the National Association of Colleges and Employers (NACE).

- For 2022 graduates, 96.1% and 97.2% of bachelor's and advanced degree candidates, respectively, achieved a career outcome.
 - JMU consistently outpaces the outcomes rates published by NACE relative to overall outcomes, by region, by school size, and by Carnegie Classification.
- Of the 2022 graduates with bachelor's degrees, 74.6% went to work full time or part time or were active in the military, and 21.5% continued their education.

- The most popular areas for undergraduates working included Virginia; Washington, DC; and New York.
- Of those undergraduates working in Virginia, 44.5% were working in Northern Virginia, 24.4% were in Central Virginia, and 16.8% were working in the Shenandoah Valley.
- Education, health professions, business, management and marketing were the most popular continuing education programs pursued.
- For those without an outcome, 3.5% were still seeking employment or education, and the remaining 0.4% were not engaged or not seeking.
- Of the 2022 graduates with advanced degrees, 97.2% achieved a career outcome.
 - Of these, 93.3% were working full time or part time or were active in the military, and 3.9% pursued additional education.
 - Virginia and Washington, DC were the most popular areas for advanced degree candidates to work.
 - Of those working in Virginia, 39.7% worked in Northern Virginia, 34.1% worked in the Shenandoah Valley, and 15.6% worked in Central Virginia.
 - 2.8% of graduates without a career outcome were still seeking employment or education.
- A full report on post-graduation pursuits and individual reports by college and department are available online.
 - [Full Career Outcomes Report](#)
 - [College of Arts and Letters Career Outcomes](#)
 - [College of Business Career Outcomes](#)
 - [College of Education and University Studies Career Outcomes](#)
 - [College of Health and Behavioral Studies Career Outcomes](#)
 - [College of Integrated Science and Engineering Career Outcomes](#)
 - [College of Science and Mathematics Career Outcomes](#)
 - [College of Visual and Performing Arts Career Outcomes](#)

C5. What specific strategies/actions, including potential changes to your program portfolio or curriculum, are you planning to take to maximize the career readiness and job attainment of all students across programs of study, including increasing early career exposure for students (e.g., internships) during their time at your institution? How will you draw on successes/challenges from prior initiatives?

Increasing career readiness is a high priority for JMU. The Work-Based Learning Experience (WBLE) Task Force, established in Fall 2022, was charged to investigate the landscape of internships and other related, similarly-named high impact practices (HIPs) at the university—student teaching, clinical placement, experiential learning experience, applied learning experience, field experience, etc.—to understand how they are currently operating so that they can be consistently tracked, assessed, given appropriate support (resources and personnel), and expanded to strengthen their value and ensure all students have the opportunity to participate.

- In its second year, the task force:
 - Reviewed the ongoing work of the SCHEV SB1280 work group and made recommendations that highlight JMU experiences and concerns.
 - Assisted in preparing responses to additional requests from SCHEV and the Governor's office related to expanding WBLE opportunities.
 - Positioned itself to assist with submissions for funding that may be available from SCHEV and other entities in the future. In AY 2023-24, JMU was awarded a SCHEV Institutional Internship Data Collection Grant and a SCHEV Institutional Award for Student Internship Support Grant for 2024-25.
 - Continued to investigate and recommend ways to better centralize, formalize, document, and grow our WBLE operations.
 - Crafted a white paper for developing a comprehensive Work-based Learning Experience initiative at JMU that will create capacity for every enrolled student to have access to a WBLE.

C6. How do you intend to use existing/provided resources to execute those strategies? Will you be requesting incremental state resources? Please explicitly tie to Part I of your planning template.

JMU will continue the foundational work of the initial task force, comprised of administrators and faculty from Academic Affairs; Research, Economic Development, and Innovation; and Students Affairs. The university will also leverage its existing strengths, such as an actively involved University Career Center and academic departments with strong WBLE programs and connections to industry.

As work continues, anticipated resources needed to strengthen these efforts would include:

- *Compensation for work-based learning experience coordinators in each program.* This could be course releases through units.
- *More full-time staff in the University Career Center to help students and faculty identify opportunities, reach out to more employers, and help with auxiliary arrangements such as housing and transportation.* This funding is essential should completing internships/WBLEs be a state-mandated requirement for all students. This could be a full-time staff position.
- *Funds to subsidize unpaid summer or semester opportunities, housing, and transportation needs.* These could be internal grants to students, on the order of \$5,000-\$10,000 per student per opportunity.
- *Additional staff in the Registrar's Office to implement course attributes for WBLE.* JMU was awarded a SCHEV Innovative Internship Program Round 3 award for FY 24, totaling \$25,000. A similar amount likely would be needed in subsequent years.
- *Funds to upgrade the university's online career services management system subscription.* This would include purchase of the Experiences module and its tracking system to increase the functionality of the *Handshake* software.

C7. For which specific workforce needs is your institution best positioned to supply talent, based on regional, industry, or occupation alignment?

Historical alignment between JMU's degree programs and high-growth occupations in the Commonwealth of Virginia is noted in JMU's Fact Pack.

- The data indicate that, since 2016, approximately 34% of JMU graduates graduate with degrees aligned with occupations that are expected to see high growth in the next five years.
- Feedback from regional employers indicates workforce needs across all occupation domains, including those in which JMU is recognized for providing excellent preparation.
 - Regional industry strengths in food and beverage manufacturing and biopharmaceutical manufacturing create workforce talent demands across technology and computing, business operations, and financial specialist occupations.
 - Economic growth across these sectors also increases demand for healthcare, education, and social services in the region.
- Recent innovations at JMU will build on the noted positive historical alignment and provide additional workforce numbers to the commonwealth and the Shenandoah Valley region in the areas below.
 - *Healthcare Diagnosing or Treating Practitioners*. JMU is currently expanding its successful nursing programs, leading to a more rapid education and certification for nurses with BSNs and PhDs.
 - *Preschool, Elementary, Middle, Secondary, and Special Education Teachers*. JMU created a Virginia-wide "Grow-Your-Own" pathway for classroom assistants to complete their undergraduate BS education degree and be eligible for teaching licensure. Recruitment focuses on school districts in low-wealth areas of Virginia, and the program provides online instruction and covers tuition for qualified students.
 - *Computer Occupations*. JMU implemented an undergraduate Information Technology major, providing the knowledge and skills needed to meet the ever-evolving computer technology needs of business, government, healthcare, education, and other organizations.
- JMU's alignment with local and regional employer needs has been augmented by receipt of a grant from SCHEV.
 - The funded program will provide coordination among educational institutions, employers, and students in the region to expand regional internship opportunities in the Shenandoah Valley in support of the Virginia Talent + Opportunity Partnership (V-TOP) initiative.

C8. What specific strategies/actions is your institution planning to take to better align your program offerings or degree conferrals to current and projected workforce needs? Please provide a list of specific programs you intend to sunset or grow in the next 6 years to increase alignment, partnerships/initiatives you intend to launch or deepen, etc. If you intend to launch any new programs, please explain why your institution is particularly well-suited to succeed in that area.

In the next six years, JMU anticipates undertaking the curriculum actions listed below in order to best offer students degrees that are relevant, innovative, and in demand to meet the existing and anticipated needs of the commonwealth. These modifications and programs are built on JMU's strong faculty expertise and successful current academic offerings.

In some areas, as noted below, JMU currently offers broad degree programs that successfully incorporate the discipline's concepts, academic offerings, and faculty. The institution proposes creating stand-alone programs for some more highly-targeted degrees to make their relevance more apparent.

- JMU has a significant history of offering academic programs in the **health and behavioral studies** arena that led to successful careers for graduates while meeting the growing physical and mental healthcare needs of the commonwealth. Anticipated proposals include:
 - Applied Behavioral Analysis (graduate)¹
 - Health Analytics (undergraduate)¹
 - Integrated Biomedical Sciences (graduate)¹
- Innovative academics that cross disciplinary lines are what JMU is known for, from its novel degree programs, like Integrated Science and Technology, to the development of X-Labs, JMU's innovative space and ecosystem for shared learning. JMU's successful record of developing **interdisciplinary academic programs in both the sciences and the humanities** provides a solid foundation to establish new degrees that leverage the best of the institution's strong, existing programs. At the same time, these new degrees are designed to address anticipated workplace needs in Virginia.
 - Civic Engagement (undergraduate)²
 - Data Science (undergraduate and graduate)¹
 - Environmental Earth Science (undergraduate)¹
 - Leadership and Data Analytics (graduate)¹
- Students interested in the arts and humanities complete programs that merge high-level artistic training with entrepreneurial action so that students are ready for the professional world. Existing **fine arts and communications programs** each boast an impressive employment or continuing education rate of 95% post graduation. The programs listed below are current popular majors that the university proposes become stand-alone degree programs to allow for enhanced curriculum design that will better align with accreditation requirements and more adeptly meet employer needs.
 - Dance (undergraduate)²
 - Graphic Design and Architectural Design (undergraduate)²
 - Industrial Design, BFA (undergraduate)²
 - Musical Theatre (undergraduate)²

¹ Proposing a new degree program

² Proposing a new certificate

- JMU has a strong history of serving the commonwealth and preparing future teachers through its **education programs**. The institution has developed responsive and creative program options for beginning and experienced educators and education administrators. JMU is continuing its commitment to addressing the state's teacher shortage by preparing administrators who can lead and mentor new teachers to help prevent attrition.
 - Educational Leadership (Graduate, current concentration)¹
 - Teacher Leadership (Graduate, current concentration)¹
 - Learning Design and Technology (Graduate, current concentration)¹
 - Transition Services in Special Education and Self-Determination (Graduate, current concentration)¹

Section D: Strategic Deep Dive – Financial Effectiveness & Sustainability

D1. What specific strategies/actions do you plan to take to improve affordability moving forward across your overall student body and priority subpopulations, and what is the expected impact? Please account for a broad range of factors including the full cost of attendance, net price, time to degree, debt load, etc.

To increase access to higher education for Virginia students and families, JMU strives to improve affordability through multi-faceted plans that increase funding for low- and middle-income in-state and out-of-state students.

- JMU has made the changes required by federal regulation changes regarding the creation of housing and food allowances and licensure exam costs in the cost of attendance (COA), to begin with the 2023-24 award.
 - The institution continues to use a weighted average when it comes to developing the tuition/fee components of the COA.
 - The consumer price index continues to be a factor as it pertains to setting many other non-direct allowances in the COA.

Goals to increase funding for low- and middle-income students were met in 2021-22 when JMU provided state and/or university grants to in-state undergraduates who met the FAFSA Priority Filing Date and had an Expected Family Contribution (EFC) equal to 50% of the Cost of Attendance (COA).

- The EFC (and subsequent Student Aid Index that replaces the EFC in 2024-25) will be increased each year as needed to ensure it continues to equal 50% of the COA.
- JMU offered up to 42% in state or university grants to qualifying students that equal 50% of their remaining need for the 2024-25 school year. Additional increases will be made in future years, as funding allows, until the 50% measure is met.
- JMU extended the FAFSA Priority Filing deadline beyond the current March 1 date. Future increases in state and university grant funding will be applied toward extending that date, which will increase the number of low- and middle-income students considered for this type of funding support.
- The Centennial Scholars program provides funding to pay 100% of tuition/fees and housing/food for approximately 150 Pell Grant students on an annual basis.
- The Valley Scholars Program provides funding to pay 100% of tuition/fees for approximately 80 students.
- JMU received two Pell Initiative Grants through the Commonwealth of Virginia for 2024-25, enabling the university to add an additional 56 Pell Grant students.
- A new four-year scholarship—the Building the Future Scholarship—begins in 2024-25 and will provide a \$6,000 award to 50 students who are also receiving Federal Pell Grant and state/university grants,

As a public institution with a relatively small scholarship endowment, JMU's options are more limited pertaining to out-of-state students due to the lack of direct state financial aid support for this population.

- While JMU offers traditional scholarships to this population of students (i.e., from endowments), the institution is making strides in this area using unfunded scholarships and waivers.
 - The Madison Recognition Award is a \$9,500 award offered to qualifying first-year, out-of-state undergraduate students. The award can be renewed for an additional three years, making it a four-year award.
 - In 2024-25, JMU offered 229% more Madison Recognition Awards than were offered three years ago, in 2021-22 (579 compared to 176).
 - This Two-Year Room Award pays 100% of a qualifying first-year, out-of-state student's housing charges while living on campus. This covers housing for the first two years and is not refundable should the student decide to live off campus in year two.

- In 2024-25, JMU offered 330% more Two-Year Room Awards than were offered in 2021-22 (800 compared to 186).

The Division of University Advancement continues to make fundraising for low-income students a high priority, allowing JMU to provide more grant and scholarship dollars to lower the net price for students and reduce the debt they will incur.

D2. Please explain the rationale behind your full pricing (i.e. published tuition & fees, including mandatory non-E&G fees) and financial aid award strategy (i.e. net tuition revenue projections). What data informed your assessment of T&F increase feasibility (e.g., market comparisons, student capacity to pay) and estimates of discounts/ waivers/unfunded scholarships? What informed your strategy around financial aid awards, merit and need-based, particularly for various student segments by income level and academic preparation?

The university's proposed 2024-26 biennium tuition and fees are based on planning assumptions that include enrollment projections, the higher education market, and projected costs of university investments.

- The most recent market data available for both in-state and out-of-state student costs were used for comparison purposes.
- Of the 15 Virginia public institutions of higher education:
 - JMU's FY 23-24 in-state tuition is lower than all but four schools.
 - JMU's FY 23-24 combined in-state tuition, E&G fees, and mandatory non-E&G fees are lower than all but five schools.
- JMU continues to diversify and enhance revenue streams. Recent efforts include:
 - Expanding online programs in targeted areas.
 - Using consulting services to identify new areas of opportunities for program offerings/expansion.
 - Providing professional certificate offerings aligned with workforce development needs.

D3. What do you expect to be the impact of your pricing/discounting approach on enrollment numbers/mix (if any) and net tuition revenue moving forward and why?

JMU developed a new strategic plan for awarding recruitment scholarships to coincide with JMU's move to the Common Application for undergraduate admissions.

- The institution is offering more scholarships, waivers, and unfunded scholarships to new students than ever before.
 - With the implementation of the Madison Award for Academic Excellence, Madison Recognition Awards, and Two-Year Room Awards (detailed in D1), JMU made 224% more offers from these three programs in 2024-25 than in 2021-22 (1,847 compared with 570).
 - Each scholarship program has a yield goal, which is evaluated on an annual basis to determine if changes need to be made for the next awarding cycle.

The six-year plan does not provide additional financial aid to students beyond adjustments for increases in tuition and fees and state mandates associated with the Virginia Military Survivors and Dependents Education Program (VMSDEP).

D4. Reflect on the categories/subcategories of cost that have recently experienced the most significant increases on an absolute or per-student basis. What have been the primary drivers of those increases? Please be specific and include supporting data.

Below is a listing of cost categories and subcategories with the most significant increases for the 10-year timeframe.

General Academic (10110)

General academic instruction has had an annual growth rate or compound annual growth rate (CAGR) of 4.5% (PS 4.2% / NPS 6.5%), for a 55.5% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Strategic Initiatives and Enrollment Growth (35%; includes PS+NPS)
 - Established the College of Integrated Science and Engineering (launched 2012).
 - Established the College of Health and Behavioral Studies (launched 2012).
 - Established the Hart School of Hospitality, Sports and Recreation Management (launched 2015).
 - Expanded the College of Business (building completed 2020).
 - Expanded College of Education undergraduate degree offerings and moved from a five-year degree to a four-year degree (effective 2019).
 - Expanded Biology and Biosciences building (completed 2012).
- Average annual salary increases provided per state guidelines plus compression/inversion adjustments to remain competitive and retain faculty (PS 3-3.5%) (79%).
- Facility updates and renovations (NPS) (6%)
 - Renovations to several academic facilities that were funded with university reallocations to afford necessary modifications to address enrollment growth constraints and strategic growth initiatives in specific areas.
 - College of Education (Memorial Hall)
 - College of Integrated Science and Engineering (EnGeo Building)
 - Computer Science (EnGeo Building, Tech Talent)
 - Hart School of Hospitality, Sports and Recreation Management (Godwin Hall)
 - Nursing and Health Disciplines (Health and Behavioral Studies)
 - X-Labs (Lakeview Hall)
- Operating and research expenditures (NPS) (15%)
 - Equipment and furniture replacement costs not covered by Equipment Trust Fund (ETF).
 - Operating budget expenditures associated with enrollment growth and inflationary costs.
 - Continued investments in research and professional development opportunities for faculty.
 - Implementation of supplemental tuition programs (differential tuition) in specific disciplines to better align tuition revenues with degree costs and remain competitive in highly compensated disciplines.

Libraries (10410)

JMU Libraries has had an annual growth rate or CAGR of 4.3%, for a 53% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Increase salaries and fringe benefits (PS; 52%).
- Increases in NPS

- VIVA Program: JMU serves as procurement for all higher education institutions – increase \$3.1 million (37%).
- Library Materials: Increase of \$745,827 (9% of total change in this category).

Academic Administration, Personnel Development, and Course and Curriculum Development (10460)

Academic administration, personnel development, and course and curriculum development has had an annual growth rate or CAGR of 5% (PS 4.1% / NPS n/a), for a 63.4% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Infrastructure/Administrative support of enrollment increases and research (95%)
 - Enrollment growth: 2013 = 19,713 to 2022 = 21,822; 10.7%
- Strategic enrollment growth in high demand fields (38%)
 - Engineering, Health Care, Business, Education
- Research infrastructure (5%)
 - Office of Research Integrity
- Strategic Initiatives and Accreditation Support (27%)
 - Quality Enhancement Plan (The Madison Collaborative)
 - Honors College and The Graduate School (Carnegie Classification)
 - Center for Assessment and Research and the School of Strategic Leadership Studies (Graduate Programs of Distinction)
- Student & Faculty Success (22%)
 - Center for Faculty Innovation
 - Center for Global Engagement
 - Library Information Technology and Learning Systems

Counseling (10530)

This category encompasses academic and student services operational areas, including the Counseling Center, disability services, and advising. As the university experienced a notable increase in the demand for mental health and counseling services, JMU has invested significantly in student success and student mental health to ensure that students have the necessary guidance to achieve their educational and career goals.

Counseling has had an annual growth rate or CAGR of 11.0%, for a 185% increase over a 10-year timeframe.

The figures below include salary and fringe benefit changes.

- Investments included:
 - Office of Disability Services (7.4%)
 - Counseling Center (36%)
 - Entered into a system-wide agreement for virtual health and well-being resources in partnership with VCU and Virginia Tech.
 - University Advising & Pre-Professional Health Advising (44%)
 - Student Success Center (7.9%)
 - Created the Student Success Center in 2014

Fiscal (10620)

Fiscal operations have had an annual growth rate or CAGR of 2.2%, for a 24.4% increase over a 10-year timeframe.

Expenditure growth from FY 12 to FY 22 was mainly driven by the need to enhance financial stewardship of resources and ensure compliance with federal and state accounting standards, regulations, and reporting practices.

This growth encompassed various areas, including salary and fringe benefit increases.

- New areas of investment included:
 - Cash & Investments (24.1%)
 - PCI Compliance (3.2%)
- Other areas of finance and budget investment over the 10-year period:
 - Audit & Management Services, Budget Management, Payroll Services, Space Management, and University Business Office (70%)

General Administrative Services (10630)

General Administrative Services shows an annual growth rate or CAGR of 22.2%, which is inflated due to the flexibility of financial policy during the COVID pandemic.

The general expense data is skewed and showed a significant increase and credit expense (recovery from auxiliary) for indirect costs that the institution was not required to charge during FY 20-22 Covid pandemic years. In addition, the university has invested in information technology, human resources, federal compliance, data stewardship, and data analytics.

This growth encompassed various areas, including salary and fringe benefit increases.

- Information Technology (17.5%)
 - Technology expenditure growth was driven by the need to enhance teaching and learning, streamline administrative processes, ensure cybersecurity, and improve student support services.
- Human Resources (6.19%)
- Planning Analytics, Institutional Research (2.33%)
- Title IX Compliance (1.1%)

Logistical Services (10640)

Logistical Services has had an annual growth rate or CAGR of 3.3%, for a 39% increase over a 10-year timeframe.

The change includes university investments in staffing for risk management compliance as well as student and employee safety.

This growth encompassed various areas, including salary and fringe benefits increases.

- Risk Management (32%)
 - Reported in program 10610 in FY 12 (\$401,300).
 - Shown increase of \$918,291.
 - Actual increase is \$516,991 due to subprogram change.
- Campus Police (50%)
 - Resources were allocated for the Police Department to ensure the safety and security of the campus community while demonstrating a commitment to creating a safe environment for students, faculty, staff, and visitors.
- Procurement (13%)

Public Relations (10650)

Public Relations operations have had an annual growth rate or CAGR 6.0%, for a 78.5% increase over a 10-year timeframe.

Expenditure growth from FY 12 to FY 22 was mainly driven by implementation and completion of the university's largest ever fundraising campaign, [Unleashed](#). At the culmination of eight-years, over 63,000 donors contributed a record-breaking \$251 million—\$51 million over the original goal—to fund scholarships, facilities, and various campus programs at JMU.

Other increases were related to JMU's new classification as R2 Doctoral University with high research activity through the Carnegie Commission. The division of Research, Economic Development, and Innovation made investments in infrastructure and staffing to better enhance and support the high-quality student-centered undergraduate education featuring a strong research, scholarship, and creative activities culture that JMU offers.

This growth encompassed various areas, including salary and fringe benefit increases.

- University Advancement
 - Principal Giving (8%)
 - Strategic Gifts (7%)
 - Advancement Planning Operations (7%)
 - Enrollment Marketing (6%)
- Academic Affairs
 - Research and Scholarship (19%)

Building Repair (10730)

Building Repair has had an annual growth rate or CAGR of 2.0%, for a 22.3% increase over a 10-year timeframe.

This growth encompassed various areas, including salary and fringe benefits increases over the period.

- Landscaping (58.3%)
 - The increase includes both additional FTE positions and additional operational costs attributed to the addition of new facilities on campus.

Utilities (10740)

Utilities has had annual growth rate or CAGR of 3.0%, for a 34% increase over a 10-year timeframe.

- The majority of the utility cost increases are attributed to new and renovated facility capital projects from FY 12 to FY 22 which include the following buildings:
 - Bioscience Building
 - College of Health and Behavioral Studies
 - DHub Academic Storage (a 700,000+ building square footage increase)
 - Hartman Hall (College of Business Learning Complex)
 - Holland Yates Hall (formerly Madison Hall)
 - Student Success Center

D5. What specific strategies/actions do you plan to take to contain/reduce key costs and improve fiscal health going forward while improving student outcomes? What are your objectives and what have been your results to date of any already-launched initiatives? What is the expected impact and timeframe of these strategies? Include any short-term costs that would need to be incurred to implement the strategies.

JMU is determined to continue improving student outcomes while taking steps to reduce costs and improve the institution's fiscal health. The institution is making significant investments in resources as well as taking opportunities to reallocate resources and streamline processes as much as possible.

- Reengineering Madison: This seven-year initiative involves implementing significant technology platforms such as an enterprise CRM (Customer Relationship Management) and new data solutions for managing and visualizing JMU's data.
 - Goals for Reengineering Madison include:
 - Improving student success outcomes, such as increasing retention and graduation rates across all demographics along with increasing academic achievement and tracking soft skill development.
 - Developing shared data systems as a university good.
 - Increasing operational efficiency at all levels of the university.
 - Strengthening JMU's relationship and communications with all constituents.

Multiple areas across the institution have developed efficiencies to help constrain costs.

- Facilities Management (FM)
 - *Bluestone Chiller Loop*: Seven buildings will be added together on a loop which will provide better load control and save energy costs due to chiller efficiency.
 - *East Campus Power Plant Project*: The university is in the design process to expand the East Campus Power Plant to provide chilled water and steam to additional buildings including the East Campus Dining Hall, Atlantic Union Bank Center, and Shenandoah Hall. This project will result in cost savings through decreased natural gas purchase costs and operational efficiencies through the use of centralized equipment.
 - *Demand Response*: FM has participated in the Virginia Energy Emergency Demand Response & Energy Efficiency programs since 2017, which helps reduce the load on the electric grid during peak demand times. Participation in these programs has resulted in payments to the university totaling over \$387,000 since joining the program.
 - *LED Lighting*: Over the last 10 years, FM has installed over 10,000 LED lamps across campus that have resulted in an estimated cumulative energy savings of over \$1.3 million. These projects included replacing over 360 pole lights on East Campus and converting the Grace Street and Champions Drive Parking Decks to high efficiency LED fixtures.
 - *Utility Submetering*: FM is actively utilizing data from the recently installed utility submeters across campus to better understand building energy performance and identify opportunities to increase their efficiency. This data was instrumental in identifying methods for decreasing the campus utility budget by \$3 million for the upcoming year.
- Academic Affairs (AA)
 - *Faculty Recruiting Partnerships and Creative Hiring Strategies*: Academic Affairs continue to use novel and established programs, partnerships, and creative hiring strategies to recruit post-doctoral and new PhD faculty to JMU. The university is developing reliable recruiting pipelines to create candidate pools that are highly qualified, talented, and represent a diverse range of disciplines.
 - *Leveraging Course Load Efficiencies*: The division established an oversight group to manage large classroom scheduling, which continues to explore both renovation opportunities and better space utilization techniques to identify cost reduction strategies that larger classrooms provide.

- *Open Educational Resources (OER)*: Leveraging custom-made, high-quality, free or low-cost textbooks helps to contain the costs of a JMU education while opening possibilities for faculty to improve student engagement and learning outcomes. Through efforts beginning in 2022, more than 10% of courses were recently listed as low- or no-cost, and JMU has achieved over \$2 million in student cost avoidance.
- *Retirement Incentive Programs*: These programs provide a mutually beneficial opportunity for continuously employed senior faculty to retire over time (phased retirement) or early (buyout), creating options for the college/department to re-purpose/reallocate the position at a lower cost.
- *Strategic Allocation of Faculty Resources*: All vacant full-time instructional positions are reviewed by the Office of the Provost and re-allocated based on data-informed enrollment growth demands and strategic interests of the university.
- **Research, Economic Development, and Innovation (REDI)**
 - *Research Centers Strategy*: Research, Economic Development, and Innovation identified distinctive areas of research so that they could be supported in a coordinated way, avoiding duplication of research infrastructure across colleges. This approach enhances collaboration and an interdisciplinary focus while creating world-renowned expertise and recognition in the field.

D6. Provide information about your institution's highest-priority E&G capital projects and requests (including new construction as well as renovations) over the six-year plan period and how they align to your enrollment trajectory, student outcomes improvement plans, or other strategic priorities. Please also reflect on your current E&G facilities utilization (especially classrooms, labs and student service areas), particularly in light of any recent trends that might impact space needs (e.g., enrollment trends, shifting learning modalities). How has square footage per student changed over time and why? What efforts have you made to reassess and further optimize the use of your existing facilities, and what has been the impact of those efforts to date? What do you intend to do in the next six years to increase utilization?

JMU is committed to maximizing the efficiency of its classrooms, labs, and other spaces to effectively use resources.

- To assist in optimizing space utilization, the institution is:
 - Integrating classroom and class lab scheduling into the Event Management System (EMS) to capture ongoing academic use of spaces beyond regular class hours. In the fall, JMU will pilot the EMS for scheduling to exceed current utilization standards and better accommodate student scheduling.
 - Continuing efforts to maximize the effectiveness of academic scheduling through a partnership between Academic Resource and Space Management staff. They actively engage with the deans and academic course schedulers to thoroughly review SCHEV utilization standards in the post-pandemic landscape. Additionally, staff generate bi-annual utilization reports to ensure classrooms and class labs are being used with maximum efficiency and effectiveness.
 - Surveying JMU students during University Assessment Day regarding the quality and effectiveness of classrooms and class labs as an integral part of their learning experience.

The six-year capital outlay plan primarily emphasizes renovations and upgrades to existing building systems and infrastructure with the goals of creating spaces that are in alignment with the university's strategic plan while meeting the technology, health, and safety needs of students, faculty, and staff. However, there is a pressing need to expand space specifically for disciplines within the College of Health and Behavioral Studies, JMU's largest college.

The university is very appreciative of the commonwealth's support and appropriated funding for the Carrier Library Renovation and Expansion furnishings and equipment, East Campus Infrastructure Phase 3 project, planning for Johnston Hall Renovation, and planning for the College of Health and Behavioral Studies Expansion.

The following projects are included in the university's six-year capital outlay plan. Their continued advancement in the phased processes of planning and construction remains a top E&G funding priority for the university, listed in priority order.

- Johnston Hall Renovation and Addition
 - This project involves 29,700 gsf (18,700 in renovations and 11,000 in additions) to a building that was originally constructed in 1929 and converted into academic space in early 1970.
 - Significant modifications are required to meet program requirements, building code standards, and ADA accessibility requirements.
 - A feasibility study in 2023 determined that an 11,000 gross square foot addition was needed to house the Center for Assessment and Research Studies (CARS), which allows for a better collaboration among the Department of Graduate Psychology, which is currently located in Johnston, and other programs.
 - After renovation, the space will continue to provide faculty offices, labs, and multiuse instructional spaces for Graduate Psychology and CARS that will better serve the students, faculty, and staff using the academic building.

- If possible, timing of the project will provide synergies with the renovation of Spotswood Hall, which is taking place directly across the street in Summer 2025. Those opportunities include shared laydown space; singular closing of the shared alley between the two, providing a smaller window of inconvenience and disruption to students/faculty/staff who travel through and occupy nearby spaces; and the potential of combining heating/cooling production facilities to create shared resources resulting in significant energy savings for outyears.
 - Total planning and construction project budget is \$26,820,000.
- College of Health and Behavioral Studies Expansion
 - The original 147,033 gsf College of Health and Behavioral Studies building was constructed in 2016 and did not fully meet the square footage requirements determined by college leadership.
 - As a result, some departments, including the Institute for Innovation in Health and Human Services and Psychology, are located in other buildings on campus. The proposed addition will relocate the scattered academic departmental entities into a new professional academic facility.
 - As degree requirements and demand for health professionals continue to increase, especially post-COVID, simulation class lab space is in higher demand to enrich the learning and readiness of nursing students for immediate impact in healthcare settings.
 - In particular, Nursing, Physician Assistant Studies, and other medical-related programs are growing rapidly.
 - JMU has maximized the lab space within the original building.
 - The addition is a five-story, 120,000 gsf project added to the southeast of the existing Health and Behavioral Studies building.
 - Program spaces in the project include community-oriented, state-of-the-art clinic space, along with administrative support spaces.
 - Total planning and construction project budget is \$109,630,000.

Section E: Budget Requests

E1. Provide additional information for any budget requests in Part I of your planning template that are not described elsewhere in your narrative.

The JMU E&G budget is constituted 75% by personnel costs. JMU continually reviews existing positions and reallocates those that are vacated, as well as carefully considering potential positions, to ensure staffing needs are met within current operational funding. Required adjustments to salary and benefits makes it difficult to reduce personnel costs while maintaining the experienced and talented employees that are essential to continue to meet the high standards for student success and satisfaction that the university has demonstrated and continually strives to improve upon.

As a result, the institution has focused its reduction efforts primarily on the remaining 25% of the budget related to non-personnel cost to identify operational efficiencies, especially within facilities and the use of technology. Part 1 of the plan includes a \$1.0 million annual reallocation of resources FY 2026.

Nongeneral Fund Support (partial list)

1. Salary and Benefit Increases for Existing Employees

Increase Institutional Instructional Faculty Salaries, Administrative and Professional Faculty Salaries and Classified Salaries. The university is very appreciative of the commonwealth's support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-2025: \$3,593,937 2025-26: \$7,294,133

Increase Adjunct Faculty & Graduate Assistantships Pay. As competition for adjunct faculty increases, compensation continues to be a challenge for the university. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-25: \$154,689 2025-26: \$314,019

Health Insurance Premiums. Medical insurance increased 6.3% percent for fiscal year 2024-25 and anticipated to remain flat in FY 2025-26

Nongeneral Fund Support

2024-25: \$1,517,741 2025-26: \$1,517,741

Faculty Promotions and Classified In-Band Adjustments: Recognize faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks helps us to attract and retain high-quality professors. In response to changes in the classified workforce and labor market, JMU plans to provide additional resources for employee retention, changes in job duties, internal alignment and salary compression.

Nongeneral Fund Support

2024-25: \$0 2025-26: \$1,050,000

Reallocations

2024-25: \$921,000 2025-26: \$921,000

- JMU offers a doctorate degree in Counseling and Supervision through an online and in-person hybrid model that allows students to enroll without leaving their jobs.
 - The program is currently operating at its maximum capacity of 20 students.
 - Accreditation standards changed in 2024 for doctoral-level counseling education to require more program credit hours while maintaining required faculty-to-student ratios.
 - By hiring an additional faculty member, JMU can maintain the current size of the program (20 graduates per year), meet the new accreditation standards, and allow for modest growth in the program cohort size and graduates who will go on to serve the K-12 community in this capacity.
- 2. *Increase the number of Mental Health Professionals and Clinicians in support of community wellness and meeting the needs of the commonwealth*
 - As part of requirements for its Clinical and School Psychology program, JMU doctoral students provide mental health services to individuals (children, adolescents, and adults) and couples in the local community through the JMU Counseling and Psychological Services (CAPS) clinic.
 - The clinic offers affordable outpatient mental health services including counseling, testing, and psychological assessment to the JMU community while providing graduate students in psychology experience in counseling and psychological assessment.
 - Current wait times for an appointment at the clinic are about one year.
 - Funding for a clinical faculty member would allow the clinic to conduct an additional 120 psychological and learning assessments per year and reduce waiting times.
 - Additional funding is also requested to provide assistantships to students in the program.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$615,786 (5.0 FTE)

Research Initiatives: Supporting the Growth of Research, Economic Development and Innovation: This initiative supports the infrastructure for research efforts in support of the university's current Carnegie designation of an R-2 institution.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$0 (0 FTE)

Reallocations

2024-25: \$230,722 (2.00 FTE)

2025-26: \$230,722 (2.00 FTE)

5. *Other Academic and Student Support Strategies and Initiatives*

Early Student Success System: The Early Student Success System (ESSS) is designed to improve retention and close the current equity gap affecting under-represented students.

- The system prioritizes a positive, proactive, and asset-based framework which understands that student success is not something done to students but is a collaborative goal.
- The ESSS will combine current and new data insights with the university's new CRM platform to identify students not meeting their goals and connect them with people, offices, and resources on campus so that they are empowered and more likely to reach their goals.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$244,389 (2 FTE)

Reallocations

2024-25: \$329,412 (3.00 FTE)

2025-26: \$329,412 (3.00 FTE)

2. Produce More Nurses through New “Fast Flex” BSN Program

JMU requests funding to increase the number of nursing graduates by launching a new non-traditional Bachelor of Science in Nursing (BSN) program while maintaining the existing traditional four-year BSN program.

- JMU is the top producer of nurses in the state among public four-year colleges and universities and produced nearly 300 nurses in 2022-23.
 - However, the program only has capacity to accept approximately half of qualified applicants due, in large part, to the common challenges associated with educating nursing students: a shortage of nursing faculty, competition for clinical placements, and space constraints in on-campus facilities.
- The commonwealth is expected to face an average shortfall of 412 nurses a year over the coming decade, and JMU understands the need for an innovative, fast-moving degree option to develop more nurses.
- The new BSN program would graduate 30 nurses per year and place nurses in the field more quickly by allowing students to complete their core nursing course work in one calendar year.
 - Classes will be delivered in a hybrid of on-campus and online formats while clinical placements will take place on nights and weekends.
 - The program will be open to those who have earned 36 credit hours, completed certain prerequisite courses, and met other criteria.
- In addition to traditional students, it is anticipated the program will appeal to transfer students and practicing nurses with a two-year degree who would like to earn a BSN.
- Requested resources to launch this program will cover expenses related to program faculty, support staff, supplies, technology needs, and student stipends to the program.
 - JMU’s ability to operate this program long-term and to its full potential is largely dependent on the approval of the expansion of the College of Health and Behavioral Studies proposed in the university’s 2024-26 capital budget proposal. The expansion would provide laboratory space vital to the growth of the health programs.
 - The program may also be contingent upon curriculum approval from SCHEV.

General Fund Request

2024-25: \$997,816 (14.69 FTE) 2025-26 \$997,816 (14.69 FTE)

Section F: Economic Development Annual Report

F1. Provide a link to any report your institution has produced about its economic development contributions. You may also share it in the appendix or as an attachment.

- [JMU Economic Development Task Force Report \(2022\)](#)

Section G: Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought

G1. Provide a copy of any policy or reports your institution has produced and provide information about annual training or orientation related to this topic.

James Madison University is committed to protecting and promoting the freedom of speech guaranteed by the United States Constitution as well as the Constitution of Virginia and applicable Virginia law. JMU's mission clearly states the institutional intent to prepare students to "be educated and enlightened citizens," and open debate of ideas and civil discourse are foundational to that preparation.

The university strives to uphold a welcoming and inclusive campus environment for all students, staff, faculty, and visitors so that every person can "reach their full potential," as stated in the commonwealth's *Guiding Principles for Virginia Education*. The institution also makes members of the JMU and surrounding communities aware of the concomitant individual responsibilities that freedom of speech carries.

JMU regularly demonstrates its strong commitment to free speech and freedom of expression and inquiry by encouraging the exploration of diverse ideas and educating students, staff, and faculty on their rights and responsibilities as citizens. A list of various programs and initiatives related to the topic is provided below.

- VA Code §23.1-401.1: Constitutionally Protected Speech
 - JMU annually complies with the statute requirement of generating [a report related to issues of constitutionally protected speech](#), which is submitted to the Governor and the Chairs of the House Committee on Education and the Senate Committee on Education and Health.
 - In addition to the summary of resources, the report verifies that JMU is not aware of any complaint that has been filed in a court of law since December 1, 2020, to initiate a lawsuit against JMU or an employee of JMU in his or her official capacity for an alleged violation of the First Amendment to the United States Constitution.
- University Policy
 - Policy 1121. [Public Expression on Campus](#) addresses speech that is constitutionally protected as well as the process to report incidents of disruption of such constitutionally protected speech.
 - The policy applies to staff, faculty, students, and all other members of the university community.
- Faculty Policy
 - Early in the [JMU Faculty Handbook](#), the Faculty Rights and Responsibilities section provides an overview and explanation of academic freedom for faculty, clearly stating that "A faculty member who is acting in the course and scope of their employment at the university is protected by the tenets of academic freedom as long as such action is performed in good faith and in a manner consistent with their responsibilities."
 - This section is followed by the responsibilities inherent in exercising academic freedom.
- Student Policy
 - The [JMU Student Handbook](#) addresses freedom of speech and related issues within the Students' Rights section, stating that "[t]he student, as a citizen, has the rights of freedom of speech, freedom of the press, freedom of peaceful assembly and association, [and the] freedom of political beliefs[.]"
 - As part of orientation, students are made aware of University Policy 1121 and informed that it explains how to file a complaint if students feel their freedom of speech rights have been violated.
- University Resources
 - The mission of the [James Madison Center for Civic Engagement](#) (CCE) is to "educate and inspire people to address public issues and cultivate the common good in our democracy," and the center serves as hub of resources and programming relevant and applicable to all employees and students.

- The CCE maintains a [free speech website](#) that captures and promotes free speech-related resources.
- The center regularly offers, often in collaboration with other offices, programming to educate various constituencies on free speech and to generate civil discourse. A recent example is the [Freedom of Expression Virtual Event Series](#) featuring multiple speakers.
- First-year and transfer students participate in [Better Conversations Together](#), a free speech and free expression orientation, upon their campus arrival in a session jointly offered by CCE and the divisions of Student Affairs and Diversity, Equity, and Inclusion. The initial orientation is supplemented with videos and digital content to equip students with resources on these topics.
- JMU often welcomes speakers to discuss issues of freedom of speech and expression as well as provide a wide array of viewpoints on important current public policy issues. Both the [Common Good Conversations](#) and the [Madison Vision Series](#) are designed to help the entire JMU community develop educated opinions on the challenging and complex issues society faces today.
- The Office of University Counsel maintains a [website of freedom of speech resources](#).

Section H: New Schools, Sites, And Mergers

H1. Provide information on any new instructional sites, schools, or mergers supported by all types of funding that your institution is considering or planning to undertake during the six-year period.

JMU anticipates expanding site offerings for several of its existing graduate teacher education programs in response to requests from various school systems.

Location	Programs
Albemarle/Charlottesville	MEd with a concentration in Literacy
Richmond	MEd and Graduate Certificate: Educational Leadership
Prince William	MEd and Graduate Certificate: Educational Leadership
Roanoke	MEd and Graduate Certificate: Educational Leadership
Winchester	MEd and Graduate Certificate: Educational Leadership

- With the exception of Roanoke, all programs above will be offered in a hybrid format, with the in-person portion occurring in the location specified.
- JMU does not anticipate any additional schools or mergers.

[Optional] Section I: Research

11. [OPTIONAL] Highlight any strategic research priorities, programs, or key areas of investment (e.g., hiring plans, critical research agendas, interdisciplinary centers, business partnerships, commercialization efforts) and IP dissemination and commercialization priorities you intend to pursue over the next 6 years that have not already been mentioned in this narrative. What are the anticipated benefits to your faculty attraction/retention strategy, student value proposition, and the economic competitiveness of the commonwealth?

Academic Institutes and Centers (AIC)

JMU's R2 Carnegie Classification status offers new opportunities to enhance collaborative research networks. In response, [Research, Economic Development, and Innovation \(REDI\)](#) created the [Research Academic Institute and Center Plan](#) to incentivize the establishment of self-sustaining centers of research excellence that enhance JMU's national and global reputation while increasing research production and expenditures.

- By 2029, the Division of Research, Economic Development, and Innovation (REDI) plans to establish six fully functional, self-sustaining, high-research AICs that will promote interdisciplinary innovation and enhance a culture of research that responds to urgent local and global issues and opportunities.
- The first cohort of research centers launched in 2023:
 - African, African American, and Diaspora (AAAD) Studies Center: The epicenter of Africana Studies at JMU, AAAD offers an international conference, a thriving academic minor, workshops and guest speakers, and a range of research and instructional activities.
 - JMU Center for Advancement Research in Education (JMU CARE™): JMU CARE™ is a hub for longitudinal studies in early childhood development, a resource for JMU faculty members to create partnerships and include students in their research and study, and a vehicle for building stronger connections with community partners.

Research Development

The [Office of Research Development](#) (RD), established in Fall 2022, strategically supports efforts by JMU constituents related to pursuing external funding. RD provides external funding opportunity support at the college, program, and individual level.

RD will continue to offer and expand the following services and programs:

- Consult with college faculty and leadership.
- Coordinate virtual and on- and off-campus site visits
- Provide Research development presentations, trainings, and workshops
- Increase awareness of the external funding landscape in addition to the resources available at JMU within colleges by supporting individual faculty interest in external funding.
- Managing sponsored programs databases for faculty and staff. There was an 87% increase in new Sponsored Programs Information Network (SPIN), a searchable database of 40,000+ funding opportunities, database profiles.
- Support external funding proposals.

JMU X-Labs and Industry Partnerships

JMU X-Labs facilitates ecosystems that catalyze and cultivate high-impact engaged learning and research experiences, hosts interdisciplinary courses, and serves as a hub for innovative collaboration through converging transdisciplinary teams, networks, and initiatives that respond to complex and grand challenges.

- JMU X-Labs collaborates with distinguished community, government, and industry organizations to provide solutions while preparing students with real-world experience, just one example of how JMU leverages community partnerships for the mutual benefit of regional economic development and student development.
- Since launching in 2015, JMU X-Labs has engaged with 118 external partners. During the 2022 academic year, 13 X-Labs courses enrolled over 210 students from 55 different majors who worked directly with 15 community partners. In Spring 2024, X-Labs launched the Re-Imagined Internship, partnering with Ellucian Corporation, a global higher education technology company in which a cohort of undergraduate and graduate students in roles such as developer, ethicist, designer, and storyteller. Students spent a semester working on a problem offered by Ellucian, then entered a cohort-based internship. In Fall 2024, X-Labs will partner with Dynamic Aviation in a similar fashion.
- X-Labs will continue to strategically collaborate in opportunities that create local economic impact and the creation of new knowledge and technologies to establish a pathway to the Office of Community and Economic Development for intellectual property protection and commercialization.
- REDI is focusing on building research relationships with small businesses to pursue Small Business Innovation Research and Small Business Technology Transfer funding opportunities. REDI organized efforts to submit one of these in spring 2024 and anticipate submitting at least two in fall 2024.

Economic Development and Commercialization

JMU's priorities related to economic development include:

- Attaining the APLU Innovation and Economic Prosperity (IEP) designation
- Supporting talent pipelines and retention in the region and Commonwealth
 - Continue to serve as the Region 8 (Shenandoah Valley) coordinating office for the Commonwealth's V-TOP initiative.
- Supporting the campus and regional innovation ecosystems by:
- Partnering with Commonwealth of Virginia initiatives to enhance partnerships with regional businesses and non-profit groups to grow research commercialization activities, including
 - Virginia Innovation Partnership Corporation (VIPIC): Develop Entrepreneur in Residence (EIR) and Eminent Researcher Recruitment (ERR) partnerships. Support researchers pursuing VIPIC Commonwealth Commercialization Fund (CCF) and related research commercialization project opportunities.
 - Commonwealth Cyber Initiative (CCI): Create and expand researcher recruitment and retention funds. VP Tongen has recently been added to the advisory board
- Fostering and supporting development of research grants that engage small businesses with JMU research efforts (e.g., SBIR/STTR collaborations)
- Growing and supporting a research-to-implementation pipeline with community partners
- Supporting campus and community collaborations that contribute to enhancing the quality of life in our communities (Placemaking)

International Research Support Services

International research is a critical component of academic exploration, yet defining its scope and functions can be challenging. As an R2, the institution is broadening its research profile and infrastructure through the implementation of an international research support unit. This unit will offer support toward

- Export controls and international compliance
- Enhancement of JMU's global research reputation
- Growth of faculty and student research and collaborations globally
- Local international research support
- Publications and publishing on the global scene
- International faculty associate and student support

- Virtual and physical global exchange
- Cross-university partnerships

Office of Research Integrity

[The Office of Research Integrity](#) upholds the university's research programs by promoting a culture of compliance, fostering collaborations, and ensuring research excellence. The office will continue to offer service and support in university-wide areas including

- University Compliance Committee
- General Data Protection Regulation (GDPR) Working Group
- Data Manager - Data Stewardship and Information Security Working Group
- Institutional Review Board (IRB)
- Institutional Animal Care and Use Committee (IACUC)
- Institutional Biosafety Committee (IBC)
- Financial Conflict of Interest (COIC – Conflict of Interest Committee)

Office of Federal Relations and Communications

The Office of Federal Relations and Communications (FRC) enhances the university's academic standing and strives for inclusive excellence by promoting faculty and student research, scholarship, and creative accomplishments while liaising with federal entities to advance university priorities and connect faculty expertise to issues of national importance. FRC serves REDI and the JMU community by

- highlighting JMU accomplishments and communicating updates to congressional offices; advocating
- Advocating on behalf of JMU constituents on a variety of federal issues (e.g., immigration, athletics-Name-Image-Likeness (NIL), Department of Education negotiated rulemaking)
- Managing the annual Congressionally Directed Spending request process
- Responding to inquiries and facilitate campus visits for elected officials and staff
- Serving on the Association of Public & Land-grant University's Council on Governmental Affairs

[Optional] Section J: Collaboration

J1. [OPTIONAL] Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions (and other state agencies as appropriate) in furthering the goals outlined in sections B-D. What is the expected impact and in what timeframe? What is the timeline for the initiative and how far along is it? What (if anything) would be required from a budget or policy perspective to facilitate the success of the initiative?

JMU is highly committed to working across the commonwealth to leverage the best opportunities for all students. Included here are several significant initiatives.

Higher Education Technical Systems

With Reengineering Madison, JMU is implementing significant technology platforms, including an enterprise CRM and new data solutions for managing and visualizing data, as well as replacing current PeopleSoft Enterprise Resource Management Finance, Human Resources, and Student Administration applications that are reaching the end of their useful life, through a seven-year, multiphase project.

To explore the potential for collaboration, we are involved in conversations with other Virginia higher education institutions. These discussions aim not only to achieve potential cost savings but also to leverage mutual benefits and shared efficiencies.

Grow Your Own: Licensing Paraprofessionals with Degrees

To move more teachers into classrooms more quickly and at a greatly reduced cost than traditional teacher preparation programs, JMU has partnered with VDOE to launch an innovative teacher preparation program. JMU has engaged two strong teacher-producing universities (Old Dominion University and Longwood University) to offer the same online module-based learning.

Open Educational Resources (OER)

JMU focuses on providing students with the [most affordable textbook options](#) available through multiple programs for students and faculty.

Leveraging custom-made, high-quality, free, or low-cost textbooks helps to contain the costs of a JMU education while opening possibilities for faculty to improve student engagement and learning outcomes. Through OER efforts led by the JMU Libraries beginning in 2022, more than 10% of courses for Fall 2022 were listed as low- or no-cost, and saved 5,259 students an estimated \$1,062,000 in out-of-pocket expenses in FY 2022.

To help ensure faculty buy-in, the university offers many opportunities for them to learn about the benefits of free and low-cost textbooks. JMU Libraries has [provided grants](#), similar to those offered by VIVA, for faculty to try OER options and makes available multiple resources for finding and evaluating OER sources.

SCHEV/ Virginia Talent + Opportunity Partnership (V-TOP) Partnership Grant

JMU was awarded a SCHEV Innovative Internship Program Round 3 award for FY 24 to develop regional (Region 8) pathways to grow business/non-profit participation in work-based learning and internship programming. The funded program will provide coordination among educational institutions, employers, and students in the region to expand local internship opportunities in the Shenandoah Valley.

With this funding, JMU has hired an internship coordinator to facilitate and manage the Region 8 Valley Internship Experience Workgroup, a partnership of representatives from regional educational institutions, economic development and business support organizations, and employers. Other project deliverables include:

- Data collection efforts to inventory existing regional internship and work-based learning opportunities.

- Provision of a primary contact and connector among employers, educational institutions, the Virginia Talent and Opportunity Partnership, and the VIEW.
- Prioritization of opportunities for expansion of regional programs, establishment of career readiness resource programming, coordination of a regional internship recruitment event, development of a multi-year program implementation plan, and a compilation of yearly project progress reports for SCHEV and stakeholders.

However, this award is limited to two years.

Virtual Library of Virginia

Membership in the Virtual Library of Virginia (VIVA) consortium and participation in interlibrary loan agreements with partner institutions extends the reach of library collections and provides students at participating institutions with access to a larger universe of information. Contracts are also negotiated to allow the general public access to licensed resources on public stations in the libraries. In addition, cooperative agreements with other Virginia universities provide access to an expanded collection of e-journals.

As a leader for VIVA, JMU manages procurement for the 39 state-assisted colleges and universities involved. Membership in VIVA brings \$5 of value for every \$1 spent through VIVA's cooperative purchasing of resources, saving the institution money and personnel hours by avoiding duplication of collections and enabling shared agreements and central invoicing.

[Optional] Section K: State Policy

K1. [OPTIONAL] Use this section to outline any state policy changes you have not already mentioned in this narrative that would enhance your ability to achieve greater success on the topics, strategies, and initiatives referenced in this narrative. What existing policies, if any, are hindering your ability to maximize outcomes and value for students? What new policies might create conditions that are more conducive to achieving those goals? What strategies or initiatives would these policy changes enable your institution to do or try that you are not yet able to do today? Please be as specific as possible.

JMU appreciates the opportunity to highlight possible state policy and procedure changes that would enhance success at JMU.

Budgeting and Financial Aid

- Allow institutions to allocate funding toward cloud-based software purchases through the Higher Education Equipment Trust Fund program. Guidelines need to be revised to include the increasing changes of technology to meet the needs of academic programs and students.
- JMU would benefit from a modification to the SCHEV financial aid funding model that results in enhancing state support.

Increased State Funding

- As with other higher education institutions in Virginia, JMU would greatly benefit from additional resources and options to fund ongoing mental health support.

SCHEV Policies

- JMU seeks clarification of its place in institutional groupings within the commonwealth. As an R2, we would like to be considered a research institution by Virginia. In addition, we would like to be able to offer an increased number of doctoral degrees, which is currently limited (SCHEV curriculum policy, VIII. Degree Level Authorization, pgs. 9-10).

Tech Talent Investment Program

- The Tech Talent Investment Program (TTIP) at JMU has had a significant impact on the growth of the Computer Science program, increasing the number of graduates by 43% from FY19 to FY23. Based on our current JMU-CS enrollment trends, the TTIP investment and associated investments by JMU will continue to produce increasing numbers of graduates well into the future, sufficient to achieve and exceed our TTIP commitments.
 - JMU kindly requests that the state consider reimplementing TTIP funding once colleges have reached our stated goals and consider expanding the program to include Information Technology degrees.

[Optional] Section L: Additional Information

L1. [OPTIONAL] Use this final section to provide any additional context and/or supporting materials you feel should be incorporated into the six-year planning process.

Economic Impact

- JMU is largest employer in northern Shenandoah Valley.
- The university is a catalyst for economic development and innovation in the region through hosting or partnering with entities such as the Shenandoah Valley Partnership, Shenandoah Valley Technology Council, Small Business Development Center, and the Valley Makers Association. JMU's Center for Entrepreneurship also plays a key role.

Community Impact

- JMU is active in the local community and dedicated to intentional engagement that supports those in the region. Two substantial examples are included here.
- The university provides significant public health services for the local community through programs including the Institute for Innovation in Health and Human Services (IIHHS).
 - The institute offers 19 community-based programs and partners with academic units to support ten clinics. In 2022-23, 999 students engaged in IIHHS programs, representing 39 undergraduate and graduate degree programs. During this time, 15,465 community clients received institute services.
- JMU annually offers the Volunteer Income Tax Assistance (VITA) program, providing free tax preparation and e-filing for low-income community members.
 - A joint collaboration between the School of Accounting and the Department of Foreign Languages, Literatures and Cultures, services are delivered in English and Spanish. In 2023, over 500 taxpayers were assisted.
- JMU's role as a community-engaged anchor institution has expanded.
 - A recent focus on co-creating new services for the local and regional communities in response to their priorities and the receipt of a substantial grant resulted in advancement in early childhood development programming through JMU's Early Childhood Initiatives.
- JMU is a national leader in civic education, [celebrating free speech](#), and drawing attention to our role as citizens, led by the nonpartisan Madison Center for Civic Engagement
 - The university's work in elevating free speech to counter threats to democracy was highlighted in a recent highly favorable [Associated Press article](#). JMU has joined a national coalition of universities dedicated to developing resources on these topics, the Institute for Citizens & Scholars.

James Madison University

2024 Six Year Financial Plan
Part I

Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2024-26 Biennium

James Madison University

Instructions: Provide annual planned increases in undergraduate tuition and mandatory E&G fees and mandatory non-E&G fees for both in-state and out-of-state students in 2024-26 biennium. The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the mission, market capacity and other factors with the assumption of no new state general fund support.

	Undergraduate Tuition and Mandatory Fees					
	2023-24 Charge (BOV approved)	2024-25			2025-26*	
		Board Approved Charge	% Increase		Planned Charge	% Increase
In-State UG Tuition	\$7,914	\$8,150	3.0%	\$8,550	4.9%	
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%	
In-State UG Mandatory non-E&G Fees	\$5,662	\$5,816	2.7%	\$5,990	3.0%	
In-State UG Total	\$13,576	\$13,966	2.9%	\$14,540	4.1%	
Out-of-State UG Tuition	\$24,542	\$24,910	1.5%	\$25,408	2.0%	
Out-of-State UG Mandatory E&G Fees	\$586	\$586	0.0%	\$586	0.0%	
Out-of-State UG Mandatory non-E&G Fees	\$5,662	\$5,816	2.7%	\$5,990	3.0%	
Out-of-State UG Total	\$30,790	\$31,312	1.7%	\$31,984	2.1%	

Institutional Notes:

* The tuition and fee rates shown for FY 2025-26 are based on planning costs and for modeling purposes only.

Part 2: Revenue: 2022-23 through 2029-30
James Madison University

Instructions: Based on assumptions of no new general fund, enrollment changes and other institution-specific conditions, provide total collected or projected to collect revenues (after discounts and waivers) by student level and domicile (including tuition revenue used for financial aid), and other NGF revenue for educational and general (E&G) programs; and mandatory non-E&G fee revenues from in-state undergraduates and other students as well as the total auxiliary revenue.
 In line 25, enter E&G GF revenues for the current biennium and 2024-26 biennium if there is the final budget. The formulas will automatically hold that constant for the remaining years of 2026 to 2030.

Instructions: Provide a pro forma analysis of total tuition revenue in years 2026-2030 by holding T&F constant at the planned 2025-26 rate while incorporating your institution's submitted enrollment projections for each year through 2030. These columns are NOT meant to be a projection and do NOT make any assumption about GF support. The calculations will be used to support the pro forma analysis in tab 5.

Items	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Estimate)	Chg	2025-2026 (Planned)	Chg	2026-2027 (Pro Forma)	Chg	2027-2028 (Pro Forma)	Chg	2028-2029 (Pro Forma)	Chg	2029-2030 (Pro Forma)	Chg	2022-2030 Chg	CAGR
	Total Collected Tuition Revenue	Total Collected Tuition Revenue		Total Projected Tuition Revenue		Total Projected Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue			
E&G Programs																	
Undergraduate, In-State	\$123,308,572	\$131,706,611	6.8%	\$138,203,564	4.9%	\$142,720,282	3.3%	\$141,513,152	-0.8%	\$140,756,257	-0.5%	\$140,576,612	-0.1%	\$140,692,369	0.1%	14%	1.9%
Undergraduate, Out-of-State	\$107,066,748	\$114,965,647	7.4%	\$115,149,846	0.2%	\$119,433,768	3.7%	\$120,167,348	0.6%	\$119,446,295	-0.6%	\$119,200,861	-0.2%	\$119,206,035	0.0%	11%	1.5%
Graduate, In-State	\$12,847,174	\$12,321,652	-4.1%	\$11,531,414	-6.4%	\$11,804,504	2.4%	\$11,786,629	-0.2%	\$11,910,540	1.1%	\$11,856,561	-0.5%	\$11,946,454	0.8%	-7%	-1.0%
Graduate, Out-of-State	\$8,917,302	\$6,440,895	-27.8%	\$5,603,036	-13.0%	\$5,713,190	2.0%	\$5,735,645	0.4%	\$5,859,131	2.2%	\$5,843,447	-0.3%	\$5,914,163	1.2%	-34%	-5.7%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Other NGF	\$6,574,488	\$6,551,421	-0.4%	\$6,859,542	4.7%	\$6,926,261	1.0%	\$6,993,642	1.0%	\$7,061,698	1.0%	\$7,130,437	1.0%	\$7,199,864	1.0%	10%	1.3%
Total E&G NGF Revenue	\$258,714,284	\$271,986,226	5.1%	\$277,347,402	2.0%	\$286,598,005	3.3%	\$286,196,416	-0.1%	\$285,033,921	-0.4%	\$284,607,918	-0.1%	\$284,958,885	0.1%	10%	1.4%
E&G GF Revenue (assume flat after 2026)	\$163,805,747	\$184,623,850	12.7%	\$196,147,227	6.2%	\$200,724,184	2.3%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	23%	2.9%
Total E&G Revenue	\$422,520,031	\$456,610,076	8.1%	\$473,494,629	3.7%	\$487,322,189	2.9%	\$486,920,600	-0.1%	\$485,758,105	-0.2%	\$485,332,102	-0.1%	\$485,683,069	0.1%	15%	2.0%

Auxiliary Revenue	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Estimated)	Chg	2025-2026 (Planned)	Chg
	Total Revenue	Total Revenue		Total Revenue		Total Revenue	
In-State undergraduates	\$76,306,955	\$81,681,552	7.0%	\$82,624,263	1.2%	\$84,110,999	1.8%
All Other students	\$24,361,851	\$26,077,751	7.0%	\$25,469,697	-2.3%	\$26,841,665	5.4%
Total non-E&G fee revenue	\$100,668,806	\$107,759,303	7.0%	\$108,093,960	0.3%	\$110,952,664	2.6%
Total Auxiliary Revenue	\$248,106,904	\$270,452,096	9.0%	\$276,172,539	2.1%	\$299,774,060	8.5%

Part 3: Financial Aid Plan: 2022-23 through 2029-30
James Madison University

Instructions: Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid for the revenue numbers in Tab 2. To ensure compliance with the state prohibition that in-state students not subsidize out-of-state students and to provide the review group with a scope of the strategy, projections must be made for each of the indicated categories. Please be aware that this data will be compared with similar data provided by other institutional offices in order to ensure overall consistency. (Please do not alter shaded cells that contain formulas.)

"Other Discounts and Waiver" means the totals of any unfunded full or partial tuition waiver reducing the students' charges, including Virginia Military Survivors and Dependent Education Program and the Senior Citizens Tuition Waiver. Do not include the tuition differential for the tuition exceptions.

Note: If you do not have actual amounts for **Tuition Revenue for Financial Aid** by student category, please provide an estimate. If values are not distributed for **Tuition Revenue for Financial Aid**, a distribution may be calculated for your institution.

Allocation of Tuition Revenue Used for Student Financial Aid

*2022-23 (Actual) Please see footnote below									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid**	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$123,308,572	\$5,521,006	4.5%	\$11,121,150	\$4,750	\$7,548,253	\$130,861,575	10.0%	-\$5,032,488 Compliant
Undergraduate, Out-of-State	\$107,066,748	\$4,793,795	4.5%	\$157,904	\$1,693,524	\$155,055	\$108,915,327	6.1%	
Graduate, In-State	\$12,847,174	\$575,218	4.5%	\$7,562	\$0	\$642,094	\$13,489,268	9.0%	
Graduate, Out-of-State	\$8,917,302	\$399,262	4.5%	\$2,665	\$714,280	\$53,359	\$9,684,941	12.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$252,139,796	\$11,289,281	4.5%	\$11,289,281	\$2,412,554	\$8,398,761	\$262,951,111	8.4%	

2023-24 (Actual)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$131,706,611	\$5,459,347	4.1%	\$10,656,083	\$0	\$6,156,831	\$137,863,442	8.4%	-\$4,685,993 Compliant
Undergraduate, Out-of-State	\$114,965,647	\$4,765,421	4.1%	\$346,408	\$2,339,938	\$184,811	\$117,490,396	6.2%	
Graduate, In-State	\$12,321,652	\$510,743	4.1%	\$0	\$0	\$668,135	\$12,989,787	9.1%	
Graduate, Out-of-State	\$6,440,895	\$266,980	4.1%	\$0	\$0	\$68,833	\$6,509,728	5.2%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$265,434,805	\$11,002,491	4.1%	\$11,002,491	\$2,339,938	\$7,078,610	\$274,853,353	7.4%	

2024-25 (Estimated)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$138,203,564	\$6,255,718	4.5%	\$11,858,023	\$0	\$6,086,733	\$144,290,297	8.6%	-\$5,080,341 Compliant
Undergraduate, Out-of-State	\$115,149,846	\$5,212,203	4.5%	\$385,481	\$2,809,022	\$124,293	\$118,083,161	6.9%	
Graduate, In-State	\$11,531,414	\$521,964	4.5%	\$0	\$0	\$571,709	\$12,103,123	9.0%	
Graduate, Out-of-State	\$5,603,036	\$253,619	4.5%	\$0	\$0	\$86,978	\$5,690,014	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$270,487,860	\$12,243,504	4.5%	\$12,243,504	\$2,809,022	\$6,869,713	\$280,166,595	7.8%	

2025-26 (Planned)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$142,720,282	\$6,487,088	4.5%	\$12,311,735	\$0	\$6,336,025	\$149,056,307	8.6%	-\$5,288,095 Compliant
Undergraduate, Out-of-State	\$119,433,768	\$5,428,642	4.5%	\$400,230	\$3,396,116	\$126,721	\$122,956,605	7.3%	
Graduate, In-State	\$11,804,504	\$536,552	4.5%	\$0	\$0	\$599,789	\$12,404,293	9.2%	
Graduate, Out-of-State	\$5,713,190	\$259,683	4.5%	\$0	\$0	\$88,663	\$5,801,853	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,671,744	\$12,711,965	4.5%	\$12,711,965	\$3,396,116	\$7,151,198	\$290,219,058	8.0%	

2026-27 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$141,513,152	\$6,443,025	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,849,177	8.6%	-\$5,332,071 Compliant
Undergraduate, Out-of-State	\$120,167,348	\$5,471,160	4.6%	\$400,230	\$3,396,116	\$126,721	\$123,690,185	7.3%	
Graduate, In-State	\$11,786,629	\$536,639	4.6%	\$0	\$0	\$599,789	\$12,386,418	9.2%	
Graduate, Out-of-State	\$5,735,645	\$261,141	4.6%	\$0	\$0	\$88,663	\$5,824,308	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,202,774	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$289,750,088	8.0%	

2027-28 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$140,756,257	\$6,436,933	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,092,282	8.7%	-\$5,330,120 Compliant
Undergraduate, Out-of-State	\$119,446,295	\$5,462,406	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,969,132	7.3%	
Graduate, In-State	\$11,910,540	\$544,682	4.6%	\$0	\$0	\$599,789	\$12,510,329	9.1%	
Graduate, Out-of-State	\$5,859,131	\$267,944	4.6%	\$0	\$0	\$88,663	\$5,947,794	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$277,972,223	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,519,537	8.1%	

2028-29 (Pro Forma)								
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,576,612	\$6,440,180	4.6%	\$12,311,735	\$0	\$6,336,025	\$146,912,637	8.7%
Undergraduate, Out-of-State	\$119,200,861	\$5,460,901	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,723,698	7.3%
Graduate, In-State	\$11,856,561	\$543,180	4.6%	\$0	\$0	\$599,789	\$12,456,350	9.2%
Graduate, Out-of-State	\$5,843,447	\$267,704	4.6%	\$0	\$0	\$88,663	\$5,932,110	6.0%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,477,481	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,024,795	8.1%

2029-30 (Pro Forma)								
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,692,369	\$6,438,950	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,028,394	8.7%
Undergraduate, Out-of-State	\$119,206,035	\$0	%	\$400,230	\$3,396,116	\$126,721	\$122,728,872	2.9%
Graduate, In-State	\$11,946,454	\$0	%	\$0	\$0	\$599,789	\$12,546,243	4.8%
Graduate, Out-of-State	\$5,914,163	\$0	%	\$0	\$0	\$88,663	\$6,002,826	1.5%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,759,021	\$6,438,950	2.3%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,306,335	5.9%

* Please note that the totals reported here will be compared with those reported by the financial aid office on the institution's annual S1/S2 report. Since the six-year plan is estimated and the S1/S2 is "actual," the numbers do not have to match perfectly but these totals should reconcile to within a reasonable tolerance level. Please be sure that all institutional offices reporting tuition/fee revenue used for aid have the same understanding of what is to be reported for this category of aid.

Institutional Note:

** "Tuition Revenue for Financial Aid" distributed based on proportionality of total revenue collections by category.

Education and General revenues are pooled and are not allocated by revenue type per expense.

Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30
James Madison University

Instructions: The Academic Plan should contain academic, finance, and support service strategies the institution intends to employ in meeting state needs/goals as found in the Virginia Plan. (Please see the main instructions sheet in this workbook for more detailed information about The Virginia Plan. Please provide short titles to identify institutional strategies and other expenditure increases. Provide a concise description in the "Notes" column (column O), including a % increase where relevant and a specific reference as to where more detailed information can be found in the Narrative document.

Complete the lines appropriate to your institution, adding lines within the relevant categories as needed. As completely as possible, the items should represent a complete picture of your anticipated use of projected tuition revenues and strategic focus areas. Categories are listed in bold; you may not change the categories but you may add lines where indicated. Please update total cost formulas if necessary. For every line, the total amount and the sum of the reallocation and tuition revenue should equal one another.

Funding amounts in the first year should be incremental. However, if the costs continue into the second year and beyond, they should be reflected cumulatively (i.e. cost increases vs. 2023-24). Please update total cost formulas if necessary. Institutions should assume no general fund (GF) support in 2024-26 in this worksheet. A separate worksheet (Part 6) is provided for institutions to request additional GF support for 2024-26. Strategies for student financial aid, other than those that are provided through tuition revenue, should not be included on this table; they should be included in Part 6, General Fund Request, of the plan.

Also, given the long standing practice that agencies should not assume general fund support for operation and maintenance (O&M) of new facilities, O&M strategies should not be included in an institution's plan, unless they are completely supported by tuition revenue.

Lines 5 and 6 are newly added to collect the estimated E&G expenditures of 2022-23 and 2023-24 as baselines for Tab 5 Pro Forma.

For the 2026-28 biennium and 2028-2030 biennium, total amounts should be provided as estimates of future expenditures on these items but delineation of reallocation vs. tuition revenue vs. GF does not need to be provided by the institution.

Please estimate total E&G expenditures for 2022-23 and 2023-24

Total Estimated 2022-23 E&G Expenditures	\$422,520,031
Total Estimated 2023-24 E&G Expenditures	\$456,610,076

Short Title	Incremental amounts relative to 2023-24 estimated baseline											Explanation Please be brief; reference specific narrative question for more detail.
	2024-2025			2025-2026			2026-2027	2027-2028	2028-2029	2029-2030		
	Total Amount	Reallocation	Amount from Tuition Revenue	Total Amount	Reallocation	Amount from Tuition Revenue	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)		
Salary & benefit increases for existing employees												
Increase T&R Faculty Salaries	\$1,974,218	\$0	\$1,974,218	\$4,006,396	\$0	\$4,006,396	\$5,400,749	\$6,822,334	\$8,271,421	\$9,748,977	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Admin. Faculty Salaries	\$683,545	\$0	\$683,545	\$1,387,292	\$0	\$1,387,292	\$1,870,209	\$2,362,463	\$2,864,243	\$3,375,964	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Classified Staff Salaries	\$936,174	\$0	\$936,174	\$1,900,445	\$0	\$1,900,445	\$2,562,570	\$3,237,959	\$3,926,846	\$4,629,491	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase University Staff Salaries	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Increase GTA Salaries	\$54,225	\$0	\$54,225	\$110,077	\$0	\$110,077	\$167,046	\$225,154	\$284,424	\$344,879	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Adjunct Faculty Salaries	\$100,464	\$0	\$100,464	\$203,942	\$0	\$203,942	\$309,490	\$417,149	\$526,961	\$638,969	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Health Insurance Premiums	\$1,517,741	\$0	\$1,517,741	\$1,517,741	\$0	\$1,517,741	\$2,205,144	\$2,913,779	\$3,643,647	\$4,394,747	Represents JMU net cost related to salary/benefit Increases (6.3% FY25 & 3% FY27-30)	
Minimum Wage & Other Salary/Benefit Changes	\$682,046	\$587,237	\$94,809	\$974,295	\$587,237	\$387,058	\$1,247,178	\$1,247,178	\$1,247,178	\$1,247,178	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Minimum wage cost increase to \$13.50 on January 1, 2025, and to \$15.00 on January 1, 2026.	
Faculty Promotion/IBA	\$921,000	\$921,000	\$0	\$1,971,000	\$921,000	\$1,050,000	\$2,671,000	\$3,371,000	\$4,071,000	\$4,771,000	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Recognize faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks. In response to changes in the classified workforce, provide additional resources for employee retention, changes in job duties, and salary compression. Reference E1.	
Inflationary non-personnel cost increases												
Contractual services	\$0	\$0	\$0	\$1,136,000	\$1,000,000	\$136,000	\$2,272,000	\$3,408,000	\$4,544,000	\$5,680,000	Annual 3% inflation adjustment in select contractual nonpersonal services.	
Utilities	\$0	\$0	\$0	\$226,120	\$0	\$226,120	\$473,053	\$915,504	\$1,383,563	\$1,851,622	Average 2% increase in utility costs.	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Financial aid expansion												
Add'l In-State Student Financial Aid from Tuition Rev	\$1,201,940	\$1,201,940	\$0	\$1,655,652	\$1,201,940	\$453,712	\$1,655,652	\$1,655,652	\$1,655,652	\$1,655,652	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	
Add'l Out-of-State Student Financial Aid from Tuition Rev	\$39,073	\$39,073	\$0	\$53,822	\$39,073	\$14,749	\$53,822	\$53,822	\$53,822	\$53,822	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	

Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30
James Madison University

New/expanded academic programs												
Expansion of Physician Assistant Program	\$201,787	\$201,787	\$0	\$351,787	\$201,787	\$150,000	\$351,787	\$351,787	\$351,787	\$351,787	\$351,787	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Expansion of Physician Assistant Program to help meet shortages in PAs within the Commonwealth. Reference E1.
Supporting Growth of the Computer Science and Information Technology Majors	\$379,080	\$379,080	\$0	\$952,266	\$379,080	\$573,186	\$952,266	\$952,266	\$952,266	\$952,266	\$952,266	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the growth of the computer science and information technology majors to help meet the needs of employers across the Commonwealth and meet student demand. Reference E1.
Meet the Commonwealth's Mental Health Needs	\$0	\$0	\$0	\$615,786	\$0	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	Maintain and grow the institution's Ph.D. program in counseling and supervision, plus increase the number of mental health professionals and clinicians in support of community wellness and needs of the Commonwealth. Reference E1.
Research Initiatives	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$230,722	\$230,722	\$230,722	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
Other academic & student support strategies & initiatives												
Early Student Success System	\$329,412	\$329,412	\$0	\$573,801	\$329,412	\$244,389	\$665,306	\$756,583	\$756,583	\$756,583	\$756,583	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Implement the Early Student Success System (ESSS), which is designed to improve retention and close the current equity gap affecting under-represented students. Reference E1.
Reengineering Madison	\$88,879	\$88,879	\$0	\$1,082,113	\$88,879	\$993,234	\$1,832,113	\$2,582,113	\$3,332,113	\$4,082,113	\$4,082,113	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Annual subscription cost for information technology infrastructure to replace current software that is approaching end of life. Includes customer relationship management (CRM), data warehouse, identity management and enterprise resource planning (ERP) expenses. Reference E1.
Academic/Student Support Initiatives	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives												
Carrier Library Expansion	\$0	\$0	\$0	\$380,057	\$0	\$380,057	\$782,898	\$806,399	\$830,616	\$855,549	\$855,549	Staffing and utility costs associated with the expanded square footage of Carrier Library. Expected completion date is January 2026.
Carrier Library Renovated Space	\$0	\$0	\$0	\$261,595	\$0	\$261,595	\$571,690	\$588,850	\$606,534	\$624,741	\$624,741	Staffing and utility costs associated with the renovation section of Carrier Library. Expected completion date is January 2026.
Information Technology Security and Institutional Operational Initiatives	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$841,344	\$841,344	\$841,344	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Additional Funding Need	\$11,279,905	\$5,918,729	\$5,361,176	\$21,530,508	\$6,918,729	\$14,611,779	\$28,830,080	\$35,454,099	\$42,088,763	\$48,801,447	\$48,801,447	

Must not be greater than incremental Tuit Rev in Part 2	
2024-2025	2025-2026
\$0	\$0

Part 5: Six-year Pro Forma Calculations: 2022-23 through 2029-30

James Madison University

Instructi

From FY23-FY30

Baseline Pro Forma Surplus/Deficit	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Est.)	Chg	2025-2026 (Plan)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Total E&G GF Revenue from Tab2, flat after 2025-26	163,805,747	184,623,850	13%	196,147,227	6%	200,724,184	2%	200,724,184	0%	200,724,184	0%	200,724,184	0%	200,724,184	0%	23%	3%
Tuition discount rate	8.4%	7.4%	-0.975pt	7.8%	0.395pt	8.0%	0.19pt	8.0%	0.013pt	8.1%	0.034pt	8.1%	0.014pt	5.9%	-2.184pt	-2.513pt	%
Total E&G NGF Revenue	258,714,284	271,986,226	5%	277,347,402	2%	286,598,005	3%	286,196,416	0%	285,033,921	0%	284,607,918	0%	284,958,885	0%	10%	1%
Incremental E&G NGF Revenue vs. prior yr		13,271,942		5,361,176	-60%	9,250,603	73%	(401,589)	-104%	(1,162,495)	189%	(426,003)	-63%	350,967	-182%	-97%	
Total E&G Revenue	422,520,031	456,610,076	8%	473,494,629	4%	487,322,189	3%	486,920,600	0%	485,758,105	0%	485,332,102	0%	485,683,069	0%	6%	1%
Implied GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	%
Total E&G Expenditures	422,520,031	456,610,076	8%	461,971,252	1%	471,221,855	2%	478,521,427	2%	485,145,446	1%	491,780,110	1%	498,492,794	1%	18%	3%
Incremental E&G Expenditures vs. 2023-24		11,279,905		21,530,508	91%	28,830,080	34%	35,454,099	23%	42,088,763	19%	48,801,447	16%	333%			
Reallocation of existing dollars (flat after 2025-26)		5,918,729		6,918,729	17%	6,918,729		6,918,729		6,918,729		6,918,729		6,918,729			
Pro Forma Surplus/Deficit	-	-	%	11,523,377	%	16,100,334	40%	8,399,173	-48%	612,659	-93%	(6,448,008)	-1152%	(12,809,725)	99%	-211%	-30%
Incremental Surplus/Deficit	-	-	%	11,523,377	%	4,576,957	-60%	(7,701,161)	-268%	(7,786,514)	1%	(7,060,667)	-9%	(6,361,717)	-10%	-155%	-22%

Surplus does not represent actual available funds but is General Fund revenue with associated expenses not reflected in the template. Associated expenses include: GF portion of salary/benefit increases, financial aid and inflationary and other necessary/planned costs.

What would a constant GF/NGF ratio at 2023-24 levels imply for T&F and GF increases?																	
	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	2.7pt	0.4pt
Implied incremental T&F increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)		
Expenditure reductions	0%	<< Input percentages here
T&F increases	0%	
GF increases	0%	
TOTAL	0%	

	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Implied E&G Expenditure Reduction (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental T&F increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	0.4pt

**Part 6: General Fund (GF) Request: 2024-2026 Biennium
James Madison University**

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2024-26 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 4 and place it in bold print to draw attention to its connection to Part 6. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	Biennium 2024-2026 (7/1/24-6/30/26)				
			2024-2025		2025-2026		
			Total Amount	GF Support	Total Amount	GF Support	
1	Support Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP)	Enrollment management	\$0	\$0	\$4,904,791	\$4,904,791	Request state general funds for the Virginia Military Survivors and Dependents Education Program (VMSDEP). This critically important program has experienced significant growth in recent years and is expected to continue growing. The requested amount reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less SCHEV's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the Commonwealth to bolster the long-term sustainability of this important program. Reference E1.
2	Produce More Nurses Through New "Fast Flex" BSN Program	Degree Pathways	\$0	\$0	\$997,816	\$997,816	Request state general funds to grow the university's number of nursing graduates by launching a new non-traditional Bachelor of Science in Nursing (BSN) program while maintaining our existing traditional four-year BSN program. Reference E1.
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$5,902,607	\$5,902,607	

Faculty Senate Update

Kathy Ott Walter
Speaker, Faculty Senate



**Faculty Senate Board of Visitors Written Report
September 12th & 13th, 2024**

Last academic year the faculty senate dedicated most of their time looking into campus and academic affairs policies. We have worked hard on our suggestions to academic affairs policy #2 - Academic Unit Heads. In addition, we are still trying to understand the various classifications of faculty on campus, instructional, administrative, and professional and the responsibilities of each of those classifications.

We passed two resolutions, one supporting our community affected by the Israel/Palestine conflict (war) and the other supporting the formation and work of the handbook revision committee.

This summer, despite most faculty senators being officially “off contract,” we wrote and passed a resolution asking for additional faculty to be added to the presidential search committee.

Members of steering, selected faculty, and administrators met to discuss feedback regarding the instructional faculty hiring guidelines as we have done for a couple of years to engage in continuous quality improvement.

This academic year we are hoping to work closely with Provost Kolvoord to finalize academic affairs policy #2 related to academic unit heads and offer suggestions for policy 000, the academic affairs policy process. Faculty most recently participated in public comment regarding policies 1121 and 3104, university-wide policies on public expression and bulletin board use and posting public notices.

The handbook revision committee should start their work within the next month. We are looking forward to those conversations.

Student Representative to the Board Update

Sydney Stafford
Student Representative to the Board



Student Representative Report

Sydney Stafford

Board of Visitors Meeting – September 13th, 2024

“The only way to learn is to live.” -Matt Haig, The Midnight Library

❖ Introduction

- Goals for this year:
 - Presidential Search Committee
 - Meeting with student organizations across campus to understand what they want for JMU’s future
 - Promoting student focused listening tours
 - Engaging students with the Board of Visitors
 - Inviting student groups across campus to attend the Board meetings
 - Requesting feedback from students: ways in which we can improve engagement
 - Hosting meeting for all Student representatives from across the Commonwealth
 - Educating and informing students on Board related topics
 - Hosting drop-in meetings for students to ask questions or express concerns or ideas on a variety of topics
 - Survey on social media, as well as monitoring private messages for questions, comments, and concerns

❖ Student Feedback on JMU Presidential Profile

- Holding meetings with organizations across campus. Common responses include but are not limited to:
 - Background in Education, Understands the Student Experience, Values Inclusivity, Focuses on Sustainable Expansion, Prioritizes the Institution, Positive, Enthusiastic, Passionate, For the Students

❖ Future Events

- Meet the SRBoV and Student Body President Discussions: September 16th, 2024 at 3pm and September 19th, 2024 at 5pm
 - Discuss what students hope to see in the next JMU President, resources offered on campus and how to access them, to clarify any questions regarding the Board of Visitors and SGA, etc.
- Annual Forum for Student Representatives in VA: November 9th, 2024
 - Invited 18 students from 14 universities across VA

Contact Information

staffosg@dukes.jmu.edu

studentrepresentativebov@jmu.edu

[Instagram: @jmusrbov](https://www.instagram.com/jmusrbov)

Sydney Stafford – Student Representative

Major: Justice Studies and Spanish

Graduation Year: 2026

Hometown: Bristow, VA

Goals for the Year:

- Presidential Search Committee
- Improve Student Engagement
- Educate and Inform Students





Student Feedback on JMU President

"Background in Education" "Interactive"

"Inclusive" "Present" "For the students"

"Values sustainability" "Focus on sustainable expansion"

"Understands the student experience"

"Open to new ideas" "Stability" "Personable"

"Welcoming" "Prioritizes the institution"

"Positive, enthusiastic, passionate"



In the next few weeks....

Meet the SRBoV and Student Body President

Discussion:

September 16th, 2024 3:00-4:30pm, September 19th
5:00-6:30pm

VA Student Rep Forum:

November 9th, 2024

Contact Information:

Staffosg@dukes.jmu.edu

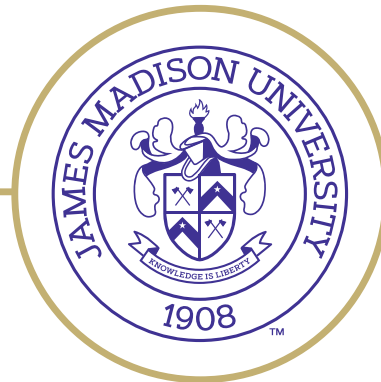
Studentrepresentativebov@jmu.edu

Instagram: @jmusrbov



JMU Foundation

Warren Coleman
President & Chief
Executive Officer





JMU Foundation Overview

501(c)(3) Entity Established May 22, 1969

Mission Statement: The James Madison University Foundation provides prudent investment policy and stewardship to sustain and grow financial support for the University, while collaborating with the University to create innovative avenues of giving and to meet critical funding initiatives.

Values: Trust, Collaboration, Innovation, Accountability, Excellence



JMU Foundation History

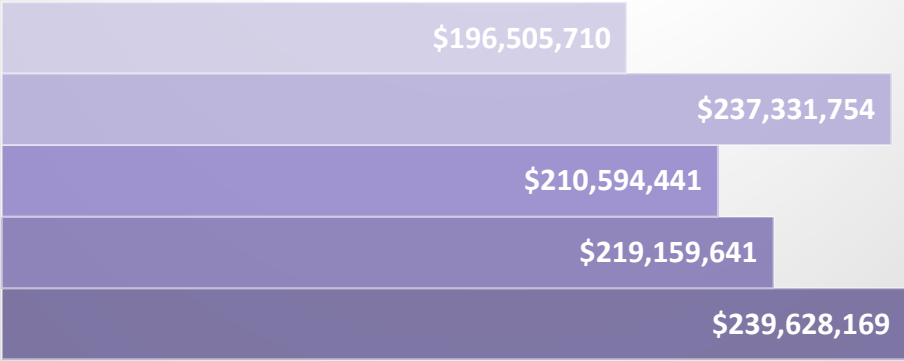
	1969	2019	2024
Total Assets	\$3,778	\$181,301,299	\$239,628,169
Endowment	-	\$111,064,813	\$155,516,395
Endowment Payout	-	\$2,802,296	\$4,379,286
Active Accounts	1	2,486	2,915



JMU Foundation FY24 Results (Unaudited)

Highlights

Foundation Total Assets



■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

Endowment Market Value

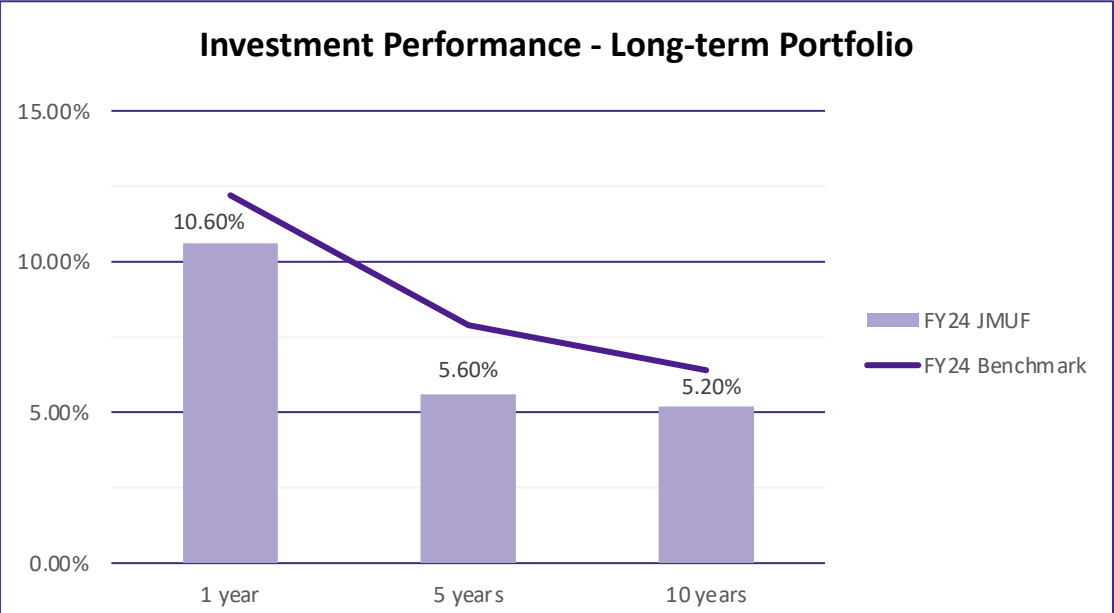


■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024



JMU Foundation FY24 Results (Unaudited)

Endowment Update



Investment Return	1-Year	5-Year	10-Year
Long-Term Portfolio	10.6	5.6	5.2
Benchmark	12.2	7.9	6.4

Scholarships & Awards	Academic Support	Other	Total Payout
\$2,758,286	1,287,200	333,800	\$4,379,286



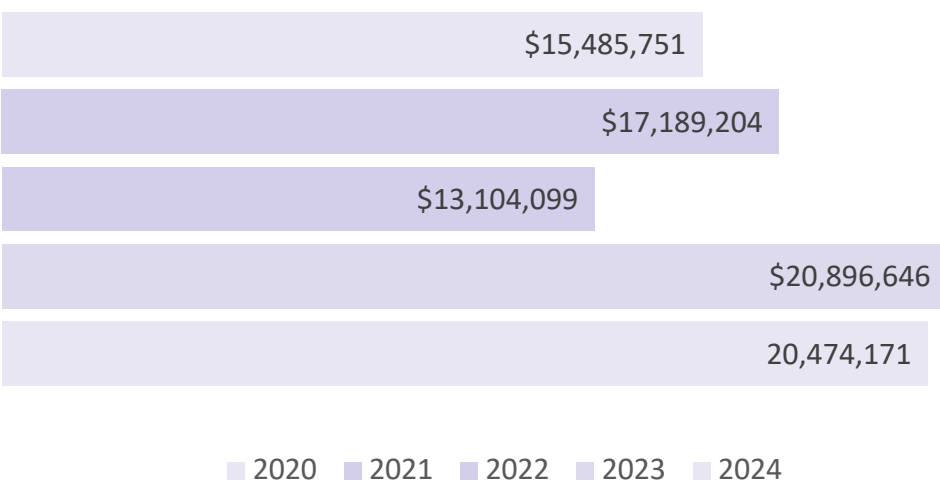
JMU Foundation FY24 Results (Unaudited)

Highlights

Foundation Contributions



Foundation Expenditures

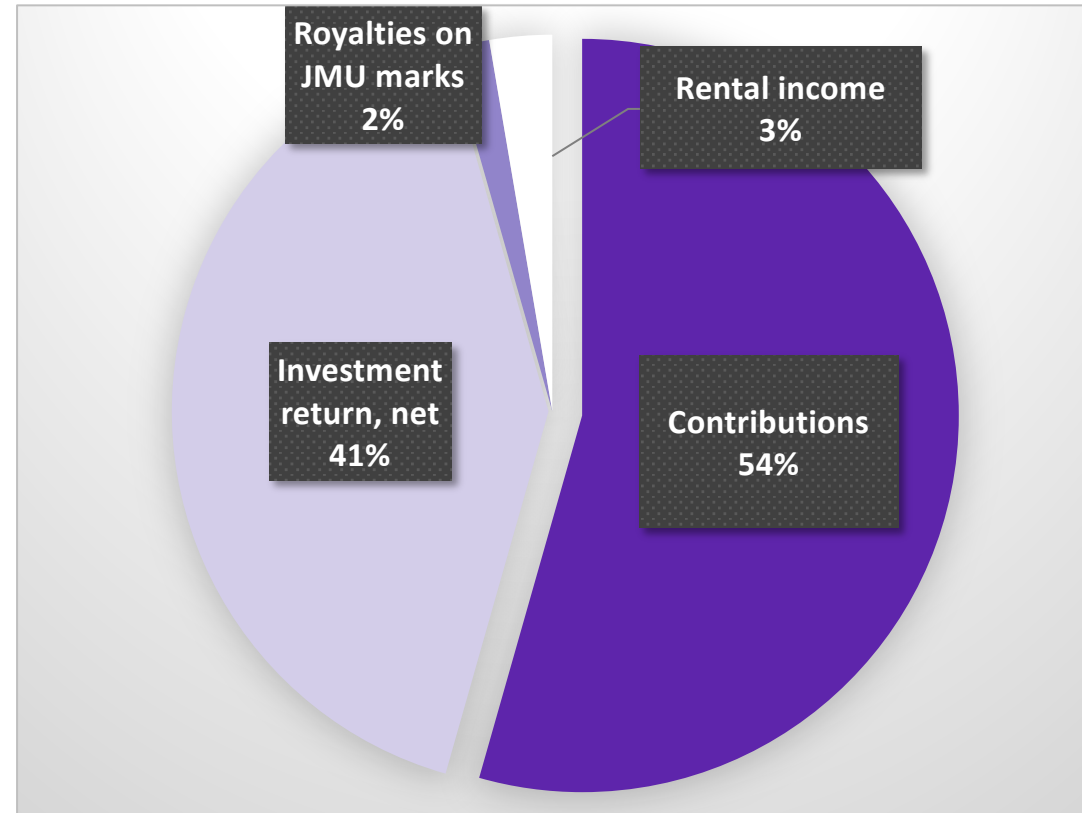




JMU Foundation FY24 Results (Unaudited)

Revenue, Gains and Other Support

Contributions	\$22,741,032
Investment return, net	17,209,676
Royalties on JMU Marks	726,043
Rental income	1,120,397
Other income (loss)	173
Total Revenue, Gains and Other Support	\$41,797,321

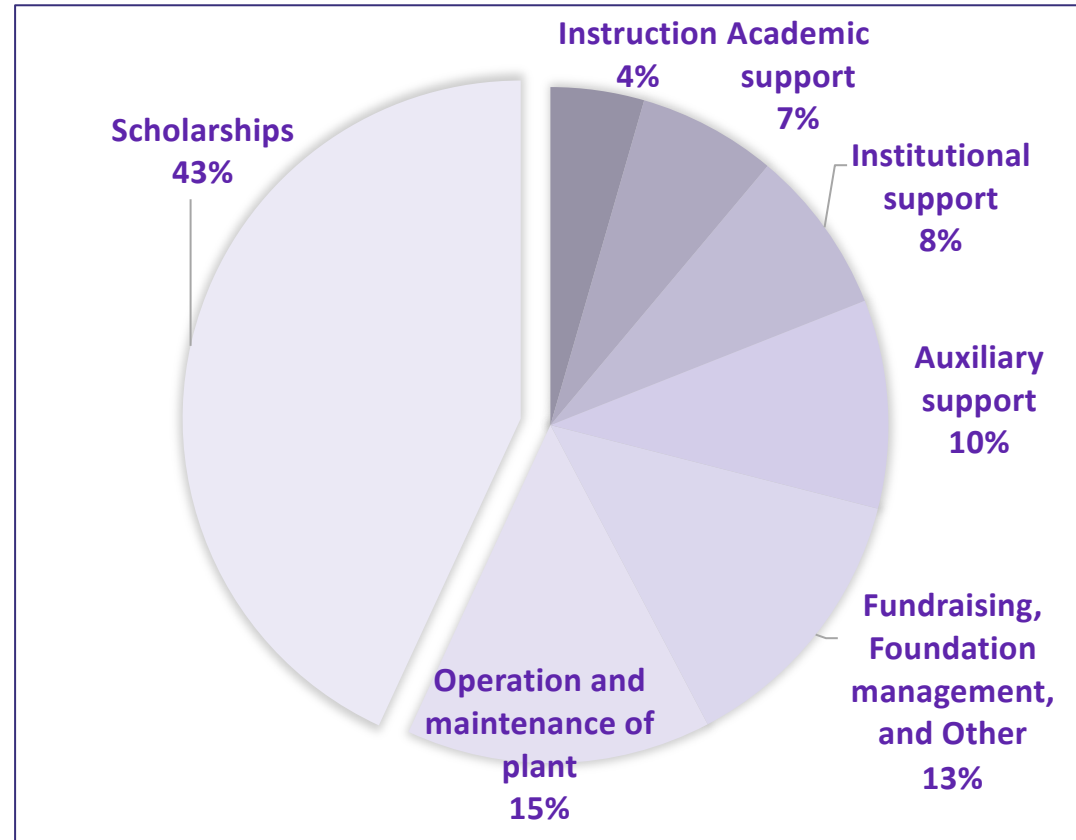




JMU Foundation FY24 Results (Unaudited)

Expenditures By Function

Instruction	\$916,017
Academic support	1,357,223
Institutional support	1,617,855
Operation and maintenance of plant	2,987,994
Scholarships	8,825,652
Auxiliary support	2,041,667
Foundation management	911,848
Fundraising	1,462,059
Other	353,856
Total Expenditures by Function	\$20,474,171





JMU Foundation Terminology

- Academic support: Academic and personnel activities that support JMU's primary mission
- Auxiliary support: Primarily relates to Athletics support
- Contributions: Annual Giving, new pledges, In- Kind gifts
- Fundraising: University Advancement, Athletics, Hospitality, and Credit Card Fees
- Institutional support: JMU operational support for general administrative services, executive level activities and fiscal operations
- Long Term Portfolio: Long-term perpetual investment pool (>10 years)
- OCIO: Outsourced Chief Investment Officer
- Operation and maintenance of plant: Primarily relates to capital transfers to the university for major construction projects

President's Report



Presidential Search Firm – Russell Reynolds

Kay Coles James, Chair, Presidential Search Committee

Jett Pihakis, Steve Newton, Joi Hayes – Russell Reynolds Search Firm



Sunbelt Media Valuation

Sam Knehans
Sr. Associate Commissioner, Chief Communications
& Branding Officer





SUN BELT CONFERENCE

FOOTBALL MEDIA VALUATION

2023 SEASON

APP STATE | ARKANSAS STATE | COASTAL CAROLINA | GEORGIA SOUTHERN | GEORGIA STATE | JMU | LOUISIANA
ULM | MARSHALL | OLD DOMINION | SOUTH ALABAMA | SOUTHERN MISS | TEXAS STATE | TROY

EXECUTIVE SUMMARY



THE HEADLINE

During the 2023 season, the Sun Belt Conference and its 14 member institutions experienced significant exposure of their respective brands—yielding a total media value of

**OVER
\$892
MILLION**

Live Game	\$80.6M
Online (Print) News	\$438.6M
Social Media	\$44.8M
Broadcast Mentions	\$328.1M
Total Media Value <small>100% Media Equivalency</small>	\$892M

UNDERSTANDING THE APPROACH

By utilizing a detailed evaluation process of game footage and earned media sources—online (print) news stories, social media posts and broadcast mentions—Vantage measured the brand exposure and media value for the Sun Belt Conference and each of its 14 member institutions.

- **LIVE GAME SOURCES**

- Passive Brand Exposure
- Live Game Graphics
- Live Game Broadcast Mentions

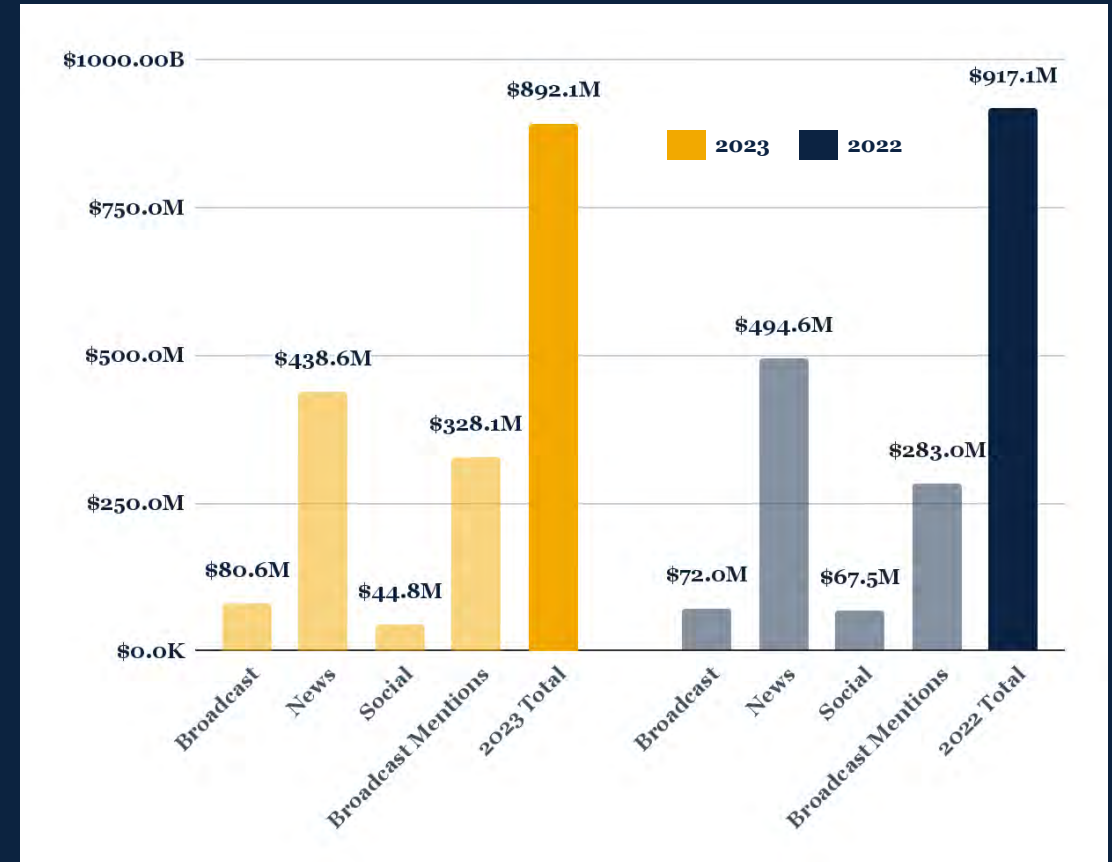
- **EARNED MEDIA SOURCES**

- Online (Print) News
- Social Media
- Broadcast Mentions

YEAR-OVER-YEAR COMPARISON

- In 2023, the Sun Belt Conference nearly maintained its media valuation following exponential growth in 2022:
 - 12 Bowl Season Participants in 2023 vs. 7 in 2022
 - **12 Percent Growth** in Live Game / Broadcast Media Valuation
 - **16 Percent Growth** in Broadcast Mentions Media Valuation

MEDIA VALUE COMPARISON



FOUR-YEAR TREND ANALYSIS

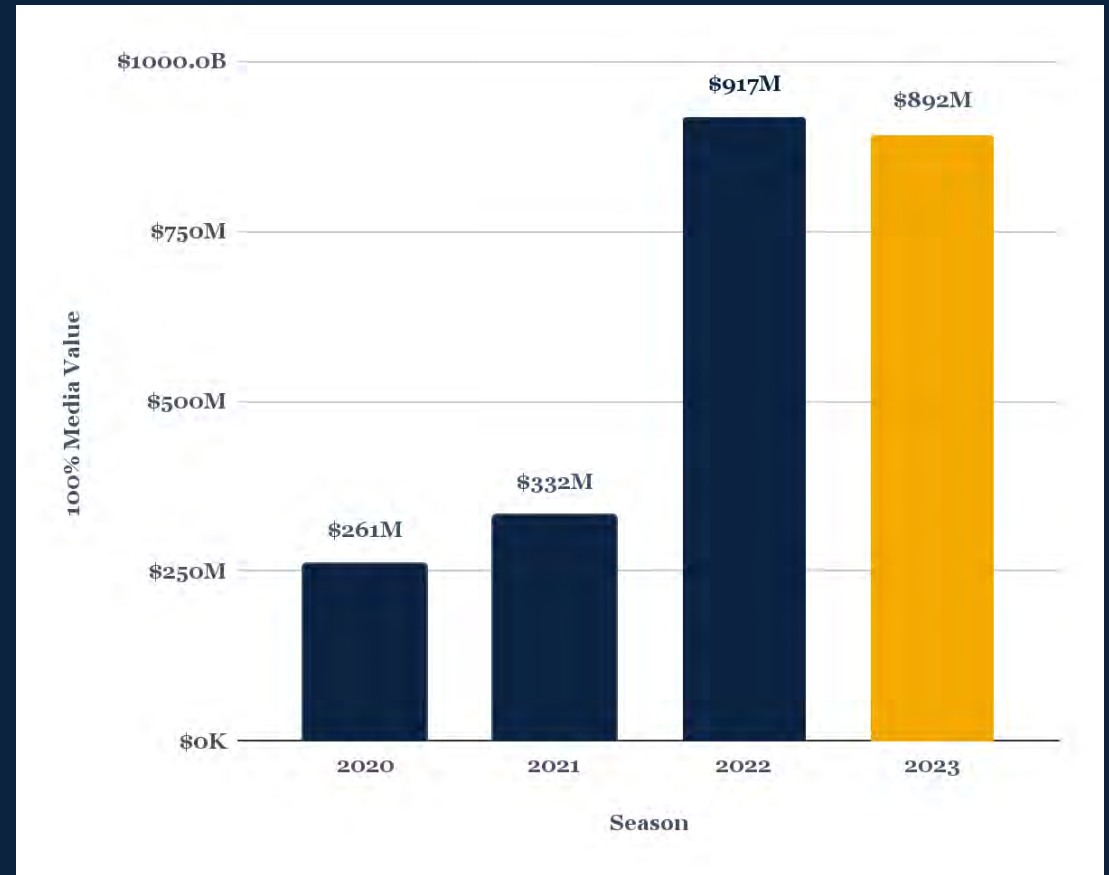
MEDIA VALUE COMPARISON

3 PERCENT

DECREASE FROM 2022 TO 2023

242 PERCENT

INCREASE FROM 2020 TO 2023

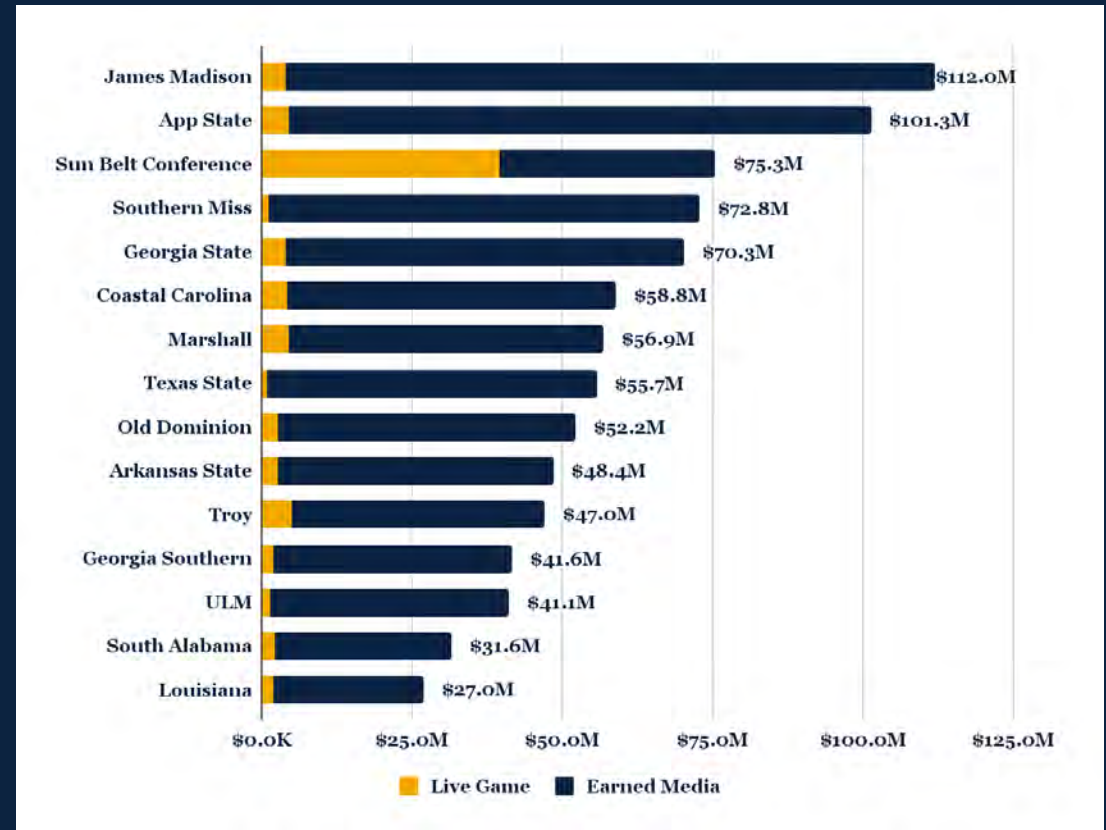


PROPERTY EXPOSURE

In 2023, the average Sun Belt property received an astounding **\$59 million in media value.**

All 14 member institutions were well-represented beyond the live game, receiving invaluable earned media exposure.

PROPERTY MEDIA VALUATION



EXPOSURE COMPARISON

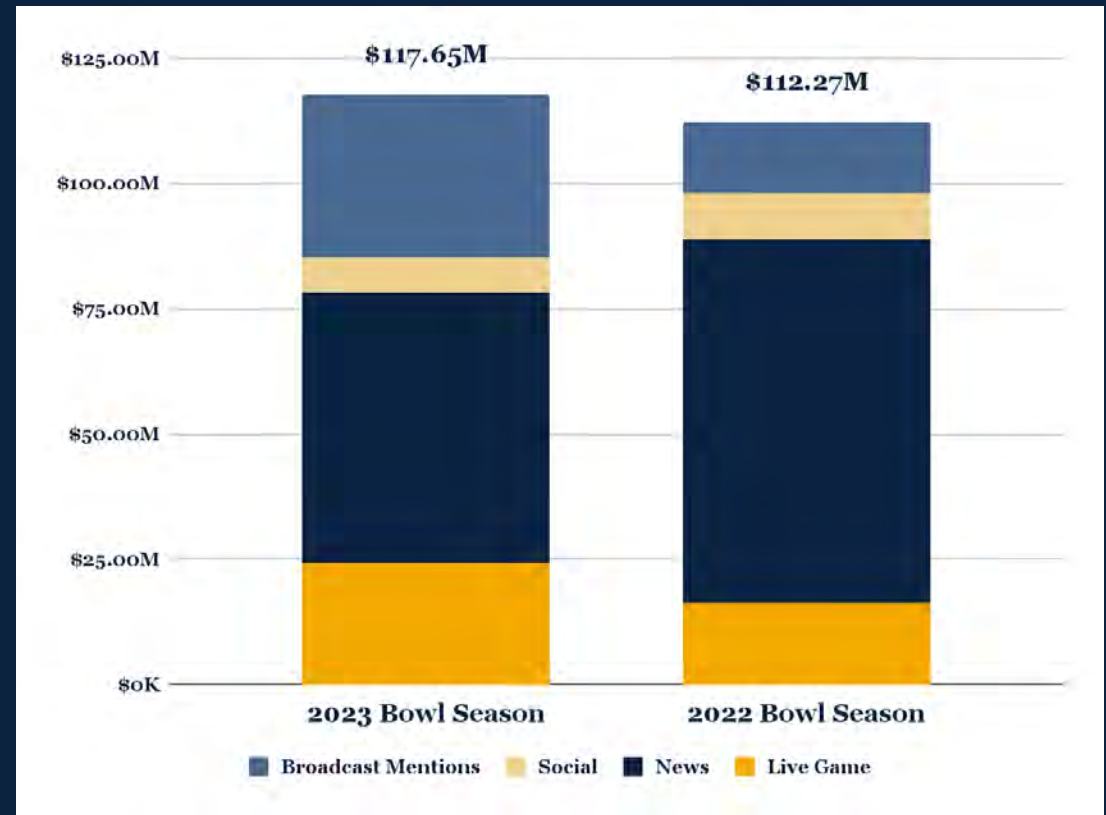
- In 2023, the average Sun Belt property benefitted from the **equivalent media exposure of over 2,500 30-second commercials** during a nationally-broadcast NCAA football game.
- **23 Percent Growth** from 2,040 30-second commercials in 2022



GOING BOWLING

The Sun Belt produced a **conference-record and national-best 12 Bowl Season teams in 2023**, outpacing totals from the ACC (11), Big Ten (9), Big 12 (9), SEC (9) and Pac-12 (8). No other non-autonomy conference had more than seven Bowl Season participants. The Sun Belt's **three ABC appearances** were tied with the Big Ten for the most during Bowl Season.

BOWL SEASON EXPOSURE

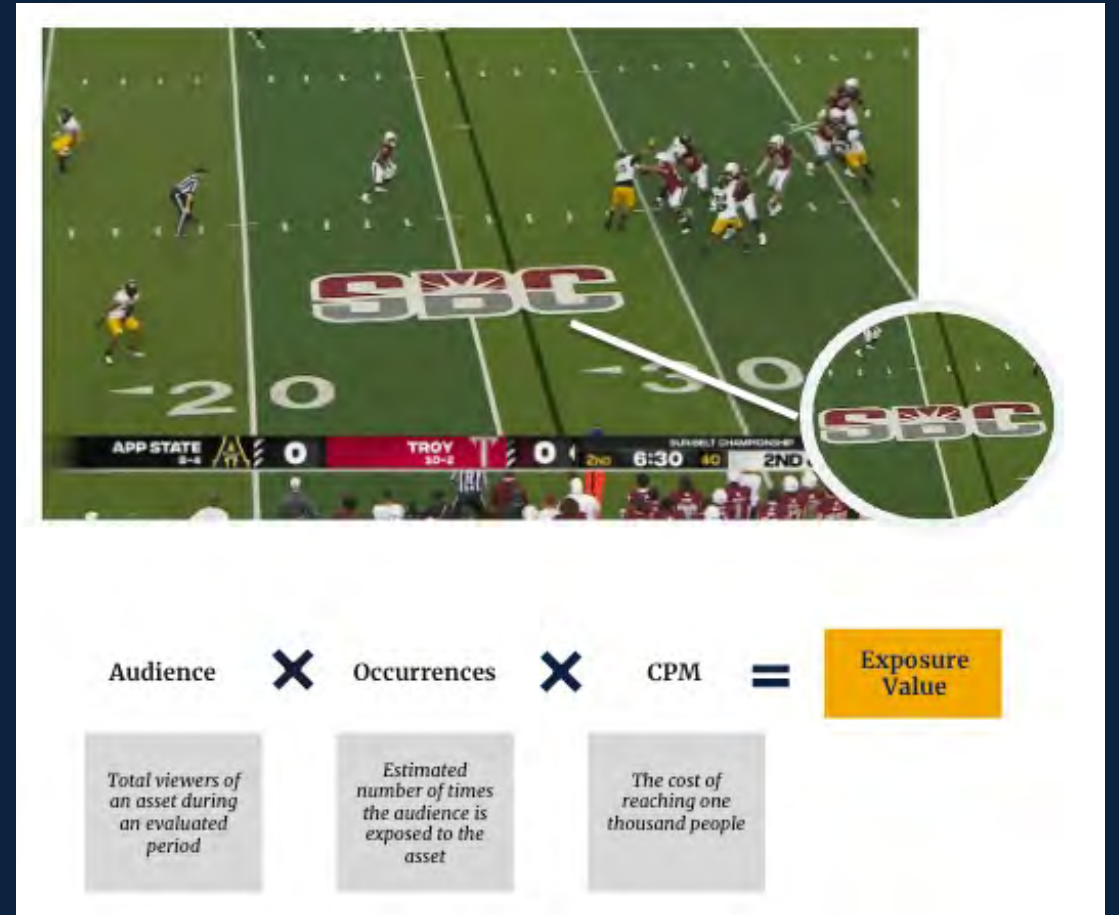


METHODOLOGY



CALCULATION APPROACH

Media value is determined using an **impressions-based methodology** that combines the size of an audience, the number of occurrences or exposures to that audience and what it would cost to reach 1,000 impressions on the platform.



100% VS. ADJUSTED MEDIA VALUE

The Gross Media Value or 100% Media Value is discounted based on the **quality of the exposure** to represent the Adjusted Media Value (AMV).



100% Media value	\$3,541
Quality score	37%
Size-On-Screen	16%
Exposure Length	4 Sec.
Centricity	98%
Adjusted Media Value	\$1,310

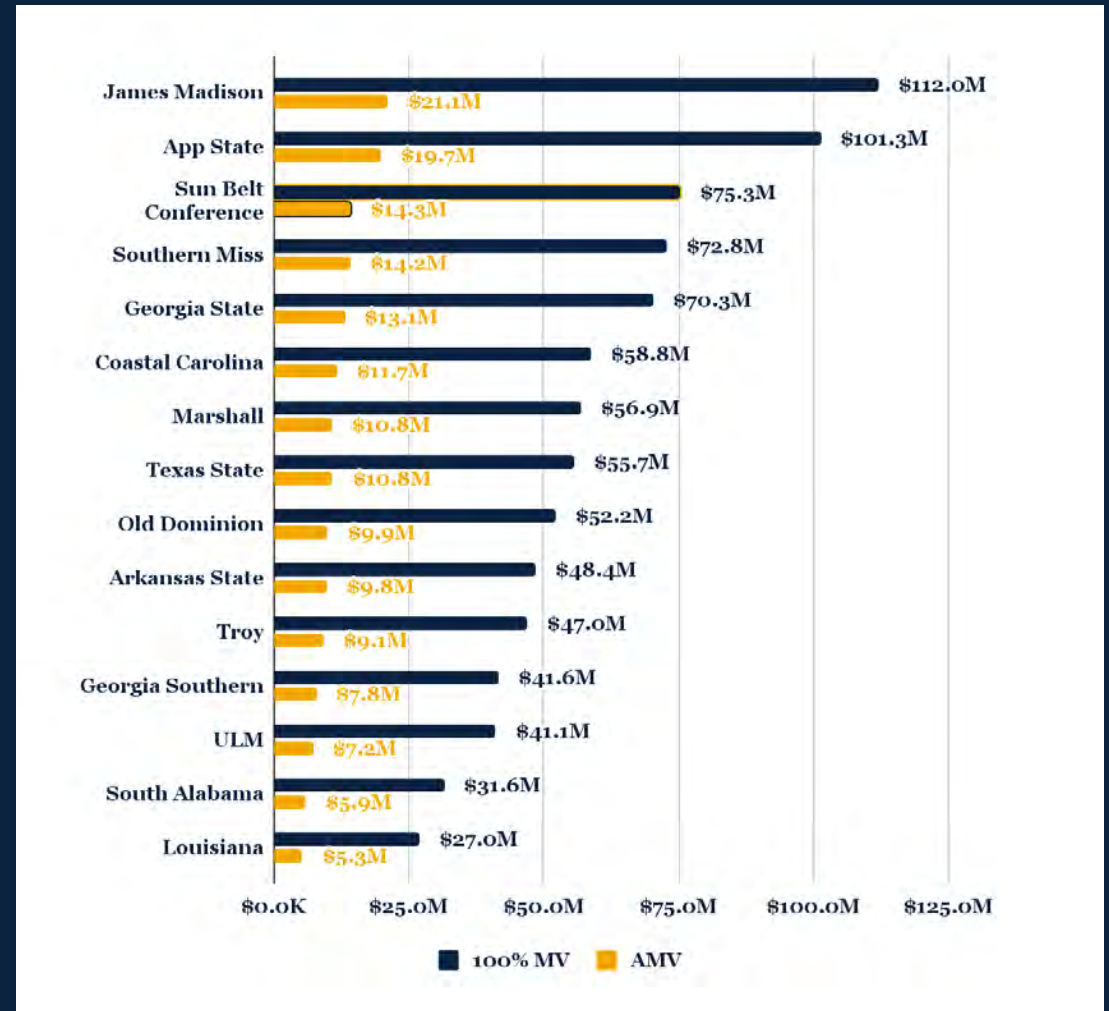
TOTAL VALUE



PROPERTY COMPARISON

James Madison's second FBS season—in which it started 10-0, hosted ESPN's College GameDay and participated in the program's first-ever bowl game—earned the Dukes the **highest media valuation among the Sun Belt's 14 member institutions.**

PROPERTY MEDIA VALUATION



THREE-YEAR TREND ANALYSIS

7 of 15 properties experienced a year-over-year increase in media valuation from 2022 to 2023.

7 of 15 properties experienced a peak media valuation in 2023.

PROPERTY MEDIA VALUATION

Property	2021	2022	2023
App State	\$49.8M	\$149.5M	\$101.3M
Arkansas State	\$11.6M	\$41.9M	\$48.4M
Coastal Carolina	\$54.7M	\$66.1M	\$58.8M
Georgia Southern	\$11.0M	\$56.0M	\$41.6M
Georgia State	\$42.3M	\$61.1M	\$70.3M
James Madison	-	\$48.9M	\$112.0M
Louisiana	\$47.8M	\$32.7M	\$27.0M
Marshall	-	\$104.8M	\$56.9M
Old Dominion	-	\$46.1M	\$52.2M
South Alabama	\$6.6M	\$40.2M	\$31.6M
Southern Miss	-	\$65.5M	\$72.8M
Sun Belt Conference	\$84.9M	\$87.1M	\$75.3M
Texas State	\$13.9M	\$25.9M	\$55.7M
Troy	\$10.0M	\$44.4M	\$47.0M
ULM	\$21.4M	\$46.6M	\$41.1M

LIVE GAME VALUE

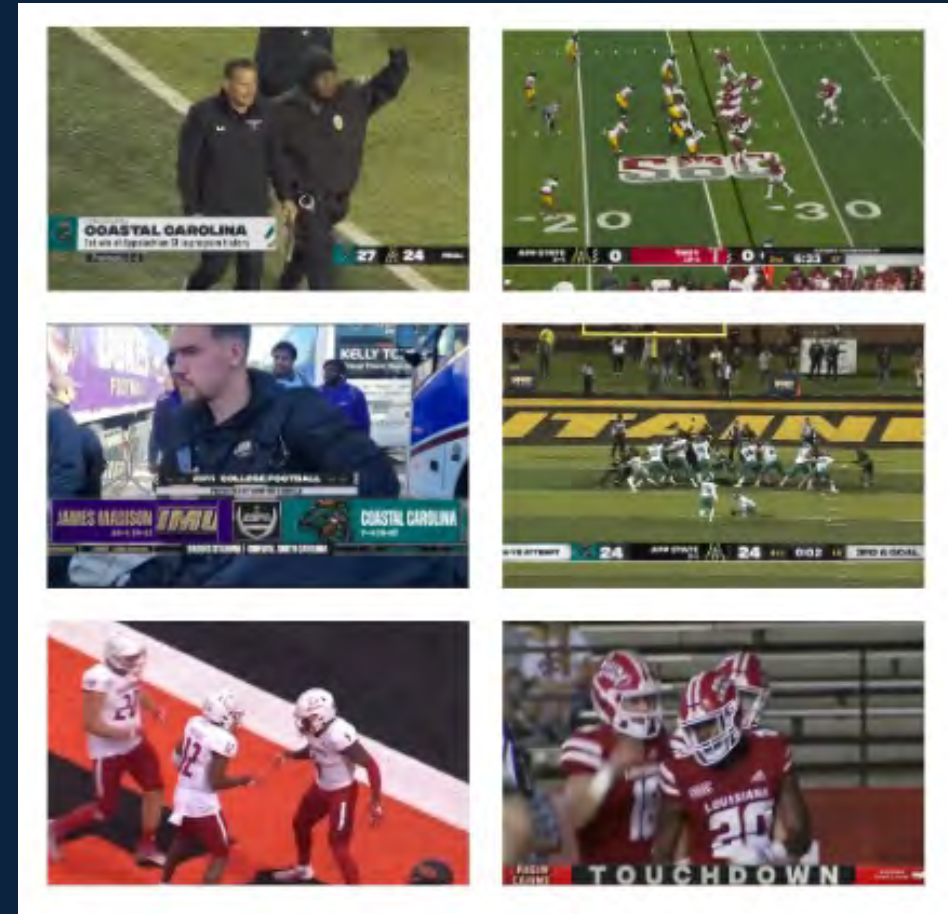


APP STATE | ARKANSAS STATE | COASTAL CAROLINA | GEORGIA SOUTHERN | GEORGIA STATE | JMU | LOUISIANA
ULM | MARSHALL | OLD DOMINION | SOUTH ALABAMA | SOUTHERN MISS | TEXAS STATE | TROY

THE MOMENTS THAT MATTER

Member institutions' brands appear in **many of the most important moments** of the live game broadcast:

- Touchdowns
- Celebrations
- High-Stakes Plays

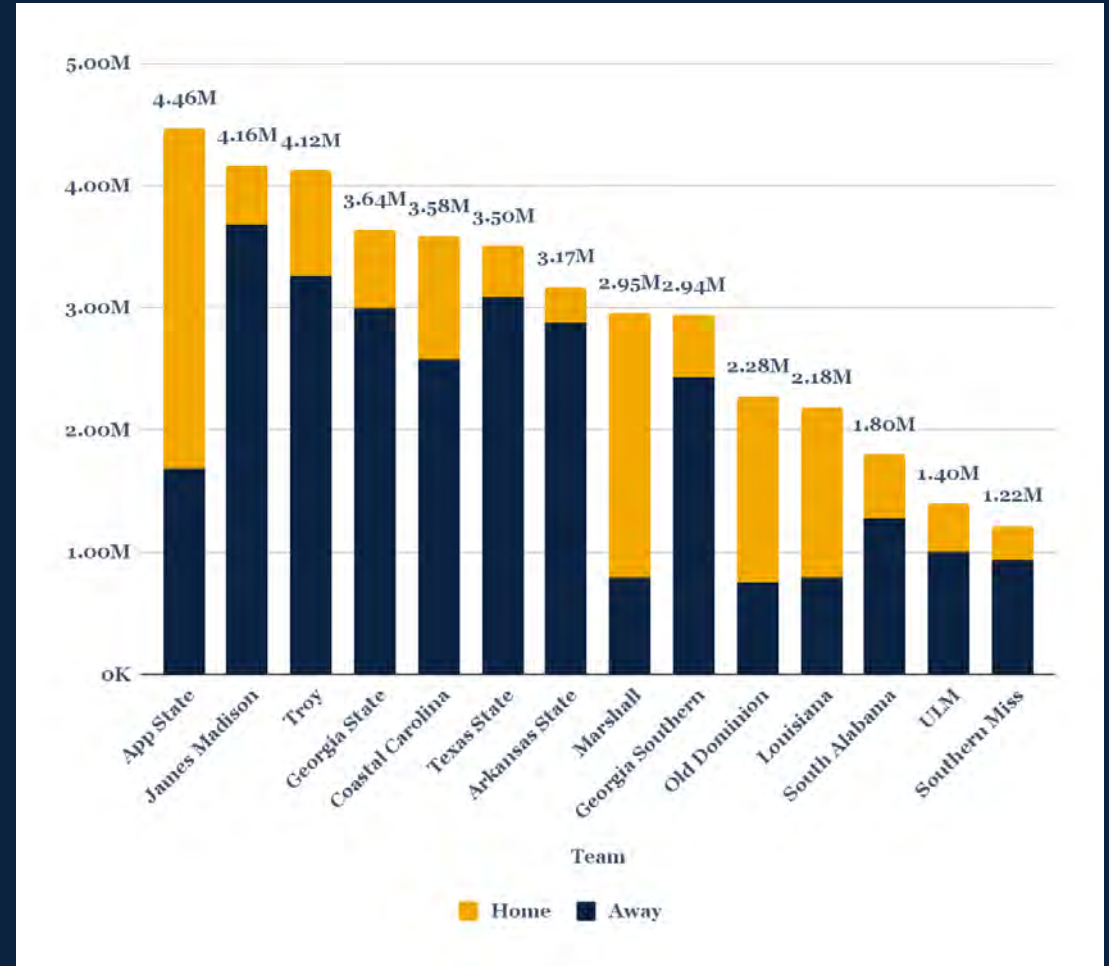


VIEWERSHIP ANALYSIS

**OVER
35 MILLION
VIEWERS**

watched Sun Belt Conference games during the 2023 football season.

LIVE GAME VIEWERSHIP



PROPERTY COMPARISON

Teams with **strong and consistent branding on their helmets and uniforms** appearing in nationally-televised games against autonomy five opponents generated the highest live game media exposure.

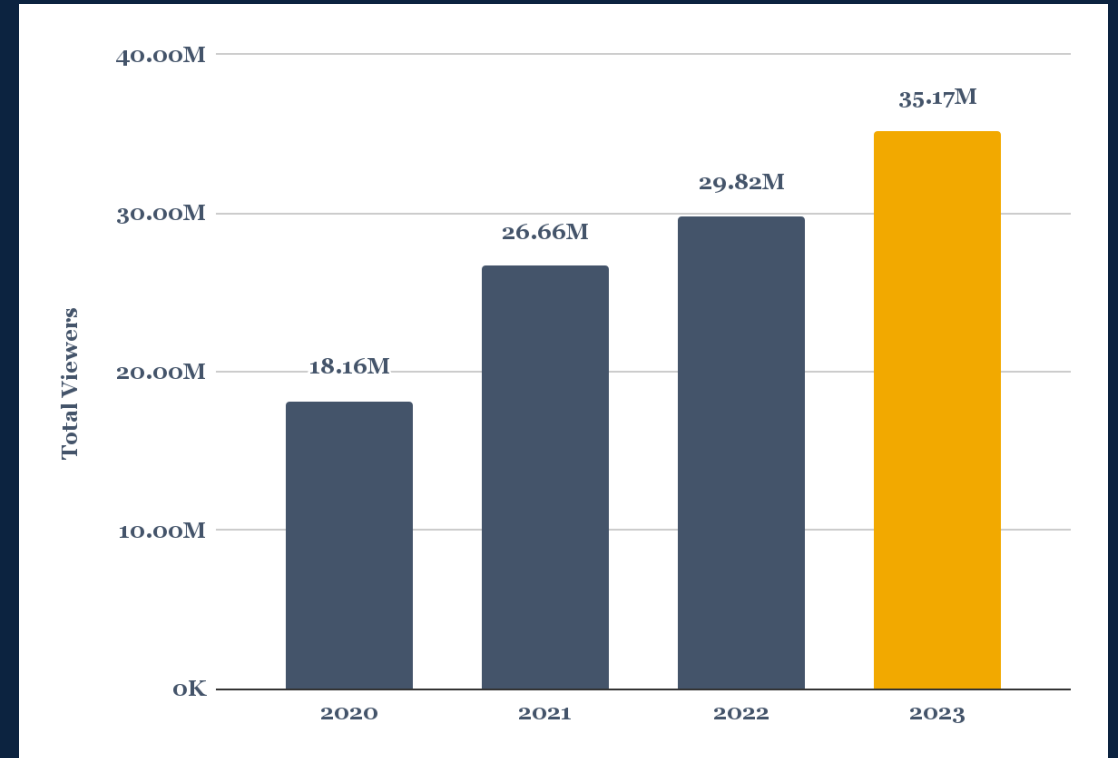
LIVE GAME MEDIA VALUATION



FOUR-YEAR VIEWERSHIP TRENDS

The Sun Belt Conference has experienced a surge in popularity over the past four seasons, with the 2023 season setting a new **record-high viewership** for the conference.

LIVE GAME VIEWERSHIP



THE ASSETS THAT DELIVER

Vantage's research revealed that the **midfield logo, player helmets and player jerseys** were the clear standouts in terms of media exposure. These assets make a powerful statement on behalf of the member institutions' brands.



Midfield Logo

\$10.5M 100% Media Value



Player Helmet

\$8.51M 100% Media Value

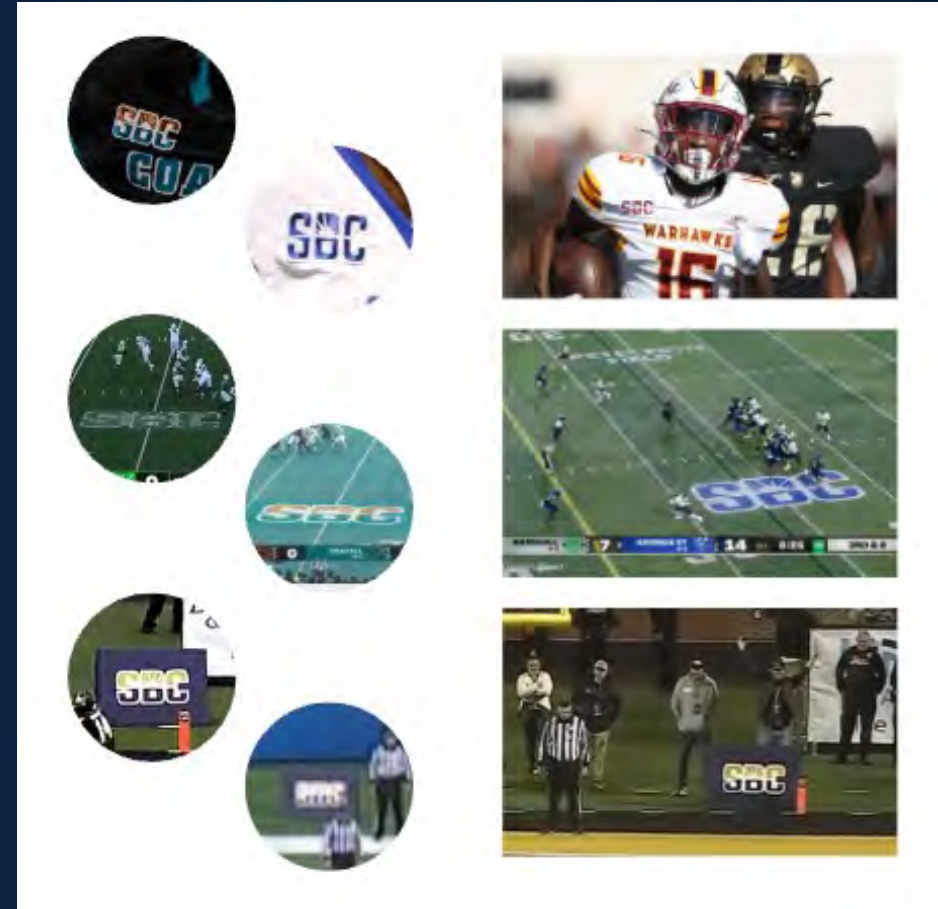


Player Jersey

\$7.75M 100% Media Value

CONFERENCE BRANDING

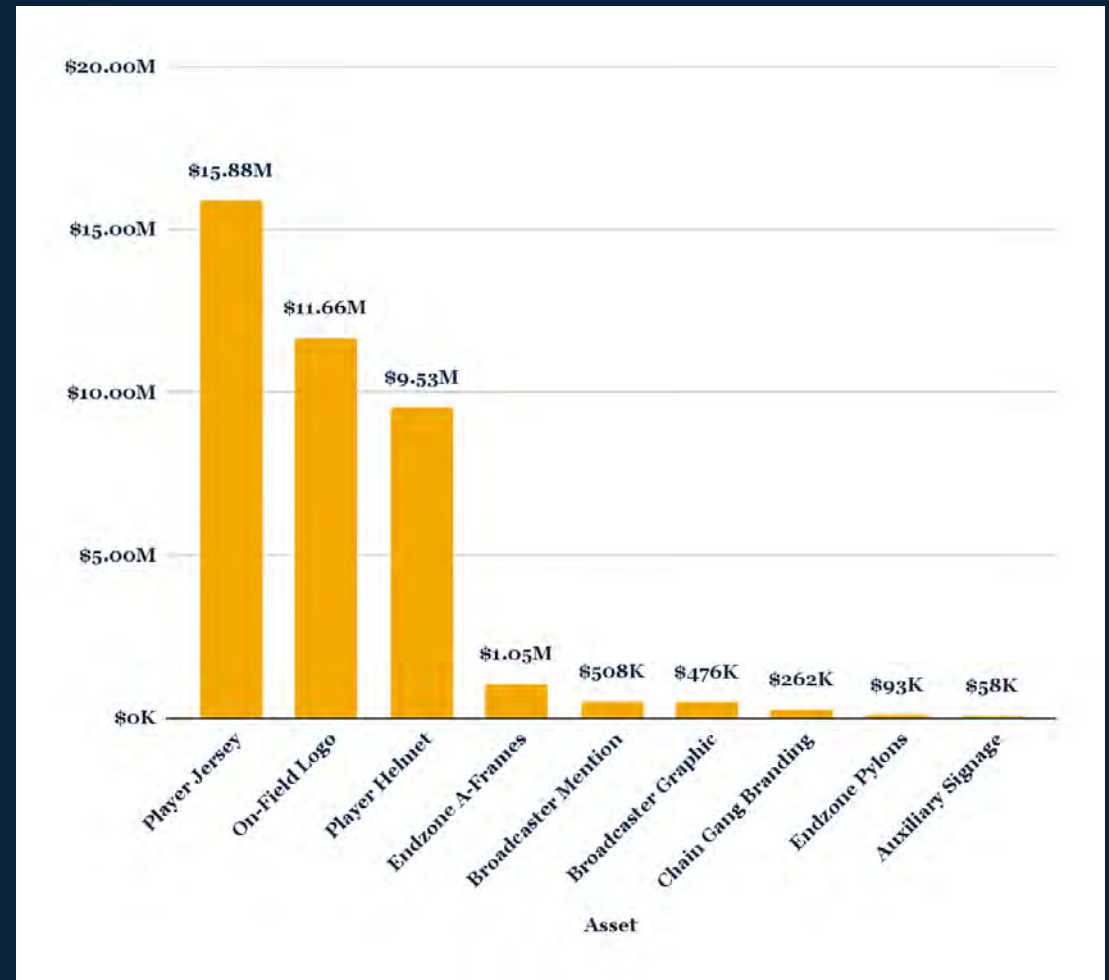
- The Sun Belt Conference took advantage of **high-profile branding opportunities**:
 - On the Field
 - On the Uniform
 - Around the Stadium



CONFERENCE EXPOSURE

The Sun Belt Conference secured nearly **\$40 million in total media value** from exposure earned in 125 games.

CONFERENCE EXPOSURE BY ASSET



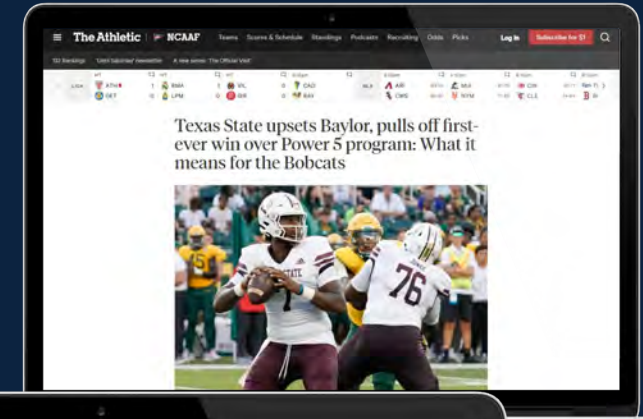
EARNED MEDIA VALUE



APP STATE | ARKANSAS STATE | COASTAL CAROLINA | GEORGIA SOUTHERN | GEORGIA STATE | JMU | LOUISIANA
ULM | MARSHALL | OLD DOMINION | SOUTH ALABAMA | SOUTHERN MISS | TEXAS STATE | TROY

CARRYING THE MOMENTUM

The Sun Belt opened the 2023 campaign with **four-straight weeks with a victory over an autonomy five foe** to match the conference record set in 2022. It also **hosted ESPN's College GameDay** for the second-straight season and produced a conference-record and **FBS-leading 12 Bowl Season participants**.

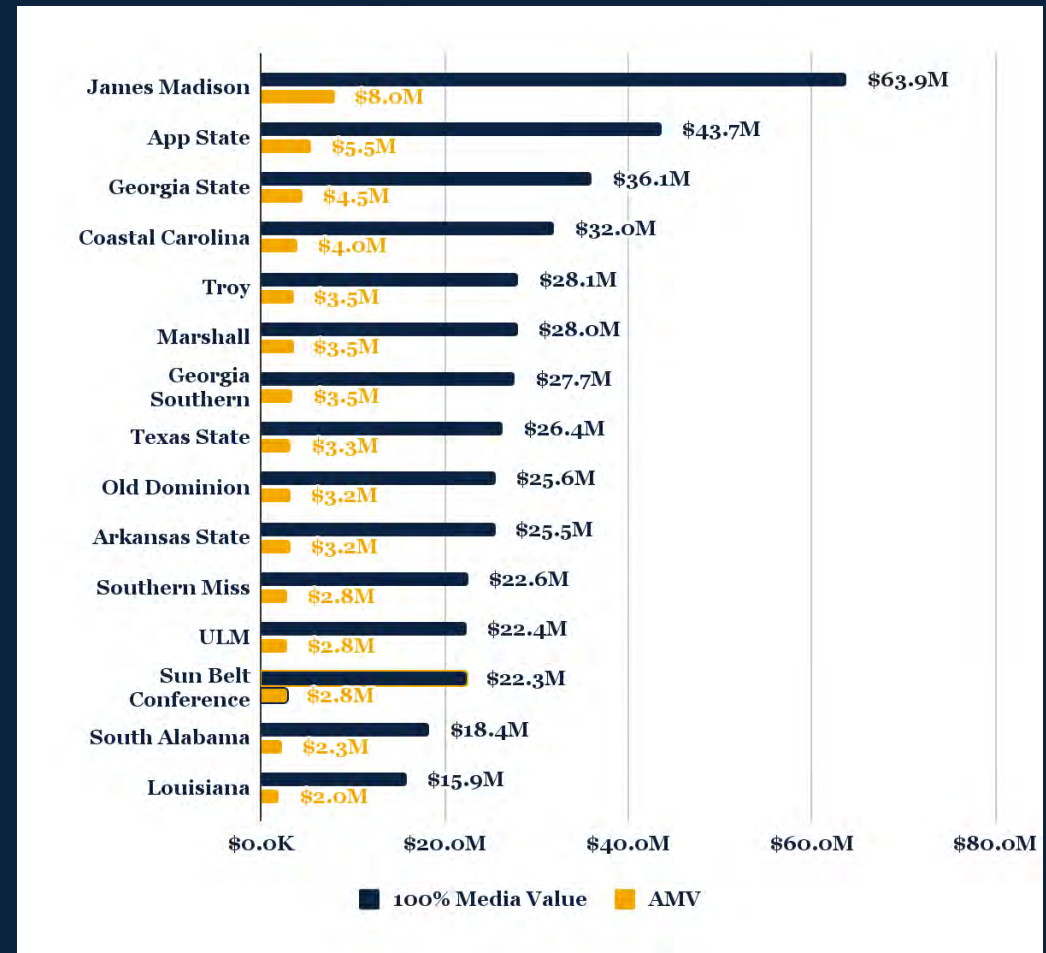


VALUABLE UPSETS

James Madison's 10-0 start, punctuated by a 36-35 victory over in-state foe Virginia, contributed to a **118 percent increase** in its online (print) news media value in 2023.

Texas State's 42-31 triumph over in-state foe Baylor contributed to a **45 percent increase** in its online (print) news media value in 2023.

ONLINE (PRINT) NEWS MEDIA VALUATION



TOP NEWS SOURCES

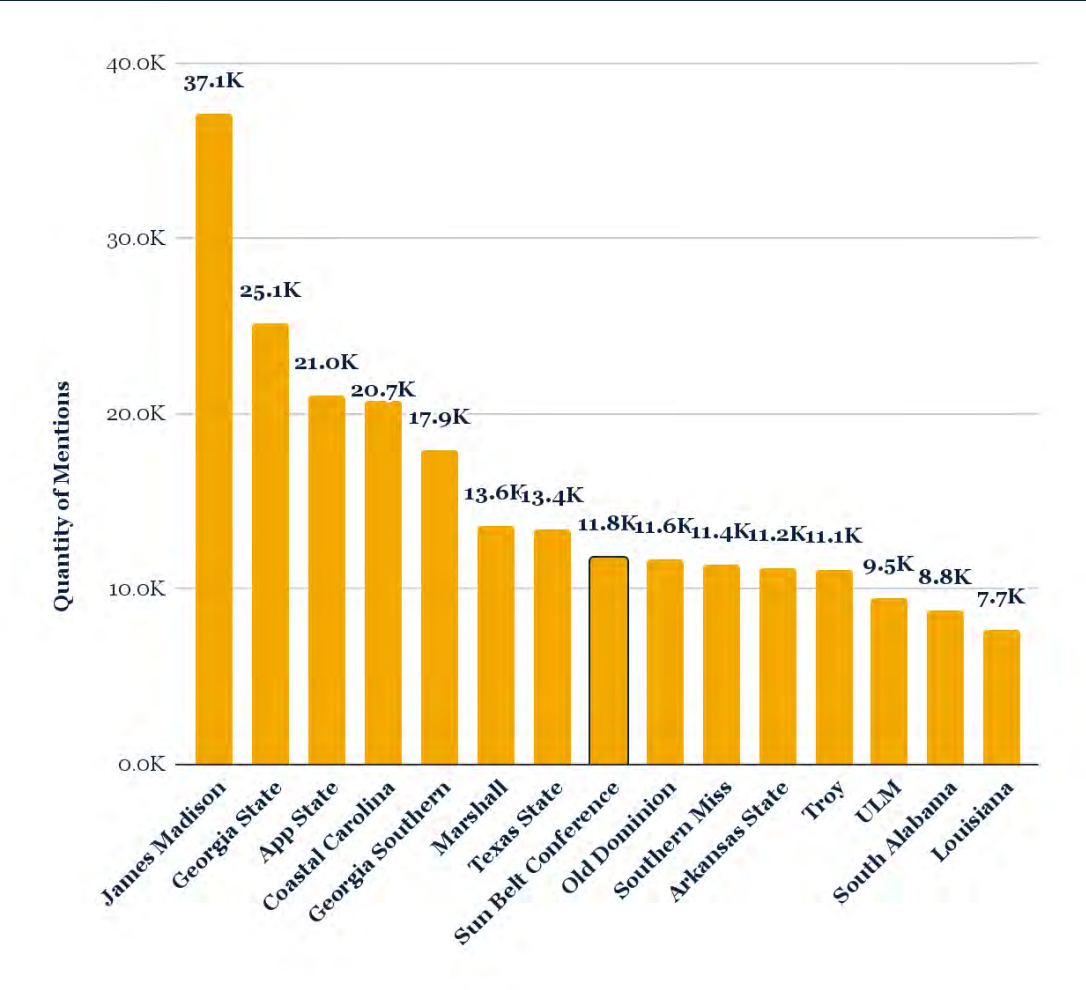
Major news outlets—both digital and print-based—took note of the Sun Belt Conference’s continued rise during the 2023 season.



MEDIA COVERAGE

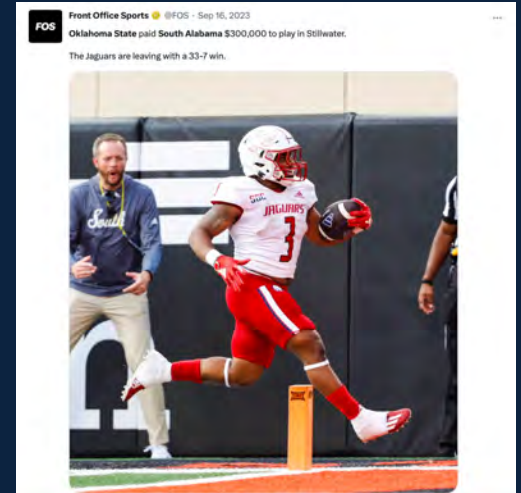
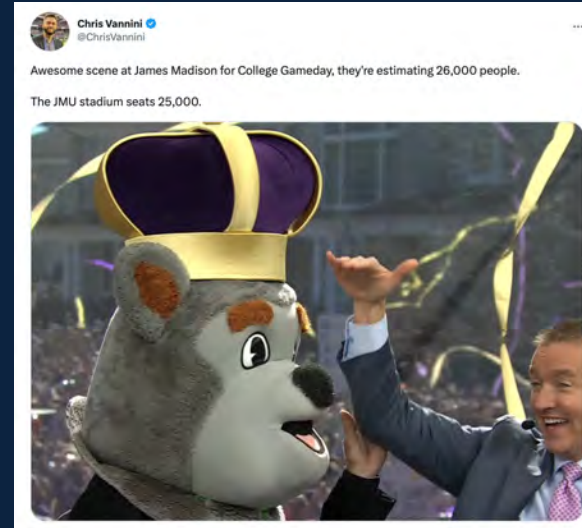
In 2023, the average Sun Belt property received over **15,000 online (print) news mentions.**

ONLINE (PRINT) NEWS MENTIONS



VIRAL EXPOSURE

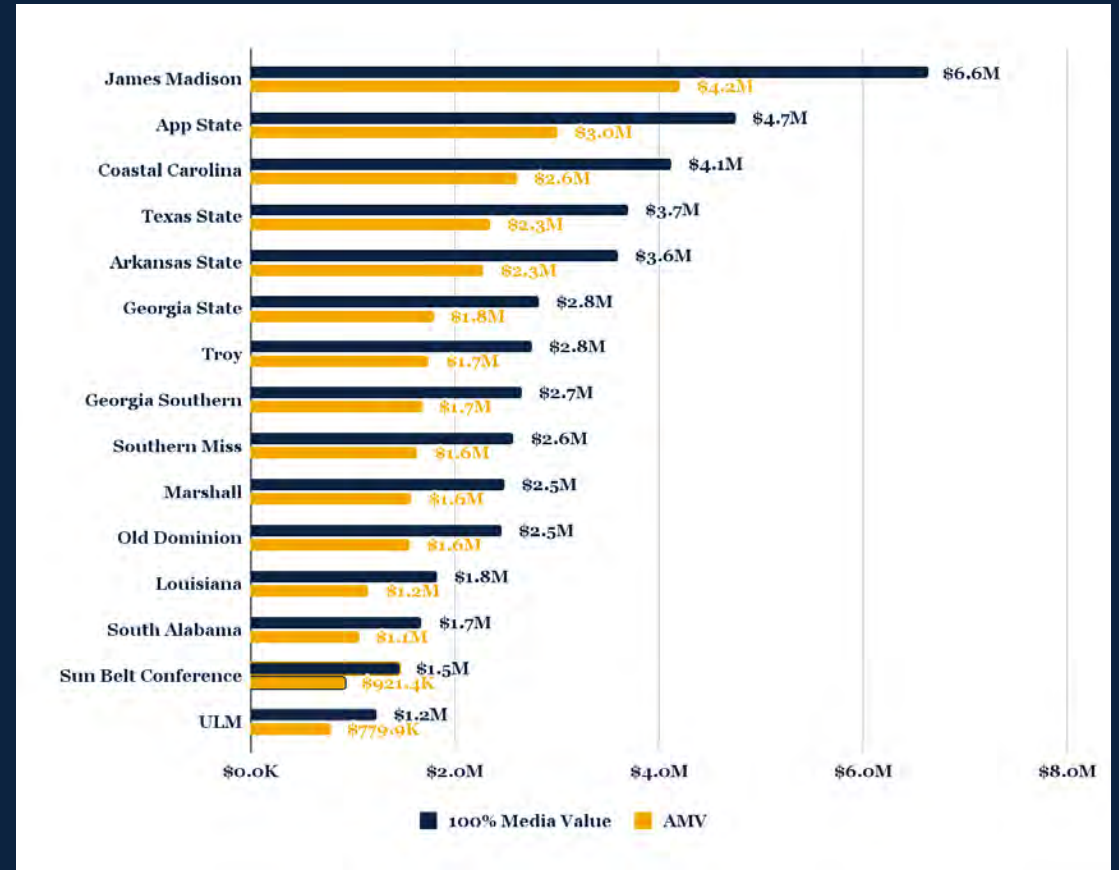
Social media was abuzz during the 2023 season, with major news outlet accounts and fans sharing the conference's signature wins and key moments.



SOCIAL MEDIA VALUATION


In 2023, the average Sun Belt property generated **\$3 million in social media value**.

SOCIAL MEDIA VALUATION



KEY SOCIAL MOMENTS

High engagement rates and posts from accounts with a significant follower base drove earned media exposure from major handles like ESPN, SportsCenter, Sports Illustrated and Barstool Sports.



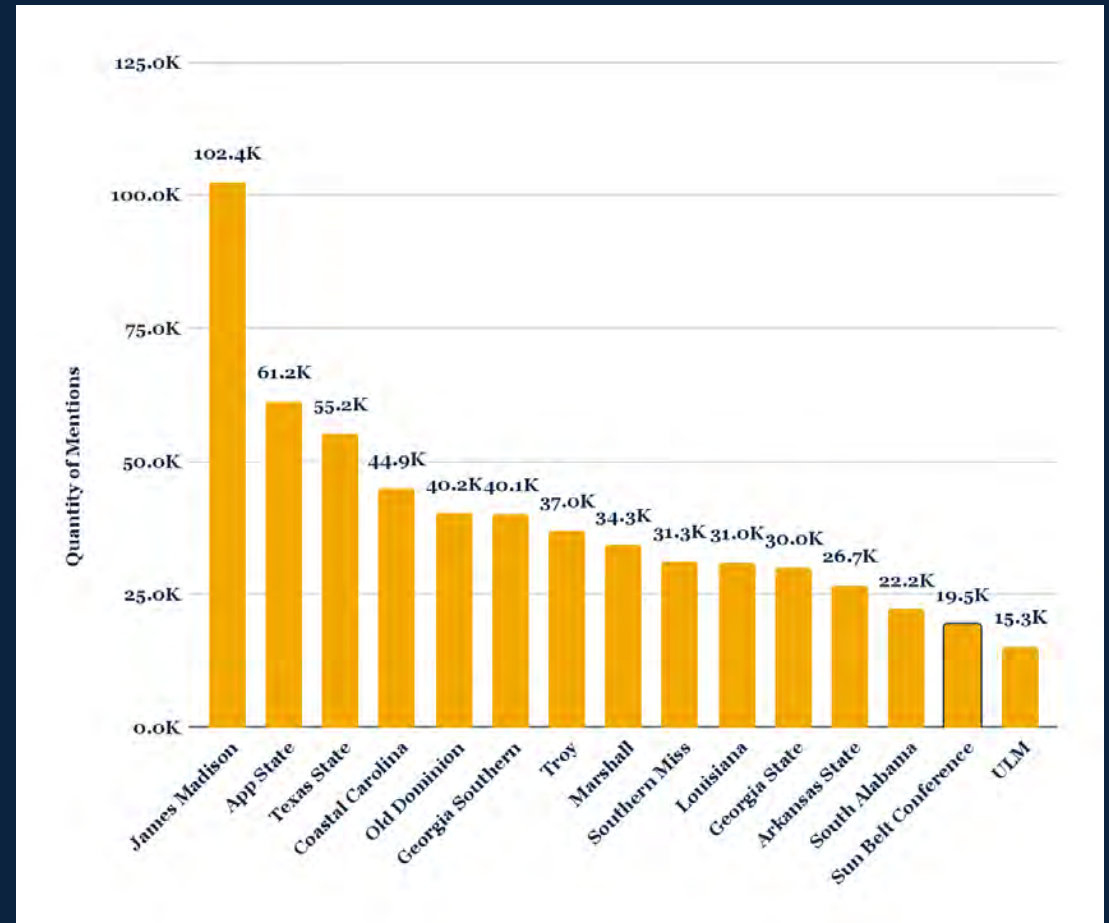
The image displays two social media posts. The first is from Sports Illustrated (@si) dated Sep 2, 2023, with 50.4K views, featuring a photo of a Texas State football player. The second is from ESPN (@espn) dated Nov 17, 2023, with 581.3K views, featuring a video of a large crowd of JMU fans.

Account	Followers	Media Value
Sports Illustrated	1.8M	\$17K
ESPN	49.4M	\$113K

SOCIAL COVERAGE

The Sun Belt Conference and its 14 member institutions saw a tremendous level of social engagement with more than **158,000 social handles sharing over 540,000 unique posts.**

SOCIAL MEDIA MENTIONS

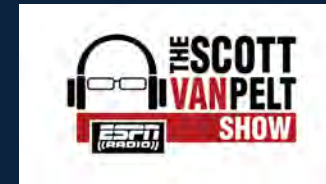


BROADCAST MENTIONS

“If you’re wondering **how strong the Sun Belt Conference is** this year, look no further than this game.”



“Texas State beat Baylor early in the season and South Alabama did so against Oklahoma State. This is **good football in the Sun Belt.**”



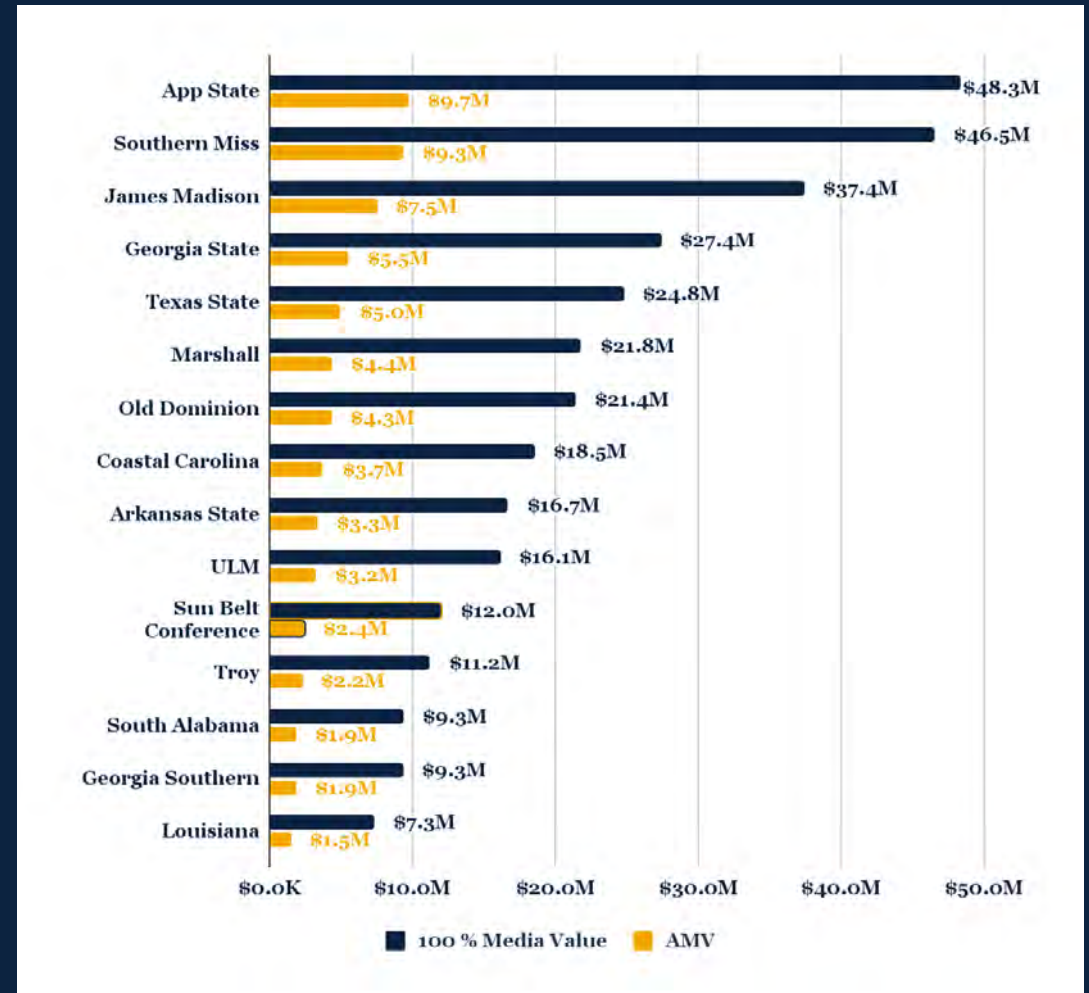
“The **Founding Father of College GameDay**. Look at that scene. Ridiculous.”



BROADCAST MENTIONS VALUATION

In 2023, the average Sun Belt property **generated \$22 million in value via broadcast mentions.**

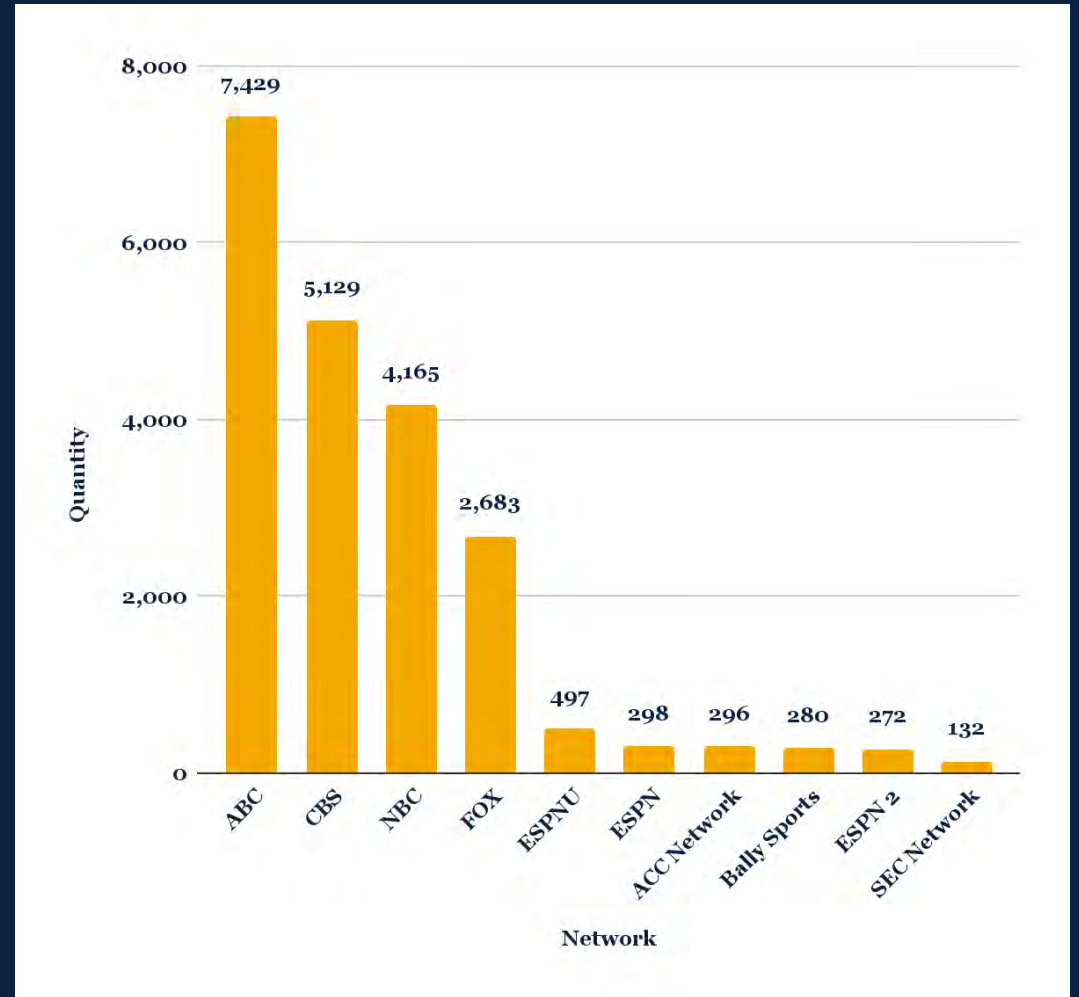
BROADCAST MENTIONS MEDIA VALUATION



NETWORK COVERAGE

ABC, CBS, NBC & FOX provided extensive coverage of the conference during the 2023 season, collectively accounting for **78 percent of total broadcast mentions**.

BROADCAST MENTIONS BY NETWORK

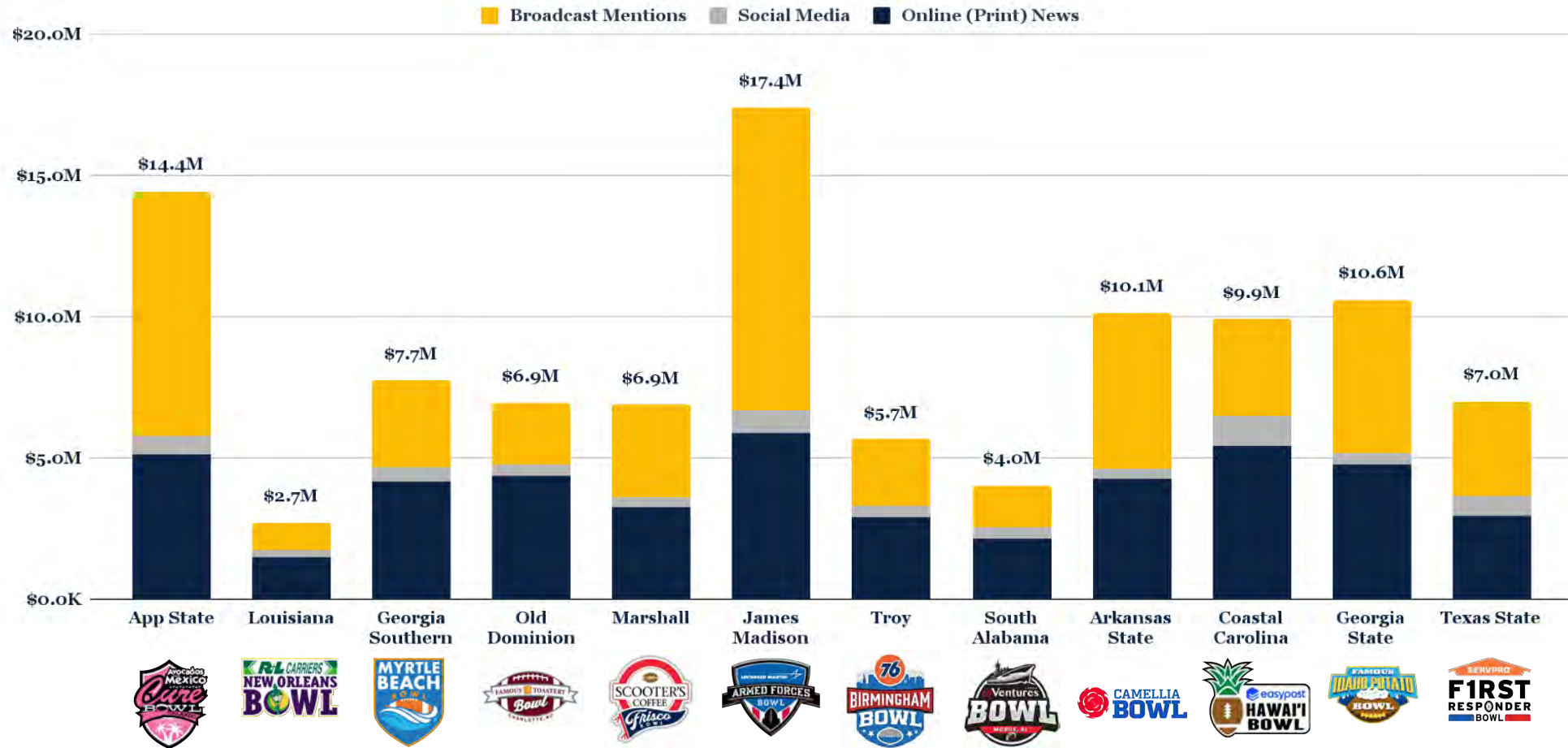


APPENDIX



BOWL SEASON EXPOSURE

BOWL SEASON MEDIA VALUATION



Impact of FAFSA

Brad Barnett

Associate Vice President, Enrollment
Management/Financial Aid Director





FAFSA Changes - What happened

- Future Act 2019 (signed into law 12/19/2019)
 - Data sharing with IRS and ED
- Consolidated Appropriations Act, 2021 (signed into law 12/27/2020)
 - 116th Congress (2019-2020)
 - FAFSA Simplification Act 2020 – FAFSA and Federal Methodology Changes
- Consolidated Appropriations Act, 2022 (signed into law 3/15/2021)
 - 117th Congress (2021-2022)
 - Technical amendments and extension to 2024-25 for FAFSA changes



Two Categories of Challenges

1. Preparation – Planning for aid eligibility changes as a result of the new FAFSA and Student Aid Index (SAI)
 - September 2021 - December 2023
2. Processing – Adjustments based on frequently changing guidance and complications from ED
 - January 2024 – Current
 - Over 70 Electronic Announcements
 - 9 Dear Colleague Letters



JMU Preparation

(Industry leader)

- NASFAA SAI Tool Beta School (work began 9/3/21)
 - Modeled three years of data
 - Identified current student populations who would be negatively impacted
 - Calculated estimated increase in number of “needy” students
 - Communication of projected funding needs to JMU
- Communication with SCHEV
- Communication with ED and industry leaders



JMU Communication Strategy

- Prospective students and families
 - Multiple e-mails
 - Instagram
 - FaceBook
- Current JMU students and families
 - Multiple e-mails
 - Text messaging
 - FaceBook
- JMU Faculty and Staff
 - Multiple e-mails
- FAFSA Changes [Website](#)
- Communication with President and Division Heads
- Communication Partners:
 - Admissions
 - Office of Family Engagement
 - University Communications



Continuing Dukes Scholarship

(Returning students)

- Created in response to SAI modeling
- Partnership with the Foundation, Office of Budget Management, and Office of Financial Aid & Scholarships
- Identified non-need based funds to provide a replacement award for prior “state grant” recipients with more than one in college
- Programmed into Mass Packaging so no student needed to appeal or request funds
- Funding them through graduation like a “normal” state grant eligible student



Need-Based Scholarships

(Returning students)

- Identified students who lost eligibility due to FAFSA changes (e.g., number in college, etc.)
- Provided a replacement award upon review of their renewal eligibility
- Automatic review without the student needing to appeal



FAFSA Priority Filing Date

(All students)

- In-state JMU FAFSA Priority Filing Date is March 1st
- Internally, changed it to April 1st for the 2024-25 school year knowing we could have more "late filers" as a result of the FAFSA challenges
- On July 16th, provided smaller awards to all "late filers" with a qualifying Student Aid Index
- Result – Provided grants to students who lost eligibility due to the FAFSA filing challenges, eliminating the need for them to appeal



FAFSA Comparison

(Fall enrolled students)

- Number of FAFSA's at year's end in 2023-24 = 13,139
- Number of FAFSA's as of 8/31/24 in 2024-25 = 13,411
- Number of FAFSA's as of 8/31/23 in 2023-24 = 12,833

Summary:

- Year over year, we are 4.5% ahead in receipt of FAFSA's compared to the same time last year, and have exceeded last year's total
- More FAFSA's will be received as additional students complete the application and we admit our class of spring transfer students



Official Financial Aid Offer Comparison

(Matriculated students – fall enrolled)

- Number of students receiving an offer at year's end in 2023-24 = 13,292
- Number of students receiving an offer as of 8/31/24 in 2024-25 = 13,039
- Number of students receiving an offer as of 8/31/23 in 2023-24 = 12,723

Summary:

- Year over year, we are 2.5% ahead in aid offers compared to the same time last year
- More offers will go out as additional students complete a FAFSA, current filers gain eligibility, and we admit our class of spring transfer students



Pell Grant Student Comparison

(Fall enrolled students)

- Number of Pell Grant recipients at year's end in 2023-24 = 3,059
- Number of Pell Grant recipients as of 8/31/24 in 2024-25 = 3,359
- Number of Pell Grant recipients as of 8/31/23 in 2023-24 = 2,795

Summary:

- We have 9.8% more Pell Grant students at this point than we did the entire 2023-24 cycle
- Year over year, we are 20.2% ahead in Pell Grant students compared to the same time last year
- This will increase as additional students complete a FAFSA, current filers gain eligibility, and we admit our class of spring transfer students
- Note: Our modeling estimated we will see a 30% increase in the number of Pell Grant students



Professional Judgment Appeals

- Number of appeals at year's end in 2023-24 = 264
- Number of appeals as of 8/31/24 in 2024-25 = 283

Appeals did not significantly spike due to our proactive strategy of assisting specific populations of students before they needed to appeal:

- Continuing Dukes Scholarship
- Need-based scholarship replacement
- Internal extension of March 1st date
- Awards to late filers as of July 16th



Verification

- Students in Verification at the start of the fall term (8/31/24) in 2024-25 = 220
- Students in Verification at the start of the fall term (8/31/23) in 2023-24 = 306

Summary:

- Despite having 2 months to do 8 months worth of Verification (6 months before corrections opened plus what came in after it opened), we have fewer outstanding Verifications to complete
- ED provided some relief in lower Verification selection rates for 2024-25
- It's normal that 100% of Verifications are not complete when school begins



Loan Processing

- Loans take longer to process than other aid
- FAFSA challenges compressed the timetable for students/parents, and subsequently JMU, for loan processing
 - Complicated by a loan team member going out on maternity leave
- Admissions "stepped up" with data entry assistance



Non-Athletic First Year Scholarships

- Admitted Students (first year) Scholarship Recipients
 - Fall 2023 – 851
 - Fall 2024 – 725

Note:

- The Fall 2024 figure will increase, as all JMU scholarships are not awarded at the beginning of the term
 - For example, some offers are based on participation in an activity that hasn't happened yet (e.g., study abroad, competitions, etc.)
- Many first year scholarships are awarded to a single student and renewable for 4 years (awarded once every 4 years)



Fall 2024 Disbursements

(By the end of the first week of classes)

- Includes federal aid programs, state aid programs, university grants, private loans, and scholarships
- Exceeded Fall 2023 totals
 - Fall 2024 - \$76,000,000
 - Fall 2023 - \$72,000,000

Note:

- This includes a 429 increase in the number of Pell Grant disbursements
- Will exceed over \$200,000,000 in disbursements by the end of 2024-25



Thank You

- Challenging year....something we've never seen before
- Our staff and campus partners rose to the occasion
- Questions

James Madison University Career Outcomes Report

Libby Westley, Director, University Career Center

Myles Surrect, Associate Vice President, Student Affairs



Presentation Components:

Career Outcomes Overview

Class of 2023 Data

JMU Graduates' Local Impact

University Career Center at JMU

What is a Career Outcome?

The outcome of a college education within six months of one's graduation date.



Full or Part-Time Work



Fellowships or Service
Programs Like Peace Corps



Military Service



Graduate School

Students Without Career Outcomes are:

- Still Seeking Employment or Enrollment for Additional Education
- Not Seeking – Taking a Gap Year, Family Obligations etc.

Normed by the National Association of Colleges and Employers (NACE)
Same language used by Department of Education



Class of 2023 Career Outcomes Overview

95.4% of Degree Recipients Have a Career Outcome

Primary Activity	Bachelor's	Advanced Degree	All Graduates
Working	73.2%	91.4%	75.4%
Continuing Education	20.6%	4.8%	18.7%
Military	1.4%	0.2%	1.3%
Total with a Career Outcome	95.2%	96.4%	95.4%
Still Seeking (employment or education)	4.1%	3.0%	3.9%
Not Seeking (due to life events, travel, etc.)	0.7%	0.6%	0.7%
Total Without a Career Outcome	4.8%	3.6%	4.6%

The data reflects knowledge of 3,378 bachelor's degree recipients and 476 advanced degree recipients, for a knowledge rate of 74.3%.

Class of 2023 Bachelor's Degree Recipients





Bachelor's-Degree Recipients Career Outcomes by College

College ¹ of Graduate's Primary Major	# in College ²	Outcomes Rate
Arts and Letters	874	93.8%
Business	985	96.8%
Education	269	97.0%
Health and Behavioral Studies	1,337	96.6%
Integrated Science and Engineering	412	90.8%
Science and Math	277	95.8%
Visual and Performing Arts	242	90.0%
University Studies	38	100%
JMU Bachelor's Overall	4,434	95.2%

¹The above data does not include certificate recipients.

²For students who completed more than one major, data in the above chart reflects only student's primary major.

N=3,378 (Number of Bachelor's Degree Recipients with a Career Outcome)



Undergraduate Career Outcomes

Salary Distribution by College

Salaries of bachelor's degree recipients are up by \$2,071 from last year

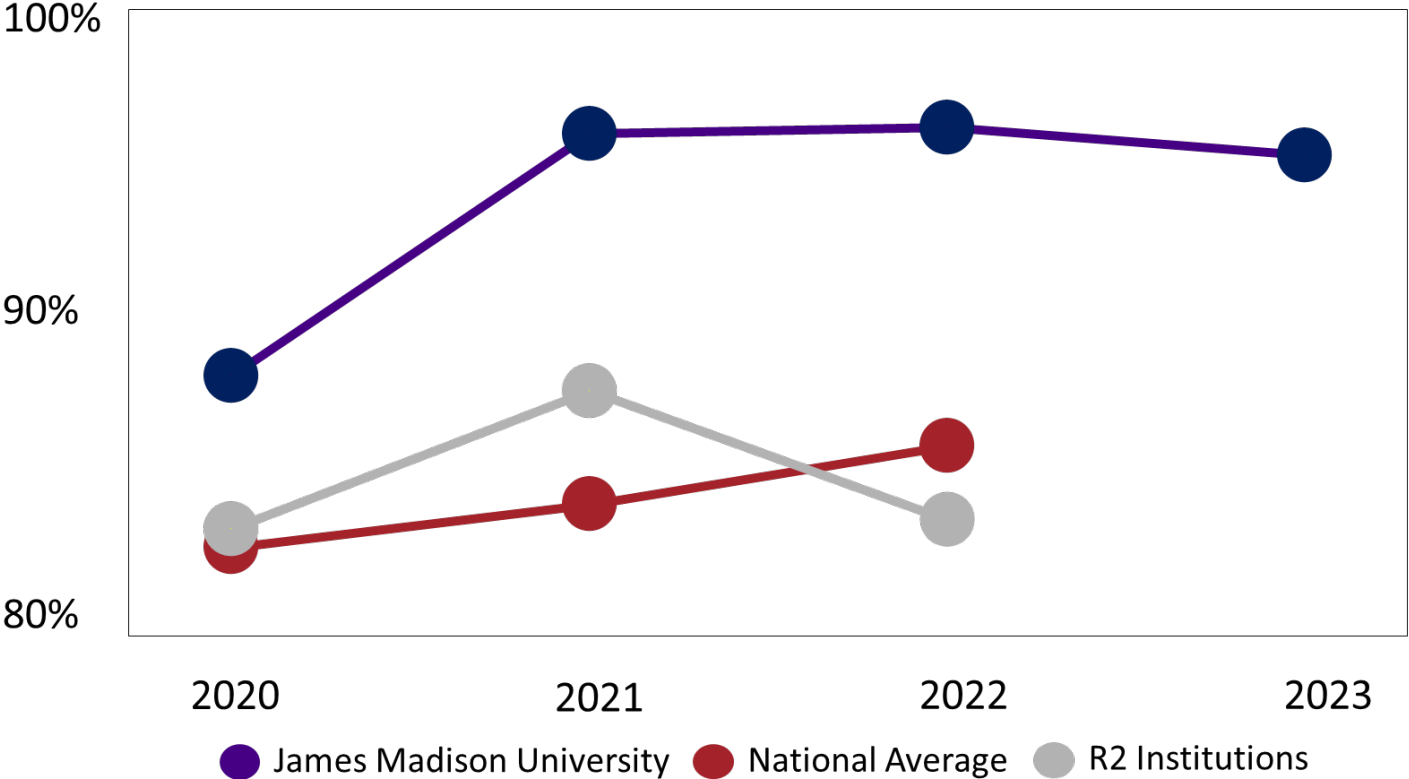
College ¹ of Graduate's Primary Major	Average Salary
Arts and Letters	\$52,462
Business	\$65,808
Education	\$56,318
Health and Behavioral Studies	\$56,535
Integrated Science and Engineering	\$70,181
Science and Math	\$48,515
Visual and Performing Arts	\$49,148
University Studies	\$53,200
JMU Bachelor's Overall	\$59,686

¹The above data does not include certificate recipients; for students who completed more than one major, data in the above chart reflects only student's primary major.

N=1,140 (Number of bachelor's-degree recipients employed full-time who provided salary data)

Career Outcomes

Bachelor's-Degree Recipients Comparative Data



¹National Association of Colleges and Employers, the professional association for college career services professionals, university relations and recruiting professionals. NACE is the leading source of information on the employment of the college graduates.



Class of 2023 Advanced Degree Recipients





Advanced-Degree Outcomes Rate Career Outcomes By College

College of Graduate's Primary Major	# in College	Outcomes Rate
Arts and Letters	62	91.8%
Business	154	98.2%
Education	261	94.9%
Health and Behavioral Studies	231	98.6%
Integrated Science and Engineering	5	100%
Science and Math	21	100%
Visual and Performing Arts	17	71.4%
JMU Advanced Degree Overall	751	97.2%



Advanced Degree Salary Distribution by College

Salaries of advanced degree recipients are up by \$5,697 from last year

College of Graduate's Primary Major	Average Salary
Arts and Letters	\$59,880
Business	\$101,349
Education	\$59,700
Health and Behavioral Studies	\$76,635
Integrated Science and Engineering	\$96,000
Science and Math	\$55,625
Visual and Performing Arts	\$51,000
JMU Advanced Degree Overall	\$76,652

N=231 (Number of employed advanced degree recipients who provided salary data)



Local Impact of JMU Graduates





Continued Virginia Connection for Graduates



of *employed*
bachelor's-degree
recipients are working
in Virginia



of *employed*
advanced-degree
recipients are
working in Virginia



Bachelor's-Degree Recipients Working in Virginia



Regions of Virginia ¹	% of Graduates Per Area
Northern Virginia	43.4%
Central Virginia	25.7%
Shenandoah Valley	20.3%
Hampton Roads	6.5%
Virginia Mountains	1.6%
Chesapeake Bay	1.4%
Southwest Virginia	0.5%
Southern Virginia	0.5%
Eastern Shore	0.1%

N= 1,294 (Number of employed bachelors' degree graduates who indicated an employer located in Virginia.)

¹Source: <https://www.virginia.org/places-to-visit/regions>

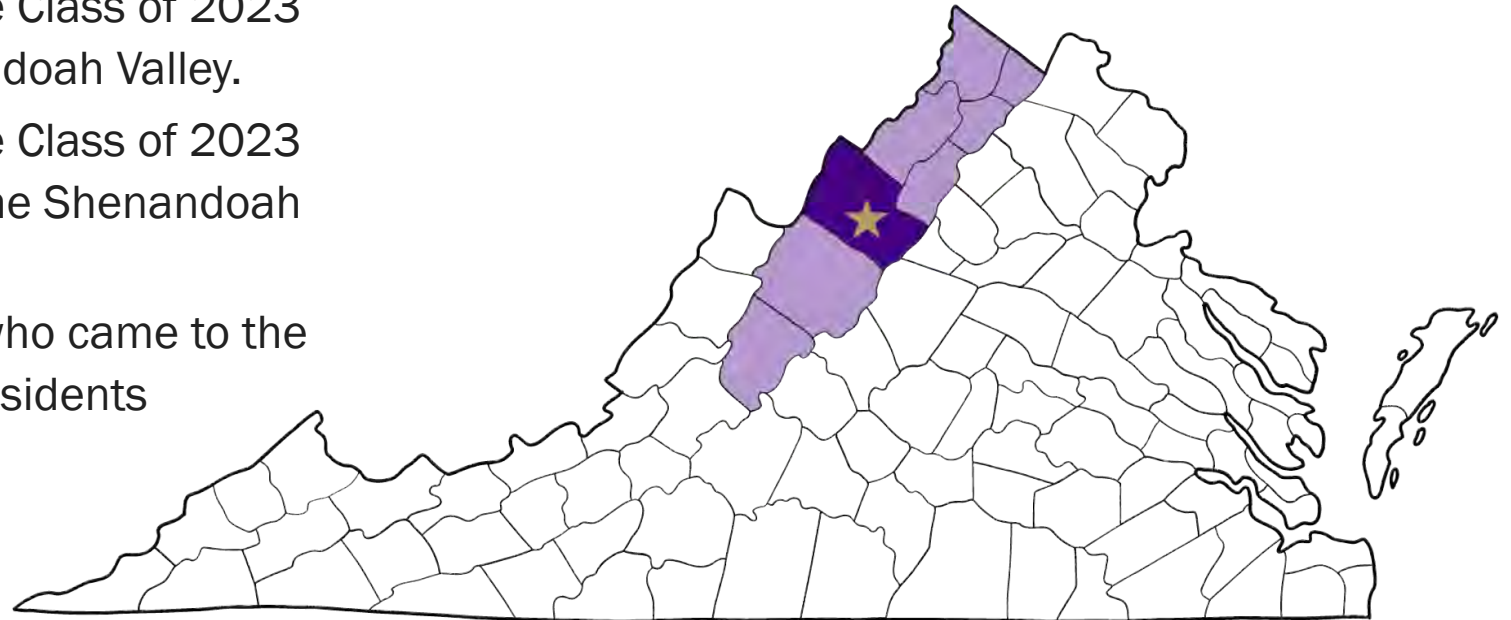


JMU's Impact on the Shenandoah Valley

213 undergraduate students started at JMU from the Shenandoah Valley in Fall 2019.

Relevant Numbers 4 Years Later...

- **386** - # of graduates from the Class of 2023 working full-time in the Shenandoah Valley.
- **256** - # of graduates from the Class of 2023 continuing their education in the Shenandoah Valley.
- **3X** - the number of students who came to the Valley for JMU and stayed as residents afterwards





JMU's Impact on Rockingham County

61 undergraduate students started at JMU from Rockingham County in Fall 2019.

Relevant Numbers 4 Years Later...

- **173** - # of graduates from the Class of 2023 working full-time in Rockingham County
- **242** - # of graduates from the Class of 2023 continuing their education in Rockingham County
- **5.8x** - the number of students who came to the County for JMU and stayed as residents afterwards



JMU Nursing Majors Across Virginia



Top Employers of Nursing Graduates in Virginia

11+ Hires
HCA
Inova Health System
Sentara Health System
University of Virginia
VCU Health System

3-10 Hires
Bon Secours
Carilion Clinic
Central Health
Children's Hospital of the King's Daughters
Valley Health
Virginia Hospital Center



77.3% of JMU Nursing majors who indicated they are employed post-graduation are employed in Virginia.



167 JMU Nursing majors who indicated they are employed post-graduation are employed in Virginia.

JMU Graduates Teaching in Virginia



Top Employers of JMU Graduates
who are
Teaching in Virginia

12+ Hires

Fairfax County Public Schools

Harrisonburg City Public Schools

Loudoun County Public Schools

Rockingham County Public Schools

8-11 Hired

Augusta County Public Schools

Chesterfield County Public Schools

Henrico County Public Schools

Prince William County Public Schools

Virginia Beach City Public Schools



226 JMU graduates
indicated they are teaching
in Virginia.



76.9% of JMU graduates
teaching indicated they
are teaching in Virginia.



Top Employers of Bachelor's-Degree Graduates in Virginia

25+ Hires
Inova Health System
James Madison University
Sentara Health Systems

15-24 Hires
Accenture Federal Services
Bon Secours
Carahsoft
Deloitte
KPMG
VCU Health

6-14 Hires	
Amazon	HCA Healthcare
Augusta Health	Leidos
Booz Allen Hamilton	memoryBlue
Capital One	Merck
CGI Federal	Oracle
CoStar Group	Prince William County Public Schools
Cvent	RSM
Enterprise Holdings	Target
Ernst & Young	University of Virginia
Fannie Mae	UVA Health

N= 1,396 (Number of employed bachelors' degree graduates who indicated an employer located in Virginia.)

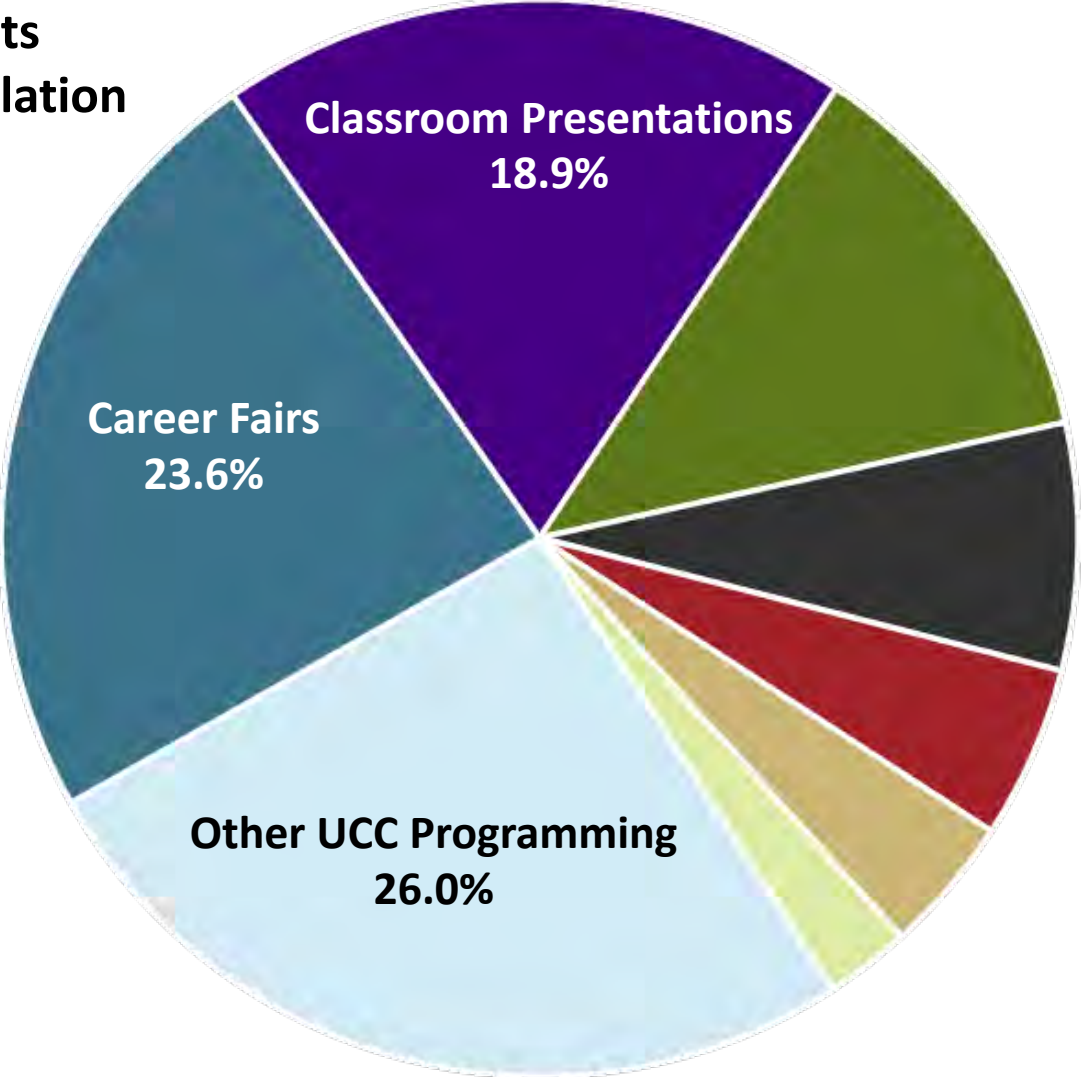
University Career Center Engagement Data



UCC Engagement Types 2023-2024



26,461 total touchpoints
50.3% of student population



Appointments 12.3%

Headshots 7.4%

Career Closet 5.2%

Interviews 4.1%

HTH 100s 2.5%



UCC Touchpoint Types Change Over 2 Years

Touchpoint Type	2021-22	2022-23	2023-24	Change Over Past 2 Years
Appointments	2,366	3,086	3,247	37.2%↑
Career Fairs	2,961	4,570	6,232	110.5%↑
Career Closet		619	1,374	122.0%↑
Classroom Presentations	3,332	4,590	5,007	50.3%↑
Headshots	463	698	1,964	324.2%↑
All Other UCC Programming	1,847	4,130	6,874	272.2%↑
Total UCC Touchpoints	12,672	20,206	26,461	108.8%↑

UCC Programming Return Rates



Engagement Type	Return Rate
Career Closet	37.6%
Presentations	38.8%
Headshots	46.1%
Health 100s	27.0%
Requested Programs	40.4%

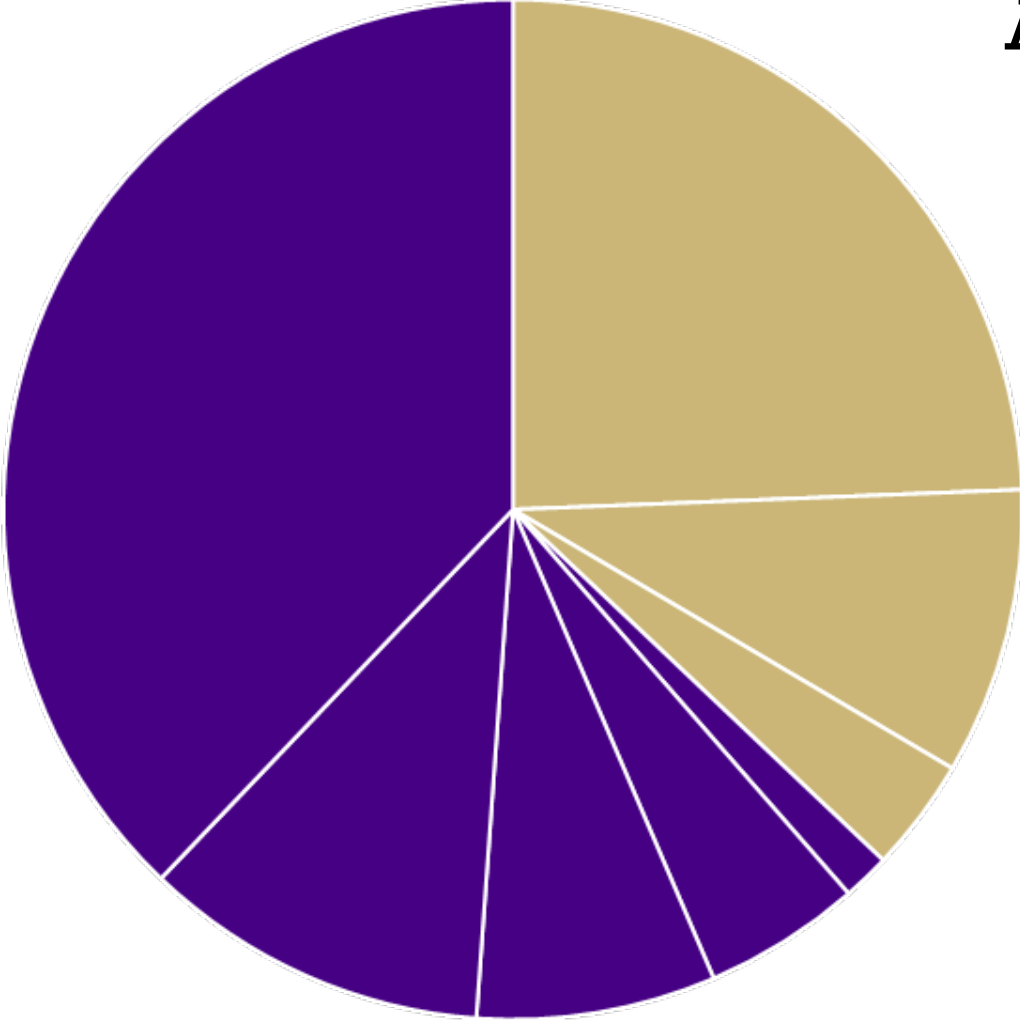


UCC Interactions by Type



Preparation 62.9%

Event	45.4%
Appointment	11.0%
Headshots	7.6%
Career Closet	5.0%
Study Space	1.5%



Application 37.1%

Career Fair	24.4%
Event	9.1%
Interview	3.6%

UCC Employer Engagement 2023-2024



Total Jobs Posted	Organizations Posting Jobs	Organizations Recruiting Beyond Job Postings
120,381	10,834	644

Engagement Type	Employer Engagement
Career Fairs	652
School or Employer Hosted Info Sessions	246
UCC Programming with Employers	92
Interview Schedules	114



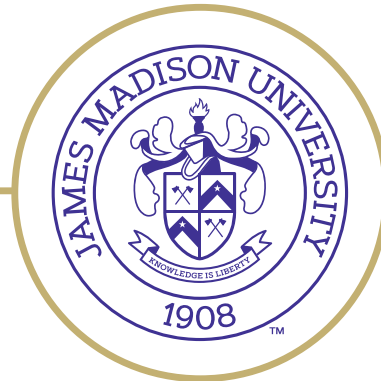
How You Can Help

- Forward contact or company recommendations for the University Career Fair to the UCC
- **Greet employers and alumni at the University Career Fairs on Tue. 9/24 and Wed. 9/25 in the AUBC between 1 p.m. and 5 p.m.**
- Refer students to the UCC
- Donate to the Career Closet





Questions?





Methodology and Quick Facts

Methodology

The University Career Center annually surveys each graduating class regarding their post-graduation destination. Data collection begins the semester before each class graduates. Additional follow-up is conducted for six months after graduation, for students who did not respond to the survey, reported they were still "seeking employment," or reported still "seeking admission to graduate school." The UCC uses a variety of data collection methods: direct survey responses from students (51.1%); phone calls made to students (16.4%); LinkedIn or other online searches (21.9%); National ClearingHouse Data (8.8%); and data retrieved from JMU faculty or staff (1.8%).

Class of 2023 Graduate Quick Facts

- The Class of 2023 includes those who graduated in August 2022, December 2022 and May 2023.
- There were 5,185 degree recipients for the Class of 2023:
 - 4,434 earning a Bachelor's degree
 - 751 earning an Advanced degree (Master's, PhD etc.)
- The total count of students per academic program may vary slightly, because some students held double majors. Any graduate with two majors will be counted just once, included in these statistics by their primary major.
- This report highlights the post-graduation pursuits of 3,854 degree recipients (74.3% of the total 5,185) for the Class of 2023. Thus, our "knowledge rate" of the "first destination outcomes" for the Class of 2023 cohort is 74.3%.

Definitions



- **Career Outcome:** Graduates are considered to have a career outcome if their primary activity is one of the following: employment (full or part-time), military, continuing education, or full-time service/volunteering.
- **Continuing Education:** Pursuing additional education with an institution of higher education
- **Employment:** Includes working full-time or part-time in an organization, fellowship, internship, volunteering, self-employed or freelance
- **First Destination Outcomes:** Activities of graduates occurring within 6 months of graduation
- **Knowledge Rate:** A term used to describe the percentage of graduates for which the University has reasonable and verifiable information--this includes graduates who responded to a UCC survey and those who the UCC was able to find using reputable sources. Sources include JMU faculty and graduate program representatives, employers, the National Clearinghouse dataset of continuing education, LinkedIn, etc.
- **Military:** Actively serving within a branch of the U.S. Military
- **Not Seeking:** Students who indicated they were not interested in seeking employment or education, because they were taking a gap year, traveling, etc.
- **Still Seeking:** Students who indicated they are actively searching for employment or a graduate school program
- **Working:** Graduates who are employed full-time, part-time, volunteering or active military

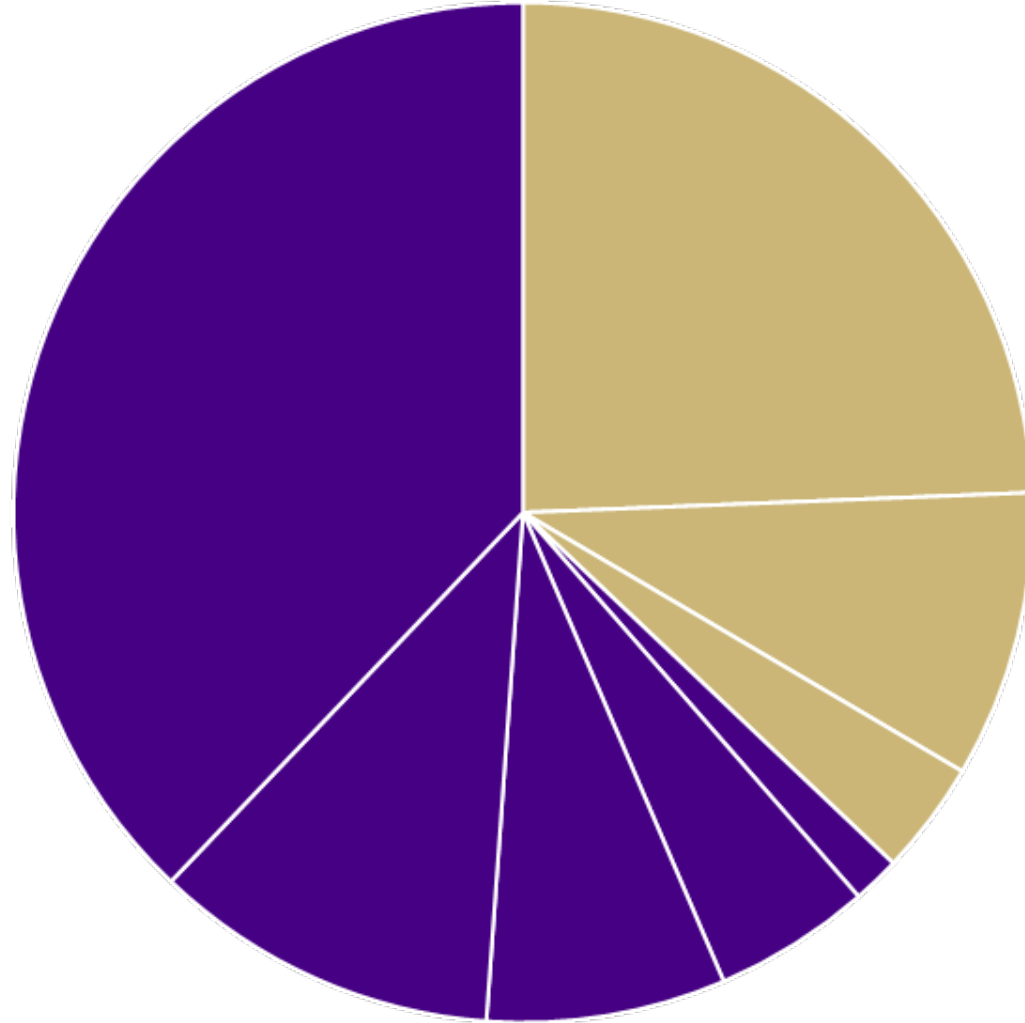
Source: www.nacweb.org/job-market/graduate-outcomes/first-destination/standards-and-protocols

UCC Interactions by Type



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Application 37.1%

Career Fair	24.4%
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Closed Session

