



# **CENTENNIAL STRATEGIC PLAN**

**2004 – 08**

**2004–05 Initiatives**

**James Madison University**

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***FROM CENTENNIAL COMMISSION TO CENTENNIAL***

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In a number of his first addresses in 1998 as the fifth president of James Madison University, Dr. Linwood H. Rose invited the university community to join him in envisioning the type of institution James Madison University might become in the 10 years from the time of his inauguration to the university's centennial in 2008. To begin the process of articulating this vision, Rose appointed the Centennial Commission — a group of more than 70 faculty members, administrators, staff members, students and representatives of off-campus groups. The Centennial Commission was charged with defining the characteristics that would ideally describe James Madison University in 2008 and offering recommendations that President Rose and the JMU Board of Visitors could consider to achieve these characteristics. After reviewing educational, societal and governmental changes that were occurring in the United States, hearing directly and indirectly from national leaders of American higher education and reflecting on the thoughts and beliefs of representatives from the university's varied constituencies; the commission completed and forwarded its final report to President Rose in May 1999.

In the ensuing months the JMU Board of Visitors, Dr. Rose and the university's vice presidents refined the ideas of the Centennial Commission. From their efforts came a revised university mission statement and characteristics that specified ways to achieve the new mission. The board of visitors approved the mission statement in January 2000. Since that time, university planning activities have been focused on advancing the mission through a pursuit of the 29 defining characteristics. Each year the strategic focuses are identified and annual departmental/office objectives are created.

In the summer of 2004, a review was conducted to determine the progress that had been achieved since 1998 in pursuing the 29 characteristics. From those analyses came the decision to identify two groups of characteristics — the first a group of six that require strategic emphasis and now constitutes the university's strategic plan for the four years until the university's centennial. The other 23 characteristics will require a continued commitment from the university over the next four years.

This report presents James Madison University's mission statement, vision and values; proposed 2004–05 initiatives to achieve the six strategic emphasis characteristics and their 2008 performance indicators; a list of other characteristics; and a summary of ways in which progress toward achieving the characteristics will be realized. The planning, implementation and positive evaluation of literally hundreds of new initiatives, achieved in the last six years and expected in the coming four years, have and will bring about significant change in

James Madison University. It is through these changes and our sustained efforts that we will be successful in providing the highest quality education in a student-centered environment.

## **J a m e s M a d i s o n U n i v e r s i t y**

***Mission Statement*** We are committed to preparing students to be educated and enlightened citizens who will lead productive and meaningful lives.

***Vision*** To be the new American university, a hybrid of the best qualities of research and liberal arts institutions.

***Values*** Student-Centered, Excellence, Integrity, Mutual Respect, Service to Others

### **The Six Strategic Emphasis Characteristics**

***of James Madison University's 2004-08 Centennial Strategic Plan:***

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- ***Diversity***
- ***Financial Resources***
- ***Private Support***
- ***Graduate Programs of Distinction***
- ***Professional Development***
- ***Institutional Planning***

## ***1. DIVERSITY***

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The university will be a diverse community whose members share a common JMU experience.

**Vision:** Our graduates will work and live in diverse settings. The prospects for their success as educated and enlightened citizens are enhanced by exposure to different perspectives, different interpretations and different points of view. What we value and believe, and what we hold to be true and factual is best confirmed by the test of another's opinion and thoughtful consideration. Diversity enriches the educational experience and promotes growth.

**Goal:** To offer a richer educational experience for our students by establishing a critical mass of underrepresented populations among the faculty, staff and students.

## ***2008 Performance Indicators***

- The diversity characteristic plan will be implemented.
- A critical mass of full-time instructional faculty members who are from underrepresented groups will be attained.
- A critical mass of full-time instructional faculty members who are female will be attained.
- A critical mass of underrepresented students will be attained.
- The number of international students will increase from 189 to 250-300.
- Comments from underrepresented groups will report that the campus is inviting and accepting.

## ***2004-05 Initiatives***

- Allocate resources to support enhanced diversity
- Increase participation of the faculty and staff, and students in open and critical thinking
- Develop diversity enhancement plans for each college and major administrative units
- Establish diversity enhancement councils in each college and major administrative units
- Fund, establish and hire four new positions to affect change in the university's diversity profile
- Establish measures of performance to assess diversity enhancement
- Expand institutional alliances for the recruitment of faculty members
- Create a position in the Office of the President to lead the diversity enhancement effort
- Develop and implement a diversity enhancement plan for admissions, financial aid, international programs and the Center for Multicultural/International Student Services
- Start reviewing academic programs to determine if new programs are needed to attract underrepresented populations to JMU
- Heighten institutional awareness of the need for diversity enhancement
- Develop a high school faculty-in-residence program
- Conduct summer programs for underrepresented high school students
- Create a set of multicultural competencies to be used in diversity training
- Create an ongoing partnership with Howard University through the IMPACT<sup>3</sup> Program
- Develop a community outreach program to build relationships with diverse businesses and organizations in the local area
- Develop programs to enhance the curriculum in high school programs throughout the state, particularly in low socioeconomic school districts
- Enhance the diversity and global awareness curriculum in the General Education Program
- Create a multicultural competencies 360 degree evaluation to assist in training needs and development
- Create a Centennial Scholars Program

## **2. FINANCIAL RESOURCES**

The university will enhance and diversify funding sources to achieve initiatives campus wide.

**Vision:** To provide the best learning experience for our students we must increase state funding to a level at least comparable to our peers. To achieve our institutional aspirations we must diversify revenue sources to reduce our dependence on the commonwealth and provide enhanced flexibility in our funding decisions.

**Goal:** To attain base adequacy, fund and construct or renovate “justified” facility needs, and diversify the university’s revenue profile.

### ***2008 Performance Indicators***

- Total annual education and general funding will be equal to or exceed the level indicated by the Virginia General Assembly’s funding model.
- University funding received through the JMU Office of Sponsored Programs will increase annually by 10 percent.
- Fair market value of the endowment will increase from nearly \$24 million to one-third of the education and general operating budget (currently \$47 million).
- Total private gifts per full-time enrolled student will increase from \$337 in fiscal year 2003 to our peer group’s average in fiscal year 2007.
- Education and general appropriations per full-time enrolled student will increase from \$8,266 to being fully funded (currently the amount is \$10,166).
- JMU general fund appropriation as a percentage of total education and general appropriation will increase from 43.3 percent to 46.7 percent.
- Distribution of total operating expenses — percentage from general fund — will increase from 24 percent to 27 percent.
- State appropriations, grants and contracts as a percentage of total current revenues will increase from 28.4 percent to 30 percent.

### ***2004-05 Initiatives***

- Approve an annual educational and general operating budget of at least \$137,384,815 or \$4,851,964 over 2003-04. (2003-04 budget plus one-sixth of the base budget deficiency)
- Initiate capital outlay planning and construction of the following facilities:
  - College of Integrated Science and Technology Library (planning, \$19.8 million)
  - Hoffman Hall renovation (planning, \$6.5 million)
  - Miller Hall renovation (planning, \$13.9 million)
  - Parking Deck No. 2 (planning, \$13 million)
  - 1031 S. Main Street replacement (begin construction, \$5.8 million)
  - Storm and Surface Water Infrastructure Phase 1 (planning, begin construction, \$5.1 million)
- Generate sponsored program and contracts revenue of \$27 million or \$2.7 million over 2003-04
- Transfer private support revenue of \$4.5 million or \$1.1 million over 2003-04 for noncapital operating support
- Collect nonfee revenue in auxiliary operations of \$15,166,942 or \$543,313 over 2003-04
- Prepare for JMU Board of Visitor’s approval of revised tuition/fee and operating plans for the next six years in January 2005 and capital outlay plans in June 2005

### ***3. PRIVATE SUPPORT***

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The university will develop broad-based financial support and involvement among alumni, parents and friends.

**Vision:** Alumni, parents, employers and others report enthusiasm with and respect for the university. These groups are likely supporters and contributors to the financial needs of the institution if properly cultivated.

**Goal:** Complete a \$50 million capital campaign in 2008, the university's centennial year.

### ***2008 Performance Indicators***

- Total money raised for fiscal year 2008 will equal the average dollar amount raised per full-time enrolled students for our peer group.
- Alumni participation rates will increase to put us in the top fourth of our peer group.
- Corporate/foundation giving will increase to 15 percent by fiscal year 2008.
- Planned giving inventory will be \$100 million by fiscal year 2008.
- Capital campaign financial goals will have been reached.
- The endowment value will be on target to equal 100 percent of JMU's annual operating budget.
- Percentage of living alumni of record who contribute in a given year will increase from 9 percent to 20 percent or more.
- Gift and new pledge receipts will increase from nearly \$7 million to \$15 million.
- Gift accrual rates will reach 125 percent of cash receipts.

### ***2004-05 Initiatives***

- Fund personnel and operating resource needs in university advancement
- Train and prepare a fund-raising staff capable of raising \$15 million annually
- Begin "decentralization" of fund-raising effort by establishing dedicated development officers in the College of Business and the College of Integrated Science and Technology
- Complete the campaign "Case" plan and message
- Establish a volunteer campaign "workforce" and appoint the leadership team
- Report and benchmark fund-raising progress against standardized information and from peer institutions
- Achieve increased fund-raising goals
- Increase alumni participation rate from 9 percent in 2003-04 to 12 percent in 2004-05
- Increase corporate/foundation giving from \$1,353,456 in 2003-04 to \$2 million in 2004-05
- Increase the planned giving inventory from \$19 million in 2003-04 to \$24 million in 2004-05
- Increase endowment value (combination of new gifts and investment yield) from \$28 million in 2003-04 to \$34 million in 2004-05
- Increase gifts to the Madison Fund from \$2,407,259 in 2003-04 to \$2.7 million in 2004-05
- Increase major (capital) gifts from \$4,016,260 in 2003-04 to \$6 million in 2004-05
- Increase gifts to the Duke Club from \$2,630,306 in 2003-04 to \$2.9 million in 2004-05
- Increase the percentage of faculty and staff members who contribute to the university from 16 percent in 2003-04 to 18 percent in 2004-05
- Change the fund-raising culture of JMU by engaging the faculty in the prospect identification and cultivation process and by incorporating fund-raising goals into performance expectations for key university officials, i.e., president, advancement vice president, provost, deans and athletics director
- Use advancement business system model to fully engage all advancement staff

#### ***4. GRADUATE PROGRAMS OF DISTINCTION***

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The university will offer graduate programs of distinction.

**Vision:** While our principal focus will remain on the undergraduate experience, a small cadre of nationally distinctive graduate programs will enhance the reputation of the university and attract faculty members and students of the highest caliber.

**Goal:** Establish six to eight programs that are recognized as nationally prominent.

#### ***2008 Performance Indicators***

- Six to eight programs will be formally identified to form a core of nationally prominent programs.
- Ten nationally prominent faculty members (at least one in each program) will be recruited in order to enhance the research, teaching and/or service dimension of our distinguished programs.
- Annual publication and grant activity will be at or above national standards.
- National rankings in both the popular media and in professional organizations/journals will be in the upper 15 percent of programs.
- National recognition of programs will be received by professional societies.
- Participation of faculty members in major national conferences and other national venues (such as the media presentations) will be comparable to nationally recognized programs. National media coverage of program activities will be significantly greater than that of other programs in the university, consequently helping to define the image of the university.
- Media coverage of these programs will be predominantly national in scope and highlight the faculty and/or programmatic activity and its benefits to the commonwealth and the nation. Articles will appear in major media outlets (e.g. *Washington Post*, *New York Times*, *Wall Street Journal*, etc.).

#### ***2004-05 Initiatives***

- Recruit four nationally prominent faculty members
- Increase research funding for graduate programs of distinction by \$1 million
- Improve the operating budgets and faculty staffing for each of our programs of distinction
- Establish one chair in a program of distinction
- Fully implement the Doctor of Applied Music program
- Complete final identification of all programs of distinction to be included in the 2008 performance review
- Promulgate guidelines that distinguish programs of distinction from other graduate programs at the university. Clearly communicate these guidelines to program coordinators and faculty members

## **5. PROFESSIONAL DEVELOPMENT**

The university's strength is in its people and thus we will invest in both professional development and instructional innovation and excellence.

**Vision:** We value the talents and contributions of our employees and want to assist in their professional development. The quality of the learning and service environment is determined primarily by the knowledge and skills of our faculty and staff, thus any efforts to enhance the quality of the collegiate experience must be grounded in the continued development of our employees.

**Goal:** Fully enable our people to realize their potential in pursuit of the university's mission.

### ***2008 Performance Indicators***

- 3 percent of the personnel budget will be expended on training.
- The importance of training throughout the entire university will be elevated.
- IMPACT<sup>3</sup> will become a very successful, sought-after leadership program.
- A comprehensive training program will be offered to meet the differing needs of our university population.
- The professional development of all employees will be recorded.
- A recommended minimum training hour requirement for all employees will be established.
- Leadership training will be available to all supervisors.
- A teaching/learning center will be established.
- Faculty and staff members will report positive feelings about the learning/training environment.
- A well-defined faculty leave program will be developed.

### ***2004-05 Initiatives***

- Establish a university training office with appropriate personnel and operating support
- Expend at least \$1.9 million (or roughly, 2 percent of the university's full-time personnel salary budget) on development and training
- Incorporate professional development in training expectations in each full-time employee's performance expectations or faculty activity report
- Establish a development and training "passport" for employees to qualify for merit increases
- Establish a recommended minimum number of development and training hours/credits earned annually for faculty and staff members
- Enroll 20 percent of management personnel in leadership training
- Prepare plans for the creation of a teaching/learning center and identify funding
- Review and fund a faculty educational leave policy
- Administer a survey of development and training needs to create a university professional development and training plan
- Conduct four performance excellence briefings

## **6. INSTITUTIONAL PLANNING**

The university will involve the entire campus community in a well-defined, consistently used and commonly understood process for planning and decision making.

**Vision:** Communicating clear messages in organizations as large as ours is always a challenge, but we realize that a common understanding of our goals and a personal sense of participation regarding institutional direction is a necessary ingredient for our success.

**Goal:** To have a planned future based on shared values and beliefs guided by the involvement of the university community.

### ***2008 Performance Indicators***

- Defining characteristics will drive unit planning efforts.
- Faculty and staff members at all levels will indicate that they understand and are aware of the planning process, the goals and how these are used in decision making.
- Faculty and staff members at all levels will be involved or, at least, have the opportunity to be involved.
- A simplified, but effective process has been consistently used.

### ***2004-05 Initiatives***

- Create a 2004-08 Centennial Strategic Plan
- Assess our progress toward becoming the institution to which we aspire
- Establish planning priorities requiring strategic emphasis over the next four years
- Simplify and implement a new Web-based goals and objectives data collection process
- Expand employee-training sessions on the university planning process
- Integrate the planning and budget functions
- Develop a communications plan for the planning process and the goals and objectives that support the university's mission
- Report progress on goal accomplishment to university constituents
- Enhance communication through senior management meetings with units

## ***CONTINUED COMMITMENT CHARACTERISTICS***

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Although six of the 29 defining characteristics have been identified as the focus for the university's strategic plan, the other 23 characteristics also require the university's continued commitment to realize its mission. The remaining 23 are:

- The university will strategically select innovative and new academic programs for development and implementation.
- The university will serve primarily full-time residential students but will increase programs that fulfill nondegree and competency certification requirements as a complement to the traditional academic programs and the bachelor's degree.
- The university will provide a challenging and supportive environment with a heightened sense of intellectual stimulation.
- The university will serve our state and the region, but through its people, programs and accomplishments will be recognized on a national basis.
- Admission to the university will remain selective with the ratio between total applications and freshman enrolled students reaching 6:1.
- The university, to enhance and support its programs, will expand its strategic alliances with external partners.
- The university will follow a planning process that emphasizes accountability and ties resource allocation and initiatives to the concepts of institutional effectiveness.
- The university, through its planning process, will clearly align aspirations, wills and resources to achieve its goals.
- The university will provide student transcripts that reflect course grades, grade-point averages, institutional certification of competencies, assessments results and participation in experiential learning programs.
- The university will offer a wide variety of quality liberal arts and professional programs.
- The university's core curriculum will provide a strong foundation in the liberal arts and will establish optimum competencies in written and oral communications, critical thinking, and information technologies as basic graduation requirements.
- The university will complement its residentially based academic programs with distance education offerings for select audiences.
- The university will provide technologies and laboratories that are widely accessible to the entire campus community.
- The university will continue to be recognized as an efficient, overachiever in its use of resources in the total educational program it offers.
- The university will provide a high level of service to all members of the JMU community.
- The university will continue to offer and develop programs and services with the student as its ultimate focus.
- The university will provide students and student-athletes with a comprehensive and competitive intercollegiate athletics program.
- The university's campus will be attractive, safe and friendly.
- The university, long characterized for its continuous enrollment growth, will stabilize residential enrollment.
- The university's faculty will integrate scholarship, service and teaching to enhance student learning.
- The university will continue to focus on the total development of the student.
- The university will challenge students to achieve beyond their expectations.
- The university will develop and offer international experiences that enhance the global awareness of the student.

## ***DETERMINING PROGRESS***

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The following actions will be taken to ensure that significant progress is being made toward achieving the Centennial Strategic Plan:

- Specific, measurable, aggressive yet realistic objectives will be developed each year by the appropriate divisional vice president for all initiatives.
- Criteria for quality and success will be established for every priority.
- Detailed plans for the assessment or evaluation of all initiatives will be developed and implemented. Assessments and evaluations will include appropriate learning measures, surveys of constituents, financial analyses and the use of national and regional benchmarks or standards.
- Assessment or evaluation results will be utilized annually to modify existing initiatives.
- University constituents will be informed periodically about the progress being made toward the achievement of the Centennial Strategic Plan.