The Madison Future Commission
James Madison University’s
Strategic Planning Process
2014-2020
Updated: October 18, 2012
Recent Planning: History and Background
Most recently, the university navigated two concerted strategic planning efforts.

1998 - The Centennial Commission
To prepare for the university’s centennial celebration in 2008, the institution conducted a major strategic planning initiative through the creation of the Centennial Commission in 1998. The work lasted approximately 10 months, from initial charge through division head review and Board of Visitor approval.

In December 1998, Dr. Rose met with a group of 70 representatives of the university and its constituencies and asked them to assist in identifying the characteristics that ought to define James Madison University in 2008 at its centennial. The commission heard from national consultants, held public meetings, posted updates and received feedback on the university's website and met in committees during the Spring Semester 1999.

Committees included:
- Academics and Student Support Programs
- Faculty, Staff and Student Development
- Resources and Infrastructure
- External Constituencies

Most importantly, the Commission established a new JMU mission statement: We are committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives. It also established 29 defining characteristics of the university, descriptive statements of what should be true about the university at its centennial.

2006 - The Madison Commission
The Madison Commission was formed to update the work of The Centennial Commission and create a new strategic plan for the university. The charge to the commission included:

Within the context of societal and higher education trends and issues:
- Review our mission, vision and values to determine whether or not these are still appropriate as our guides, or if there are modifications that should be considered.
- Examine the Higher Education Restructuring Act Six-Year Plan and provide input regarding gaps and/or other issues that should be considered.
- Review the university Defining Characteristics to ensure their relevancy for the next six years. Either validate or provide modification suggestions that should be considered.
- Submit final report to the president in April 2006.

Committees included:
- Academic Life
- Infrastructure/Resources
- Student Life
- Staff Life

As part of its work, the commission made a change to the mission statement: We are a community committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives. It also reduced the number of defining characteristics from 29 to 17, an 18th was later added.
The Madison Future Commission: A New Strategic Plan for James Madison University
Why?
There are many reasons that now is the right time to create a new JMU Strategic Plan.

- JMU’s new president, Mr. Jonathan Alger, must be given the opportunity to develop and cast his vision, setting the best new course for JMU.
- The higher education marketplace is undergoing significant change. To be on the leading edge, the institution should take a fresh approach to planning and create a new strategic plan that anticipates change for the university’s best success.
- The work of the 2006 Madison Commission is coming to its conclusion.
- The university is required by the Code of Virginia to maintain a continually-updated 6-year plan.
- Each division head expects the university to establish its strategic plan to guide them as they set the respective courses of their divisions.

What?
A task force of key university leaders (and those with experience in the previous planning efforts) met in May 2012 and suggested the following parameters for any new strategic planning effort:

- Rather than a simple update of previous planning efforts, it should start fresh, with a very future-focused approach.
- It should reflect and result in alignment between the university’s mission, vision, values, goals, and objectives.
- It should involve all major university stakeholders - faculty, staff, students, community leaders, and alumni.
- The resulting plan should be characterized by a sense of involvement in and ownership by faculty and staff.
- It should have complete and vocal support from the president, division heads, AVP’s and deans.
- It should provide students an opportunity for involvement.
- It should be more focused on the breadth and quality of the work rather than speed.
- The resulting strategic plan should be a living, organic concept, the focus of continual updating, change, and adaptation. It should not be a static, “once-now-forever” approach.
- The resulting strategic plan should be communicated frequently and clearly, the subject of a running dialogue.
- The resulting strategic plan should be understood by applicable stakeholders.

How? and When?
The following proposal represents a suggested roadmap for creating the university’s new strategic plan for 2014-2020. The Madison Future Commission (MFC) is the primary vehicle for creating the new strategic plan under the guidance of a new University Planning Team (UPT).
One:
Create a Permanent University Planning Team
In July 2012, President Alger appointed a permanent University Planning Team. The objectives of the team are to:

- Serve the president and division heads in ensuring the university consistently maintains a strategic plan that is aligned, powerful, and broadly understood.
- Guide the creation of the university's new strategic plan.
- Ensure that the strategic plan is continually and effectively updated and adapted.
- Provide representative input from each division for the planning process.
- Communicate the plan and its elements broadly.
- Determine the best planning tools for university use, including consideration of a new planning application.

Makeup of the University Planning Team (UPT)

- Supervising Division Head: Mark Warner - Senior Vice President, Student Affairs and University Planning
- Chair: Brian Charette - AVP, University Planning & Analysis
- Kevin Caran - Chemistry & Biochemistry
- Corinne Diop - Art Design and Art History
- Frank Doherty - Director, Office of Institutional Research
- Teresa Gonzalez - Vice Provost, Academic Programs
- Tina Grace - Office of Institutional Research
- Linda Halpern - Dean, University Studies
- Dale Hulvey - AVP, Information Technology
- Matt Klein - President, SGA
- Christina Landes - Co-chair, EAC
- Rick Larson - AVP, HR, Training & Performance
- Jim McConnel - Dean of Students
- David McGraw - Speaker, Faculty Senate
- Tom McHardy - Co-chair, EAC
- Towana Moore - AVP, Business Services
- Ken Newbold - Director of Research Development
- Eric Nickel - Director of University Recreation
- Andy Perrine - AVP, Communications & Marketing
- Geoff Polglase - Deputy Director of Athletics
- Sheila Smith - Senior Director, Development Planning & Ops
- Diane Stamp - AVP, Budget Management
- Lisa Tumer - Director, Financial Aid

UPT Mission: The University Planning Team assists and supports the president and his senior leadership team by guiding the planning process at JMU, including the development and maintenance of the university's strategic plan and effective communication of plans and the planning process.

UPT Vision: The planning process at JMU will be collaborative, aligned, productive, and well understood - an effective tool in the accomplishment of the university's mission and vision.
Two: Assign Two Strategic Planning Preparation Teams
Two strategic planning preparation teams have been appointed. The first of these teams, the **Environmental Scan Team**, will:

- Conduct a thorough literature review relevant to future trends in higher education.
- Enlist the support of an expert consultant.
- Analyze and project higher education market trends as they apply to the future of James Madison University (i.e. online, distance, Coursera, Khan Academy, etc.).
- Interpret feedback being gathered through the President’s Listening Tour.
- Conduct a review of Commonwealth of Virginia broadly and SCHEV more specifically to present future external expectations of the university.
- Propose key future-based issues that should inform the creation of the university’s next strategic plan.
- Prepare a report for the UPT.

The second of these teams, the **Internal Analysis Team**, will:

- Conduct SWOT (Strengths, Weaknesses, Opportunities, Threats) analyses and issues development sessions with groups of key stakeholders.
- Conduct detailed interviews with the president and division heads to collect feedback on the current vision and values. *(It will be assumed through this process that the current mission statement will remain the same.)*
- Interpret feedback being gathered through the President’s Listening Tour.
- Survey key university stakeholders to gather perceptions and feedback related to the vision and values to determine:
  - The alignment of vision and values with goals and objectives.
  - The perception and understanding of the vision and values among stakeholders.
  - The perceived appropriateness of the vision and values for the future of the university.
- Recommend to the president, division heads, and UPT any suggested changes to vision and values.
- Present a SWOT and strategic issues report to the UPT.

**Suggested Makeup of Strategic Planning Preparation Team #1, The Environmental Scan Team**

- Supervising Division Head: Jerry Benson - Provost & Senior Vice President, Academic Affairs
- Co-Chair: Jim Shaeffer - Associate Dean, Outreach & Engagement
- Co-Chair: Donna Harper - Vice President for Access and Enrollment Management

**Suggested Team Roster**

- Robin Anderson - Faculty, Graduate Psychology
- Josh Bacon - Director, Judicial Affairs
- Brad Barnett - Financial Aid & Scholarships
- CJ Brodrick-Hartman - Director, OESS
- Peter DeMichele - Office of Institutional Research
- Frank Doherty - Director, Office of Institutional Research
- Lou Hedrick - Office of Institutional Research
- Eric Maslen - ISAT
- Rick Mathieu - COB
- Jason McClain - Office of the Provost
- Randy Mitchell - AVP, Student Success
- Michael Moghtader - WRTC
- Chris Pipkins - AVP, Advancement Information Services
- Ken Newbold - Research & Public Service
- Eric Stark - COB
- Michael Walsh - Dean of Admissions
- Susan Wheeler - University Legal Services
- Consultant

**Suggested Makeup of Strategic Planning Preparation Team #2, The Internal Analysis Team**

- Supervising Division Head: Nick Langridge - Interim Vice President, University Advancement
- Co-Chair: Sharon Lovell - Interim Dean, CHBS
- Co-Chair: Rick Larson - AVP, HR, Training, & Performance

**Suggested Team Roster**

- Dave Barnes - Director, University Unions
- Christy Bradburn - Senior Assistant Director, Admissions
- David Brakke - Dean, CSM
- Art Dean - Special Asst to the President for Diversity
- Don Egle - Director, Public Affairs
- Scott Gallagher - COB
- Bob Jerome - COB
- John Knight - AVP for Finance
- Howard Lubert - CAL/Political Science
- Marsha Mays-Bernard - AVP, MASH
- Michael McCleve - Associate Director, Dux Center
- Meg Mulrooney - University Studies/History
- J.W. Myers - AVP for Academic Resources
- Jennifer Phillips - Assistant Athletic Director, Compliance
- Roger Soenksen - Faculty, School of Media Arts and Design
- Jennifer Testa - Director, University Training and Development
Three: Assign Five Committees
Five major Madison Future Commission committees have been established. Each committee is charged with the following based on its area of focus:

- Determine what are the key issues related to the subcommittee’s JMU focus. This should be 4-6 statements of apparent fact that must be considered as the university establishes plans related to that area.
- Draft 2-4 recommended core qualities that describe the desired state of that area by 2020 in priority order. (The Academics Subcommittee should draft 3-5 and the Fundraising Subcommittee should draft 1-2.)
- Draft one recommended goal in support of each core quality.

<table>
<thead>
<tr>
<th>Academics</th>
<th>Student Life &amp; Success</th>
<th>Resources</th>
<th>Faculty &amp; Staff Success</th>
<th>Fundraising</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervising Division Head: Jerry Benson - Provost &amp; Senior Vice President, Academic Affairs</td>
<td>Supervising Division Head: Mark Warner - Senior Vice President, Student Affairs and University Planning</td>
<td>Supervising Division Head: Charles King - Senior Vice President, Administration &amp; Finance</td>
<td>Supervising Division Head: Donna Harper - Vice President for Access and Enrollment Management</td>
<td>Supervising Division Head: Nick Langridge - Interim Vice President, University Advancement</td>
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<td>Academic performance, academic rigor, accessibility, assessment, culture, curricula, diversity, engagement, ethical decision making, SACSCOC, SCHEV, etc.</td>
<td>Citizenship, clubs and organizations, diversity, JMU culture (“The JMU Way”), quality of student life, Residence Life, student engagement, etc.</td>
<td>Athletics, campus master plan, expanded Level II, facilities, infrastructure, Level III, public revenue sources, technology, etc.</td>
<td>Faculty and staff development, fulfillment, growth, productivity, etc.</td>
<td>Endowment, JMU Foundation, private revenue sources</td>
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<tr>
<td>Co-Chair: Teresa Gonzalez - Vice Provost, Academic Programs Co-Chair: Reid Linn - Dean, Graduate School</td>
<td>Co-Chair: Randy Mitchell - AVP, Student Success Student Health Co-Chair: Maggie Evans - Director, Residence Life</td>
<td>Co-Chair: Diane Stamp - AVP, Budget Management Co-Chair: Towana Moore - AVP, Business Services</td>
<td>Co-Chair: Judy Dilts - Associate Dean, CSM Co-Chair: Rick Larson - AVP, HR, Training, &amp; Performance</td>
<td>Co-Chair: Weston Hatfield - AVP for Development Co-Chair: Kathy Thompson - Assistant Dean, The Graduate School</td>
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<tr>
<td>Committee membership to be designated by division heads and finalized by the co-chairs.</td>
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Four:
Schedule Town Hall-Style Sessions
As a way to expand the reach of the work being done by the Madison Future Commission, strategic planning town hall-style meetings should be scheduled in the early spring of 2013. These meetings would provide feedback to the University Planning Team and the committees. Each would last 90 minutes and be planned and staffed as follows:

<table>
<thead>
<tr>
<th>Stakeholder group</th>
<th>Faculty &amp; Staff</th>
<th>Students</th>
<th>Community</th>
<th>Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of meetings</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
| Meeting moderators | Mark Warner - Senior Vice President, Student Affairs and University Planning  
Brian Charette - AVP, University Planning & Analysis | Michael McCleve - Associate Director, Dux Center  
Kimberly Duvall - University Advising | Rick Larson - AVP, HR, Training, & Performance  
Director, University Training & Development | Sheila Smith - Director, Office of Annual Giving  
Steve Smith - AVP Constituent Relations |
| Meeting logistics planners/ coordinators/hosts | Debbie Glass - Human Resources  
Lisa Hess - Office of Equal Opportunity  
Kim Thompson - HR Training & Performance | Leslie Beam - Student Affairs and University Planning  
Brandon Cline - University Business Office  
Tisha McCoy-Ntimoah - Orientation | Pete DeSmit - Information Systems  
Ramona Messenger - University Events  
Suzanne Vance - University Training & Development | David Grimm - Development for College of Arts & Letters  
Sonja Lovell - Development  
Karen Wheatley - Development for College & University Prog. |
| Record/Report | Cindy Chiarello - University Planning & Analysis | Tina Grace - Office of Institutional Research | Renee Reed - University Training and Development | Ashley Privott - Alumni Relations |
Five:
Create a Plan for Post-Commission Work
The work of drafting objectives and action steps in support of the core qualities and goals recommended by the Madison Future Commission should be assigned to those directly involved in the work itself.

As a result of the work of the Madison Future Commission, the following strategic planning items will be created:

- 20-25 key issues (these are not goals or objectives)
- 12-15 prioritized core qualities
- 1 overarching goal for each core quality

These will be elements of the final report completed by September 3, 2013. The university divisions will then be charged with creating operational objectives in support of the core qualities and goals. This work will be done in coordination with the University Planning Team. Training/Interest sessions will be made available to help those who will be creating operational objectives.

Division heads will determine which of the core qualities and/or goals involve work that is or could be done by their respective divisions. Then they will be asked to create operational objectives for those.

Divisions will be asked to emphasize quality over quantity. Rather than pursue a large number of objectives, they will be asked to choose objectives that have the greatest impact on working toward the core quality.

Those resulting objectives will be placed into the planning database by January, 2014.
Six:
Create a Master Timeline
Glossary/Abbreviations

“Available for Review”: It is expected that committees will issue “final” reports by 9/3/13, but that those reports will be available for review by faculty, administrators, etc. to offer “final” comments and input.

IA: Internal Analysis Team: One of the MFC prep teams that will study vision, values, and internal concerns related to the university’s future.

ES: Environmental Scan Team: One of the MFC prep teams that will study external/global concerns related to the university’s future.

MFC: The Madison Future Commission. The University Planning Team, prep teams, and committees.

“Town Hall” Meetings: Discussion sessions conducted with major constituent groups (faculty, staff, alumni, community) to inform the planning process.

UPT: University Planning Team. Permanent group that advises the president and senior leadership team on matters related to university planning.

Firm Deadlines/Dates

2/15/13: Prep team final reports submitted
5/1/13: “Town Hall” meetings complete
6/6/13: BOV Strategic Planning Retreat
9/3/13: Final committee reports submitted
1/31/14: Resulting objectives entered into planning database