

## **Madison Future Commission Resources Committee**

### **Section 1: Introduction**

- a. The Madison Future Commission Resources Committee first met on October 25<sup>th</sup> at a kick-off meeting and concluded on May 10<sup>th</sup>. In total, the full committee met approximately eleven times along with intermittent subcommittee meetings during the eight month time period. The focus of the first few meetings included discussions regarding the process, timeline and anticipated outcomes as well as brainstorming sessions regarding the definition of resources and what should be included and considered in our discussion (i.e. fiscal, people and facilities). In order to assist committee members in the overall understanding of university resources, guest speakers were invited to present on various topics including: budget, enrollment, financial aid, sponsored programs, and outreach and engagement.

The committee worked in smaller groups at various stages throughout the process. In the first stage the groups gathered “themes” from the Listening tours, Town Hall Meetings, Internal Analysis Report and Environmental Scan Report. The themes then helped guide the committee in development of the strategic issues on March 19<sup>th</sup> and core qualities on May 10<sup>th</sup>.

Throughout the entire process, the committee members were encouraged to openly brainstorm, discuss ideas/thoughts and to “Dream Big.” Initially the ideas were listed without judgment of viability but simply with a focus on the future of the institution in support of the university’s mission and vision. By completing the process, each suggested idea and associated opinions were vetted and the final list was comprised. Each member of the committee provided valuable input throughout the process and the final core qualities represent a collaborative effort by the committee.

- b. *Committee co-chair names and contact information*

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c. *Committee roster*

| <b>Name</b>      | <b>University Department or Affiliation</b> | <b>University Division &amp; Other</b> |
|------------------|---|--|
| Ralph Alberico   | Libraries & Educational Technologies        | Academic Affairs                       |
| Bryan Brown      | Computing Technology                        | Student Affairs & University Planning  |
| Robin Bryan      | Information Systems                         | Administration & Finance               |
| Bud Clarke       | College of Business                         | Academic Affairs                       |
| Frank Doherty    | Institutional Research                      | Student Affairs & University Planning  |
| Rick Gardner     | Financial Aid                               | Access & Enrollment Management         |
| Jim Hartman      | Former Board of Visitors Member             | Harrisonburg Community                 |
| Mary Helmick     | Procurement                                 | Administration & Finance               |
| Joan Houff       | Residence Life                              | Student Affairs & University Planning  |
| Win Hunt         | Facilities Planning                         | Administration & Finance               |
| John Knight      | Finance                                     | Administration & Finance               |
| Joe Manning      | Admissions                                  | Access & Enrollment Management         |
| J.W. Myers       | Provost Office                              | Academic Affairs                       |
| Eric Nickel      | University Recreation                       | Student Affairs & University Planning  |
| Cindy O'Donoghue | Communication Sciences and Disorders        | Academic Affairs                       |
| John Meck        | Rockingham County Representative            | Rockingham County                      |
| Nancy Poe        | Social Work                                 | Academic Affairs                       |
| Geoff Polglase   | Athletics                                   | Administration & Finance               |
| Jim Shaeffer     | Outreach & Engagement                       | Academic Affairs                       |
| David Taylor     | Marketing                                   | University Advancement                 |
| John Ventura     | Facilities Management                       | Administration & Finance               |

**Section 2: Key Strategic Issues**

**Primary Issues**

| <b>Working in Favor of Mission</b>   | <b>Undetermined</b>  | <b>Working Against Mission</b>   |
|--|--|--|
| Its people are Madison's most valuable resource and a highly qualified workforce is an asset to JMU. | Students, faculty and staff expectation for technological services and infrastructure is increasing. | The university is increasingly faced with unpredictable state and federal funding.   |
| Changing and improving alumni demographics may offer enhanced funding opportunities.                 |  | Financial aid resources impact the university's ability to attract the highly qualified and diverse student body it desires. |
|  |  | The university tends to add new programs and services without evaluating or reprioritizing the current use of resources.     |

### Secondary Issues

| Working in Favor of Mission   | Undetermined  | Working Against Mission |
|---|---|-------------------------|
| Current employee commitment results in a collaborative and effective staff.   | Technology advances are changing what is required to support operational services and instructional delivery. |                         |
| The student-centered approach results in strong student satisfaction with their JMU experience as reflected in student satisfaction surveys, retention, and graduation rates.                           | Technology offers opportunities to change the way instruction is delivered and certified.                     |                         |
| The university's attractive campus and location are assets for recruiting and retaining students and employees.   |   |                         |
| The university has the potential to develop a culture of entrepreneurship that could provide the basis for reaching new markets and developing innovative ideas to attract new private revenue sources. |   |                         |
| The university's welcoming culture is a significant strength.   |   |                         |

### Tertiary Issues

| Working in Favor of Mission                  | Undetermined  | Working Against Mission  |
|--|---|--|
| JMU's niche is the undergraduate experience. | The university's in-state tuition is low compared to Virginia peers and the comprehensive fee is high as compared to Virginia peers.  | JMU's historic lack of robust fundraising limits our ability to innovate and recruit.                          |
|  | The changing landscape of conference affiliation will have a major impact on the resources of the university's Athletics programs.  | State regulations and mandates are constraining efficient operations.  |
|  | The university's ratio of undergraduate students to graduate students is atypically high for an institution of our size, thus impacting such things as revenue diversity and labor force opportunities. | The current Athletics funding model will be difficult to sustain long-term for an institution the size of JMU. |

### Section 3: Core Qualities and Goals

| Core Quality   | Attendant Goal(s)  |
|--|--|
| <p>A highly motivated and qualified workforce is always a key asset to the university's success.</p>   | <p>Goal 1: To enhance recruitment and retention of a highly qualified workforce, the university will establish, maintain, and meet compensation and benefits targets based on market and internal pay parameters.</p>  |
|  | <p>Goal 2: Motivation and qualification of the workforce will be enhanced by a continuous investment in professional development as well as through the liberal use of awards and bonuses in recognition of the highest quality work.</p>  |
|  | <p>Goal 3: The university will openly foster a healthy work/life balance in our employees by emphasizing appropriate staffing and by being responsive to employee needs.</p>   |
| <p>Our financial aid programs must be competitive with peer institutions and have a continuingly positive impact on the university's ability to attract and maintain a highly qualified student body, resulting in a positive impact on access, retention, and graduation for all qualified students from all economic, social and ethnic backgrounds.</p> | <p>Goal 1: Change the initial eligibility requirement for in-state grants from students with expected family contributions (EFC) at or below 41% of James Madison University's cost of attendance to students with EFC's at or below 50% of James Madison University's Cost of Attendance.</p>         |
|  | <p>Goal 2: Decrease reliance on state and tuition and fees generated university grant dollars while expanding financial assistance programs, such as the Madison Achievement Scholarship, with alternative resources to enhance the university's ability to compete for highly qualified students.</p> |
| <p>Since innovation is an important university value, we regularly evaluate the effectiveness of new and current programs and services while prioritizing resources for maximum efficiency.</p>  | <p>Goal 1: Decisions regarding resource allocation will be based on established processes, which integrate assessment and evaluation with cost-benefit factors (including but not limited to monetary/financial, political, legislative, environmental and societal influences.)</p>                   |
| <p>Intercollegiate Athletics contributes to a vibrant student experience bringing pride, positive energy and national exposure to the university. Student-athletes will experience a holistic program emphasizing personal development, academic achievement, civic engagement and competitive excellence.</p>   | <p>Goal 1: Graduation success rates for student-athletes will be within 5% of the graduation rate for all JMU undergraduates.</p>  |
|  | <p>Goal 2: We will develop and implement aggressive new strategies to expand and diversify external funding by an annual growth rate with an emphasis on reducing institutional support as a percentage of the overall athletics budget.</p>   |
|  | <p>Goal 3: Student-athletes, teams and coaches will compete annually for NCAA post-season appearances and earn conference, state and national recognition for excellence in both academics and athletics.</p>  |
|  | <p>Goal 4: We will increase the level of engagement between intercollegiate Athletics and the University's many constituents in accordance with annual targets.</p>  |

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| <p>The University will possess sufficient resources (financial, facilities, human and technology) to achieve its goals through a creative focus; developing diversified revenues with an emphasis on financial innovation and flexibility, while maintaining the belief that we hold a responsibility for providing access and affordability for all students.</p> | <p>Goal 1: We will implement innovative and flexible revenue generating strategies to achieve the university's mission and goals through diversified tuition plans, entrepreneurship and market driven revenue opportunities.</p>                       |
|  | <p>Goal 2: To maximize operational flexibility, the university will pursue designation of the state's Level III restructuring authority (which provides greater autonomy in areas of Human Resources, Finance, IT, Procurement and Capital Outlay.)</p> |

#### Section 4: “Dreaming Big”

The “Dreaming Big” theme was continually discussed throughout the work of the committee and was incorporated when identifying strategic issues and core qualities. A summary of the core qualities and goals which are considered as “Dreaming Big” are shown below with a corresponding rationale.

| Core Quality   | Attendant Goal(s)  | “Dreaming Big” Rationale   |
|--|--|--|
| <p>A highly motivated and qualified workforce is always a key asset to the university's success.</p>   | <p>Goal 1: To enhance recruitment and retention of a highly qualified workforce, the university will establish, maintain, and meet compensation and benefits targets based on market and internal pay parameters.</p>  |  |
|  | <p>Goal 2: Motivation and qualification of the workplace will be enhanced by a continuous investment in professional development as well as through the liberal use of awards and bonuses in recognition of the highest quality work.</p>  |  |
|  | <p>Goal 3: The university will openly foster a healthy work/life balance in our employees by emphasizing appropriate staffing and by being responsive to employee needs.</p>   |  |
| <p>Our financial aid programs must be competitive with peer institutions and have a continuingly positive impact on the university's ability to attract and maintain a highly qualified student body, resulting in a positive impact on access, retention, and graduation for all qualified students from all economic, social and ethnic backgrounds.</p> | <p>Goal 1: Change the initial eligibility requirement for in-state grants from students with expected family contributions (EFC) at or below 41% of James Madison University's cost of attendance to students with EFC's at or below 50% of James Madison University's Cost of Attendance.</p>         | <p>While the university has made some progress in this area, an enhanced focus on in-state grants will support the dream of providing a higher education degree to more Virginia families.</p>                               |
|  | <p>Goal 2: Decrease reliance on state and tuition and fees generated university grant dollars while expanding financial assistance programs, such as the Madison Achievement Scholarship, with alternative resources to enhance the university's ability to compete for highly qualified students.</p> | <p>The university's external fundraising has been limited and a growth in funds for additional external financial assistant programs will support the dream of an expanded diversified and qualified student population.</p> |

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| <p>Since innovation is an important university value, we regularly evaluate the effectiveness of new and current programs and services while prioritizing resources for maximum efficiency.</p>  | <p>Goal 1: Decisions regarding resource allocation will be based on established processes, which integrate assessment and evaluation with cost-benefit factors (including but not limited to monetary/financial, political, legislative, environmental and societal influences.)</p> |   |
| <p>Intercollegiate Athletics contributes to a vibrant student experience bringing pride, positive energy and national exposure to the university. Student-athletes will experience a holistic program emphasizing personal development, academic achievement, civic engagement and competitive excellence.</p>   | <p>Goal 1: Graduating success rates for student-athletes will be within 5% of the graduation rate for all JMU undergraduates.</p>  |   |
|  | <p>Goal 2: We will develop and implement aggressive new strategies to expand and diversify external funding by an annual growth rate with an emphasis on reducing intitutional support as a percentage of the overall athletics budget.</p>  | <p>Implementing aggressive new strategies for diversified revenues will support Athletics strategic planning to dream big in support of operational funding with less emphasis on student fees.</p>   |
|  | <p>Goal 3: Student-athletes, teams and coaches will compete annually for NCAA post-season appearances and earn conference, state and national recognition for excellence in both academics and athletics.</p>  |   |
|  | <p>Goal 4: We will increase the level of engagement between intercollegiate Athletics and the University's many constituents in accordance with annual targets.</p>  |   |
| <p>The University will possess sufficient resources (financial, facilities, human and technology) to achieve its goals through a creative focus; developing diversified revenues with an emphasis on financial innovation and flexibility, while maintaining the belief that we hold a responsibility for providing access and affordability for all students.</p> | <p>Goal 1: We will implement innovative and flexible revenue generating strategies to achieve the university's mission and goals through diversified tuition plans, entrepreneurship and market driven revenue opportunities.</p>  | <p>There is increasing pressures on tuition and fees and the university has not expanded revenue options in the past. The university's expansion into diversified revenue plans will provide additional financing opportunities to "dream big" and provide resources for funding goals.</p> |
|  | <p>Goal 2: To maximize operational flexibility, the university will pursue designation of the state's Level III restructuring authority (which provides greater autonomy in areas of Human Resources, Finance, IT, Procurement and Capital Outlay.)</p>                              | <p>Additional university autonomy from state regulations would provide flexibility to "dream big" in many operational areas and expand efficiencies, provide enhanced flexibility and customer service.</p>   |

## **Section 5: Enrollment Narrative**

In preparation for the committee's discussion on enrollment, a presentation was given by the Director of Institutional Research which included an overview of enrollment trends, emerging issues and future projections.

Important areas of consideration for future enrollment projections through 2020 include:

- On- and off-campus headcount is projected to grow from 19,927 to 21,272 (+7%).
- In-state student headcount is projected to grow from 13,906 to 15,124 (+9%).
- The percentage of undergraduates from out-of-state is projected to decline from 27.8% to 26.2%.
- Out-of-state student headcount is projected to grow very slightly from 5,028 to 5,068 (<1%).
- Degree-seeking graduate student headcount is projected to increase from 1,512 to 1,643 (+9%).

Key resource issues to consider as enrollment projections and resource funding strategies are implemented over the next six-years include:

- As we increase the percentage of students from Virginia and enrollment growth slows, there will be revenue implications.
- At the state and national levels there will be increased pressure to constrain tuition and fee costs for students.
- The University will need to consider alternative strategies to increase efficiencies to offset slower enrollment growth and external pressures to reduce costs.
- There will be a significant need to increase institutional grants to offset declines in federal monies.
- Additional scholarships and grants will be needed to continue to attract the best out-of-state students to JMU.
- To grow the graduate school will require additional resources, including faculty, staff and operating funds.
- Additional resources will be required to increase the diversity of the student body.

## **Section 6: Engagement Narrative**

In 2010 JMU received the Carnegie classification as a community engaged institution in recognition of the institution's vision of becoming the model engaged institution through the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. This is clearly evident by the many volunteer activities that our faculty, staff and students support including the multiple outreach activities by our athletic teams, the many music and theatre performances by our students and the outreach JMU provides to school divisions.

The two core qualities that incorporate engagement include the following:

- “A highly motivated and qualified workforce is always a key asset to the university’s success.” That is, a key part of becoming highly motivated is being engaged not only in our jobs but also with our JMU community as well as a greater community. A collaborative relationship, each sharing ideas will strengthen the university’s vision of an engaged institution.
- “Intercollegiate Athletics contributes to a vibrant student experience bringing pride, positive energy and national exposure to the university. Student-athletes will experience a holistic program emphasizing personal development, academic achievement, civic engagement, and competitive excellence.” This core quality cannot be achieved without the student athlete becoming engaged with ideas and the community. As with all students, our mission is to prepare educated and enlightened students and to accomplish this we provide opportunities for students to engage with ideas and with the community. We accomplish this with our student athletes through their many outreach events they hold for children and non-profit organizations.