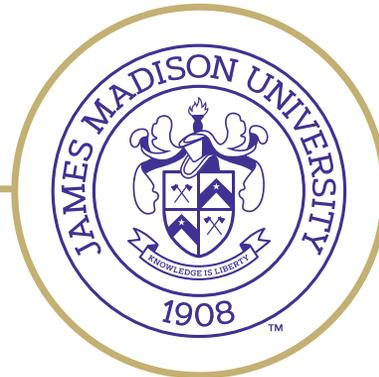


Academic Excellence Committee

September 14, 2023



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

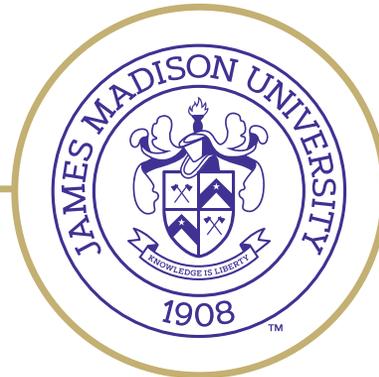
Academic Excellence Committee
Thursday, September 14, 2023, 1:00 p.m.
Highlands Room

Agenda

1. Opening Remarks and Approval of Minutes for April 20, 2023 Meeting*
2. Academic Affairs Divisional Update
Heather Coltman, Provost and Senior Vice President
3. College Spotlight: College of Integrated Science and Engineering (CISE)
Bob Kolvoord, Dean
Jason Forsyth, Associate Professor, Engineering
Megan Caulfield, '24 Engineering major
Amber Oliver, '24 Computer Science major
4. Student Panel: Work-based Learning Experiences
Steve Whitmeyer, Associate Dean for Research and Scholarship, College of Science and Mathematics
Jack Christman, '23 Bachelor of Science, Chemistry
Brian Wachter, '24 Dietetics major
Mya Wilcox, '24 Public Administration major, Honors Interdisciplinary Studies and Spanish minors
5. Faculty Senate Report
Kathy Ott Walter, Speaker
6. Topics of Interest for Future Meetings

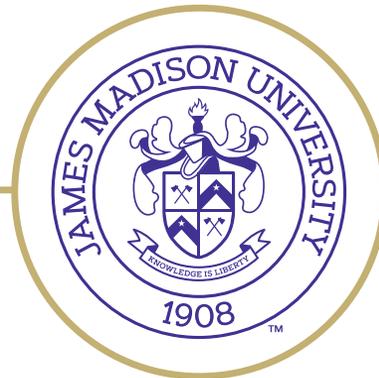
*Action Required

Opening Remarks and Approval of Minutes



Academic Affairs Divisional Update

Heather Coltman
Provost and Senior Vice President



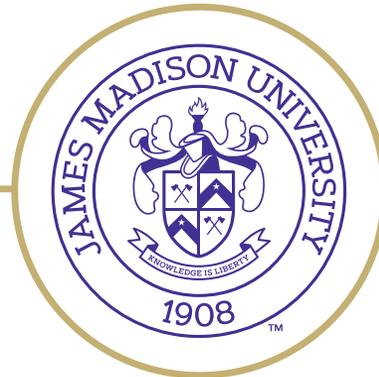
Integrated Science and Engineering (CISE)

Bob Kolvoord, Dean

Jason Forsyth, Associate Professor, Engineering

Megan Caulfield, '24 Engineering major

Amber Oliver, '24 Computer Science major





The College of Integrated Science and Engineering (CISE – pronounced “size”)



We value theory, but we thrive on application.

Enrollment Growth



How has enrollment changed over time? (E-01)

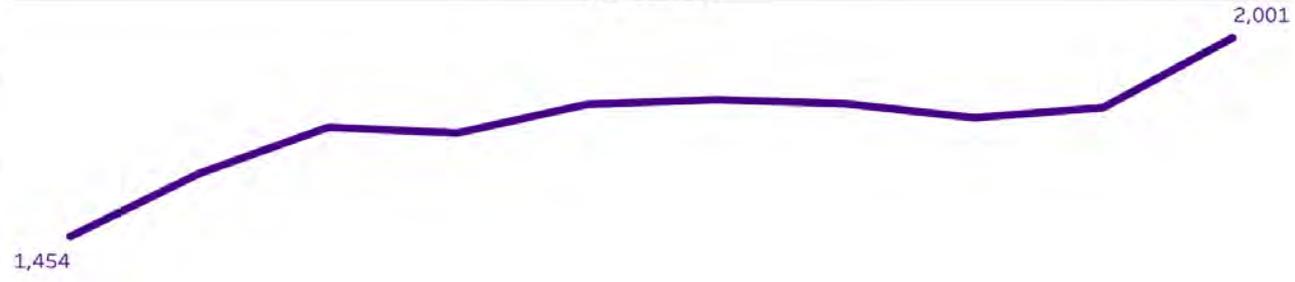
FILTERS

From Fall 2013 to Fall 2022:

Enrollment increased by
547 students
(▲37.6%)

Term: Start Year: End Year:

- Student Level:
- Degree/Certificate-Seeking?:
- Full-time/Part-time:
- College:
- Department:
- Major:
- Race/Ethnicity:
- Residency:





CISE Today

■ Undergraduate

- Computer Science
- Engineering
- Geography
- Information Technology
- Integrated Science and Technology
- Intelligence Analysis
- *Biotechnology

■ Graduate

- MS Computer Science (Information Security)
- MS ISAT (Environmental Management and Sustainability with the Univ. of Malta)
- Graduate Certificate in CyberIntelligence

Our Focus

- Experiential
- Real-world
- Big problems
- Technical and non-technical aspects



The Future of CISE

- Sustainability
- AI
- Continued quality teaching and scholarship
- Continuing to be nimble, adaptive and ready to explore whatever comes next

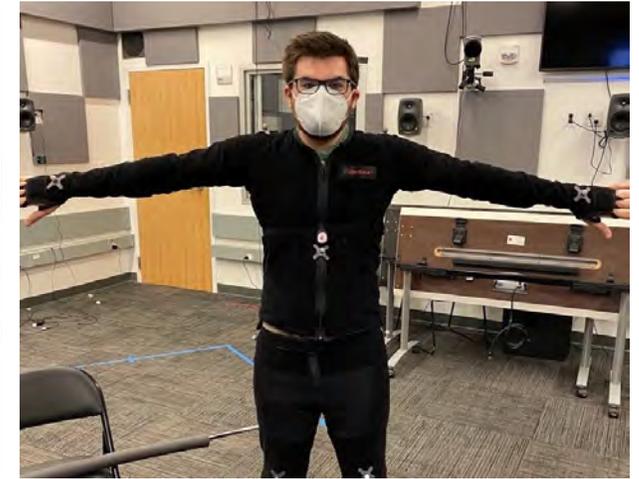
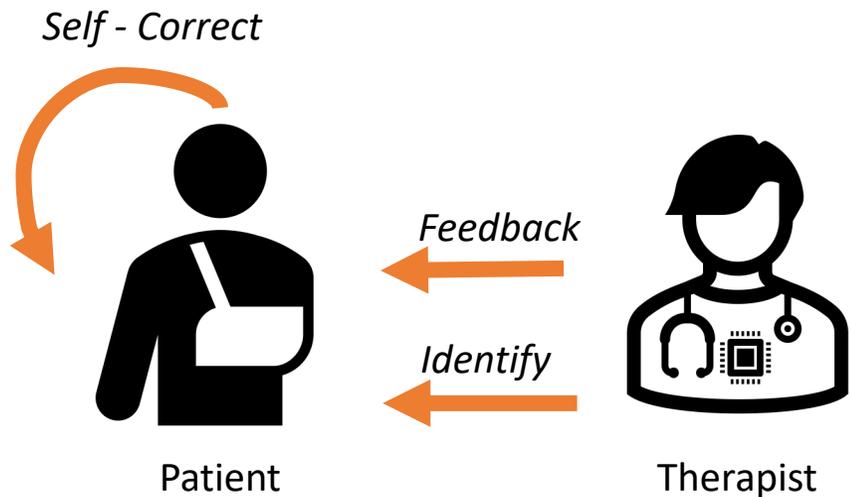




Faculty-student collaboration

- Dr. Jason Forsyth, Associate Professor and Megan Caufield, Senior, Department of Engineering

Undergraduate Engineering Research and Wearable Computing



DEPARTMENT OF
ENGINEERING
JAMES MADISON UNIVERSITY

Braille Writing Through Passive Haptic Learning



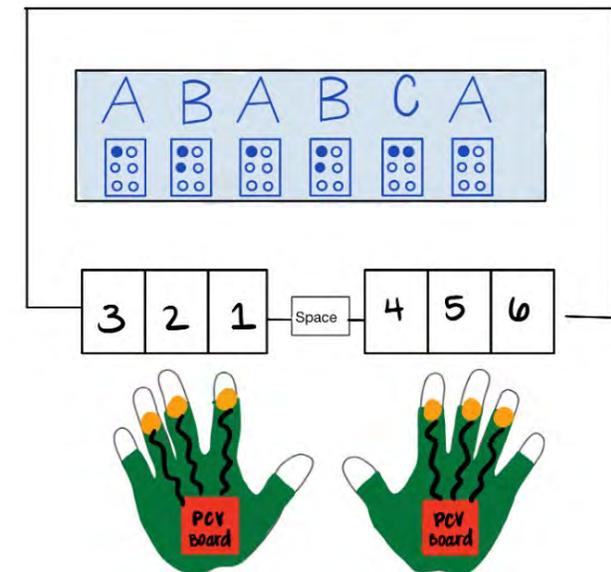
Perkins Brailier



Passive Haptic Learning



Chameleon Tactile Display at VSDB

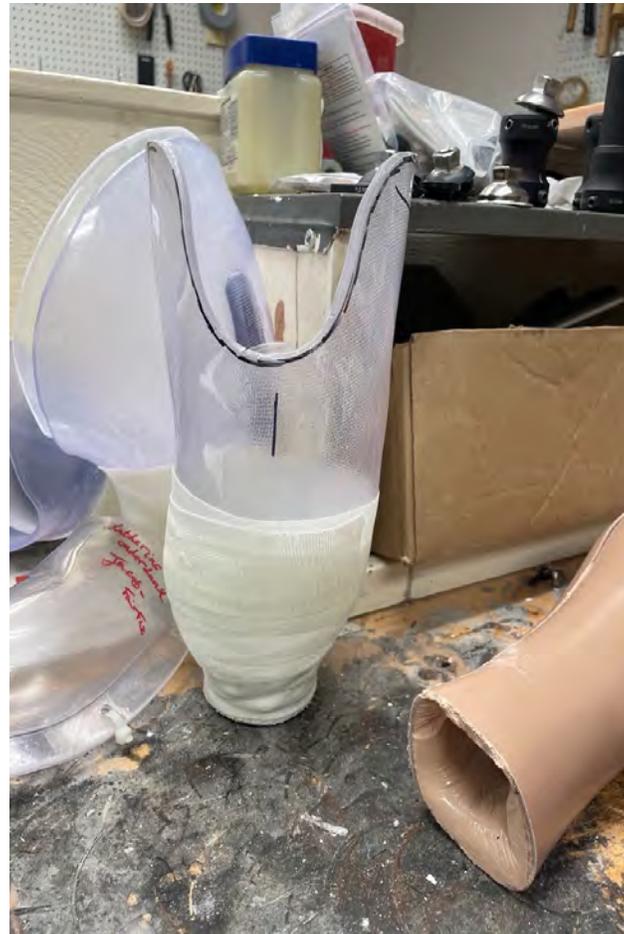


Braille Writing Experimental Design

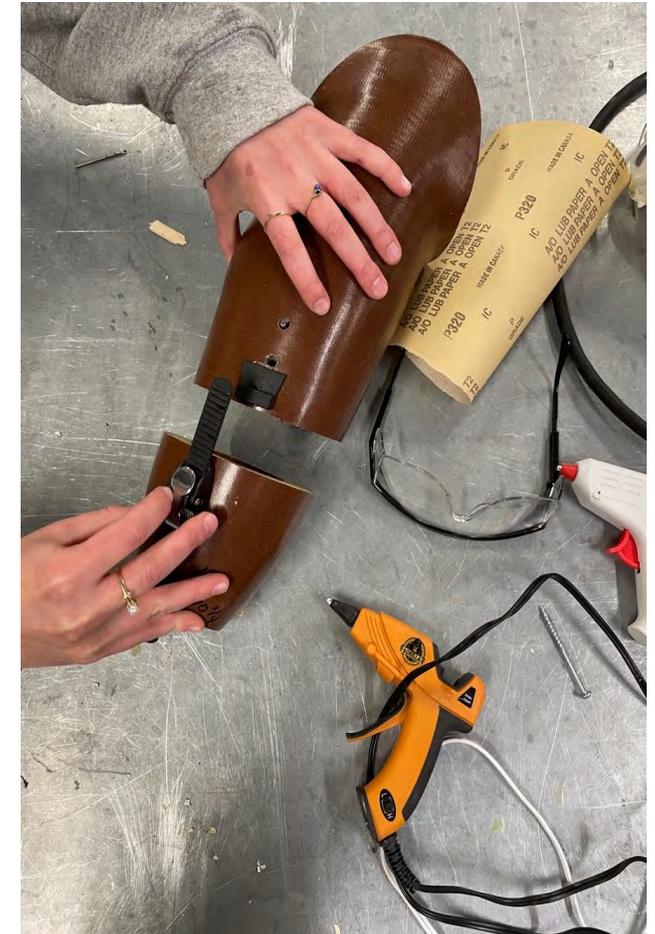
Capstone Projects and Summer Internship



Volume Adjustable Prosthetic
Capstone Project



Transtibial Test Socket Hanger
Clinic Internship



Length Adjustable Prosthetic
Capstone Project



Business-Industry Connections

- Industrial Partner Program
- CISE Career and Internship Fair
- Placement Data



Work-based Experiences

- Amber Oliver – Senior, Computer Science major



CISE in Summary

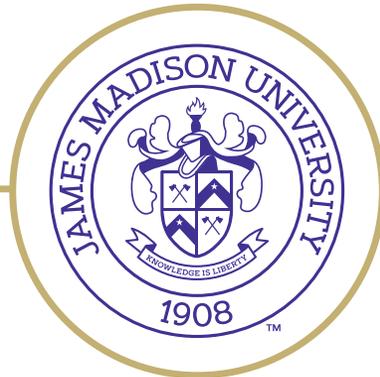
- Agile and adaptable
- Growing
- Engaged
- Faculty and students working on wicked problems
- Focused on the future



Work-based Learning Experiences Student Discussion

Moderator:

Steven Whitmeyer, Associate Dean for Research and Scholarship
College of Science and Mathematics





Panel Discussion Participants

Jack Christman

Laboratory Analyst, Merck & Co. Inc.
B.S. in Chemistry, Class of 2023
Merck intern, January–June, 2023

Brian Wachter

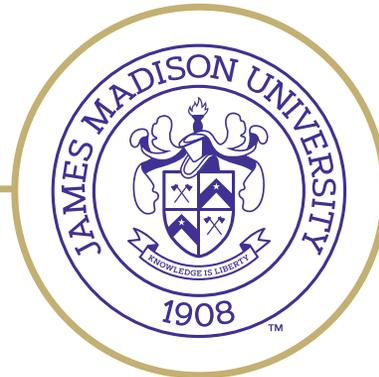
Dietetics major, Class of 2024
Intern at Warren Memorial Hospital, June–July, 2023

Mya Wilcox

Public Administration major, Class of 2024
Governor's Fellow, May–August, 2023

Faculty Senate Report

Kathy Ott Walter, Speaker



Faculty Senate Written Report to the Board of Visitors September 14th and 15th, 2023

September 2023 Resolutions/Motions

First Read

- Motion on JMU's ALICE (Asset Limited, Income Constrained, Employed) population
 - this motion calls upon the administration to develop a tangible action plan to provide its custodial staff and other members of the ALICE population who work for JMU with a decent living wage, and to implement this plan as soon as possible; and
 - that the JMU faculty senate requests the administration to provide quarterly reports to the Faculty Senate Budget Committee on its progress toward implementing this plan.
- Motion Regarding the Dissolution of the Provost's Core Curriculum Appraisal Task Force (Sent to committee)

Resolutions

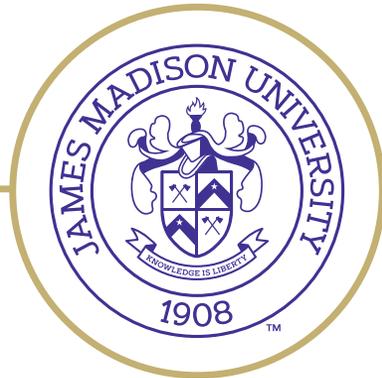
- Holocaust Remembrance Resolution (passed)
- Resolution Eliminating Term Limits for Faculty Senators (passed)

In total we passed four resolutions, donated \$10,000 to The Pantry at JMU, a joint effort on campus supported by the Basic Needs Advisory Board, that supports students who are facing food insecurity, and we wrote a statement supporting human rights in Iran.

It has been the goal of the steering committee to focus more on policy recommendations than motions, so although the number of resolutions are down considerably from previous years, we are working hard to have conversations with stakeholders before putting a motion forward. For example, we submitted feedback for the Academic Affairs Policy Process, the AUH policy, and faculty hiring guidelines. Steering plans to revisit resolutions from previous years to see where they stand and explore next steps..

This year we are committed to working across the board to ensure good communication between the senate and administration. We would like to track growth and shrinkage in departments across the university to better understand how the university is shifting.

Topics of Interest for Future Meetings



Advancement and Engagement Committee

September 14, 2023



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

Advancement and Engagement Committee
Thursday, September 14, 2023
Board Room
7:00 p.m.

Agenda

1. Approval of Minutes* – April 20, 2023
2. Earned Media and Social Presence
Mary-Hope Vass, Executive Director of University Communications
3. Digital Advertising Impact
Andy Perrine, Associate Vice President, Marketing and Branding
4. Market Study
Kennedy and Company
5. Topics of Interest for Future Meetings
Nick Langridge, Vice President for University Advancement
6. 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 20, 2023. Mr. Craig Welburn, Chair called the meeting to order at 2:50 p.m.

COMMITTEE MEMBERS PRESENT:

Edwards, Terrie
Rothenberger, John
Stoltzfus, Michael
Welburn, Craig, Chair

ABSENT:

Jankowski, Maria

OTHERS PRESENT:

Alger, Jon, President, James Madison University
Battle, Mike, James Madison University Alumni
Bradley, Miriam, Assistant Vice President for Principal Relations Development
Brock, Pam, Senior Director of Marketing
Campbell, Cannie, Associate Vice President for Constituent Engagement
Coe, Ann Marie, Associate Director of Events
Funkhouser, Savanna, Assistant Director, State Government Relations
Gilligan, Jeff, Associate Vice President for Development
Herod, Maribeth, Rector for James Madison University Board of Visitors
Langridge, Nick, Vice President for University Advancement
Lowry, Jared, Athletics Development Officer
Meck, John, Director of Corporate and Foundation Relations
Meyers, Chris, Director of Enrollment Marketing
Read, Caitlyn, Director of State Governmental Relations
Risch Mott, Karen, Director of Annual Giving
Roth, Justin, Associate Director of Digital Marketing
Sajko, Whitney, Director of Donor Relations
Smith, Sheila, Associate Vice President for Advancement Planning and Operations
Vass, Mary-Hope, Executive Director of Communications

APPROVAL OF MINUTES

The minutes of the February 9, 2023 meeting were brought before the committee and approved as presented on a motion by Michael Stoltzfus, seconded by Terrie Edwards.

FUNDRAISING REPORT

Jared Lowry reported that the Duke Club has had \$4 million donated and that they are ahead for the amount raised at the same time last FY.

Jeff Gilligan reported through April 14, 2023 \$22.2 million has been donated in FY23. Our Annual Giving total remains strong at \$2.3 million. In our Individual Major Gifts category, we have raised over \$3.9 million. Our Organizational Major Gift category is in a very strong position with a total of \$9.2 million to date. Planned Giving has raised \$513k in realized commitments with conditional expectancies of \$3.9 million.

The pipeline holds 82 Pre-solicitation requests for \$7.4M and 86 Solicitations for \$14M. To date there are 104 Closed Major Gifts for \$17.7M.

VICE PRESIDENT'S UPDATE

Nick Langridge gave an update on the Big Ideas working group identifying Sheila Smith and Chris Orem as co-chairs. He also highlighted conversations with the Federal Dukes Alumni affinity organization in the capital area. He introduced Mike Battle, who is a leader among the group and who spoke about the early successes.

ENROLLMENT MARKETING

Chris Meyers presented an overview of how university advertising strategies have expanded JMU's reach and connected future Dukes. Advertising strategies include print ads, billboards and college search sites. Advertising analytics included impressions, clicks, and conversions. Class of 2027 enrollment has exceeded all goals with a total of 3,264 deposits made as of April 6, 2023.

SPRING EVENTS

Whitney Sajko, Cannie Campbell and Justin Roth reviewed recent and upcoming events at JMU. They highlighted the Reddix Center for First Generation Students dedication and the Alumni Awards Ceremony. They went on to outline the upcoming Reunion Weekend and the Women for Madison Summit to be held in May. Events are one of the best ways to engage with our donors and alumni.

MADISON TRUST

John Meck and Karen Risch Mott reported on the 10th Annual Madison Trust, this year's event boosted the cumulative total giving to \$1 million. Through the hybrid format a record 31 donors committed \$155,000 toward the 10 innovative project ideas.

GOVERNMENT RELATIONS

Caitlyn Read gave the committee an overview of engagement in Government Relations, outlining important opportunities to work directly with legislators. Engagement strategies include district visits when the General Assembly is out of session, hosting spring and fall campus visits, participation in "off-season" work groups. In session engagement includes Student Lobby Day along with a JMU legislative reception and visits to legislators in their offices by Senior Leadership and BOV members.

CLOSED SESSION

The chair then called for the committee to move into Closed Session. Terrie Edwards made the following motion: “I move the committee go into closed session to discuss the following matter: Pursuant to Section 2.2-3711.A.8 of the Code of Virginia, to discuss matters relating to gifts and fundraising activities.”

The motion was seconded by Michael Stoltzfus and the committee moved into closed session.

Following the closed session, Mr. Welburn 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:

Craig Welburn, Chair
John Rothenberger
Michael Stoltzfus
Terrie Edwards

The meeting adjourned at 4:23 p.m.

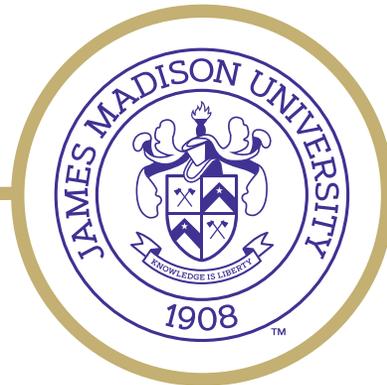
Respectfully submitted,

Craig Welburn, Chair

Donna L. Harper, Secretary to the Board

Advancement and Engagement Committee

September 14, 2023



Earned Media and Social Presence

Mary-Hope Vass, Assistant Vice President for University Communications

Trey Secrist, Assistant Director of Social Media





Focus areas of University Communications

Executive & Crisis
Communications

Social Media

Media Relations

FOIA

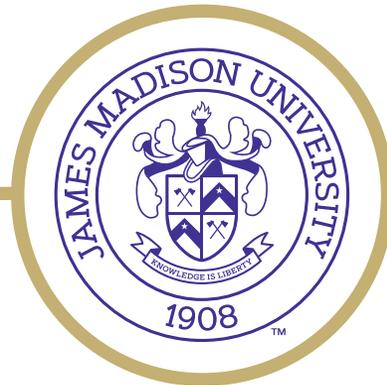
- Total of 7 staff members
- Collaborate with partners to share news and stories that connect the universities audiences
- Monitor trends and listen to social channels
- Issues management – being proactive



Goals

- Create, curate and distribute content
- Grow and cultivate public and private online communities
- Secure earned media placements in statewide, national and priority markets
- Expand on non-traditional methods to connect with reporters
- Educate and empower internal and external partners

Earned Media Placements



JMU in the News

The Washington Post
Democracy Dies in Darkness

LOCAL EDUCATION

Va. teaching jobs at risk as state manages delays in issuing licenses

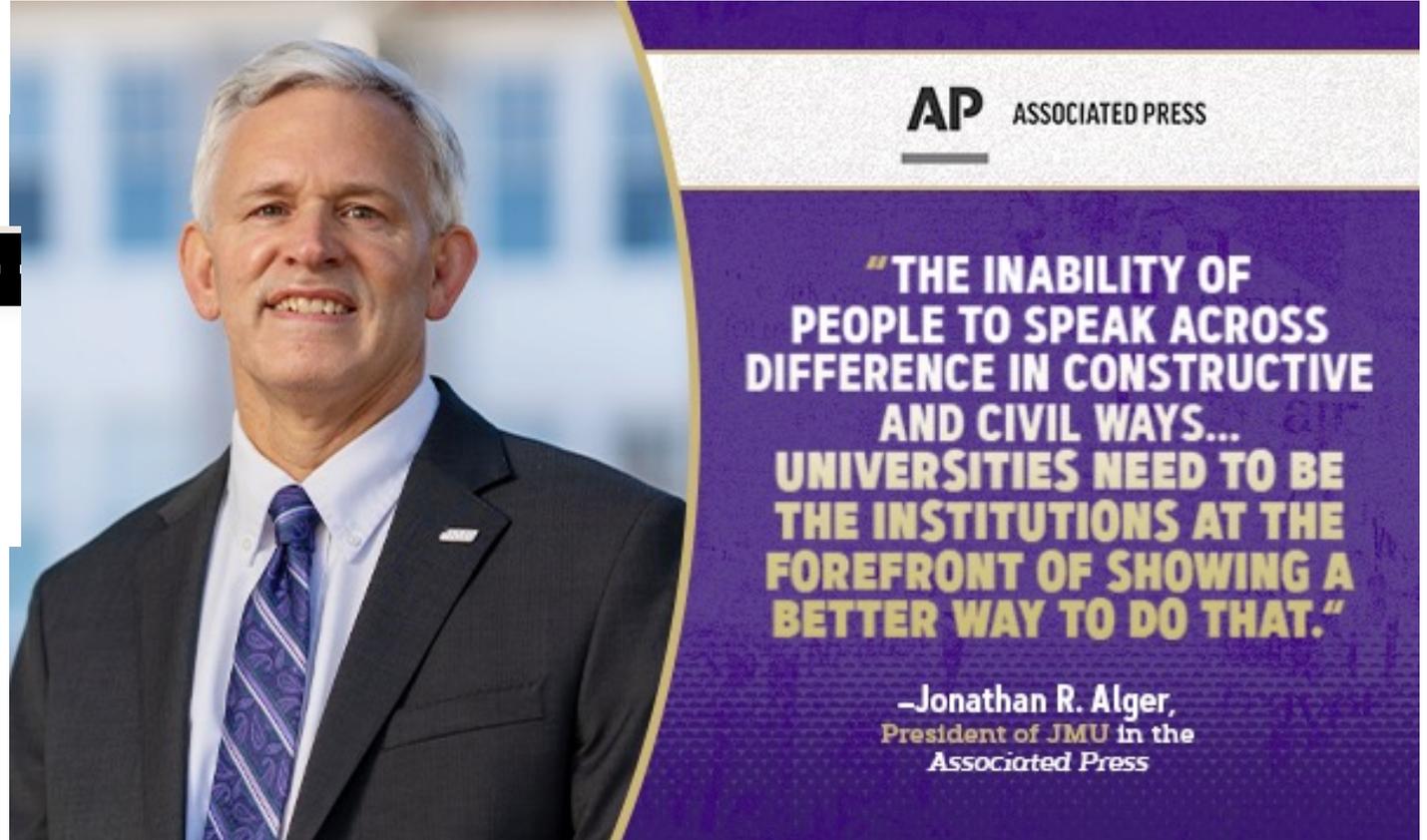
AP U.S. WORLD POLITICS VIDEO SPOTLIGHT ENTERTAINMENT SPORTS BUSINESS SCIENCE FACT CHECK CLIMATE HEALTH

JMU intelligence expert outlines implications of Russia withdrawal from New START

How to Make a Staycation Feel Like an Actual Break

A 'mental flip' can help make your time off more restorative, even if you're not traveling far.

Share full article 178



Media Relations Metrics



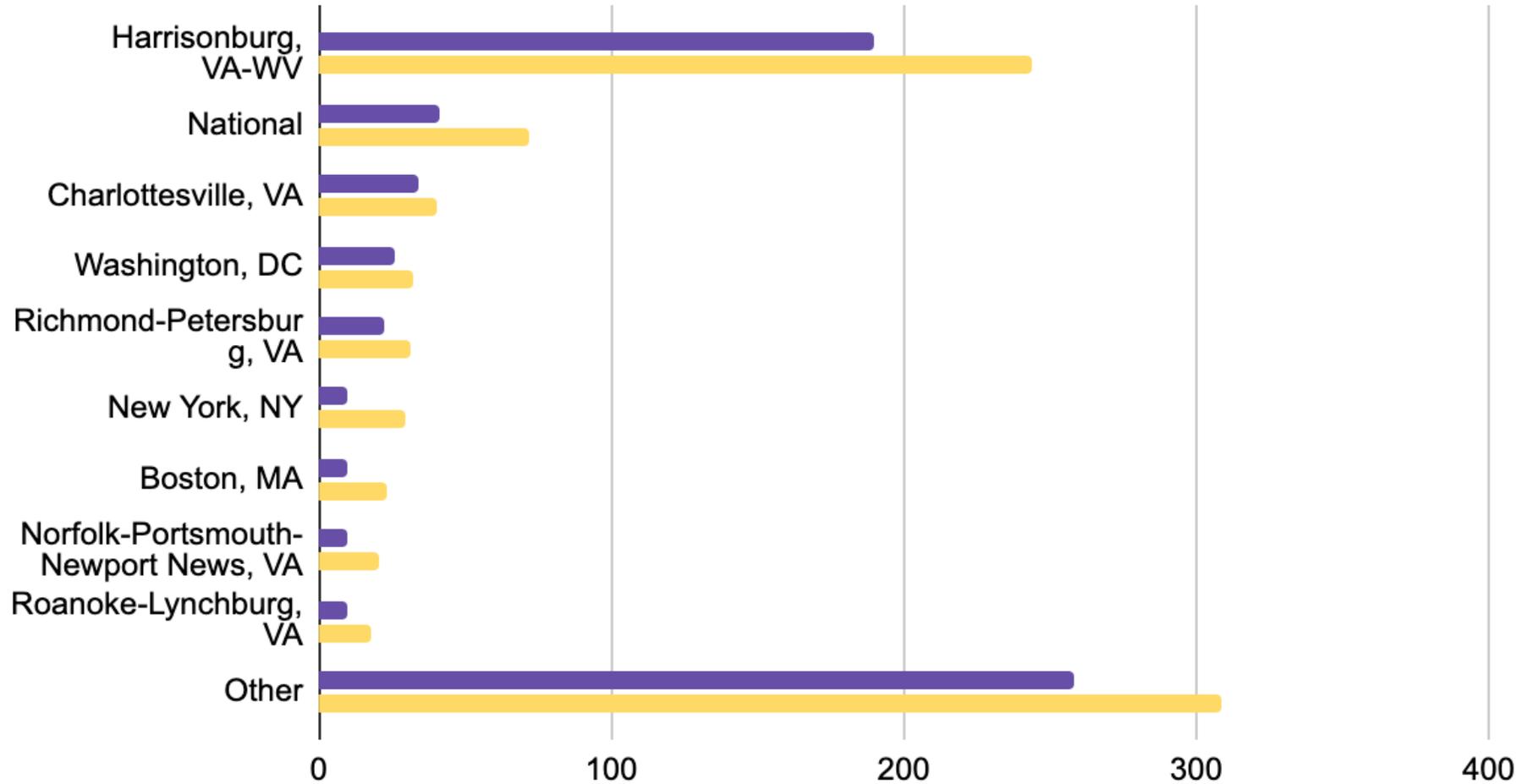
Share of DMA Mentions- FY23



Harrisonburg, VA-WV: 29.8% National: 8.8% New York, NY: 4.9% Richmond-Petersburg, VA: 3.9%
Roanoke-Lynchburg, VA: 3.8% Washington, DC: 3.7% Charlottesville, VA: 2.8% Norfolk-Portsmouth-Newport News, VA: 2.6%
Pittsburgh, PA: 2.2% Other: 37.7%

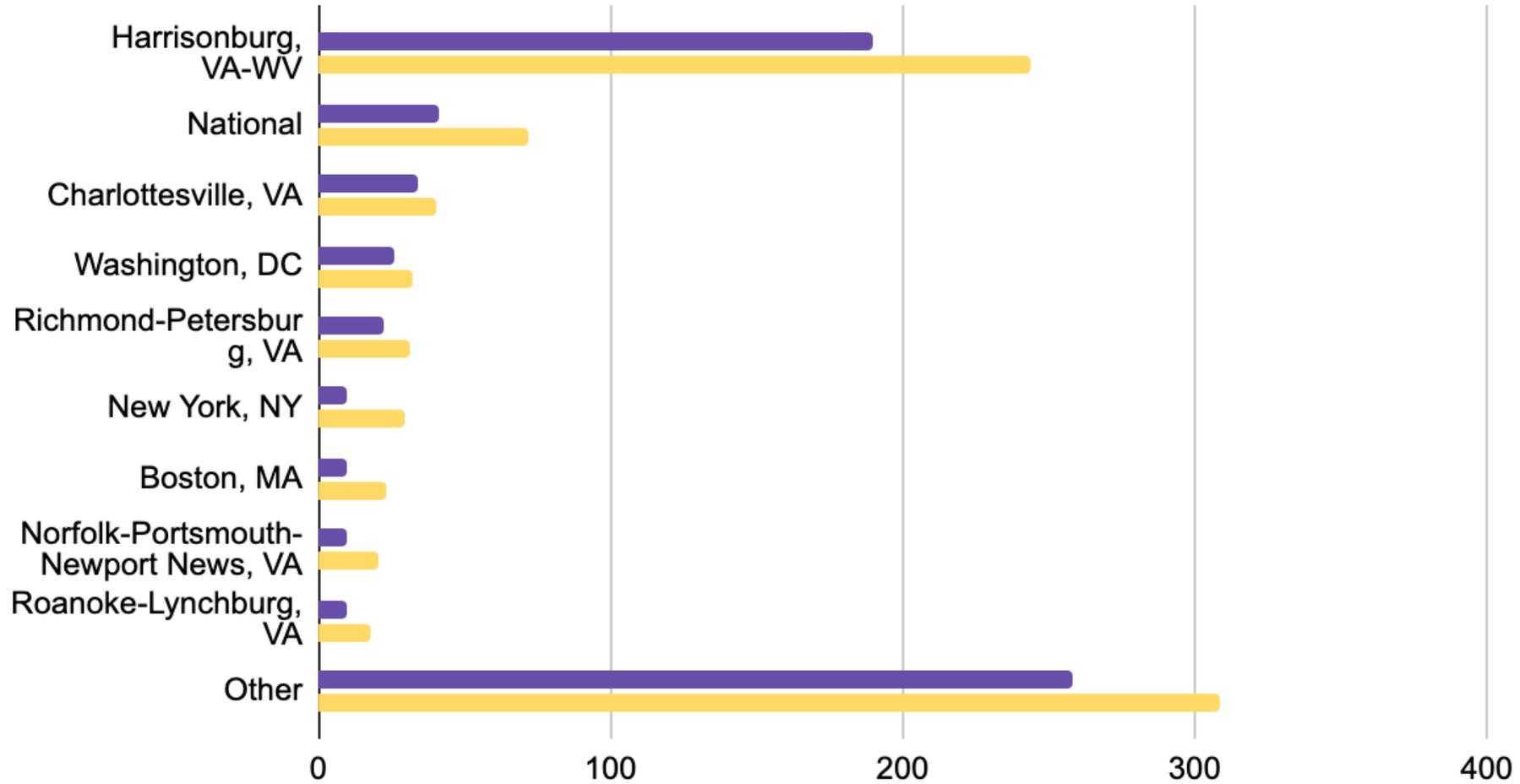


Team earned media by media market



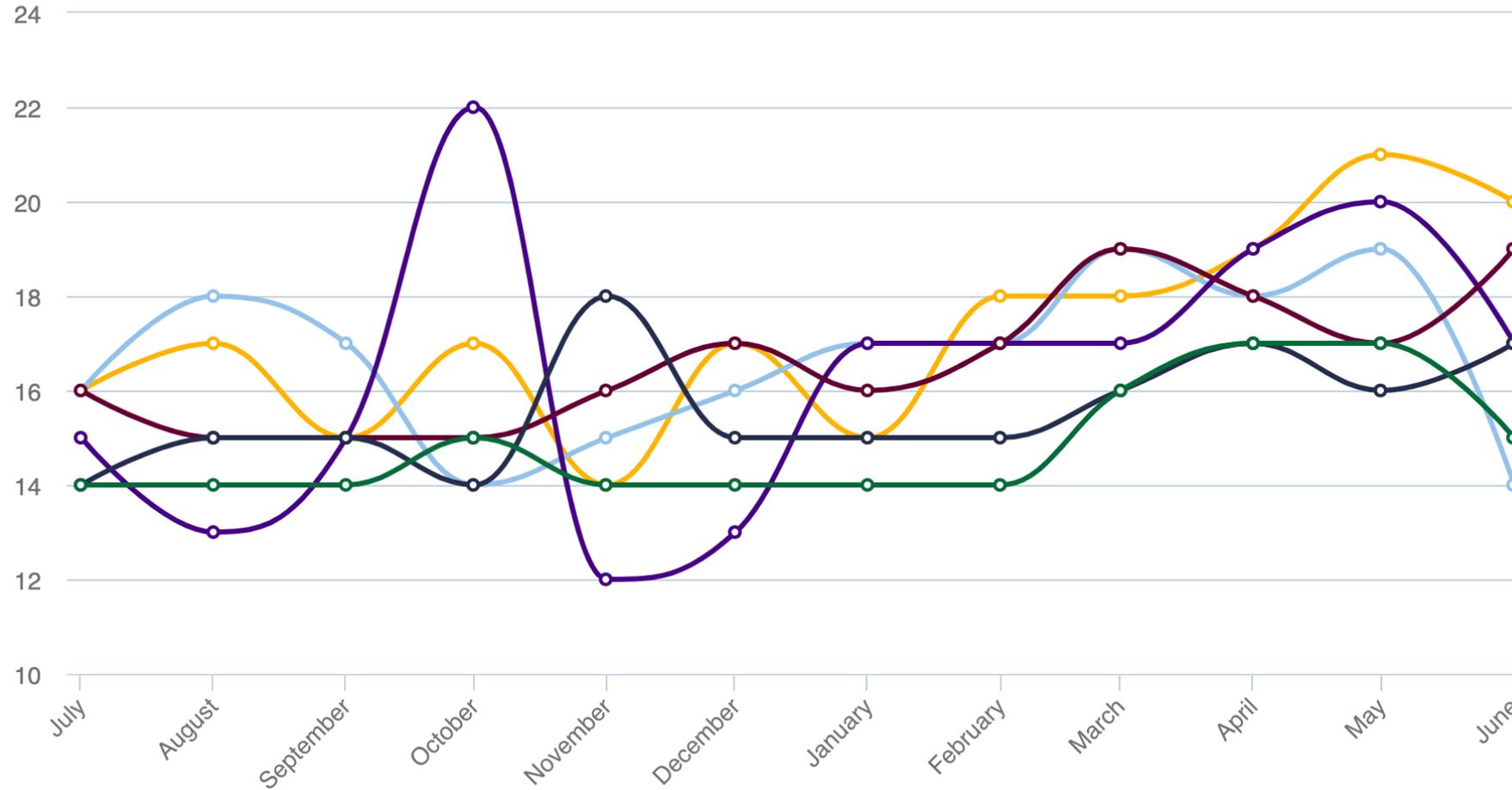


Team earned media by media market





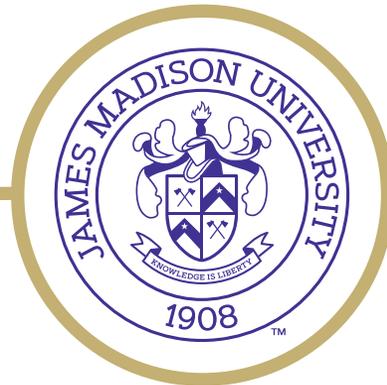
Company Impact Over Time



- Virginia Commonwealth University (18)
- Virginia Tech (17)
- James Madison University (17)
- Marshall University (17)
- Georgia Southern University (16)
- Texas State University (16)
- University of Virginia (16)
- Coastal Carolina University (15)
- University of South Alabama (15)
- William & Mary (15)
- George Mason University (15)
- Appalachian State University (14)
- JMU Faculty (12)
- Old Dominion University (17)

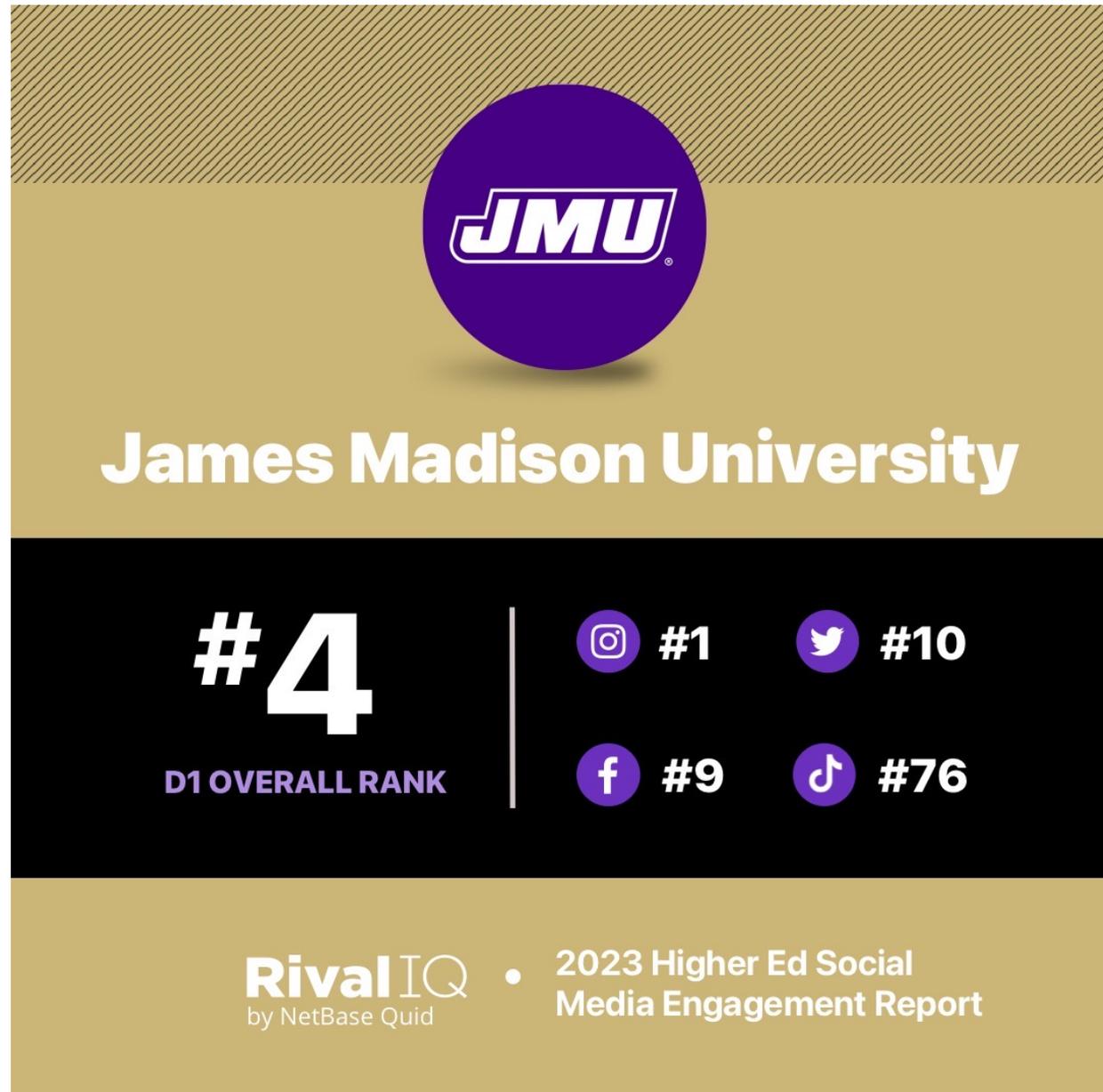


Social Media Presence



Achievement

- Rival IQ creates annual industry benchmark comparisons
- JMU ranked **#4 in social media performance for FY23**
 - Measures engagement rate (*i.e. content efficiency*)
 - Compares all D1 Schools in US
 - Only school with a “top 10” ranking in all active channels
 - Outperform all in-state schools
- Not the first time JMU has been recognized
 - Ranked in top 10 every year since inaugural report in 2016

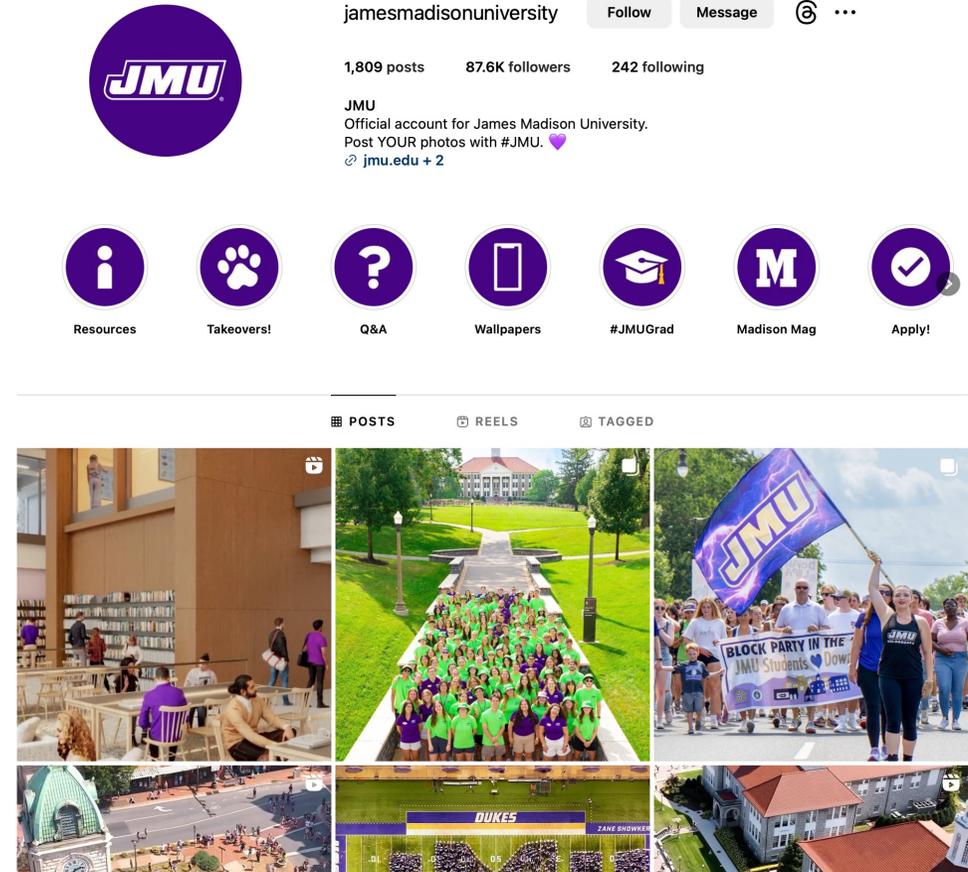




Analyzing Social Media

FY23 Social Media Key Performance Indicators

- Total Impressions (*amount of times content is served*):
24,312,130
- Total Engagements (*interaction with piece of content*):
1,442,970
- Total Video Views (+3 second view):
2,801,816
- Engagement Rate (*total impressions/total engagements*):
5.23%
- Account Growth
424,610 total fans





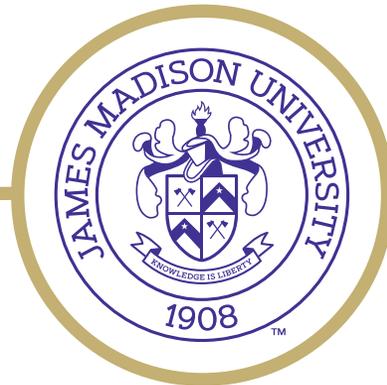
Challenges & Strategy

- **Challenges**
 - Complex distribution algorithms
 - Disparate audiences
 - Evolving trends
 - Community management
- **Strategy**
 - Informational videos
 - “In the moment” video content
 - More curated and actively moderated parents FB group



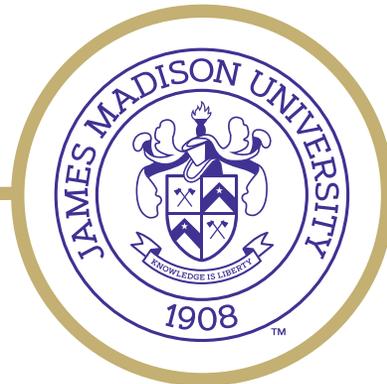
Digital Advertising Impact

Andy Perrine, Associate Vice President for Marketing and
Branding



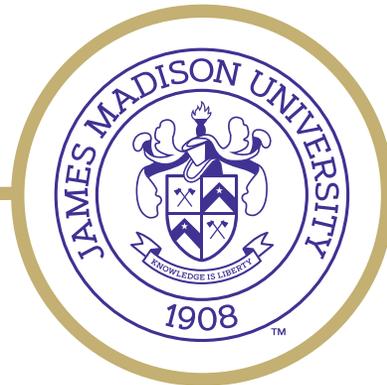
Market Study

Ben Kennedy, Founder and CEO, Kennedy & Company



Athletics Committee

September 14, 2023



THE COMMONWEALTH OF VIRGINIA THE VISITORS OF JAMES MADISON UNIVERSITY

Athletics Committee
Thursday, September 14, 2023
Festival, Ballroom B
2:45 p.m.

Agenda

1. Approval of Minutes – April 20, 2023*
2. Introductions, NCAA, Sun Belt Conference, Sports Update
Jeff Bourne, Director of Athletics
3. Sun Belt Conference Provost Meeting
Dr. Heather Coltman, Provost and Senior Vice President of Academic Affairs
4. 2022-2023 Strategic Plan Accountability Measures
Geoff Polglase, Deputy Athletics Director
5. Compliance Update
Stephen LaPorta, Assistant Athletics Director, Compliance
6. Student-Athlete Focus: Sun Belt Meeting & SAAC Engagement
Cassidy Clements, Assistant A.D., Student-Athlete Leadership Program
7. Development Report
Scooter Renkin, Associate A.D. for Development
8. Topics of Interest for Future Meetings

*Action Required

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

Minutes of the Athletics Committee

The Athletics Committee met on April 20, 2023, in Ballroom B of the Festival and Student Center. The meeting was called to order at 2:47 p.m. by John Lynch, Chair.

Present:

Lynch, John, Chair
Bell, Dickie
Major, Lara
Tompkins Johnson, Deborah
White, Jack

Others:

Bourne, Jeffrey, Director of Athletics
Clements, Cassidy, Assistant A.D., Student-Athlete Leadership
Gorton, Eric, University Media Relations Coordinator
Knight, Jack, University Counsel
LaPorta, Stephen, Assistant A.D. for Compliance
Li, Kongrong “KR”, Head Diving Coach
Lowry, Jared, Athletics Development Officer
Pass, Anthony, Associate A.D. for Integrated Health & Sports Performance
Phillips, Jennifer, Senior Associate A.D. for Student-Athlete Development/SWA
Ryan, Felicity, SAAC Representative
Soenksen, Roger, Faculty Athletics Representative
Warner, Kevin, Assistant A.D. for Communications
White, Kevin, Associate A.D. for Sports Programs

Mr. Lynch called for a motion to approve the minutes. It was moved by Deborah Tompkins Johnson and seconded by Jack White approve the minutes of the February 9, 2023, meeting of the Athletics Committee.

NCAA, Sun Belt Conference Sports Update

Jeff Bourne, Director of Athletics, recognized Kongrong “KR” Li, Head Women’s Diving Coach, for his CCSA Diving Coach of the Year honor and related team accomplishments from this past season. Mr. Bourne also recognized, Head Women’s Volleyball Coach, Lauren Steinbrecher, for her Sun Belt Conference Coach of the Year and VaSID Coach of the Year honors and highlighted including regular season champions of the Sun Belt Conference; the first SBC championship in JMU history for any sport. Mr. Bourne then provided the Committee with an overall Sports Update. JMU teams have compiled a 196-95-9 cumulative record for a .668 winning percentage. Men’s Basketball Head Coach, Mark Byington, was named VaSID State Coach of the Year. Combined with women’s basketball, JMU tied for its most total basketball

wins in program history with 48. Women's basketball claimed the league's regular season title and tournament championship, finishing 26-8 overall and 13-5 in the conference. Kiki Jefferson was named conference Player of the Year and Tournament MVP. The second "full capacity" season in the Atlantic Union Bank Center and first year in the Sun Belt resulted in positive attendance numbers as men's basketball averaged 4,306 fans per game, good for third in the league. The women averaged 2,216 fans per game, which also ranked third in the Sun Belt. Swimming and diving went 5-3 in dual meets and narrowly finished second in its first CCSA Championship meet. KR Li was named CCSA Diving Coach of the Year and Maddie Yager named both Female Diver of the Championship and Diver of the Year. Men's golf has had third- and fourth-place tournament showings during the spring season. Women's golf's reeled off three wins in the spring at the Oyster Shuck Match Play, the Golfweek/AGT Intercollegiate and the ECU Ironwood Invitational. JMU was the top seed heading into the Sun Belt Championship in April and finished eighth. Women's tennis sits at 12-7 to start its spring season, including 8-1 and second place in the Sun Belt. Men's Tennis holds a 12-9 record, including 3-5 in the Sun Belt. The Dukes were the No. 7 seed for the Sun Belt Championship. Softball sits at 23-13 overall and is fifth in league play at 8-7. Lacrosse sits at 14-1 and earned at least a share of the regular season title in the AAC. Shelley Klaes picked up her 200th win as JMU head coach with a February win over UConn. Baseball is 20-15; the Dukes are 10-0 in midweek non-conference games and currently 11th in the Sun Belt at 5-8. Indoor track and field placed seventh at its first Sun Belt Championship. JMU went on to finish as runner up at the ECAC Indoor Championships. JMU SAAC President Felicity Ryan served as chair of the Sun Belt SAAC mental health subcommittee. Lauren Sander was named the Virginia Athletic Trainers' Association Athletic Trainer of the Year. She works most closely with volleyball and oversees the Dukes Let's Talk program, supporting mental health for student-athletes. Finally, JMU debuted the Duenkel Athletics Complex at Sentara Park in September and officially dedicated the named facility in March. The expansion added game day locker rooms, concessions and improved sports medicine space. In March, JMU debuted an expanded Veterans Memorial Park softball stadium with seating up to 1,500 in addition to improved lighting, expanded press box and new wall padding. With no comments from Committee members, Mr. Bourne concluded his update.

Title IX Participation Report

Jennifer Phillips, Senior Associate A.D., Student-Athlete Development/SWA, provided a summary of the recent Title IX review conducted with each of the female sport programs to review all areas of Title IX at JMU. Ms. Phillips reported that overall, that the JMU Athletics program should be commended with its efforts to fully comply with Title IX requirements. She recognized that the coaches continue to do a great job managing their respective rosters and despite financial challenges, make accommodations where they are able. In Academic Year 2022-2023, Ms. Phillips reported that JMU met the requirements of Title IX Compliance Test 1, regarding providing proportional participation opportunities for males and females with respect to their overall enrollment in the University, and that the Department should continue to follow its current Roster Management Plan and monitor enrollment rates. It was recommended that that JMU Athletics create a plan for the Fueling Zone in Memorial Hall and that an additional Strength and Conditioning coach should be hired once the renovated Convo is reopened. Further,

it was encouraged that discussions relating to a new outdoor Tennis facility and additional renovations to the existing Field Hockey complex should continue. Ms. Phillips shared additional recommendations and findings from the review, relating to locker rooms, practice and competitive facilities, sports information and marketing/promotions, and sports nutrition. Overall, the consultant was impressed with the operations at JMU and how we have transitioned to the FBS level. Following questions from the Committee, Ms. Phillips concluded her update.

Student-Athlete Leadership Program (Dukes LEAD)/SAAC Update

Cassidy Clements, Assistant A.D., Student-Athlete Leadership Program, provided an overview of Student-Athlete Leadership Program (Duke LEAD) and highlighted the key areas of focus: Career Readiness, Civic and Community Engagement, Human Development, and Leadership Development. Ms. Clements noted that Dukes LEAD continues focus on Community Service and the need to connect with those in the surrounding community. Further, JMU Athletics has set an aspirational goal to be in the top five among community services initiatives within the Sun Belt Conference. Student-Athlete Advisory Committee (SAAC) President, Felicity Ryan (Women's Diving), then provided a SAAC update which detailed the committee's priorities and sponsored initiatives. She reflected on her time as SAAC President, her experiences growing and learning behind the scenes and collaborating with Sun Belt Conference peers, and emphasized that efforts will continue to help advocate for Diversity, Equity and Inclusion in College Athletics. Redshirt Sophomore, Demitri Turner, of Men's Soccer, will serve as the new SAAC President; his platform goals include campus and community involvement, peer support and education, and Student-Athlete voice-driving experiences. Following a brief discussion and questions from Committee Members, the updated concluded.

NCAA Waiver Update

Jeff Bourne, Director of Athletics, provided a brief update on the status of JMU's petition to the NCAA to reclassify from FCS to FBS football in one-year, opposed to the standard two-years. Mr. Bourne shared that this is a bureaucratic process, which includes review by various committees within the NCAA and also by the NCAA's Board of Directors. JMU expects to receive a final decision by the end of April.

Development Update

Jared Lowry, Athletics Development Officer, provided a fundraising update through March 31, 2023. Overall, the Duke Club is pleased with current numbers. The total number of Duke Club donors is 4,250, up 900+ donors from last year, with an aspirational goal of reaching 5,000 donors by the end of the Fiscal Year. The Annual Fund is up \$489,000 from last year, while overall fundraising is up \$867,000 from last year. Mr. Lowry shared that the Duke Club has currently met 67% of its annual fundraising goal of \$4.3M for this fiscal year. Sport Specific Giving continues to increase as Duke Club Development Officers are working with their teams to send out email solicitations this fall. Capital projects are in the planning stages and in turn, so we expect to see that number continue to grow over the course of the Fiscal Year. Mr. Lowry reminded Committee Members that re-parking and reseating for Football will occur this Spring, following the May 15 priority deadline. Following questions from Committee Members, Mr. Lowry concluded his update.

There being no further business, Mr. Lynch us then called for a motion to adjourn. It was moved by Lara Major and seconded Jack White. The meeting was adjourned at 3:50 p.m.

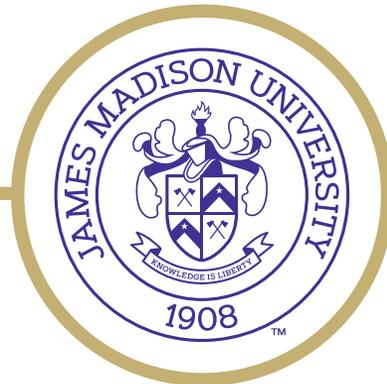
Respectfully submitted,

John Lynch, Chair

Donna L. Harper, Secretary to the Board

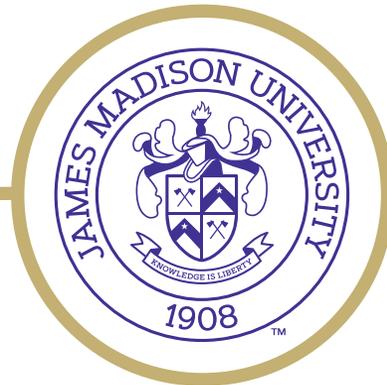
Athletics Committee

September 14, 2023



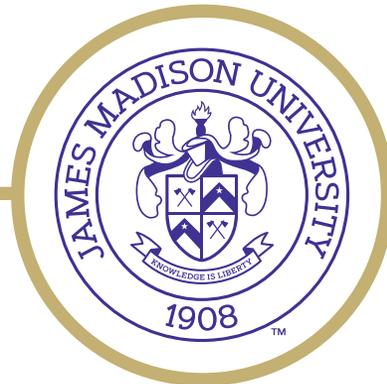
NCAA, Sun Belt Conference Sports Update

Jeff Bourne, Director of Athletics



Sun Belt Conference Provost Meeting

**Dr. Heather Coltman, Provost and Senior Vice
President of Academic Affairs**



**2022-2023 Strategic Plan
Accountability Measures
Geoff Polglase, Deputy Athletics
Director**



JMU Athletics Accountability Measures Report to the Board of Visitors September 14, 2023

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.

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) 2022-23 Measures and Results

Theme - Student-Athlete Well-Being

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
 - **AY2021-22(most recent data available) Result = 92**
- Achieve a cumulative Student-Athlete Grade Point Average of 3.0
 - **AY2022-23 Result = 3.18**
- Achieve an Institutional single year NCAA Academic Progress Rate of 985. The most recent data reflects the 2021-22 academic year.
 - **AY2021-22 Result = 993**
- Achieve top 5 status among SBC institutions for Community Service annually
 - **AY2022-23 Result = 6,352 total hours; 5th 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
 - **AY2022-23 Result – Achieved**
- Develop a financial model for Student-Athlete financial awards (ALSTON) based on academic achievement by 9.30.23 (*ongoing*)

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

Measures -

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

- 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*)

Theme - Competitive Sports Supporting a National Profile

Measures -

- Achieve top 3 status for Bubas Cup (Sun Belt overall team standings) annually
 - **AY2022-23 Result = 2nd in Bubas Cup Standings**
- Five (5) teams will win conference championships annually
 - **AY2022-23 Result = 2**

- Seven (7) teams will be represented in NCAA post-season annually
 - **AY2022-23 Result = 5**
- 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 (*ongoing*)

Theme - **Access and Inclusivity**

Measures -

- Completion of Annual Gender Equity Report and program initiatives
 - **AY2022-23 Result = Completed**
- Completion of Annual Title IX Report by external consultant
 - **AY2022-23 Result = Completed**
- Completion of Annual Athletics Diversity Report and program initiatives
 - **AY2022-23 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
 - **AY2022-23 Result = completed as outlined**
- Distribute *Engaged in Excellence* report card annually to key constituents
 - **AY2022-23 Result = completed as outlined**
- Meet Annual Athletics funding requirements for the Commonwealth of Virginia
 - **AY2022-23 Result = completed as outlined**
- Complete annual Athletics Program Reviews for continuous improvement
 - **AY2022-23 Result = completed as outlined**
- Complete annual student-athlete exit surveys and reports for continuous program improvement and planning.
 - **AY2022-23 Result = completed as outlined**

2022-2023 Strategic Plan Accountability Measures

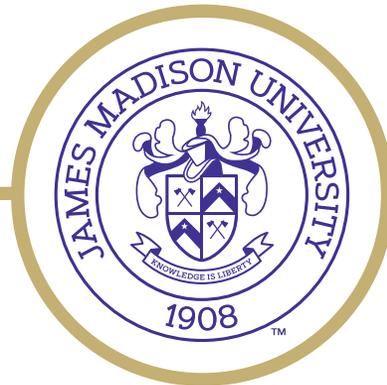


- Questions



Compliance Update

**Stephen LaPorta, Assistant A.D.,
Compliance**





NCAA Transformation Committee

- Holistic Student-Athlete Benefits Model - 8/1/2024
- Student-Athlete Voice in Decision Making - 8/1/2023
- Education and Programming - 8/1/2024
- Membership expectations - 8/1/2024



Holistic Student-Athlete Model

- Medical coverage and out of pocket expenses for athletically related injuries for 2 years following graduation or completion of eligibility
- Degree completion funds within 10 years of separation for full scholarship student-athletes
- Autonomy scholarship protections
- Career counseling, life skills programming, and academic support services
- Dedicated pathway for access to full-time clinical services of a mental health professional

Student-Athlete Voice



- SAAC oversight by senior staff member
- Establish a SAAC executive team
- One student athlete serving on any ad hoc or athletic committee established to address issues impacting student-athletes
- Student-athlete engagement at coaches meetings and operational level committees
- Student-athlete involvement on the DI Board of Directors
- Conference office must establish sport-specific engagement and advocacy groups

Education and Programming



- Mental health
- Strength and conditioning
- Nutrition
- Name, image, and likeness
- Financial literacy
- Transfer requirements
- Career preparation
- Diversity, equity, inclusion and belonging
- Sexual violence prevention

Membership Expectations



- Empowerment of Athletics Health Care Administrator
- Review of health and safety support
- Compliance review

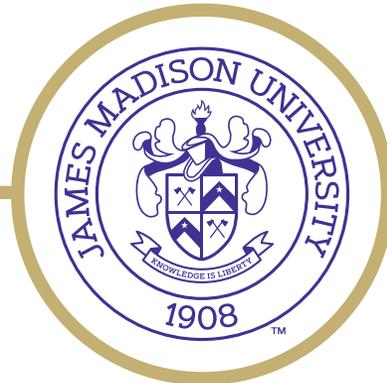


Possible Future Items

- FBS Membership Requirement
 - Attendance – immediate
 - Financial aid minimum – 8/1/2027
- Championship access and bracket composition
- Amateurism
 - Professional drafts
 - Professional opportunities
 - Delayed enrollment

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



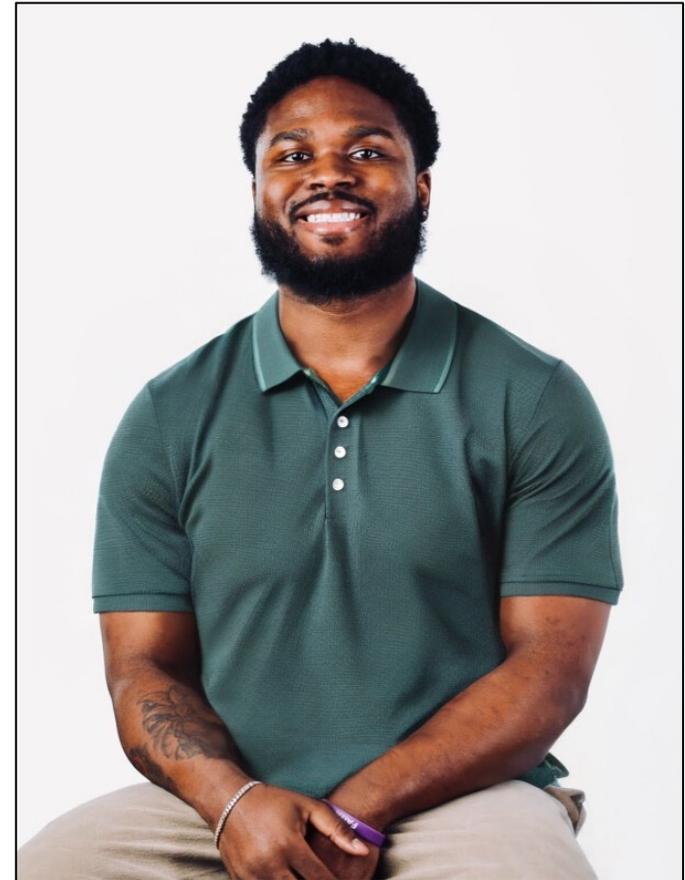
Marcus Bell

Coordinator for Student-Athlete Leadership
Development

-

UNC-Pembroke ('22)

McLendon Future Leader ('23)





| Our Staff



Elizabeth Helmich

Graphic Design Intern

Volleyball

-

Oversees @JMUDukesLead socials, creates graphics and marketing materials





| Key Areas of Focus



- Career Readiness
 - 1:1 Career Coaching Sessions
 - Suited for Success Program
 - Networking opportunities, Relationship Building

- Civic and Community Engagement
 - Achieve top-5 status among Sun Belt Institutions
 - Helper Helper App
 - NCAA Civic Engagement Day and MLK Day of Service

- Human Development
 - Self-awareness, self-esteem, and personal skills and traits
 - Athletics Orientation, Welcome Back
 - Eight (8) Affinity Groups, Expansion

- Leadership Development
 - Dukes Leadership Academy
 - Enhance leadership abilities and increase effectiveness in team environments
 - Two (2) cohorts
 - Student-Athlete Advisory Committee





| Experiential Learning



- Michael Battle ('81, '83M) and Cecelia Battle Summer Leadership Scholarship
 - Kali Findlow, Cheerleading
 - Paige Miller, Track and Field
- NCAA Student-Athlete Leadership Forum 2023
 - Rodrigo Robles, Men's Soccer



SCHOOL
James Madison University

JOB SITE
The Villas at Shenandoah Valley Westminster-Canterbury in Winchester, VA

Kali Findlow, Intern





Student-Athlete Advisory Committee



Demitri Turner

SAAC President | 2023-2024

Men's Soccer

-

Priorities: Campus and Community Involvement,
Peer Support and Education, Student-Athlete
Voice Driving Experiences



JMU | Preseason Planning

SAAC

Student-Athlete Advisory Committee (SAAC)

- Goals and Initiatives
 - Sub-Committee Planning
- Committee Structure
- Executive Board Retreat
- September General Body Meeting

- Sun Belt Summer Student-Athlete Summit Recap
- Sun Belt Fall Meeting



Development Update

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

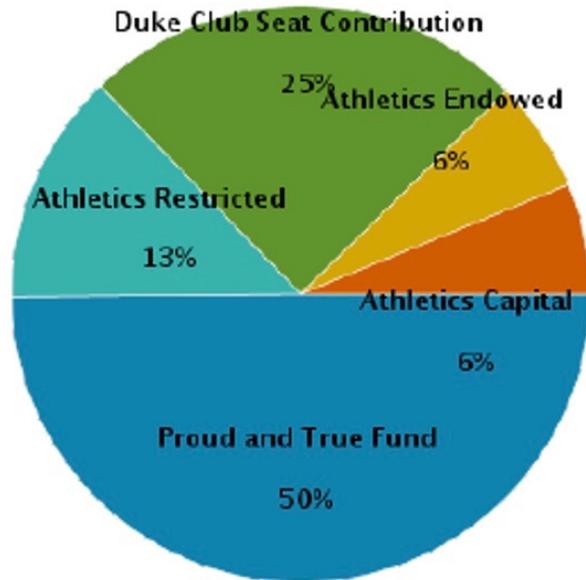




Development Update

Athletics FY23

Athletics Cash and Receipts by Fiscal Year



	2023	2022	2021	2020	2019
Duke Club Seat Contribution	\$1,549,123	\$1,363,962	\$641,549	\$659,199	\$1,281,697
Proud and True Fund	\$3,120,290	\$2,680,205	\$2,144,907	\$1,340,066	\$1,359,163
Athletics Restricted	\$811,162	\$389,992	\$416,393	\$410,233	\$606,368
Athletics Capital	\$387,257	\$400,324	\$1,050,488	\$951,742	\$1,282,669
Athletics Endowed	\$389,226	\$217,430	\$168,040	\$358,448	\$132,867
Event Contribution Restricted	\$13,632	\$15,340	\$77,840	\$36,836	\$46,631
Event Contribution Unrestricted	—	\$20,994	—	\$48,733	\$30,176
Total	\$6,270,691	\$5,088,248	\$4,499,216	\$3,805,257	\$4,739,570

(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

2023	2022	2021	2020	2019
5,633	4,699	3,767	3,412	4,329



Development Update

By Fiscal Year YTD

	2020	2021	2022	2023	2024
Duke Club Seat Contribution	\$86,477	\$72,696	\$168,704	\$203,263	\$188,201
Proud and True Fund	\$141,204	\$223,350	\$209,902	\$153,025	\$166,456
Athletics Restricted	\$69,575	\$37,348	\$59,692	\$71,795	\$56,917
Athletics Capital	\$29,351	\$17,060	\$65,120	\$19,585	\$11,638
Athletics Endowed	\$10,555	\$21,422	\$1,583	\$4,750	\$6,106
Event Contribution Restricted	\$0	\$0	\$0	\$0	\$29,651
Total	\$337,162	\$371,876	\$505,001	\$452,418	\$458,968

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

Current FY Annual Fund Dollars: \$354,657

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

Percent of Goal: 7%

Total Unique Athletics Donors by Fiscal YTD

Includes unique households

2020	2021	2022	2023	2024
1,196	521	1,063	1,481	1,937

**Dollar Amounts and Donor Counts as of August 24, 2023*

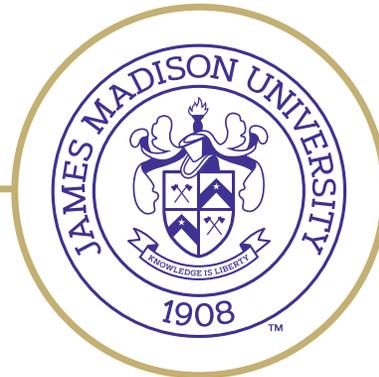
Future Agenda Items

Jeff Bourne, Director of Athletics



Finance and Physical Development Committee

September 14, 2023



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

Finance and Physical Development Committee
Thursday, September 14, 2023
Meeting Room 3
1:00 p.m.

Agenda

1. Approval of Minutes* – April 20, 2023
2. Introduction of Administration and Finance Team
3. Bond Rating
Mark Angel, Associate Vice President, Finance
4. Financial Review
Mark Angel, Associate Vice President, Finance
5. 2021-2022 Receivables Write-Offs
Mark Angel, Associate Vice President, Finance
6. 2023-2024 Budget Update
Towana Moore, Vice President, Administration and Finance
Diane Stamp, Associate Vice President, Budget Management
7. 2024-2026 Budget Requests
Towana Moore, Vice President, Administration and Finance
Diane Stamp, Associate Vice President, Budget Management
8. Six-Year Plan Update
Towana Moore, Vice President, Administration and Finance
Diane Stamp, Associate Vice President, Budget Management
9. Workforce Planning
Rick Larson, Associate Vice President, Human Resources, Training and Development
10. Topics of Interest for Future Meetings

*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 meeting met on Thursday, April 20, 2023 at 7:00 p.m. The meeting was called to order by Mr. John Rothenberger, Chair.

Present:

Rothenberger, John, Chair
Falcon, Christopher, Vice Rector (via proxy Maria Jankowski)
Grass, Jeffrey
Obenshain, Suzanne
Stoltzfus, Michael

Also Present:

The Honorable Richard “Dickie” Bell	Edwards, Teresa
Herod, Maribeth, Rector	Major, Lara
Tompkins Johnson, Deborah	White, Jack

Williams, Xaiver, Student Representative to the Board of Visitors
Harper, Donna, Secretary

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

ABSENT:

Jankowski, Maria

It was moved by Ms. Suzanne Obenshain and seconded by Mr. Michael Stoltzfus to approve the minutes of the February 9, 2023 meeting of the Finance and Physical Development Committee. The motion was approved.

Financial Review:

Mr. Mark Angel, Assistant Vice President for Finance, reviewed the financial report and reported the university’s revenue and expenditures were appropriate for the period July 1, 2022 through February 28, 2023 of the fiscal year.

2021-2022 Audit Review:

Mr. Mark Angel provided an update on the university's financial statements audit. The university received an unqualified opinion on the statements. The university did not receive any written comments during the audit. The three written comments received from the 2021 Student Financial Assistance Audit were cleared.

General Assembly Update:

Ms. Caitlyn Read, Director of State Government Relations, gave an update that the House and Senate have not yet agreed on a budget. 2,800 bills were filed in the 2023 General Assembly session, 21 passed with a direct impact to JMU. The Government Relations team is preparing for an unprecedented amount of turnover of members in both the House and Senate in 2024.

Six-Year Capital Plan:

Ms. Towana Moore, Vice President for Administration and Finance, presented the Six-Year Capital Plan. The Six-Year Capital Plan is required by the Commonwealth and covers the 2024, 2026 and 2028 biennia. The Six-Year Capital Plan is requesting \$813,908,700 in general funds and \$205,644,300 in nongeneral funds.

On motion of Mr. Jeffrey Grass and seconded by Christopher Falcon, the Six-Year Capital Plan was approved by the committee and recommended approval by the board.

2023-2024 Proposed Tuition and Fees:

Ms. Towana Moore, Vice President for Administration and Finance, presented the proposed 2023-2024 tuition and fees for the academic year and the proposed tuition and fees for the 2024 summer sessions. Factors affecting tuition and fees such as employee compensation, benefits costs, unavoidable inflationary costs and unfunded mandates were discussed.

On motion of Mr. Jeffrey Grass and seconded by Christopher Falcon, the tuition and fees presented for the 2023-2024 academic year and the 2024 summer sessions were approved by the committee and recommended approval by the board.

2023-2024 Proposed Budget:

Ms. Towana Moore presented the 2023-2024 budget. The proposed university budget will be \$723.8 million, which reflects a total increase of \$38.9 million or 5.7% over the current budget.

On motion of Mr. Jeffrey Grass and seconded by Mr. Christopher Falcon, the 2023-2024 budget was approved by the committee and recommended approval by the board.

Mr. Jeffrey Grass 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. Michael Stoltzfus 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 matters identified in the motion for the closed session.

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

Rothenberger, John, Chair
Falcon, Christopher, (via proxy Maria Jankowski)
Grass, Jeffrey
Obenshain, Suzanne
Stoltzfus, Michael

The meeting adjourned at 8:41 p.m.

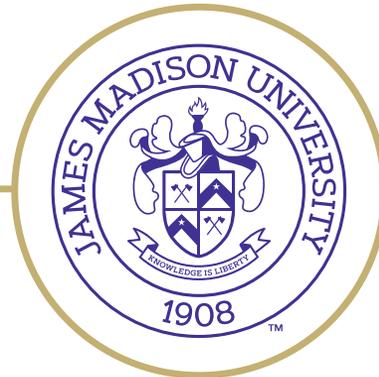
Respectfully submitted,

John Rothenberger, Chair

Donna L. Harper, Secretary to the Board

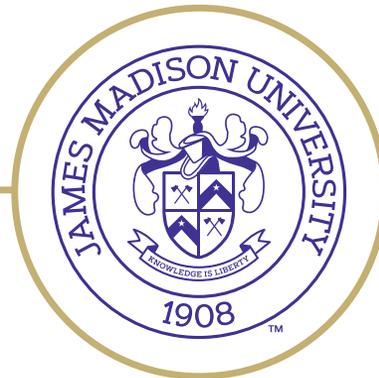
Introduction of Administration and Finance Team

Towana Moore
Vice President
Administration and Finance

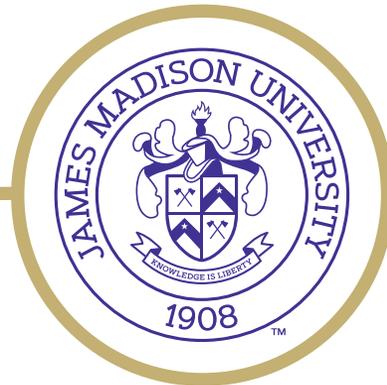


Bond Rating

Mark Angel
Associate Vice President
Finance



Financial Review



**James Madison University
2022 - 2023 Revenue Summary**

	FY2023				FY2022		
	Revised Revenue Budget	Actual Revenue as of 6/30/2023	Uncollected Budget Balance 6/30/2023	Percentage Collected as of 6/30/2023	Percentage Collected as of 6/30/2022	Revised Budget as of 6/30/2022	Actual as of 6/30/2022
Educational and General							
State General Fund Appropriations - Operations (2)	153,931,515	130,766,781	23,164,734	85%	89%	141,463,239	126,571,951
State General Fund Appropriations - Financial Aid	14,541,127	14,541,127	-	100%	100%	13,165,520	13,211,551
Tuition and Technology Fee (1)	250,226,906	253,172,388	(2,945,482)	101%	101%	247,125,897	248,915,701
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	1,568,250	2,091,407	(523,157)	133%	154%	1,252,966	1,935,666
CARES Act - Institutional	-	-	-	-	-	-	7,060,348
Miscellaneous Revenue	2,480,999	3,214,945	(733,946)	130%	117%	2,600,445	3,050,506
Total Education and General	419,650,506	400,688,357	18,962,149	95%	99%	402,509,776	397,647,432
Auxiliary Enterprises							
Dining Services	70,670,775	76,087,146	(5,416,371)	108%	108%	63,881,511	68,955,955
Retail Services	1,600,000	1,499,588	100,412	94%	102%	1,561,000	1,589,808
Residential Facilities	39,209,504	38,624,220	585,284	99%	101%	37,663,836	37,861,833
Parking and Transportation	7,691,135	8,296,030	(604,895)	108%	108%	7,463,892	8,037,730
Telecommunications	2,007,117	1,993,942	13,175	99%	96%	1,782,868	1,715,736
Health Center	6,139,669	6,182,903	(43,234)	101%	100%	6,022,155	6,007,488
Student Union and Student Services	7,979,129	8,001,249	(22,120)	100%	100%	6,826,436	6,832,234
Recreation Center	13,283,311	13,270,891	12,420	100%	99%	9,544,191	9,479,754
Athletics	63,901,455	63,732,179	169,276	100%	100%	56,241,475	55,997,508
Other	18,484,942	31,583,559	(13,098,617)	171%	97%	26,903,792	26,095,427
CARES Act - Institutional	-	-	-	-	-	-	8,310,576
Total Auxiliary Enterprises	230,967,037	249,271,707	(18,304,670)	108%	106%	217,891,156	230,884,049
TOTAL REVENUE	650,617,543	649,960,064	657,479	100%	101%	620,400,932	628,531,481

(1) Budgeted revenue includes a reduction of \$3,098,291 for non-general fund cash to be transferred back to the State. This, in effect, is a transfer of tuition, fee and other Educational and General revenue previously collected. The State makes these transfers 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 current year-end reversion is included in this line.

**James Madison University
Tuition and Technology Fee Revenue
September 14, 2023**

Description	Budget	Actual Revenue 6/30/23	Uncollected Budget Balance	Percentage Collected as of 6/30/23
Regular Undergraduate In-State Tuition	\$104,348,915	\$108,275,086	(3,926,171)	104%
Summer Undergraduate In-State Tuition	10,736,104	10,863,729	(127,625)	101%
Graduate In-State Tuition	11,760,826	11,545,076	215,750	98%
Regular Undergraduate Out-of-State Tuition	102,873,827	100,739,338	2,134,489	98%
Summer Undergraduate Out-of-State Tuition	6,329,564	6,406,042	(76,478)	101%
Graduate Out-of-State Tuition	6,682,801	7,956,630	(1,273,829)	119%
Instruction - Off Campus	6,441,725	6,423,147	18,578	100%
Course and Other Fees	1,053,144	963,340	89,804	91%
Total Tuition & Technology Fee Revenue	\$250,226,906	\$253,172,388	(2,945,482)	101.2%

**James Madison University
2022 - 2023 Expenditure Summary**

	FY2023				FY2022		
	Revised Expenditure Budget	Actual Expenditures as of 6/30/2023	Unexpended Budget 6/30/2023	Percentage Expended as of 6/30/2023	Percentage Expended as of 6/30/2022	Revised Budget as of 6/30/2022	Actual as of 6/30/2022
Education and General							
Instruction	208,781,046	202,526,693	6,254,353	97%	97%	199,514,641	193,026,133
Research and Public Service	1,919,992	1,766,753	153,239	92%	85%	1,868,820	1,588,749
Academic Support	50,134,219	46,421,133	3,713,086	93%	77%	56,273,375	43,561,113
Student Services	29,051,670	29,301,489	(249,819)	101%	103%	26,700,163	27,385,007
Institutional Support	56,973,003	50,422,975	6,550,028	89%	106%	51,808,999	55,106,191
Operation and Maintenance of Plant	46,600,818	43,271,557	3,329,261	93%	89%	42,273,959	37,632,277
Student Financial Assistance - University and State GF	26,189,758	25,814,864	374,894	99%	99%	24,069,819	23,783,040
Total Education and General	419,650,506	399,525,464	20,125,042	95%	95%	402,509,776	382,082,510
Auxiliary Enterprises							
Dining Services	69,056,753	69,198,654	(141,901)	100%	100%	62,629,540	62,770,756
Retail Services	1,284,973	1,207,082	77,891	94%	95%	1,245,973	1,185,529
Residential Facilities	39,698,995	36,269,126	3,429,869	91%	84%	37,429,441	31,537,588
Parking and Transportation	7,691,135	7,290,666	400,469	95%	81%	7,463,892	6,069,562
Telecommunications	2,007,117	1,263,756	743,361	63%	37%	1,782,868	667,447
Health Center	6,247,946	6,087,915	160,031	97%	95%	5,734,673	5,454,223
Student Union and Student Services	8,549,857	7,819,411	730,446	91%	77%	6,898,608	5,318,088
Recreation Center	13,511,189	12,782,701	728,488	95%	94%	10,148,547	9,504,091
Athletics	65,836,540	62,144,293	3,692,247	94%	93%	57,307,904	53,178,683
Other	17,078,768	11,883,354	5,195,414	70%	-15%	25,587,050	(3,899,884)
Auxiliary Reserve Projects (1)	30,550,494	18,899,360	11,651,134	62%	39%	27,974,888	10,875,920
Total Auxiliary Enterprises	261,513,767	234,846,318	26,667,449	90%	75%	244,203,384	182,662,003
TOTAL EXPENDITURES	681,164,273	634,371,782	46,792,491	93%	87%	646,713,160	564,744,513

(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.

Revenue Variance Analysis

Education and General

Note - State General Fund Appropriations - Operations

The uncollected budget balance is almost entirely the general fund appropriations reverted to the state at year end. The reversion amount was \$23,215,000 and \$14,894,000 in 2023 and 2022, respectively. General fund reversions are re-appropriated in the next fiscal year and become available for operations.

The most significant factor in the reversion balance is savings on budgeted personal services. Ongoing challenges in the hiring environment has led to difficulty in filling positions and to the time positions remained vacant.

Undergraduate and Graduate Application Fees

The actual revenue increased in 2023 by \$156,000 due to a continued increase in the number of applications. We increased the 2023 budget \$315,000 in 2023 due to the increase in revenue in 2022, however we still exceeded the budgeted amount, just by not as much as in 2022.

Miscellaneous Revenue

Actual revenue increased \$164,000 in 2023, mostly due to a \$130,000 increase in orientation fees. This increase resulted from continuing increases in freshman enrollment and an increase in the orientation fee from \$180 in 2022 to \$200 in 2023.

Auxiliary Enterprises

Other

Interest we received on auxiliary funds held by the state increased \$3,500,000 in FY2023 while the budget remained the same. For much of FY2022, we received little or no interest on a monthly basis. The interest we receive is totally dependent on the instruments and interest rates earned on pooled funds held by the State Treasurer.

International Education revenue increased \$2,300,000, mostly attributable to a rebound of Summer 2022 programs recorded as revenue in FY2023. FY2022 was still being impacted by the pandemic, particularly the Summer 2021 programs.

FY2023 unbudgeted capital gift revenue included \$1,000,000 for the Sentara Park Expansion, \$2,200,000 for the Atlantic Union Bank Center, and \$1,700,000 for the College of Business. These funds reimbursed the auxiliary reserve for auxiliary funding provided in prior years to complete the projects. The funds were from pledges collected and held by the James Madison University Foundation. FY2022 included only \$250,000 in capital gift revenue for Atlantic Union Bank Center equipment.

**Note: Analysis is provided for all budget to actual revenue variances in excess of 10%.

Expenditure Variance Analysis

Education and General

Increase for Academic Support

Actual Academic Support expenses increased \$2,860,000 (6.6%) and the related budget decreased \$6,139,000 (10.9%), resulting in the percentage of actual to budget increasing 16% as compared to the prior year. 2022 included a one-time item of \$7,025,000 corresponding to the planning funds that the University covered for the Carrier Library Renovation/Expansion project. The move of these funds in FY22 to the capital project was recorded as a cash transfer and not reported as an expense for this report. The current year budget to actual of 93% is consistent with previous years.

Decrease for Institutional Support

Actual Institutional Support expenses decreased \$4,683,000 (8.5%) and the related budget increased \$5,164,000 (10.0%), resulting in the percentage of actual to budget decreasing 17% as compared to the prior year. The current year decrease in actual expenses results from recovering (charge to auxiliary expenses and an expenditure credit to E&G) indirect costs from auxiliary activities for the first time since 2019. In response to the COVID19 pandemic, the General Assembly enacted legislation for FY2020 through FY2022 that granted higher education institutions the authority to reduce or eliminate the recovery of auxiliary indirect costs. This year's recovery offset E&G expense by \$14,891,000. There were numerous offsetting increases to institutional support, the most significant included the E&G portion of the Reengineering Madison project (\$3,369,000) and upgrades to networking equipment and the related licenses (\$2,951,000).

Auxiliary Enterprises

General Auxiliary Expense Comment

2022 Auxiliary Enterprise budgets included a decrease of \$12,595,000 related to debt service. That decrease was mostly the result of the 2021 restructuring and refinancing of 9(d) debt service. The restructuring was a measure to provide cash flow relief given the uncertainties surrounding the pandemic. The University chose to defer 2022 principal payments on select 9(d) debt issues of approximately \$10,100,000. The State also refinanced a number of debt issues on the University's behalf, resulting in additional principal and interest savings for 2022.

Increase for Parking and Transportation

2023 actual expenses increased \$1,221,000, mostly attributable to an increase in debt service of \$986,000 (see General Auxiliary Expense Comment above).

Increase in Telecommunications

Telecomm and Network saw an overall budget increase of \$224,000 compared to a \$596,000 increase in actual expenses. A significant expenditure in FY23 related to telecom expenses for athletics broadcasts, required for all athletics facilities to comply with Sun Belt regulations. In addition, the auxiliary portion of upgrades to networking equipment and the related licenses increased by \$273,000 over the prior year.

Increase in Student Union and Student Services

In 2022, we moved Utility Deposit Assistance Program (UDAP) activities from a local department to an auxiliary department. A one-time transfer of \$377,000 was made from the local department and recorded in the auxiliary department as an offset to expenses. In addition, UDAP incurred \$227,000 in FY23 expenses. Over \$823,000 of the FY23 increase relates to departments moving from the Other category. Finally, Student Life expenditures increased \$252,000 in FY23.

Increase in Other

2023 budgets decreased by \$8,508,000, while 2023 actual expenses increased by \$15,783,000. The budget decrease mostly reflects the 2022 debt service savings noted in the General Auxiliary Expense Comment above, offset by revenue adjustments due to enrollment changes. During 2020-2022, we charged all auxiliary units across all programs for indirect costs, and recorded the offsetting expense reduction in the Other category. The net expense to the Auxiliary fund as a whole was zero, but resulted in a "negative" expense balance on the Other category.

Most of the actual expense increase is due to the payment to E&G of indirect costs from auxiliary activities for the first time since 2019. The 2023 payment to E&G for indirect costs was \$14,891,000.

**Note: Analysis is provided for all budget to actual expenditure variances in excess of 10%.

James Madison University
Restricted Funds
2022 - 2023 Expenditure Summary

FY2023

	Appropriation/ Allotment	Actual Expenditures as of 6/30/2023	Unexpended Appropriation	Comment
Sponsored Programs, Grants and Contracts				
Virtual Library Of Virginia	10,301,968	10,301,968	0	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.
Federal grants and contracts	26,014,500	25,990,757	23,743	Current year includes \$14,908,174 in financial aid (mostly PELL grants).
State and nongovernmental grants and contracts	19,000,000	18,601,287	398,713	
Indirect costs	5,000,000	88,862	4,911,138	
All Other grants and contracts	995,078	703,797	291,281	Includes Work-Study, Eminent Scholars, Excess Indirect Costs, Commonwealth Innovative Internship Fund, and Surplus Property. Work-Study and Eminent Scholars are recorded near year-end by moving incurred expenses in E&G to these funds.
COVID19 Pandemic Related				
ARPA - Fiscal recovery funds (Online Virginia Network)	1,403,485	408,182	995,303	Federal pass-through funds from Old Dominion University. The original award was \$620,000 in 2022 with an additional award of \$850,000 in 2023.
ARPA - Fiscal recovery funds	5,263,954	5,263,954	0	SCHEV allocation for need based financial aid for in-state undergraduate students. We received these funds in 2022, and all financial aid awards were made in 2023 (Fall 2022 and Spring 2023).
COVID Testing Grant	10,678	10,678	0	Majority of award spent in 2022, final expenses to close out the grant in 2023.
CARES Act - GEER	1,274,303	1,274,303	0	Grant awards to Higher Education Institutions via the Governor's Emergency Relief Fund for undergraduate financial aid.

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.

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 includes University supported workshop and institutes (Elderhostel, Civil War Institute, Center for Service Learning, Student Theatre and Music productions, and the University's Public Radio Station).

Academic Support -

This program encompasses the Carrier Library, Multimedia center and student computer labs, activities of the deans of colleges and schools, honors program and other related expenditures.

Student Services -

This programs 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.

2022-2023 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	FY23 Write-Off	FY22 Write-Off	FY21 Write-Off
Tuition/Fees/Room/Board	\$ 474,784	\$ 362,748	\$ 160,156
Parking	2,583	2,233	1,474
Clinics/Grants/Univ Conf/Other	10,311	4,324	6,768
Total	\$ 487,678	\$ 369,305	\$ 168,398



Write-Off Comparison

Institution	FY23 Write-Off	FY22 Write-Off	FY21 Write-Off
JMU	\$ 487,678	\$ 369,305	\$ 168,398
VT	375,586	294,305	147,328
GMU	3,000,000	3,800,000	3,297,888
ODU		3,648,103	5,928,138



Write-Off vs. Authorization

	FY23	FY22	FY21
Total Write-Off	\$ 487,678	\$ 369,305	\$ 168,398
Total Billings	\$ 512,469,148	\$ 476,903,553	\$ 466,603,172
Write-Off Percentage	.095%	.077%	.036%

- 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 \$2,562,346 for FY23.



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



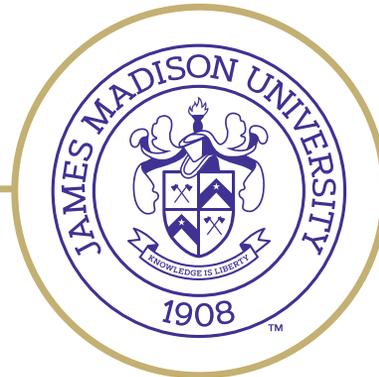
FY23 Collection Payments

- Precollect – \$560,020
- Attorney General – \$71,071
- Debt Set-Off – \$126,703
- Outside Collection Agencies – \$164,506

2023-2024 Budget Update

Towana Moore
Vice President
Administration and Finance

Diane Stamp
Associate Vice President
Budget Management





2023-2024 Budget Update - Operating

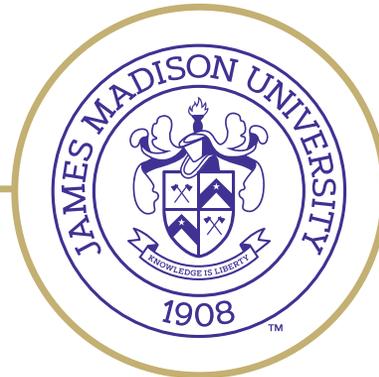
- Compensation
 - Provides additional two percent salary increase December 2023, (five percent July 2023)

Summary of Budget Actions	House 2023-24 General Fund	Senate 2023-24 General Fund	Final 2023-24 General Fund	2023-24 JMU GA Budget Assumptions	2023-24 Difference
Operating					
Affordable Access	\$ 4,492,000	\$ 9,970,000	\$ 4,724,000	\$ 4,492,000	\$ 232,000
Expand Nursing Programs (D.N.P.)	\$ 1,250,000	\$ -	\$ -	\$ -	\$ -
Nursing Workforce	\$ -	\$ 660,000	\$ 660,000	\$ -	\$ 660,000
Total Operating Change	\$ 5,742,000	\$ 10,630,000	\$ 5,384,000	\$ 4,492,000	\$ 892,000
Financial Aid					
Undergraduate Student Financial Assistance	\$ -	\$ 3,500,000	\$ 2,917,000	\$ -	\$ 2,917,000
Total Financial Aid Change	\$ -	\$ 3,500,000	\$ 2,917,000	\$ -	\$ 2,917,000
Total Budget Actions	\$ 5,742,000	\$ 14,130,000	\$ 8,301,000	\$ 4,492,000	\$ 3,809,000

2024-2026 Budget Requests

Towana Moore
Vice President
Administration and Finance

Diane Stamp
Associate Vice President
Budget Management





2024-2026 Budget Requests - Operating

Budget Request Description	2024-25			2025-26		
	Nongeneral Funds	General Funds	Total	Nongeneral Funds	General Funds	Total
Support Veterans Through the Virginia Military Survivors & Dependents Education Program	\$ -	\$ 5,332,593	\$ 5,332,593	\$ -	\$ 6,770,812	\$ 6,770,812
Fund Operations and Maintenance of Carrier Library Expansion	\$ -	\$ -	\$ -	\$ -	\$ 380,057	\$ 380,057
Retain Excellent Employees	\$ -	\$ 500,000	\$ 500,000	\$ -	\$ 750,000	\$ 750,000
Increase Enrollment of Pell-Eligible Students	\$ -	\$ 1,280,000	\$ 1,280,000	\$ -	\$ 1,280,000	\$ 1,280,000
Academic and Student Success	\$ -	\$ 5,404,342	\$ 5,404,342	\$ 299,272	\$ 5,888,151	\$ 6,187,423
<i>Produce More Nurses Through New "Fast Flex" BSN</i>		997,816	997,816		997,816	997,816
<i>Create a New Partnership School Program (Lab School w RCPS)</i>		1,169,886	1,169,886		1,337,181	1,337,181
<i>Grow Your Own: Licensing Paraprofessionals with Degrees</i>		1,056,000	1,056,000		1,056,000	1,056,000
<i>Support Growing Commonwealth Healthcare Needs with Advanced Degrees: BSN to DNP</i>		1,267,776	1,267,776		1,267,776	1,267,776
<i>Strengthen Student Access to Internships and Support Local Business</i>		303,024	303,024		303,024	303,024
<i>Meet the Commonwealth's Mental Health Needs</i>				299,272	316,514	615,786
<i>Support Student and Employee Mental Health</i>		609,840	609,840		609,840	609,840
Total Budget Request	\$ -	\$ 12,516,935	\$ 12,516,935	\$ 299,272	\$ 15,069,020	\$ 15,368,292



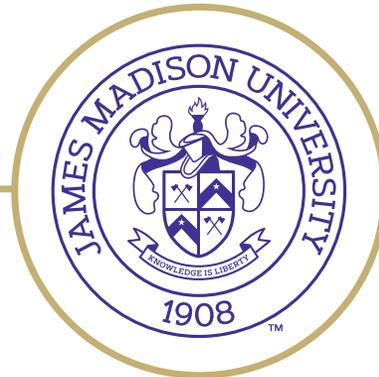
2024-2026 Budget Requests - Capital

Capital Request Description	2024-2026			
	General Funds	Nongeneral Funds		Total
		Bonds	Auxiliary Reserve	
<i>Education & General Projects</i>				
Carrier Library Renovation & Expansion Equipment	7,043,000			7,043,000
East Campus Infrastructure Phase III - Distribution	19,235,700	9,474,300		28,710,000
Johnston Hall Renovation & Expansion	26,820,000			26,820,000
College of Health & Behavioral Studies Expansion	109,630,000			109,630,000
Godwin Hall Renovation	40,480,000			40,480,000
Moody Hall Renovation & Expansion	46,340,000			46,340,000
<i>Auxiliary Projects</i>				
Blanket Property Acquisition			3,000,000	3,000,000
Spotswood Hall Renovation		23,820,000		23,820,000
Total Capital Budget Request	\$249,548,700	\$33,294,300	\$3,000,000	\$285,843,000

Six-Year Plan Update

Towana Moore
Vice President
Administration and Finance

Diane Stamp
Associate Vice President
Budget Management



Alignment with the Commonwealth

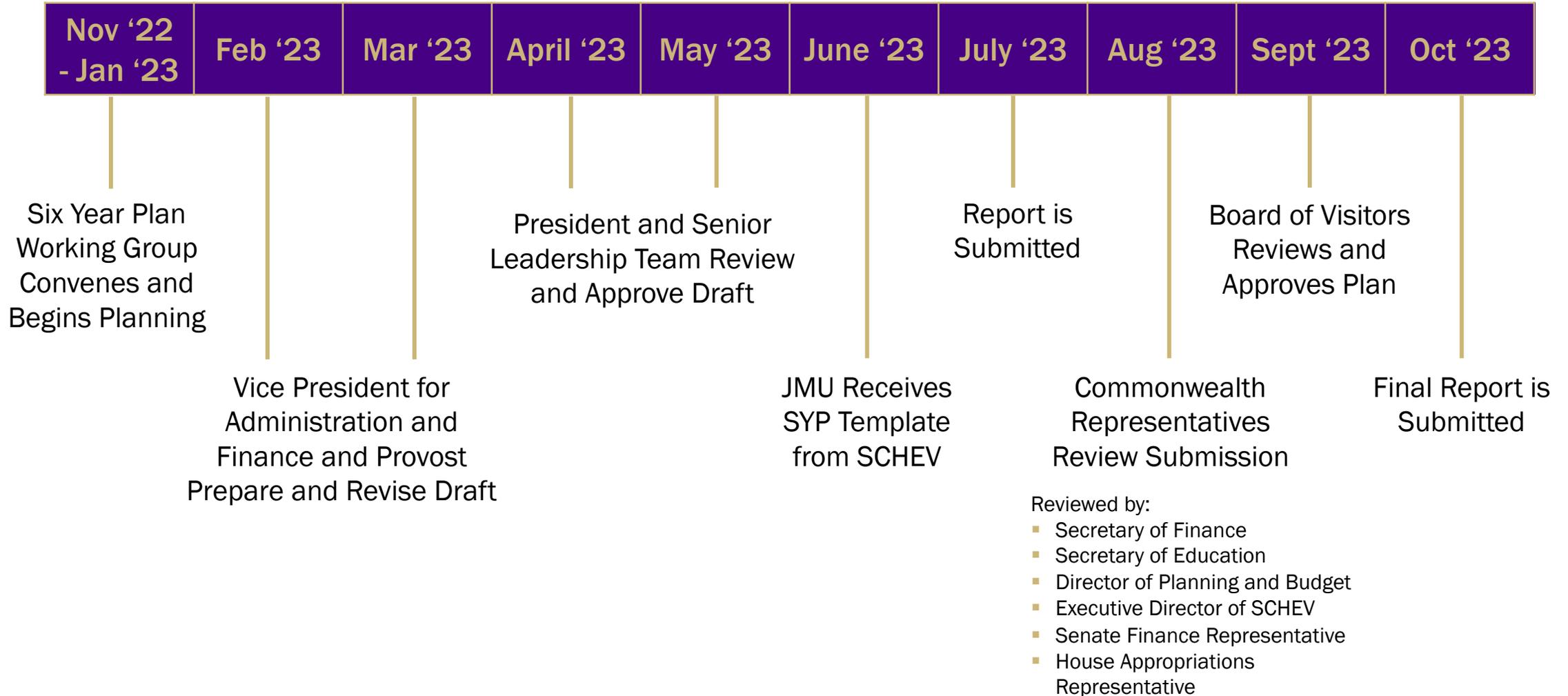


<p style="text-align: center;">North Star: Prepare Every Graduate for Success in Life</p>	
<p>4-2. Prioritize mental health solutions in our schools and on our campuses to nurture a culture of well-being</p>	<p style="text-align: center;">Health</p>
<p>2-2. Create incentives for institutions, employers, and students to pursue credentials aligned to our most urgent labor market demands and retain graduates in Virginia</p> <p>3-1. Strengthen “Pathway Programs” and other efforts that prepare young people for long term academic, career, and life success</p> <p>3-3. Partner with K-12 to ensure every high school graduate earns an industry recognized credential or associates degree upon graduation as part of the effort to elucidate the multiple pathways to success</p>	<p style="text-align: center;">Workforce Needs</p>
<p>1-3. Increase student exposure to and experiences with the world of work</p> <p>3-2. Launch innovative lab schools in communities across the Commonwealth</p>	<p style="text-align: center;">Education</p>
<p>1-1. Prepare every credential-earner for employment in a family-wage supporting job</p> <p>1-3. Increase student exposure to and experiences with the world of work</p>	<p style="text-align: center;">Technology</p>





Six-Year Planning Process





Six-Year Financial Plan Assumptions

- **Timeline**
 - Covers six years (FY 2024–30)
 - Focus on 2024–26 Biennium
- **Projections**
 - Enrollment
 - Tuition and fees
- Tuition and fee revenue estimate based on projected enrollments by degree level and residency
- General funds for salary and medical cost increases only

Academic and Financial Plan Strategies: 2024-25



	Nongeneral Funds	General Funds	Reallocation	Total
Increase Salaries: Teaching & Research Faculty, Admin Faculty, Classified Staff	2,217,158	2,344,894		4,562,052
Increase Adjunct Faculty & Graduate Assistant Base Pay	164,480	173,955		338,435
State Health Insurance Cost Increase	594,235	628,470		1,222,705
Minimum Wage Increase	126,678			126,678
Faculty Promotions and Staff In-Band Adjustments	1,050,000			1,050,000
Inflationary Non-Personnel Cost Increases	412,447	1,443	1,000,000	1,413,890
Expand Financial Aid	850,125			850,125
Expand Physician Assistant Studies Program (New and Expanded Academic Programs)	202,935			202,935
Support Growth of the Computer Science and Information Technology Majors (New and Expanded Academic Programs)	531,277			531,277
Early Student Success System (Academic and Student Support Strategies)	376,257			376,257
Reengineering Madison (Academic and Student Support Strategies)	546,187			546,187
Total	\$7,071,779	\$3,148,762	\$1,000,000	\$11,220,541

Academic and Financial Plan Strategies: 2025-26*



	Nongeneral Funds	General Funds	Reallocation	Total
Increase Salaries: Teaching & Research Faculty, Admin Faculty, Classified	4,477,724	4,735,698		9,213,422
Increase Adjunct Faculty & Graduate Assistant Base Pay	332,447	351,599		684,046
State Health Insurance Cost Increase	1,206,058	1,275,542		2,481,600
Minimum Wage Increase	513,736			513,736
Faculty Promotions and Staff In-Band Adjustments	2,100,000			2,100,000
Inflationary Non-Personnel Cost Increases	776,005	2,964	2,000,000	2,778,969
Expand Financial Aid	1,730,640			1,730,640
Expand Physician Assistant Studies Program (New and Expanded Academic Programs)	352,935			352,935
Support Growth of the Computer Science and Information Technology Majors (New and Expanded Academic Programs)	952,266			952,266
Meet the Commonwealth's Mental Health Needs	299,272			299,272
Early Student Success System (Academic and Student Support Strategies)	573,801			573,801
Reengineering Madison (Academic and Student Support Strategies)	1,616,180			1,616,180
Carrier Library - Renovation & Expansion O&M	641,652			641,652
Total	\$15,572,716	\$6,365,803	\$2,000,000	\$23,938,519

*2025-26 is cumulative of 2024-25



Six-Year Financial Plan – Tuition & Fees

Tuition & Fees Shown for Modeling Purposes*

	FY 2023-24	Dollar Change	
		FY 2024-25	FY 2025-26
In-State Undergraduate Tuition	7,914	388	407
In-State Undergraduate Mandatory non-E&G Fees	5,662	168	173
In-State Undergraduate Total	\$13,576	\$556	\$580
Out-of-State Undergraduate Tuition	25,128	491	501
Out-of-State Undergraduate Mandatory non-E&G Fees	5,662	168	173
Out-of-State Undergraduate Total	\$30,790	\$659	\$674

* The tuition & mandatory fee rates shown are based on planning costs and are for modeling purposes only





Six-Year Financial Plan E&G – Summary

(\$s in millions)

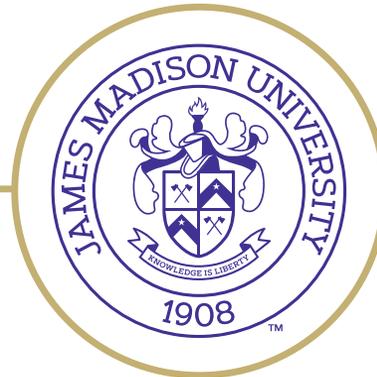
	FY 2024-25	FY 2025-26*
Revenues		
Nongeneral Fund Estimate	7.1	15.6
Reallocations	1.0	2.0
General Fund Assumption ⁽¹⁾	3.1	6.3
Total	\$11.2	\$23.9
Expenditures		
Salaries & Benefits (partial state support)	6.2	12.9
Inflationary Non-personnel Costs	1.4	2.8
Financial Aid Expansion	0.9	1.7
Academic Initiatives	1.1	2.2
All Other Operating Needs	1.6	4.3
Total	\$11.2	\$23.9

(1) Assumes new state general fund support for salaries and benefits and VITA costs only.

* 2025-26 is cumulative of 2024-25

Workforce Planning

Rick Larson
Associate Vice President
HR, Training, and Performance



Governance Committee

September 14, 2023



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

Governance Committee
Thursday, September 14, 2023
Meeting Room 2
12:00 p.m.

Agenda

1. Approval of Minutes – April 20, 2023*
2. Bylaw Revisions*
3. 2024 Retreat
4. Topics of Interest for Future Meetings

*Action Required

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

GOVERNANCE COMMITTEE

Minutes of the Meeting of April 20, 2023

The Governance Committee of the James Madison University Board of Visitors met on Thursday, April 20, 2023 in the Festival Conference and Student Center at James Madison University. Jeff Grass, chair, called the meeting to order at 12:02 pm.

PRESENT:

Falcon, Chris
Grass, Jeff, Chair
Harper, Donna, liaison

Herod, Maribeth
Major, Lara
Tompkins Johnson, Deborah
White, Jack

ALSO PRESENT:

Alger, Jonathan, President
Knight, Jack, University Legal Counsel
Langridge, Nick
Orem, Chris

On motion by Lara Major, seconded by Deborah Tompkins Johnson, approved the minutes of the February 9, 2023 meeting.

2023 Board Retreat

Jeff Grass shared the intended outcome for the retreat and the collaboration with EAB. Nick Langridge, Vice President for Advancement and Chris Orem, Director for Institutional Research shared the philosophy and vision for how the strategic plan, key priorities and long-range planning will fit with the development of “big ideas.” (Attachment A)

Leadership Succession

The committee concurred on the draft procedure for any vacancy in the presidency.

Governance Committee Review

The committee discussed the past year and shared the following as significant accomplishments:

- Establishment of the committee following the retreat in 2021
- Transparency and website update
- Improvements to work and efficiencies of the board
- Procedures that provide consistency and guidance
- Proactive and reactive for board functions and operations
- Collaboration to consider ideas
- Review of committee structure

Board Liaisons

The committee discussed the role/purpose of board liaisons; what topics/initiatives might have a board liaison; and what type of feedback/reporting would here be. It was suggested to develop a procedure describing the board liaison position and an addition to the Manual incorporating the board liaison concept.

With no further business, the committee adjourned at 1:01 pm.

Jeff Grass, Chair

Donna L. Harper, Secretary

Governance Committee
September 14, 2023

Recommended revisions to the Board Manual

1) Article VII. Terms of Appointment

The non-voting student representative serves a term of one year. The student representative may be ~~appointed~~ **elected** to a second one-year term but is not eligible to serve for more than two successive one-year terms. **The term of office shall be from the date of the May graduation to the following May graduation.**

2) Article IX. Rights and Powers

4. The board has the authority to make all needful rules and regulations concerning the university, including the following:

~~d. The bylaws of the Faculty Senate are subject to approval by the board.~~

Delete this from the Manual. No other universities require this approval of the Faculty Senate bylaws by the board.

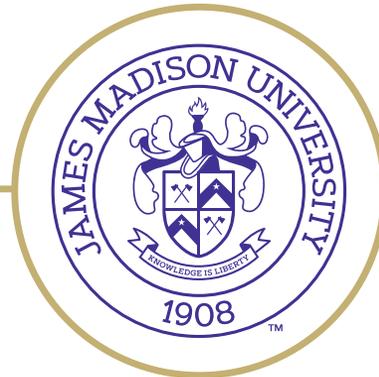
3) Article X. Officers

ADD: C. Secretary, Powers and Duties

9. The president shall recommend a university employee to the Nominating Committee to serve as Secretary to the Board of Visitors.

Student Affairs Committee

September 14, 2023



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

Student Affairs Committee
Thursday, September 14, 2023
Festival Ballroom B
1:00 p.m.

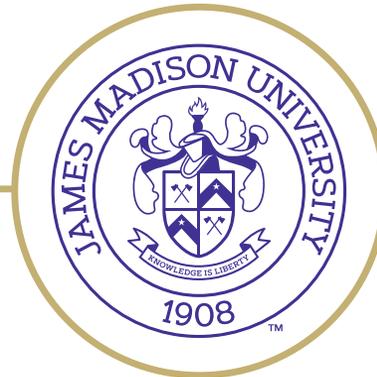
Agenda

1. Opening Remarks and Approval of Minutes* - April 20, 2023
Terrie Edwards, Chair
2. Student Affairs Update
Tim Miller, Vice President for Student Affairs
3. Student Government Association Report
Nate Hazen, President
4. Student Representative to the Board of Visitors Report
Abby Cannella, Student Representative to the Board
5. Dean of Students Office Spotlight
Hollie Hall, Dean of Students
Dominique Rodriguez, Assistant Dean of Students
Matthew Hunsberger, Coordinator, Dean of Students
6. Student Panel
 - Kevin Cottrell; Senior Psychology major; Student Assistant in the Dean of Students Office, President/Founder of Dukes Support Network
 - Tara Pollnitz; 2nd year graduate student in Clinical Mental Health Counseling; Madison Cares Graduate Assistant, Community Engagement & Volunteer Center Learning Partner
 - Kyleigh Schlenker; LSS Graduate Assistant, Education—MAT program
7. Topics of Interest for future meetings

*Action Required

Opening Remarks and Approval of Minutes

Terrie Edwards, Chair



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

Minutes of the Student Affairs Committee

The Student Affairs Committee met on Thursday, April 20, 2023, in Ballroom B of the Festival Conference and Student Center at James Madison University. Deborah Tompkins Johnson, Chair, called the meeting to order at 1:04 p.m.

Present:

Edwards, Terrie Lynch, John
Major, Lara Tompkins Johnson, Deborah, Chair

Others:

Alger, Jon, President, James Madison University
Allen, Dirron, Associate Vice President Student Life and Involvement
Bakhtiari, Shawdee, President, Student Government Association
Brenneman, Anne, Director, University Health Center
Davis, Mike, Chief of Staff, James Madison University
Hall, Hollie, Dean of Students
Knight, Jack, University Counsel, James Madison University
Miller, Tim, Vice President for Student Affairs
Surrett, Myles, Associate Vice President, Career, Experiential Learning and Transition
Williams, Xavier, Student Representative to the Board of Visitors

Approval of Minutes

On the motion of Lara Major and seconded by John Lynch the minutes of February 9, 2023, were approved.

Opening Remarks

Deborah Tompkins Johnson welcomed members and guests.

Student Affairs Update

Dr. Miller thanked Ms. Deborah Thompkins Johnson for her service as board chair. He proposed a moment of silence for the recent student incident that occurred off campus. A moment of silence was held in support of the recent loss of life at JMU and recent worldwide events. He shared about how our community has experienced and can challenge hate, confrontation and violence and this summer will be looking at additional safety measures for students on and off campus. Finally, he concluded with celebrations and accomplishments of several campuswide groups and initiatives, as well as final student celebrations and events.

Student Government Association Report

Shawdee emphasized her central platform initiative, student outreach. She highlighted the work of student organizations around campus through social media efforts, such as her weekly series, Sundays with Shawdee. She has also continued to encourage and model attendance at club meetings and campus-wide events. She has supported and highlighted the work of Student Government Association initiatives for the betterment of the student body. She has also played a supportive role in the recruitment of new members of the Student Government Association for Fall 2023.



**Board of Visitors
April 20, 2023**

Student Representative to the Board of Visitors Report

Xaiver Williams, Student Representative to the Board of Visitors, shared with the committee a summary of the accomplishments and work completed throughout his two years of leadership. He concluded his report by sharing final words for board members to consider as he prepares to complete his term and continue his support of the university as an alum. Xaiver formally introduced Abigail Cannella ('24) as the 2023-2024 Student Representative to the Board of Visitors and looks forward to assisting her as she transitions into her role with the board.

Career, Experiential Learning, and Transition Spotlight

Myles Surrett, Steve Grande, Shana Meganck, Casey Ouren, and Libby Westley shared updates on the Career, Experiential Learning, and Transitions area within Student Affairs. Steve Grande shared about the nature of service-learning at JMU and its far-reaching impact in the local community. Shana Meganck, a faculty partner, provided examples of successful student experiences and collaboration. Casey Ouren talked about the sense of belonging JMU effectively cultivates during the orientation experience for new students and steps being taken to maximize that impact. Libby Westley highlighted the work being done to engage employers to optimize the internship and job prospects for JMU students. We concluded with a panel of students engaged in this work in each of the offices.

Student Panel

Joi Johnson, Class of 2025, Communication Studies

Hailey Duarte, Class of 2024, Health Sciences

Jamisen Blythe, Class of 2023, Health Sciences

Students shared about how working with the departments and engaging in learning opportunities at JMU contributed to their belonging, career readiness, and commitment to service.

There being no further business, on the motion of Lara Major and seconded by John Lynch the Student Affairs Committee meeting adjourned at 2:32 p.m.

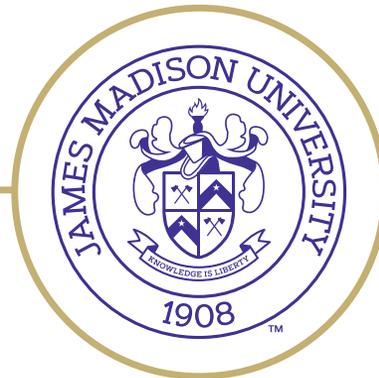
Respectfully submitted,

Deborah Tompkins Johnson, Chair

Donna Harper, Secretary to the Board

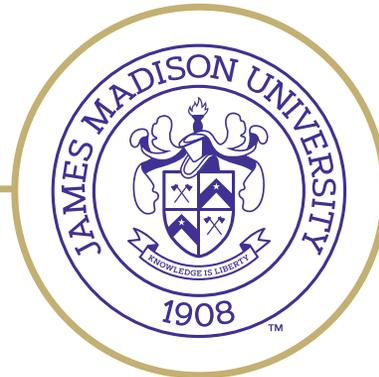
Vice President for Student Affairs Update

Tim Miller



Student Government Association Report

Nate Hazen



Nathan Hazen

Student Body President of JMU

Student Life Committee Presentation

Student Government Association Report:

Nathan Hazen, the Student Government Association President, has made it his mission to use the experience and knowledge he has gained on this campus these past 3 years, to make a lasting and positive effect on this campus by the SGA. He hopes to do this by focusing SGA efforts on providing opportunities for students to come together in a positive environment on campus, promoting student efficacy and civic engagement, and playing a supportive role to members of the SGA to help achieve their own missions and goals on this campus.

About Nate

- Senior
- Business Management Major, Coaching Education Minor
- Young Life College Mentor
- Khaki and quarter-zip enthusiast
- Lover of purple and gold



Why I am here

- I believe in JMU



What I plan to do

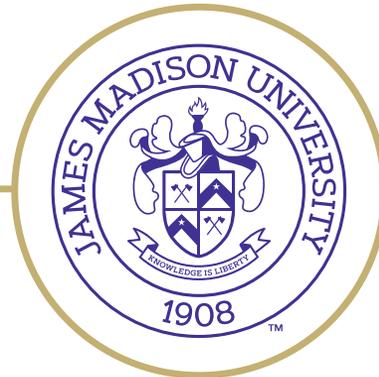


Questions?



Student Representative to the Board of Visitors Report

Abby Cannella



Student Representative Report

Abigail Cannella

Student Life Committee Meeting– September 14, 2023

“Someday when you get where you're going, you will know it was you and the people who love you who put you there, and that will be the greatest feeling in the world.” - Taylor Swift

Connecting with students-

- Presidents Council-
 - Monthly meeting with representatives from student organizations at JMU
 - First meeting- August 30, 2023
 - Students are able to share any concerns, which can then be brought to Administrators and the Board of Visitors
 - Students leaders are able to learn about the Board of Visitors
 - Provides student leaders with an opportunity to bring knowledge and resources to the members of their organizations
 - Builds a community of student leaders who will empower each other and their organizations
- Visiting Student Organizations-
 - Throughout the year, I will attend at least one student organization a week
 - Gives students the opportunity to learn about the Board of Visitors
 - Provides students an opportunity to share their concerns
- Weeks of Welcome
 - Visited Residence Halls across campus with Dr. Miller to help students move in
 - Attended various events throughout the week to talk with students

Communication-

- Social Media-
 - Utilizing the official Student Representative accounts to:
 - Share information with the student body
 - Answer questions, and address concerns
 - James Madison University Instagram takeover September 14, 2023
 - Sharing a “day in my life”
 - Answering questions from students
 - Educate the student body on the Board of Visitors
- SRBOV Newsletter
 - Email newsletter sent to students who opt-in
 - Updates before and after every Board meeting asking what they would like me to report on, and informing them what was covered in each Board meeting.

About Abby

- Public Policy and Administration and Political Science double major
- From Poquoson, Va
- Former Chairwoman | JMU College Republicans
- Former Membership Chair | Student Government Association
- 2022 Orientation Peer Adviser
- Avid Taylor Swift fan

My Goals for the upcoming year:

- Engaging with the student body
- Increasing communication with and educating the student body
- Expanding the role of the Student Representative





2023 Orientation Peer Advisors





Weeks of Welcome

- The 28 Orientation Peer Advisers, and 132 First year Orientation Guides (FROGs) worked to welcome the over 4,000 incoming first-year and transfer students to JMU. The Office of Orientation and Transitions keeps all of the students busy with fun events throughout the first weeks of the school year to help students feel comfortable on campus.



President's Council

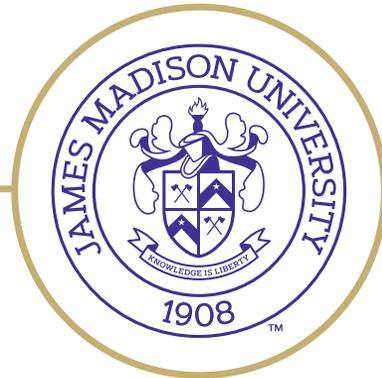
- New Initiative to trickle down information about the Board of Visitors from club representatives to the wider student body, and to hear about student experiences from the club representatives.



Student Organization Meetings

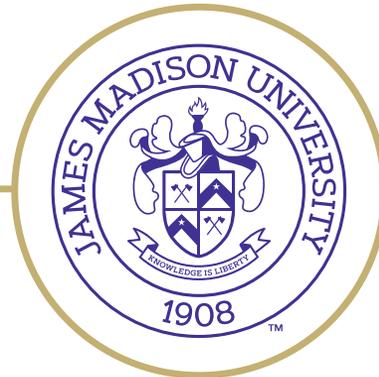
- Throughout the year, I will attend various student organization meetings to educate the JMU population on the Board of Visitor, and to hear from students about what is important to them.

Questions?



Dean of Students

Hollie Hall, Dean of Students and Associate Vice President





deanofstudents@jmu.edu

540-568-6468

Monday - Friday from 8:30 a.m. - 5 p.m.



Dr. Hollie Hall, Dean of Students

Gloria Mast,
Associate Dean

Ritter Clevenger,
Associate Dean

Jill Staley Wade,
Executive Assistant

Dominique Rodriguez,
Assistant Dean

Matthew Hunsberger,
Coordinator

Tara Pollnitz,
Graduate Student

Jessica Haravay,
Graduate Student

Kyleigh Schlenker,
Graduate Assistant

Kevin Cottrell,
Student Assistant

Emma
Muscar

Ashlynn
Brown

Maggie
Nelson

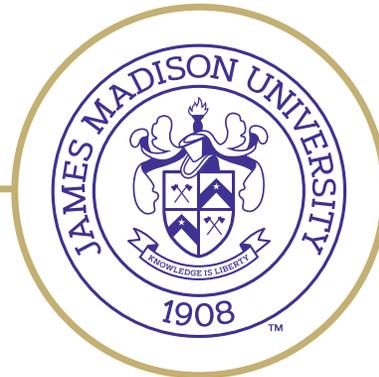
Bridget
Piwowar

Maggie
Freedy

LSS Peer Learning Assistants

Madison Cares

Dominique Rodriguez, Assistant Dean of Students



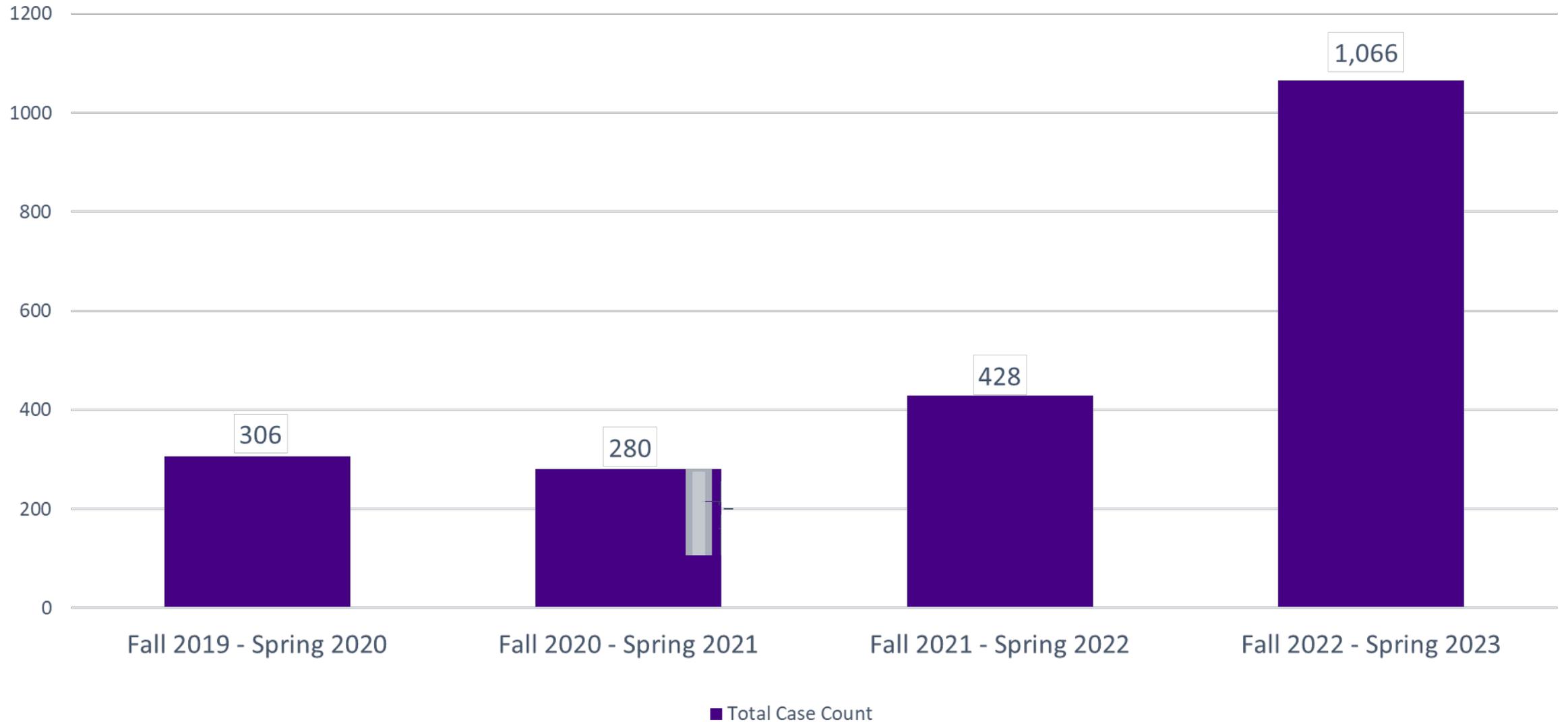


What is Madison Cares?

Madison Cares is a centralized program for staff, students, parents, and community members to refer or consult about students experiencing obstacles. **If you are concerned about a student, you can refer them to Madison Cares.**

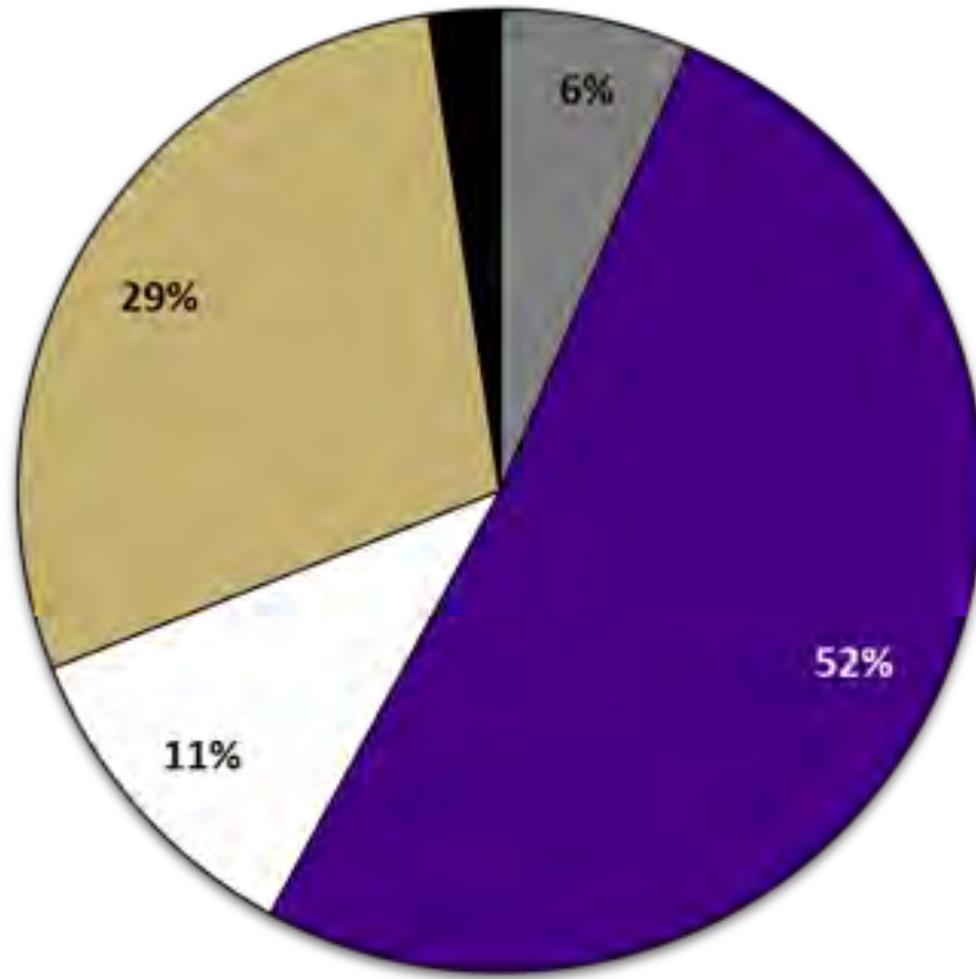


Madison Cares by Academic Year





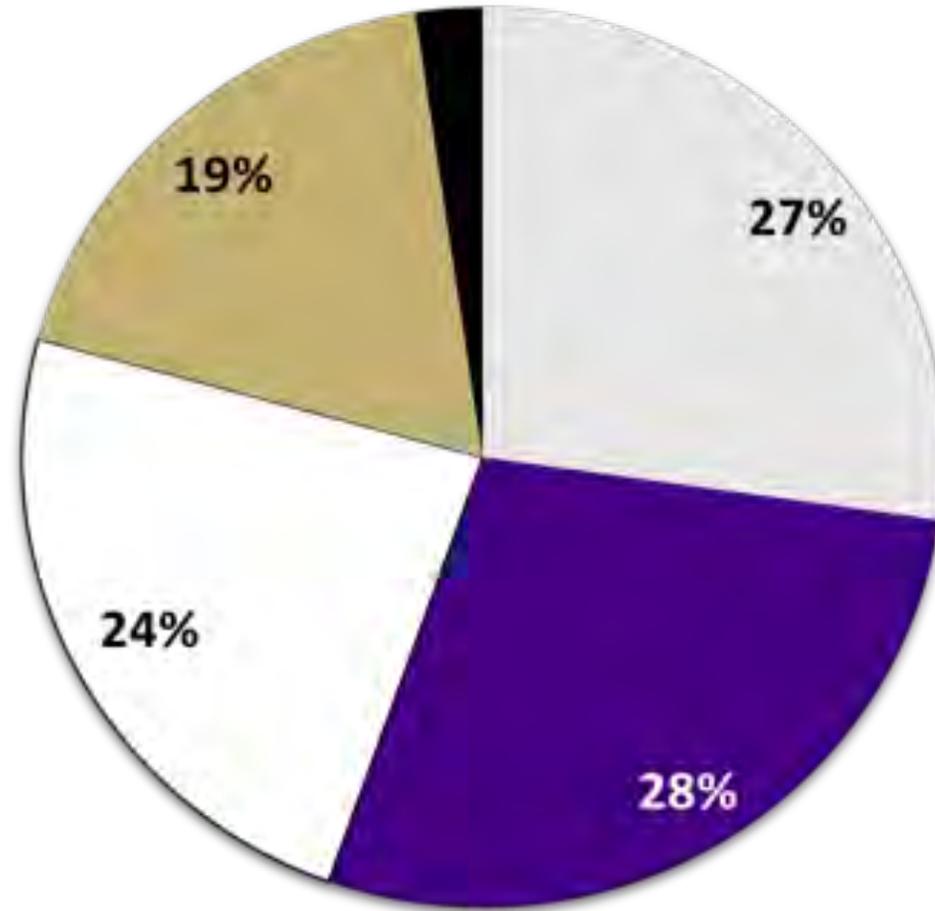
2022-2023 Referrer Demographics



■ Parent/Family Member ■ JMU Faculty/Staff □ JMU Student ■ DOS Staff ■ Other



2022-2023 Student Demographics



Freshman Sophomore Junior Senior Graduate

Fall 2022	
Nature of Concern	Case Count
Academic	117
Assaulted	9
Basic Needs Insecurity	4
Disruptive Behaviors	7
General Concerns	85
Medical Concern	39
Missing Student	1
No Contact Order	5
Mental Health Concern	176
Safety Risk (thoughts of suicide, suicide attempt, self harm)	25
Social/Emotional	76
Threat to Others	6
Title IX Issue	7
TOTAL	557

Spring 2023	
Nature Of Concern	Case Count
Academic	139
Assaulted	9
Basic Needs Insecurity	5
Disruptive Behavior	16
General Concerns	42
Incident of Bias	2
Medical Concern	40
Mental Health Concern	89
Missing Student	1
Self Harm	5
Social/Emotional Concern	122
Suicide Attempt	9
Thoughts of Suicide	20
Threat to Others	8
Title IX Issue	2
TOTAL	509





Testimonials

- "I truly appreciate you reaching out to her. I think it would feel good to her to have someone official at JMU take an interest in how she is doing and offer support/ guidance. I think she's generally feeling discouraged and lost... Regardless of how this plays out, I really appreciate that it was an option for me to try to drum up additional support for her through the Madison Cares program. Such a great idea!"

-JMU Parent, submitted Madison Cares referral



Testimonials

- "I truly appreciate Madison Cares and the support it offers both faculty and students. Thank you for all you do for our students. "
 - JMU Professor, submitted Madison Cares referral

- "I am glad to have resources like this at JMU so I can have assistance during difficult times like this...I really appreciate your help on this matter, I will say I already feel less anxious about this being in contact with you and some of my professors."
 - Madison Cares Student



Sarah

Student Profile

- Self-referred to Madison Cares
- Art Major, transfer student from NOVA/George Mason, first-gen college student
- Does not have support from family
- Had recently experienced an emergency surgery, COVID, and a robbery
- Financial Aid had not come through; tuition bill had not been paid

Support from Dean of Students

- Meeting to discuss her self-referral
- Notified Sarah's professors of the extenuating circumstances
- Reached out directly to the Director of Financial Aid and Director of University Business Office
- Aid was awarded and bill was removed from her account
- Successfully completed the semester, is expecting to graduate Spring 2024



Michael

Student Profile

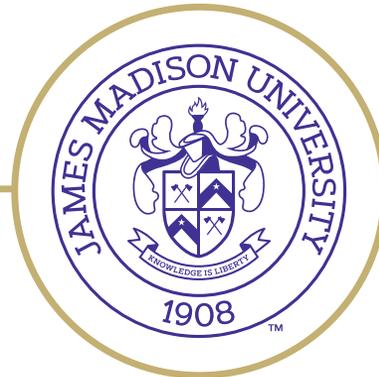
- Sophomore, Public Policy major from VA
- Multiple siblings who graduate from JMU
- A friend from his hometown recently passed away
- Mom referred him to Madison Cares after becoming aware of concerning behavior
- Michael was living at home and commuting to campus

Support from Dean of Students (DoS)

- Michael and his family met to discuss referral
- Michael met one-on-one with DoS staff
- He was encouraged to participate in Wellness Coaching and talked about counseling options
- DoS staff checked in throughout the semester to discuss academics, family, etc.
- DoS followed up with family over spring break
- Michael was allowed to return to campus full time

Rebound and Learning Success Strategies (LSS)

Matthew Hunsberger, Coordinator, Dean of Students



The *Rebound* Program

- Aims to promote student resilience
- Mentor or small group experience
- Eight-week program; Six dimensions of wellness
- Normalizes setbacks through sharing stories and videos
- www.jmu.edu/rebound





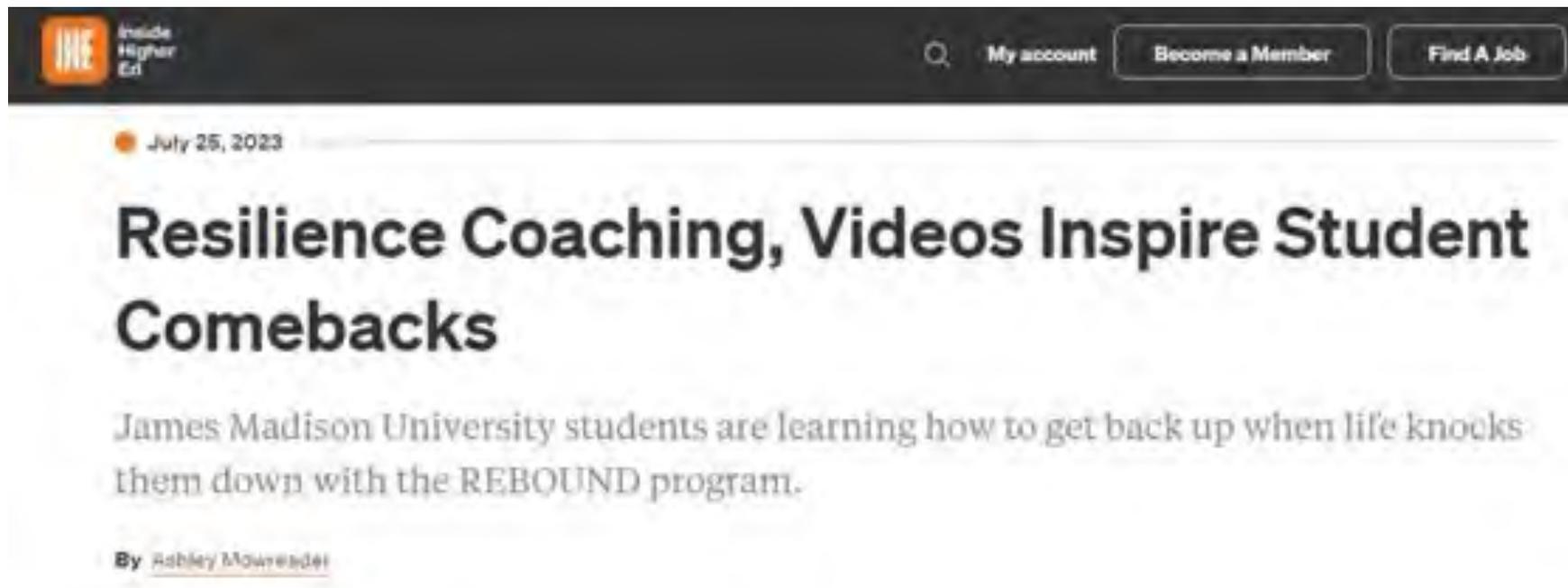
Rebound 2022-2023 Snapshot

- Created, marketed, and facilitated a Rebound-style course during the spring semester for students wishing to “rebound” from their fall semester struggles
- Expanded the course this fall to "Navigate JMU"
- Recorded and posted two new Rebound videos and six new Rebound podcasts hosted by Dr. Tim Miller
- Participated in various outreach events throughout the year



Rebound in the News!

- Article by [Inside Higher Ed](#), July, 2023

A screenshot of a news article from Inside Higher Ed. The article is dated July 25, 2023, and is titled "Resilience Coaching, Videos Inspire Student Comebacks". The text of the article states: "James Madison University students are learning how to get back up when life knocks them down with the REBOUND program." The author is identified as Ashley Mowresder.

IME Inside Higher Ed

July 25, 2023

Resilience Coaching, Videos Inspire Student Comebacks

James Madison University students are learning how to get back up when life knocks them down with the REBOUND program.

By [Ashley Mowresder](#)



Testimonials

- "Overall, I did not really find my footing freshman year... Through Rebound, I could see the big picture a little bit and be more grateful for what I did have. It was a sense of community that I could share random thoughts and stories with. It provided resources but overall was just a place to decompress and talk. Highly recommend it for almost anyone."
- Student participant
- "Every meeting with my mentor was a pleasure so it is hard to point to one favorite moment. There were multiple moments, however, when my mentor and I were engaging in conversation that I came to realizations about myself or about what I was dealing with at the time. These realizations helped me make smart decisions and resonated with me throughout the week."
- Student participant



Testimonials

- “I just wanted to thank [you] for all of your dedication, kindness, and patience with struggling JMU students, especially my son. The whole Rebound experience was wonderful, and I can’t thank you enough for reaching out to him. As parents it is such a relief to know that your child is in good hands when he is so far away.”
- Parent of a student participant

Learning Success Strategies (LSS)

- Five undergrad *Peer Learning Assistants* and one *Graduate Assistant*
- Time-Management, Goal-Setting, Reading Comprehension, Test-Taking, Note-Taking, Study Strategies, etc.



LSS

- Transitioned from Office of Disability Services to Dean of Students Office
- Implementation of new scheduling and appointment notation software
- Increased participation in Orientation and outreach events

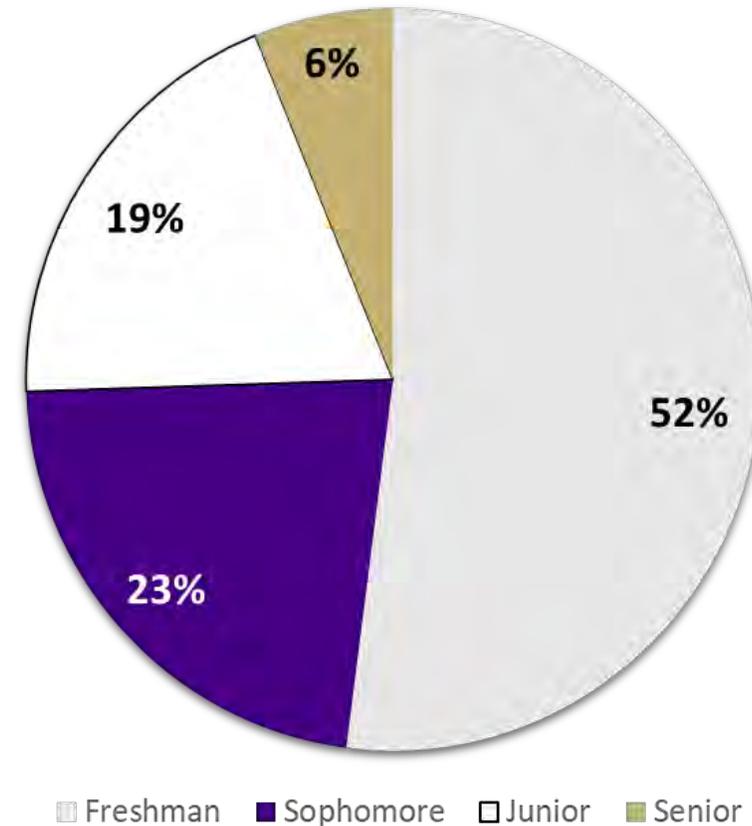




LSS Snapshot 2022-2023

- 19 Presentations to 689 students
- 339 appointments with Peer Learning Assistants
- 147 Personalized Planners created for students

Student Demographics



Personalized Planners

"Setting goals is the first step in turning the invisible into the visible." -Tony Robbins

SMART goals are Specific, Measurable, Attainable, Realistic, and Time-based

Short-term goals

1)
2)
3)

Long-term goals

1)
2)
3)

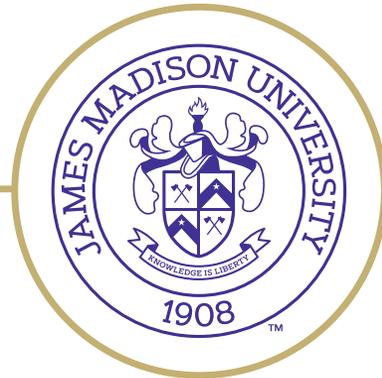
"Unless you try to do something beyond what you have already mastered, you will never grow."

Ronald E. Osborn



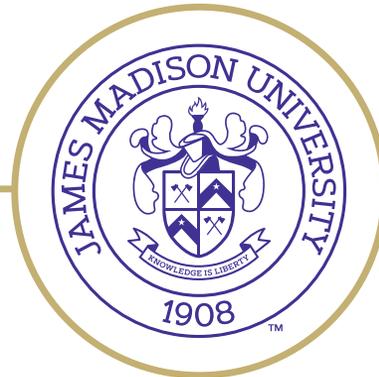
jmu.edu/rebound

Questions?

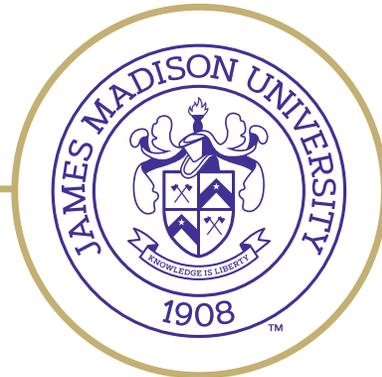


Student Panel

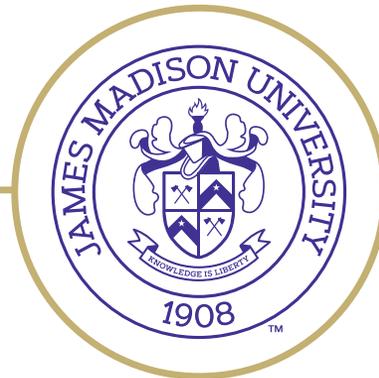
Tara Pollnitz, Madison Cares Graduate Assistant, Clinical Mental Health Counseling Graduate Program
Kevin Cottrell, Student Assistant, Psychology Major & Honors Minor
Kyleigh Schlenker, LSS Graduate Assistant, Masters in Teaching Graduate Student
Jillian Lake, Rebound Class Participant, Business Management Major



Questions?



Thank You



ITINERARY
September 14-15, 2023

PLEASE NOTE THE COMMITTEE START TIMES.

Thursday, September 14, 2023:

9:00 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	Athletics Committee – Ballroom B
2:45 pm – 4:15 pm	Audit, Risk and Compliance Committee - Meeting Room 1
5:30 pm – 6:45 pm	Reception & Dinner– Board Dining Room
7:00 pm	Advancement and Engagement Committee – Board Room

Friday, September 15, 2023:

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 14-15, 2023

**THE VISITORS OF JAMES MADISON UNIVERSITY
THE COMMONWEALTH OF VIRGINIA
BOARD MEETING AGENDA
FRIDAY, SEPTEMBER 15, 2023
8:30 a.m**

**1
CALL TO ORDER**

**2
*CONSENT AGENDA:
Approval of Minutes: April 21, 2023
Approval of Retreat Minutes: April 22, 2023
Approval of Executive Committee Minutes: September 5, 2023**

**3
*COMMITTEE REPORTS
Academic Excellence – Lara Major
Advancement and Engagement– Michael Stoltzfus
Athletics – John Lynch
Audit, Risk and Compliance – Chris Falcon
Finance & Physical Development – John Rothenberger
Governance Committee - Jack White
Student Affairs – Terrie Edwards**

**4
PRESIDENT’S REPORT
Jonathan Alger**

**5
*SIX-YEAR PLAN
Jon Alger, President
Towana Moore, Vice President for Finance and Physical Development
Donna Harper, Vice President for Access and Enrollment Management
Heather Coltman, Provost and Senior Vice President for Academic Affairs**

**6
JMU VALOR
Tim Miller, Vice President, Student Affairs**

**7
BIG IDEAS
Chris Orem, Executive Director, Planning, Analytics and Institutional Research
Sheila Smith, Associate Vice President, Planning & Operations**

**8
CAREER OUTCOMES
Myles Surrett, Associate Vice President, Career, Experiential Learning & Transitions
Libby Westley, Director, University Career Center**

**9
*CLOSED SESSION**

**10
ADJOURNMENT**

***Action Required**

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

Volume LIX No. 4

Minutes of the Meeting of April 21, 2023

The Visitors of James Madison University met on Friday, April 21, 2023 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
Edwards, Terrie	Obenshain, Suzanne
Falcon, Chris, Vice Rector	Rothenberger, John
Grass, Jeff	Stoltzfus, Michael
Gray-Keeling, Matthew	Tompkins Johnson, Deborah
Herod, Maribeth, Rector	Welburn, Craig
Lynch, John	White, Jack

Williams, Xaiver, Student Representative to the Board, 2022-23
Harper, Donna, Secretary

ABSENT:

Jankowski, Maria

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

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

The Rector recognized the newly elected student representative to the board, Abby Cannella and Nate Hazen, the new Student Government Association President. She also recognized Shawdee Bakhtiari, “retiring” Student Government Association President and Xaiver Williams, “retiring” student representative to the Board of Visitors.

APPROVAL OF CONSENT AGENDA

On motion of John Rothenberger, seconded by Deborah Tompkins Johnson, the consent agenda was approved including minutes of the February 10, 2023 meeting and the minutes from the Public Comment meeting on April 5, 2023.

COMMITTEE REPORTS

Academic Excellence Committee

Matthew Gray-Keeling, Chair, presented the report of the Academic Excellence Committee. The minutes of the February 10, 2023 meeting were approved. (Attachment A)

Mr. Gray-Keeling reported on the following topics from the committee meeting:

- 1) Comments from Heather Coltman, Provost and Senior Vice President for Academic Affairs;
- 2) Update on the Bridge to Madison Program with Blue Ridge Community College;
- 3) Jennifer Campfield, Assistant Vice President for Academic Initiatives and Planning shared the Academic Affairs Strategic Plan;
- 4) College spotlight – Honors College;
- 5) Revisions to the Faculty Handbook:
 - a. On motion from committee, the board approved the revisions to the Faculty Handbook; and
- 6) Report from the Speaker of the Faculty Senate, Kathy Ott Walter.

On motion of Mr. Gray-Keeling, seconded by Craig Welburn, the report of the Academic Excellence Committee was accepted.

Advancement and Engagement Committee

Craig Welburn, Chair, presented the report of the Advancement and Engagement Committee. The minutes of the February 10, 2023 meeting were approved. (Attachment B)

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

- 1) Fundraising report from Jared Lowry, Duke Club and Jeff Gillian, Advancement;
- 2) Update from Nick Langridge, Vice President for Advancement;
- 3) Chris Myers, Senior Director for Enrollment Marketing presented on university advertising strategies;
- 4) John Meck, Director for Corporate Relations, reported on the 10th Annual Madison Trust;
- 5) Caitlyn Read, Director for Government Relations provided an overview of engagement during this past General Assembly.

On motion of Mr. Welburn, seconded by Chris Falcon, the Advancement report was accepted.

Athletics Committee

John Lynch, Chair, presented the report of the Athletics Committee. The minutes of the February 10, 2023 meeting were approved. (Attachment C)

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

- 1) Sports update;
- 2) Results from the recent Title IX report;
- 3) Student Athlete Leadership program update;
- 4) NCAA waiver update;
- 5) Development update from the Duke Club.

On motion of Mr. Lynch, seconded by Deborah Tompkins Johnson, the Athletics report was accepted.

Audit, Risk and Compliance Committee

Chris Falcon, Chair, presented the report of the Audit Committee. The minutes of the February 10, 2023 meeting were approved. (Attachment D)

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

- 1) April Cassada and Nick Nonnemacker of the Auditor of Public Accounts presented the results of the JMU Financial Audit;
- 2) Jen Grossman Leopard, Director of Student Life, provided an overview of JMU's response to Adam's Law; and
- 3) Matt Bingay, WMRA station manager, discussed the results of the WMRA financial audit.

On motion of Mr. Falcon, seconded by Lara Major, the Audit 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 10, 2023 meeting were approved. (Attachment E)

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

- 1) Financial Review;
- 2) 2021-22 Audit Review received an unmodified opinion statements with no written comments;
- 3) General Assembly update;
- 4) Six-Year Capital Plan:
 - a. On motion from committee, the board approved the Six-Year Capital Plan;
- 5) 2023-24 Proposed Tuition and Fees and 2024 Summer Tuition and Fees; and
- 6) 2023-24 Proposed Budget.

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

Governance Committee

Jeff Grass, Chair, presented the report of the Governance Committee. The minutes of the February 10, 2023 meeting were approved. (Attachment F)

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

- 1) Plans for the upcoming Board retreat;
- 2) Presidential succession:
 - a. On motion from committee, approved the following change to the Board Manual: Article IX. Rights and Powers, Section A. 2C: "In case of the president's incapacity because of disability or death" be replaced with "In the case of a planned or unplanned departure of the president".
- 3) Reviewed the last year to pass along to the next committee; and
- 4) Discussed the possibility/purpose of Board liaisons.

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

Student Affairs Committee

Deborah Tompkins Johnson, Chair, presented the report of the Education and Student Life Committee. The minutes from the February 10, 2023 meeting were approved. (Attachment G)

Ms. Tompkins Johnson reported on the following topics from the committee meeting:

- 1) Report from Tim Miller, Vice President for Student Affairs;

- 2) SGA report from Shawdee Bakhtiari, Student Government Association President;
- 3) Report from Xavier Williams. Student Representative to the Board;
- 4) Career, Experiential Learning and Transition Spotlight; and
- 5) A student panel.

On motion of Ms. Tompkins Johnson, seconded by Lara Major, the Student Affairs Committee report was accepted.

PRESIDENT'S REPORT

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

- An admissions update was provided with the following information: There are 37,001 first-year applicants, which is a 17% increase over 2022 and a 68% increase over 2021. First-year applicant demographics are 46% out-of-state, 21.5% first-generation, 34.4% underrepresented minorities and 565 international applicants. Applicants represent 50 states, Washington, D.C., U.S. territories and 112 countries;
- Class of 2027 update: Almost 4,105 deposits (in-state: 2,945 and out-of-state: 1,156) have been received with a class goal of 4,650. First-year class demographics are: 21% underrepresented minorities, 15% first generation; 41% male; 59% female. They represent 37 states and 28 countries. 265 deposits are from transfer students;
- JMU successfully completed the on-site review with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) and for the second consecutive decennial review, JMU received zero recommendations as a result of the site visit;
- Funded by the Virginia General Assembly, JMU received a \$250,000 grant as part of the Virginia Talent + Opportunity Partnership, which will expand paid and credit-bearing student internships and other work-based learning opportunities in collaboration with Virginia Employers;
- A Student Engagement Symposium was hosted on campus and organized by a JMU Presidential Engagement Fellow. This focused on the work of engaged students with a wide cross-section of the university, focusing on engaged learning, community engagement and civic engagement;
- Mya Wilcox, public policy and administration major, has been appointed to the Virginia Governor's Fellows Program;
- Reggie Wilcox was awarded a Newman Civic Fellow, which is an award to a select group of students from around the nation by Campus Compact. Reggie is a junior at JMU and an integrated science and technology major;
- Ava Galgano, chemistry major, and Stephanie Ouderkirk, biophysical chemistry major, were named as Goldwater Scholars. This is a premier award and selects high-achieving students who will pursue research careers in their chosen STEM fields;
- Junior music major, Haven Kahn, was named the Petrichor Grand Prize Winner – under 21 category – and won second place in the Vandoren Emerging Artist competition. This is one of the most prestigious competitions in classical saxophone;
- Ken Rutherford, political science professor and world renowned expert on global conflict and stability and recovery operations, was appointed to the Virginia Board of Historic Resources by Governor Youngkin;
- Aramark received the Gold Medal at the Aramark Culinary Excellence competition;
- Over 400 people attended JMU's Diversity Conference. The audience was made up of faculty, staff, students, community partners and representatives from peer institutions;
- The College of Education visited Rwanda to formalize its partnerships with the Ministry of Education. During the 2023-24 academic year, Rwanda teachers will enroll in JMU's Graduate Certificate for teacher leadership. The College of Education at the University of Rwanda plans to

partner with JMU to provide faculty exchanges, share information on faculty support and compare curriculum at the undergraduate and graduate levels;

- David Kirkpatrick has been named Executive Director of the Madison Center for Civic Engagement. A discussion, Europe at the Crossroads, was held with a lively discussion with students and faculty. JMU partnered with the Constructive Dialogue Institute and is considered a Voter Friendly Campus;
- JMU hosted Dr. Anthony Fauci and CNN Anchor Jim Acosta ('93) for a town hall discussion with more than 1,000 people attending; and
- JMU Women's Basketball was the Sun Belt Conference Champion, JMU Lacrosse ranked 4th in the Nation, all spring sports are over .500 and the fall football schedule has been finalized.

2023-24 PROPOSED TUITION AND FEES

Towana Moore, Vice President for Administration and Finance shared the challenges, considerations and university investment that will impact the decision on tuition and fees. (Attachment I). On motion from the Finance and Physical Development Committee, the board approved the following tuition and fees for 2023-24 with Richard Bell, Terrie Edwards, Suzanne Obenshain and Jack White opposing:

UNDERGRADUATE

VIRGINIA STUDENT	2023-24
Tuition & Fees	7,914
Comprehensive Fee	5,662
TOTAL COMMUTER COSTS	\$ 13,576
Room & Board	11,988
TOTAL ON-CAMPUS COSTS	\$ 25,564

NON-VIRGINIA STUDENT	
Tuition & Fees	25,128
Comprehensive Fee	5,662
TOTAL COMMUTER COSTS	\$ 30,790
Room & Board	11,988
TOTAL ON-CAMPUS COSTS	\$ 42,778

GRADUATE (Per Credit Hour)	2023-24
Virginia	\$ 545
Non-Virginia	\$ 1,272

2023-24 PROPOSED SUMMER TUITION AND FEES

Towana Moore, Vice President for Administration and Finance shared the proposed 2024 summer tuition and fees. On motion from the Finance and Physical Development Committee, the board approved the following summer tuition for 2024:

Summer 2024	
Tuition and Education & General Fees (Per Credit Hour)	
Virginia Undergraduate	\$408
Non-Virginia Undergraduate	\$985
Virginia Graduate	\$475
Non-Virginia Graduate	\$1,117

Student Services Fee (Per Credit Hour)	
Virginia Undergraduate	\$27
Non-Virginia Undergraduate	\$27
Virginia Graduate	\$27
Non-Virginia Graduate	\$27
Room & Board (Per Week)	
Room	\$114
Board - 19 Meals No Dining Dollars	\$140

2023-24 PROPOSED BUDGET

Towana Moore, Vice President for Administration and Finance explained the institutional revenue and projected expenses for the coming fiscal year. On motion from the Finance and Physical Development Committee the board approved the 2023-24 budget with Richard Bell, Terrie Edwards, Suzanne Obenshain and Jack White opposing. (Attachment J)

2023-24 Budget Summary (Millions)		
Education & General		403.5
Auxiliary Enterprises		242.5
Financial Aid		31.0
E&G, F/A & Auxiliary	\$	677.0
Sponsored Programs	\$	46.8
Total Operating*	\$	723.8
* Excludes Equipment Trust Fund		

RESEARCH INSTITUTES AND CENTERS

Anthony Tongen, Vice Provost for Research and Scholarship, provided background information on the role of research institutes and centers and the goals for the future. Dr. Delores Phillips, Director for the African, African American, and Diaspora (AAAD) Studies Center and Dr. Maryam Sharifian, Director of Early Childhood Initiatives and the Center for Innovation in Early Childhood Development (CIECD) shared the vision for these new centers.

The Rector and President then recognized the board members whose terms will expire on June 30, 2023: Jeff Grass, Matt Gray-Keeling, Maria Jankowki (absent), Deborah Tompkins Johnson, and Craig Welburn.

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

“I move the Board go into closed session to discuss the following matters: 1) pursuant to Virginia Code Section 2.2-3711 A-1, to discuss personnel matters involving promotions, performance, retirements, hiring, resignations, salary adjustments, and status changes of various faculty members, administrators and appointees, as well as the award of tenure to faculty members; 2) pursuant to Section 2.2-3711-A-3 of the Code of Virginia to discuss the acquisition/disposal of real property; 3) pursuant to Section 2.2-3711 A-7 of the Code of Virginia to consult with legal counsel and be briefed by staff members/consultants pertaining to litigation.”

The motion was seconded by Jeff Grass 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
Edwards, Terrie
Falcon, Chris, Vice Rector
Grass, Jeff
Gray-Keeling, Matthew
Herod, Maribeth, Rector
Lynch, John

Major, Lara
Obenshain, Suzanne
Rothenberger, John
Stoltzfus, Michael
Tompkins Johnson, Deborah
Welburn, Craig
White, Jack

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

On motion from John Rothenberger, seconded by Michael Stoltzfus, approved the purchase of 449 Eastover Drive at a price of \$279,500.

On motion from John Rothenberger, seconded by John Lynch, approved the quitclaim deed for property at 11352 Sassafras Ridge, Markham, Va.

On motion from John Rothenberger, seconded by Lara Major, approved the Personnel Action Report.

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 12:13 pm.

Maribeth Herod, Rector

Donna L. Harper, Secretary

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

Volume LI No. 1

Minutes of the Board Retreat on Saturday, April 22, 2023

The Visitors of James Madison University met on Saturday, April 22, 2023 at the Red Barn in Bridgewater, Virginia. David Vuletich, from EAB, facilitated the retreat. (Attachment A)

PRESENT:

Edwards, Terri	Obenshain, Suzanne
Falcon, Chris, Vice Rector	Rothenberger, John
Grass, Jeff	Stoltzfus, Michael
Herod, Maribeth, Rector	Tompkins Johnson, Deborah
Lynch, John	Welburn, Craig
Major, Lara	White, Jack

Williams, Xaiver, Student Representative to the Board, 2022-23
Harper, Donna, Secretary

ABSENT:

Dickie Bell
Maria Jankowski
Matthew Gray-Keeling

ALSO PRESENT:

Alger, Jonathan, President
Bourne, Jeff, Director of Athletics
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
Moore, Towana, Vice President for Administration and Finance
Ott-Walter, Kathy, Speaker, Faculty Senate

David Vuletich shared trends and future visioning for higher education. The board discussed four topics in small groups following each section of the presentation. The topics were: research, diversity, campus environment, and value proposition. EAB will develop themes from the notes on each topic that will be shared with the board for future consideration.

ADJOURNMENT

The board adjourned at 2:15 pm.

Maribeth Herod, Rector

Donna L. Harper, Secretary

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

Minutes of the Executive Committee

The Executive Committee of the Board of Visitors met at 1:36 pm on Tuesday, September 5, 2023 in Reston, Virginia.

PRESENT

Edwards, Terrie (virtual)
Falcon, Chris, Vice Rector
Herod, Maribeth, Rector (virtual)

Lynch, John (virtual)
Major, Lara
Rothenberger, John

Maribeth reviewed the process for the evaluation of the president’s performance. The committee then went 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.”

The motion was seconded by Terrie Edwards and approved.

Following the closed session, the Rector stated:

“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:

Terrie Edwards
Chris Falcon
Maribeth Herod

John Lynch
Lara Major
John Rothenberger

The meeting adjourned at 2:46 pm

Maribeth Herod, Rector

Donna L. Harper, Secretary

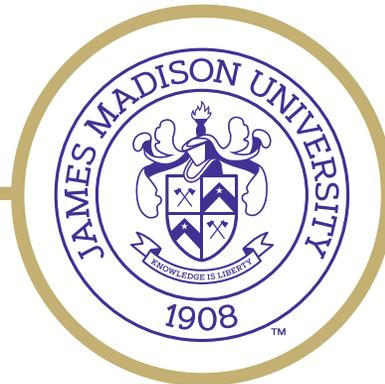
Six-Year Plan

Jon Alger
President

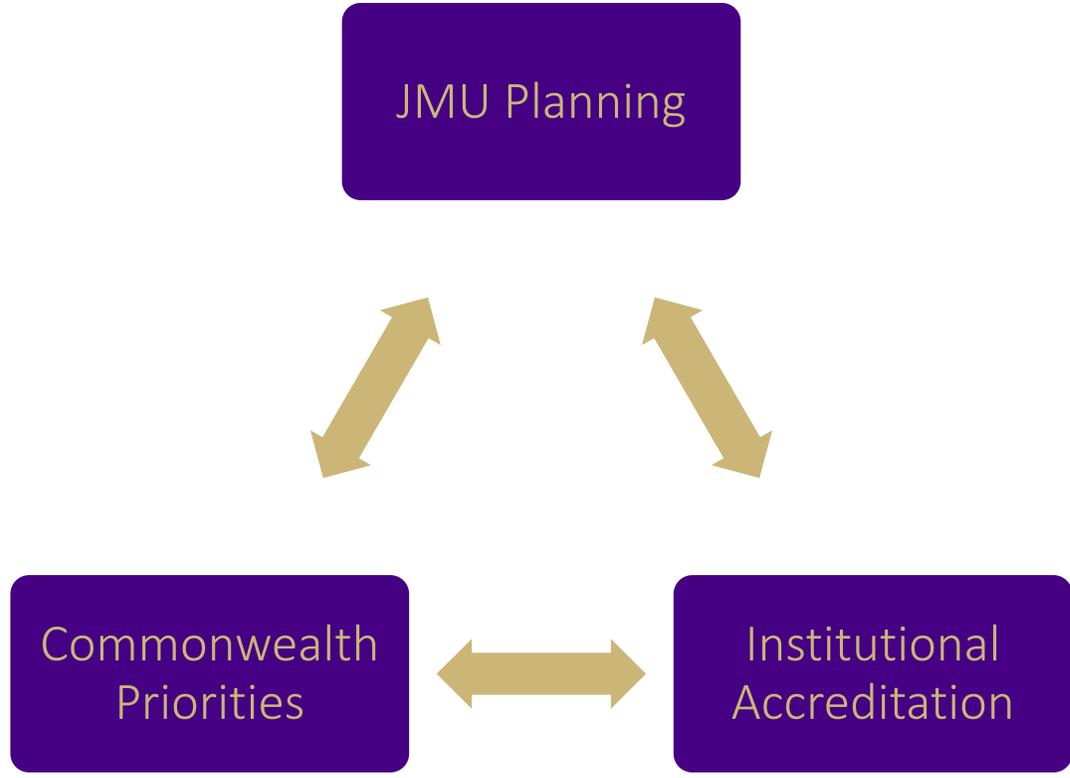
Heather Coltman
Provost and Senior Vice President
Academic Affairs

Donna Harper
Vice President
Access & Enrollment Management

Towana Moore
Vice President
Administration and Finance



Six-Year Planning Process





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



Enrollment Management and Projections

- **Fall 2022 Population: 22,224**
 - Undergraduate students: 20,346
 - Graduate students: 1,878
- **Resident Status**
 - In State: 79%
 - Out of State: 20%
 - International: 1%
- **Retention Rates**
 - First to Second Year: 89%
 - Pell Recipients: 85%
 - First Generation: 83%
- **Graduation Rates**
 - Six Year: 81%
 - Pell Recipients: 76%
 - First Generation: 77%
- **Challenges**
 - Changes to student demographics
 - State support for financial aid

Alignment with the Commonwealth



			<p style="text-align: center;">North Star: Prepare Every Graduate for Success in Life</p>	
<p>1.3 Strengthen student support services for persistence and completion: mental health, mentoring, career services, social, student basic needs, information technology, disability support and other services.</p>		<ul style="list-style-type: none"> ▪ Post-Secondary Readiness ▪ Vibrant and Safe Learning Environments 	<p>4-2. Prioritize mental health solutions in our schools and on our campuses to nurture a culture of well-being</p>	<p>Health</p>
<p>2.2 Cultivate affordable postsecondary education pathways for traditional, non-traditional and returning students.</p>		<ul style="list-style-type: none"> ▪ Prioritized Resources ▪ Access and Affordability 	<p>2-2. Create incentives for institutions, employers, and students to pursue credentials aligned to our most urgent labor market demands and retain graduates in Virginia</p> <p>3-1. Strengthen “Pathway Programs” and other efforts that prepare young people for long term academic, career, and life success</p> <p>3-3. Partner with K-12 to ensure every high school graduate earns an industry recognized credential or associates degree upon graduation as part of the effort to elucidate the multiple pathways to success</p>	<p>Workforce Needs</p>
<p>3.2 Improve the alignment between post-secondary academic programs and labor market demands.</p>		<ul style="list-style-type: none"> ▪ Transparency and Accountability ▪ Innovation 	<p>1-3. Increase student exposure to and experiences with the world of work</p> <p>3-2. Launch innovative lab schools in communities across the Commonwealth</p>	<p>Education</p>
<p>3.2 Improve the alignment between post-secondary academic programs and labor market demands.</p>		<ul style="list-style-type: none"> ▪ High Expectations 	<p>1-1. Prepare every credential-earner for employment in a family-wage supporting job</p> <p>1-3. Increase student exposure to and experiences with the world of work</p>	<p>Technology</p>



Six-Year Strategies

■ Health

- Produce More Nurses through the “Fast Flex” BSN Program
- Support Growing Commonwealth Healthcare Needs with Advanced Degrees: BSN to DNP
- Increase Enrollment in the Physician Assistant Studies Program (New and Expanded Academic Programs)
- **Meet Commonwealth’s Mental Health Needs**
- Support Student and Employee Mental Health

■ Workforce Needs

- Strengthen Student Access to Internships and Support Local Business

■ Education

- Create a New Partnership School: Lab Schools with RCPS
- Grow Your Own: Licensing Paraprofessionals with Degrees

■ Technology

- Expand Early Student Success Program (Academic and Student Support Strategies)
- Grow Computer Science Programs (New and Expanded Academic Programs)
- Grow Information Technology Program (New and Expanded Academic Programs)

Key

General Fund Requests

Nongeneral Fund

General and Nongeneral Funds



Six-Year Strategies

■ Other Financial Strategies

- Increase Salary and Benefits for Existing Employees: FT, PT, Adjuncts, GAs
- Provide Faculty Promotions and In-band Adjustments Funding
- Retain Excellent Employees
- Fund Inflationary Non-Personnel Costs
- Implement Re-engineering Madison (Fund Academic and Student Support Strategies)
- Support Veterans through the Virginia Military Survivors and Dependents Education Program
- Increase Enrollment of Pell-Eligible Students
- Expand Financial Aid
- Fund Operations and Maintenance of Carrier Library Renovation & Expansion

Key

General Fund Requests

Nongeneral Fund

General and Nongeneral Funds



Six-Year Financial Plan Assumptions

- **Timeline**

- Covers six years (FY 2024–30)
- Focus on 2024–26 Biennium

- **Projections**

- Enrollment
- Tuition and fees
- Tuition and fee revenue estimate based on projected enrollments by degree level and residency
- General funds for salary and medical cost increases only



Academic and Financial Plan Strategies: 2024-25



	Nongeneral Funds	General Funds	Reallocation	Total
Increase Salaries: Teaching & Research Faculty, Admin Faculty, Classified Staff	2,217,158	2,344,894		4,562,052
Increase Adjunct Faculty & Graduate Assistant Base Pay	164,480	173,955		338,435
State Health Insurance Cost Increase	594,235	628,470		1,222,705
Minimum Wage Increase	126,678			126,678
Faculty Promotions and Staff In-Band Adjustments	1,050,000			1,050,000
Inflationary Non-Personnel Cost Increases	412,447	1,443	1,000,000	1,413,890
Expand Financial Aid	850,125			850,125
Expand Physician Assistant Studies Program (New and Expanded Academic Programs)	202,935			202,935
Support Growth of the Computer Science and Information Technology Majors (New and Expanded Academic Programs)	531,277			531,277
Early Student Success System (Academic and Student Support Strategies)	376,257			376,257
Reengineering Madison (Academic and Student Support Strategies)	546,187			546,187
Total	\$7,071,779	\$3,148,762	\$1,000,000	\$11,220,541

Academic and Financial Plan Strategies: 2025-26*



	Nongeneral Funds	General Funds	Reallocation	Total
Increase Salaries: Teaching & Research Faculty, Admin Faculty, Classified Staff	4,477,724	4,735,698		9,213,422
Increase Adjunct Faculty & Graduate Assistant Base Pay	332,447	351,599		684,046
State Health Insurance Cost Increase	1,206,058	1,275,542		2,481,600
Minimum Wage Increase	513,736			513,736
Faculty Promotions and Staff In-Band Adjustments	2,100,000			2,100,000
Inflationary Non-Personnel Cost Increases	776,005	2,964	2,000,000	2,778,969
Expand Financial Aid	1,730,640			1,730,640
Expand Physician Assistant Studies Program (New and Expanded Academic Programs)	352,935			352,935
Support Growth of the Computer Science and Information Technology Majors (New and Expanded Academic Programs)	952,266			952,266
Meet the Commonwealth's Mental Health Needs	299,272			299,272
Early Student Success System (Academic and Student Support Strategies)	573,801			573,801
Reengineering Madison (Academic and Student Support Strategies)	1,616,180			1,616,180
Carrier Library - Renovation & Expansion O&M	641,652			641,652
Total	\$15,572,716	\$6,365,803	\$2,000,000	\$23,938,519

*2025-26 is cumulative of 2024-25



Six-Year Financial Plan – Tuition & Fees

Tuition & Fees Shown for Modeling Purposes*

	Dollar Change		
	FY 2023-24	FY 2024-25	FY 2025-26
In-State Undergraduate Tuition	7,914	388	407
In-State Undergraduate Mandatory non-E&G Fees	5,662	168	173
In-State Undergraduate Total	\$13,576	\$556	\$580
Out-of-State Undergraduate Tuition	25,128	491	501
Out-of-State Undergraduate Mandatory non-E&G Fees	5,662	168	173
Out-of-State Undergraduate Total	\$30,790	\$659	\$674

* The tuition & mandatory fee rates shown are based on planning costs and are for modeling purposes only



Six-Year Financial Plan E&G – Summary

(\$s in millions)

	FY 2024-25	FY 2025-26*
Revenues		
Nongeneral Fund Estimate	7.1	15.6
Reallocations	1.0	2.0
General Fund Assumption ⁽¹⁾	3.1	6.3
Total	\$11.2	\$23.9
Expenditures		
Salaries & Benefits (partial state support)	6.2	12.9
Inflationary Non-personnel Costs	1.4	2.8
Financial Aid Expansion	0.9	1.7
Academic Initiatives	1.1	2.2
All Other Operating Needs	1.6	4.3
Total	\$11.2	\$23.9

(1) Assumes new state general fund support for salaries and benefits and VITA costs only.

* 2025-26 is cumulative of 2024-25

Summary of Six-Year Planning Process

The State Council of Higher Education for Virginia (SCHEV), in cooperation with public 2- and 4-year institutions, develops six-year plans which support institutional commitments to the Statewide Higher Education Strategic Plan and objectives of the Higher Education Opportunity Act of 2011.

Each public institution of higher education is required by the Higher Education Opportunity Act of 2011 to prepare and submit a six-year plan. The governing board of each public institution must adopt a six-year plan in each odd-numbered year and amend or affirm the plan in each even-numbered year. As the title suggests, this is a planning document only and is used for that purpose—it involves projections based on current information that can be amended and updated over time.

In April, the Boston Consulting Group (BCG) was hired by the Commonwealth to support the revamping of the six-year plan process. BCG will assist in the planning process over three phases through fall 2023, which include creating a new reporting approach, supporting the planning process and providing policy/budget recommendations. Throughout this period, BCG has and will continue to actively involve various institutional constituent groups (including board members) in the process of discovery, solicit feedback, and offer opportunities to shape the six-year plan.

The 2023 six-year plan consists of the following components:

- 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:
 - 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: Collaboration; State Policy; Additional Information

James Madison University

2023 Six Year Plan Narrative
Part II

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 drives innovation, shapes our educational approaches, and provides 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 proactive 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 position base adequacy with debt 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 re-classification is a reflection of JMU's significant level of research opportunities for undergraduates, as well as our excellent doctoral programs and acquisition of external funding, and it is classification reached organically. 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. Develop 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. Embark 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. Establish 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 teaching faculty 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.

The OpSix could most help JMU achieve the strategic priorities listed above in by providing increased funding, particularly in the areas below. See E1 for details.

- Capital
 - The university's capital request for renovated space is essential to provide a safe learning environment for students as well as the technology needs that are integrated into today's learning environment.
 - The renovation of Johnston Hall also allows the university to increase the number of students referenced in the General Fund ask to "Meet the Commonwealth's Mental Health Needs."
 - Funding for the expansion of the College of Health and Behavioral Studies is a necessity for the university to meet its goals of expanding the nursing (BSN and DNP) programs included in the general fund request and the expansion of the physician assistant program included with non-general fund support.
- Financial assistance and increasing enrollment of Pell-eligible students
 - JMU is requesting general funds to increase the number of Pell students by 40 per year as the university has an excellent track record of graduating Pell eligible students that attend JMU.
- Increasing on-going base institutional operations and funding disparity would relieve the stress that has been placed on the university due to unfunded mandates and inflationary pressures (personnel and non-personnel) needed to support students while trying to maintain affordability, particularly as related to:
 - Virginia Military Survivors and Dependent Education Program
 - Operations and Maintenance of the Renovated and Expanded Carrier Library
 - Retaining Excellent Employees
 - Support Student and Employee Mental Health
- A completed and approved Commonwealth budget, available earlier, would be helpful for planning and operational implementation.

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 two 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 begun to affect 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 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 and 2023.
 - 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.
 - JMU intends to maintain enrollment targets for new undergraduate students, as evidenced by the provided projections.
- 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 serves as the Quality Enhancement Plan (QEP) for JMU's re-affirmation of accreditation with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). The program was approved in April 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 needs that are currently not served or are underserved by existing program offerings in the region and the Commonwealth are also top priorities.
 - Examples include several programs highlighted in this plan, such as Nursing, Physician Assistant Studies, and Counseling and Supervision.
- 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 the past two years. Overall projections call for stable or slight declines in enrollment over the next six years.
- 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 amount of in-state targets) beginning in Fall 2022 to maintain realistic projections.
- 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 projected 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 2021 (Last year before Common App)	
Residency	Number of Pell Admits
In-State	1,552
Out-of-State	587
Total	2,139

Fall 2022 (First Year of Common App)		
Residency	Number of Pell Admits	% Increase from Prior Year
In-State	1,794	15.59%
Out-of-State	927	57.92%
Total	2,721	27.21%

Fall 2023 (Second Year of Common App)		
Residency	Number of Pell Admits	% Increase from Prior Year
In-State	1,743	-2.84%
Out-of-State	1,115	20.28%
Total	2,858	5.03%

In addition, beginning in AY 2024-25, the Free Application for Federal Student Aid (FAFSA) and associated Federal Methodology (FM) are changing. As it relates to FM, the Expected Family Contribution (EFC) is being replaced by the Student Aid Index (SAI).

- Analyzing two years of JMU FAFSA data using the NASFAA SAI Tool, JMU estimates that with no action, there will be a 30% increase in the Pell Grant population based solely on the underlying changes to the FAFSA and new SAI. The analysis of the two years (2020-21 and 2021-22) of FAFSA data also indicates that more students will be moved into the neediest category.
- For both aid years:
 - Under the EFC model, 26% of undergraduate students had a \$0 EFC. A \$0 EFC is the floor and represents the highest level of financial aid.

- Under the SAI model, 54% of undergraduate students have a -\$1,500 to \$0 SAI. Beginning in AY 2024-25, the lowest SAI will remain -\$1,500, but all students with a -\$1,500 to \$0 SAI will receive a maximum Pell Grant and would be considered at the neediest level.

In the future, JMU anticipates:

- An increase in the number of Pell Grant students applying, and being accepted, to the university.
- An anticipated 30% increase in the number of matriculating Pell Grant students based solely on changes to the FAFSA and the new SAI.
- Doubling of 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 2016 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%) are informed by national trends among public universities, 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 increase 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 (89%) and aspirational target (94%).
- As completion rates lag behind retention rates, 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 consistently exceeds the minimum threshold of acceptability for its overall six-year graduation rate (80%) with the 2015 cohort graduating at a rate of 81%. This rate has remained relatively stable over the past twenty years, fluctuating between 80% and 84%. To support retaining all students, thus leading to their 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 both space and programming that creates a shared connection to the university experience. The Reddix Center is home to the Madison Society for First Generation Students.
 - 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, specifically marketed to Centennial Scholars (CS), Valley Scholars (VS), and the larger First Gen demographic.
 - Plans for 2023 include developing a partnership with the [Madison Hispanic Caucus](#) to pilot mentoring for first-gen Latino students.
 - 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 will open 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 a local resource for their needs.
 - 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 to those that are eligible to participate.
- 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 four years.
- Although BIPOC students are graduating above the acceptable threshold (78%) with 80% for the 2015 cohort, there are certain strategies and programs in place to help ensure these targets are met, as detailed in the next section.

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.
- *Facilitate and grow mentoring opportunities for under-represented students.*
 - Mentor Collective is a mobile application used by the College of Integrated Science and Engineering, College of Visual and Performing Arts, and Alumni Relations to facilitate, monitor, and assess peer-to-peer mentoring on campus.
 - After one semester, assessment by the involved colleges showed the Mentor Collective had assisted 97 mentees, matched 46 mentors, and logged 415 conversations. Students indicated that conversations helped with improved sense of belonging and academic self-efficacy.
- *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.

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.
 - As Congress recently passed a law preventing further extensions of the payment pause, student loan interest will resume Sept. 1, 2023, with payments due in October. JMU will notify borrowers well before payments restart.
 - 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 the graduates in 2021, 95.6% and 98.1% 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 2021 graduates with bachelor's degrees, 72.9% went to work full time or part time, 22.9% continued their education.

- The most popular areas for undergraduates working included Virginia; Washington, DC; Maryland; and New York.
- Of those undergraduates working in Virginia, 48.4% were working in Northern Virginia, 22.2% were in Central Virginia, and 17.6% were working in the Shenandoah Valley.
- Education, business, and occupational/physical therapy were the most popular continuing education programs pursued.
- For those without an outcome, 4.0% were still seeking employment or education, and the remaining 0.2% were not engaged or not seeking.
- Of the 2021 graduates with advanced degrees, 98.1% achieved a career outcome.
 - Of these, 93.5% were working full time or part time and 4.6% pursued additional education.
 - Virginia; Washington, DC; and Maryland were the most popular areas for advanced degree candidates to work.
 - Of those working in Virginia, 32.2% worked in Northern Virginia, 31.0% worked in the Shenandoah Valley, and 23.3% worked in Central Virginia.
 - The 1.9% 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 report: <https://www.jmu.edu/career/careeroutcomes/outcomes2021.pdf>
 - College of Arts and Letters: <https://www.jmu.edu/career/careeroutcomes/cal2021.pdf>
 - College of Business: <https://www.jmu.edu/career/careeroutcomes/cob2021.pdf>
 - College of Education: <https://www.jmu.edu/career/careeroutcomes/coe2021.pdf>
 - College of Health and Behavioral Studies: <https://www.jmu.edu/career/careeroutcomes/chbs2021.pdf>
 - College of Integrated Science and Engineering: <https://www.jmu.edu/career/careeroutcomes/cise2021.pdf>
 - College of Science and Engineering: <https://www.jmu.edu/career/careeroutcomes/csm2021.pdf>
 - College of Visual and Performing Arts: <https://www.jmu.edu/career/careeroutcomes/cvpa2021.pdf>

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. In Fall 2022, the university created a cross-divisional task force of faculty and staff to explore and enhance student options for career exposure.

- The Work-Based Learning Experience Task Force 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 first year, the task force:
 - Developed a definition of work-based learning experiences (WBLEs) that reflects these student opportunities at JMU.
 - Collected information about existing opportunities and support systems in each program across the entire university.
 - Interviewed representatives from peer institutions (including R2 institutions and Virginia institutions) about their practices, challenges, and processes.
 - Interviewed and surveyed current JMU students and employers.
- Based on the initial findings, future strategies and actions related to WBLEs include:
 - Analyzing collected data to identify equity gaps and differences between programs and/or colleges.
 - Implementing a curricular designation for “internship” or similar learning experiences to make visible which courses “count” as work-based learning experiences, which will also aid reporting efforts.
 - Determining the viability of increasing credit opportunities to connect academic and WBLE experiences.
 - Creating a mechanism for students to complete some of the essential expectations and self-reflection work for WBLE experiences.
 - Enhancing opportunities for students, faculty, and employers to interact around work-based learning experiences.
 - Developing more integrated and consistent communications between offices in Academic Affairs and Student Affairs to highlight and promote WBLEs.
 - Modifying annual graduation outcomes reports to incorporate the percentage of class completing WBLEs.

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 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.
- Resources from General Fund Request #9: *Strengthen Student Access to Internships and Support Local Business* will assist the university in preparing employers, students, and institutions to significantly increase the availability of high-quality, paid internship, and work-based learning opportunities in the region.

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 on pp. 27-31.

- 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 5 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 has 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 lead 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
 - Communication Sciences and Disorders (undergraduate)²
 - Health Analytics (undergraduate)¹
 - Health Sciences, BS (undergraduate)²
 - Integrated Biomedical Sciences (graduate)¹
 - Counseling and Supervision: Modify credit hours and request new classification (doctoral)²
 - Nursing (doctoral)³
 - Physician Assistant Studies (graduate)³

- 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.
 - Interdisciplinary Studies (undergraduate)¹
 - Civic Engagement (undergraduate)⁴
 - Climate Change and Mental Health (graduate)⁴
 - 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%

¹ Proposing a new degree program

² Requesting a stand-alone degree program be created from a currently popular major

³ Proposing expansion to existing program

⁴ Proposing a new certificate

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
 - Industrial Design, BFA (undergraduate)²
 - Media Arts and Design (undergraduate)²
 - Musical Theatre (undergraduate)²
- 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 (doctoral)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.

Efforts to increase funding for low- and middle-income students began in 2021-22 when JMU reached its goal of providing state and/or university grants to in-state undergraduates who met the FAFSA Priority Filing Date and have 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.
- In 2021-22, the institution began awarding an additional \$2,000 University Grant to qualifying in-state Pell Grant students. This, in addition to gradually increasing the percentage of remaining need met by grants, allows JMU to gradually fund a greater percentage of direct costs for qualifying low-income students.
 - The increase in VSFAP funds JMU will receive in 2023-24 will allow the largest single year increase to JMU award amounts in the past two decades. In 2023-24, the institution will meet an average of 39% of remaining need, which is 6% above the 33% average in 2022-23 and moving toward the long-term goal of 50%.
 - The 6% increase will enable \$0 EFC Pell Grant recipients to receive a total grant package that will cover 68-71% of their direct costs, depending on their year in college. The difference in percentages is due to the current Virginia requirement that students at higher grade levels receive larger awards than those with equal amounts of need at lower grade levels.
- Other efforts include creation of the Warden Scholarship program to recruit 50 new in-state Pell Grant students in 2022-23 and 2023-24.
 - Pell Grant students receiving the Warden Scholarship receive a total grant/scholarship package that covers 81% of direct costs.
 - Funding was raised to provide four-year awards to students in each of these two cohorts. Unfortunately, there are no additional funds at this time to extend the program past these two cohorts.
- 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.

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 through the use of 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 2023-24, JMU offered 295% more awards than were offered just two years ago, in 2021-22 (695 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 2023-24, JMU offered 341% more awards than were offered just two years ago, in 2021-22 (820 compared to 186).

The University Advancement division 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?

A new strategic plan for awarding recruitment scholarships was developed in the 2022-23 year, which coincides with JMU's move to the Common Application for undergraduate admissions.

- This institution is offering more scholarships, waivers, and unfunded scholarships to new students than ever before.
 - For example, with the implementation of the Madison Award for Academic Excellence, Madison Recognition Awards, and Two-Year Room Awards (detailed in D1), JMU made 248% more offers from these three programs in 2023-24 than in 2021-22 (1,985 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 Dependent Educational Program (VMSDEP).
 - The VMSDEP program has grown from 111 participants in FY 20 to 361 participants in FY 23. This resulted in the university using an additional \$3 million in resources to fund the program in FY 23 over FY 20 in support of this state mandate.
 - The institution expects that participation in the program will continue to grow with an additional 170 full-time equivalents or \$2.77 million in resources being allocated to the program over the biennium.

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.

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. Research and Scholarship 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.
- *Research Centers Strategy*: Research and Scholarship identified distinctive areas of research that are supported in a coordinated way to avoid duplication of research infrastructure across colleges. This approach enhances collaboration and an interdisciplinary focus while creating world-renowned expertise and recognition in the field.
- *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.

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 Fall 2023, 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 following projects are included in the university's six-year capital outlay plan and are top E&G priorities for the university, listed in priority order.

- Carrier Library Renovation and Additional Furnishings and Equipment
 - Request for furniture, fixtures and equipment (FF&E) funding for the previously approved renovation and expansion of Carrier Library.
 - Substantial project completion is January 2026.
 - Total FF&E project budget is \$7,043,000.
- East Campus Infrastructure (ECP) Phase 3 – Distribution
 - This is the final phase of the multi-year East Campus infrastructure projects.
 - East Campus Infrastructure Phase 1 and 2 capital projects included boiler replacements, chiller equipment and power plant renovations, and expansion.
 - Phase 3 includes the infrastructure required to connect all buildings on East Campus to the chilled water and steam loops.
 - Anticipated completion results include an increase in energy efficiency and system redundancy to mitigate future failures.
 - A total project budget of \$28,710,000 for this phase includes \$19,235,700 in state support and \$9,474,300 in auxiliary bond funding.

- 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.
 - 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.

- Godwin Hall Renovation
 - This facility is located near to the College of Business Learning Complex and houses the Department of Kinesiology and the Hart School of Hospitality, Sport and Recreation Management.
 - With recent relocations of athletic services, the building will predominately consist of educational and general (E&G) space in a central location.
 - The proposed project is to remodel 70,555 gsf of the 185,300 gsf building and convert it into more functional academic spaces.
 - The upper-level proposed renovation includes a large mixed-use room, student services center, a larger call center, informal student study space with huddle rooms, a new office suite for the Hart School, a revamped graduate classroom, and a large lecture hall. This additional space will consolidate the Department of Kinesiology and Hart School labs and classrooms, which are currently dispersed across different facilities on campus.
 - A new academic hub will include several EPIC (Enhancing Pedagogy through Innovation Classroom Center) classrooms of varying sizes, offices, a testing center, a computer lab, and office space.
 - The total planning and construction project budget is \$40,480,000.

- Moody Hall Renovation and Expansion
 - Moody Hall was originally constructed in 1961 and has had very little renovation since its original construction.
 - The 18,724 gsf renovation and 26,000 gsf addition will bring the existing structure up to current codes and building standards while maintaining the historic nature of the building.
 - The renovation will provide much needed space for the College of Arts and Letters with state-of-the-art classrooms, meeting and conference rooms, faculty offices, and support spaces.
 - Being considered for inclusion are the Department of Sociology and Anthropology; the School of Writing, Rhetoric and Technical Communication; the Department of English; and the Department of Languages, Literatures, and Cultures, which are currently located in multiple buildings across campus.
 - The total planning and construction project budget is \$46,340,000.

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.

Non-General Fund Support (partial list)

Salary and Benefit Increases for Existing Employees

- *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.

Non-General Fund Support

2024-25: \$1,000,000

2025-26: \$2,100,000

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.

Non-General Fund Support

2024-25: \$136,000

2025-26: \$272,000

Reallocations

2024-25: \$1,000,000

2025-26: \$2,000,000

New and Expanded Academic Programs

- *Expansion of Physician Assistant Program:* In 2024 we will increase 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.

Non-General Fund Support

2024-25: \$202,935 (1.0 FTE)

2025-26: \$352,935 (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.

Non-General Fund Support

2024-25: \$531,277 (4.48 FTE) 2025-26: \$952,266 (8.96 FTE)

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.

Non-General Fund Support

2024-25: \$376,257 (3 FTE) 2025-26: \$573,801 (5 FTE)

- *Reengineering Madison:* Resources will be required for annual technology costs 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.
 - The university prioritized flexibility, adaptability, forward thinking, and added value on student outcomes.

Non-General Fund Request Support

2024-25: \$546,187 2025-26: \$1,616,180

General Fund Requests

1. Support Veterans through the Virginia Military Survivors and Dependent Education Program.

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

- VMSDEP offers a vital pathway to a college degree for the Commonwealth's veterans and their families, with an estimated over 3,000 families benefitting from the program.
 - Related legislation mandates that each public institution provide a 100% waiver of tuition and mandatory fee costs for eight semesters.
 - Across the Commonwealth, the VMSDEP program has grown exponentially and has nearly doubled between FY 21 and the next biennium. The cost of tuition and fee waivers is estimated to grow to \$78M through FY 24, despite no direct funding to institutions.

- JMU provided waivers for 249 VMSDEP students during the 2021-22 academic year and 360 students for 2022-23 and anticipate the number of participants will continue to grow.

General Fund Request

2024-25: \$5,332,593

2025-26: \$6,770,812

2. Fund Operations and Maintenance of the Renovated and Expanded Carrier Library

JMU requests funding to meet the increased operating and maintenance expenses resulting from the long overdue expansion of Carrier Library.

- Carrier Library, which is central to campus operations, experienced more than 700,000 visits by students, faculty, staff, and community members in 2020.
- A third-party consultant recently concluded that Carrier Library, originally constructed in 1938, was not meeting today's basic life safety, circulation, and accessibility standards and was therefore inadequate to serve current and future patrons.
- JMU appreciates previous funding from the Commonwealth to expand Carrier Library.
 - Additions were completed in 1969, 1980, and 1991 with no comprehensive renovations to the library.
- Carrier Library will reopen in January 2026 with the addition of 69,300 gross square feet and renovation of 121,200 gross square feet, significantly raising operating expenses.
 - The cost of utilities and additional housekeeping and other services required to properly operate and maintain the library's new square footage will also increase.

General Fund Request

2024-25: \$0

2025-26: \$380,057 (3.0 FTE)

3. Retain Excellent Employees

James Madison University requests funding to offer increased employee compensation and offer other methods to incentivize retention in JMU's non-faculty positions.

- In keeping with the Commonwealth's commitment to attracting and retaining the best and brightest for Virginia's workforce, JMU recruits and hires talented, well-trained, and committed employees at all levels.
 - The institution's modest endowment and low tuition and funding per student has damaged JMU's ability to compensate equitably and retain employees.
- Beyond ensuring the successful continuation of university operations, retaining qualified administrative faculty and staff benefits JMU and the Commonwealth in multiple ways:
 - As the largest employer in the Northern Shenandoah Valley, the institution's ability to employee and retain staff is crucial to the economic health of the region.
 - The university is an excellent steward of Commonwealth resources, operating a very lean administrative structure. A third-party consulting firm conducted an efficiency review in 2015 and found that JMU is leanly staffed in core administrative functions and that staff at JMU spend a much higher portion of time on high-value tasks than their counterparts at other universities.
- Turnover is especially reflected in fields including Information Technology, Law Enforcement, Procurement, Housekeeping, Administrative Assistants, and the Counseling Center, and targeted investment will allow us to offer more competitive wages to those seeking to stay in the area.
- Funding will also be used to invest in additional means of attracting and retaining employees, to include hiring recruiters focused on difficult-to-fill positions, conducting additional marketing to advertise positions, and providing an employee referral program and sign-on and retention bonuses.

General Fund Request

2024-25: \$500,000

2025-26: \$750,000

4. Increase Enrollment of Pell-Eligible Students

JMU requests ongoing funding to permanently expand the Pell-eligible student body by 40 students annually.

- In Fall 2021, 16.4% of JMU’s in-state undergraduate students received a Pell grant as the institution is severely limited in the financial aid that can be offered to low-income students due to JMU’s modest endowment and relatively low tuition revenue.
 - Every year, hundreds of Pell-eligible students apply and are accepted to JMU but choose to go elsewhere where they can receive more financial support.
- JMU seeks to increase its percent of in-state Pell-eligible students to be closer to Virginia’s average percent of Pell-eligible in-state students across all public, four-year institutions (26.6%), which supports JMU and Virginia’s shared goal of increasing access and inclusion for the Commonwealth’s lowest-income families.
- Pell-eligible students are successful when they come to JMU, making this a sound investment for the Commonwealth. The average six-year graduation rate for Pell-eligible students at JMU is 76%. This is compared to 59% across public four-year institutions in Virginia as a whole.
- JMU was successful in securing \$1M in one-time grant money to supplement aid packages for Pell-eligible students from \$25 million in one-time funds the 2022-24 state budget provided to be dispersed by SCHEV.
- As funds received from SCHEV were one-time money and will only support one cohort of 40 students for four years, JMU seeks ongoing funding to permanently expand the Pell-eligible student body by 40 students.
 - JMU would use the requested funding to award \$8,000 in institutional financial aid to students on top of the Pell funds and state financial aid students also receive, which data suggests would meet most Pell-eligible students’ financial need and make JMU an affordable option.

General Fund Request

2024-25: \$1,280,000

2025-26: \$1,280,000

5. Produce More Nurses through New “Fast Flex” BSN Program

JMU requests funding to grow 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 to develop more nurses with an innovative, fast-moving degree option.
- 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 Sciences 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)

6. Create a New Partnership School Program (Lab School w/RCPS)

JMU requests funding to establish the Lab School for Innovation and Career Exploration, a lab school program that would serve grade 9-12 students in rural Virginia.

- James Madison University has a long history of preparing teachers for the workforce and, in partnership with Blue Ridge Community College and Rockingham County Public Schools, is well positioned to continue to grow strong teachers while serving a new population of high school students and industry partners.
 - Lab school students will receive early exposure to career pathways and customized educational paths, preparing students to learn, thrive and meet the Commonwealth's most pressing workforce needs, as well as allowing students to explore high-demand careers.
 - By 2028-29, the Lab School would provide more than 400 students with real-world work opportunities.
- JMU has submitted the lab school application to the Virginia Board of Education, with hopes of gaining approval for the school and opening in Fall 2024.
- To ensure that the lab school funding model is strong and sustainable, JMU intends to charge tuition for students to attend the lab school at \$6,000 per pupil to be paid by the Rockingham County School District.
 - In addition to helping to cover operating expenses, funds collected would also pay the tuition for students to take some credit-bearing classes at Blue Ridge Community College and James Madison University.
- Ongoing state support would allow JMU to employ more dedicated Lab School staff as well as reduce the amount of tuition paid by the Rockingham County School District to cover students' lab school tuition.
 - In the absence of ongoing state support, JMU will apply for one-time state support through the College Partnership Laboratory Schools Fund to mitigate tuition for the lab school for the first five years.

General Fund Request

2024-25: \$1,169,886 (11.26 FTE) 2025-26: \$1,337,181 (12.7 FTE)

7. Grow Your Own: Licensing Paraprofessionals with Degrees

JMU requests funding to expand its innovative teacher preparation program that moves teachers into classrooms more quickly and at a greatly reduced cost and that will produce up to 300 new licensed teachers per year (after three years).

- The program allows professionals with bachelor's degrees already working in the schools, such as teacher's aides, to begin teaching immediately as they work toward licensure.
 - Participants in the three-year program will complete fully online, non-credit teacher preparation course work while also teaching. At the end of the course work, students will be eligible for full licensure.
 - The total cost of the program is \$3,200 per participant.
- JMU is piloting this program and has secured federal funding for 167 program slots, and multiple school districts have already asked to partner with JMU on this program.
 - With an investment of just over \$1M from the Commonwealth, JMU could expand the program to offer 100 seats each at James Madison University, Old Dominion University, and Longwood University, which would graduate up to 300 new licensed teachers per year, after three years.

- The funds would cover the \$3,200 cost per participant that would otherwise be paid for by the school district.

General Fund Request

2024-25: \$1,056,000 (2.75 FTE) 2025-26: \$1,056,000 (2.75 FTE)

Proposed Budget Breakdown of \$1,056,000:

- \$320,000 Old Dominion University (100 participants x \$3,200)
- \$320,000 Longwood University (100 participants x \$3,200)
- \$320,000 James Madison University (100 participants x \$3,200)
- \$96,000 James Madison University (operational leadership as fiscal agent at 10%)

8. Support Growing Commonwealth Healthcare Needs with Advanced Degrees: BSN to DNP

JMU requests funding to expand its current nursing program to offer a direct BSN to DNP option, allowing undergraduate nursing students to seamlessly transition into a doctoral program and obtain their nurse practitioner advanced practice certification more quickly.

- America’s shortage of Primary Care Doctors is projected to reach 48,000 physicians by 2034, and the shortage is felt most severely in rural areas. Nurse Practitioners (NPs) can help alleviate this shortage and meet the healthcare needs of the Commonwealth, but NPs require doctoral-level degrees.
- Currently only 11% of Nurse Practitioners in Virginia work in rural areas, and JMU is uniquely positioned to help alleviate primary care healthcare shortages in rural areas.
 - Of JMU’s recent graduate-level nursing graduates, 78% work in rural and underserved areas in primary care settings.
- Additionally, this graduate-level program would help the university produce more undergraduate nursing (BSN) students and prepare participants to become nursing faculty.
 - An expansion of JMU’s well-established DNP degree, the three-year program would launch in Fall 2024 and graduate 24 students per year.
- This program is currently funded in the House of Delegates’ 2023 proposed budget amendments at \$1.25M. This request may change depending on the outcome of the ongoing budget negotiations.

General Fund Request

2024-25: \$1,267,776 (12.22 FTE) 2025-26: \$1,267,776 (12.22 FTE)

9. Strengthen Student Access to Internships and Support Local Business

JMU requests funding to create and staff an Internship Center that would increase the visibility and opportunities for internships and other work-based learning experiences while providing support for local business.

- JMU recognizes that work-based experiences such as internships, allow students to explore career opportunities, experience workplace settings, and refine essential skills for employment while receiving quality mentorship from their supervisors.
- Businesses within GO Virginia’s Region 8 employ approximately 250,000 people with manufacturing, health care, retail trade, educational services, and transportation representing the top employment sectors.
 - JMU has strong relationships with a number of Region 8 partners that are invested in the expansion and accessibility of work-based learning opportunities to enhance the workforce of the Shenandoah Valley.
- JMU is seeking state support to establish and on-campus center to examine currently available Region 8 internship opportunities, assess the opportunities to expand internship offerings, and build bridges among economic development and business support organizations, educational institutions, employers, and students.

- With the recent award of a SCHEV/Virginia Talent + Opportunity Partnership grant, JMU has hired an internship coordinator; this award is limited to two years.
 - This funding would allow JMU to support the position permanently, as well as hire additional Internship Center support staff.

General Fund Request

2024-25: \$303,024 (3.25 FTE) 2025-26: \$303,024 (3.25 FTE)

10. Meet the Commonwealth’s Mental Health Needs

JMU requests funds to maintain and grow its existing PhD program in Counseling and Supervision (K-12 School Counselors) 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 will change 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.
 - The university is requesting funding for a clinical faculty member, which 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.

General Fund Request

2024-25: \$0 2025-26: \$316,514 (5.0 FTE)

Non-General Fund Support

2024-25: \$0 2025-26: \$299,272 (5.0 FTE)

11. Support Student and Employee Mental Health

JMU requests ongoing funding to support its student contract with TimelyCare (currently paid for by the university), increase the number of psychiatry appointments available to students, and expand the service to faculty and staff.

- National data suggests that 75% of students struggle with anxiety or depression while at college.
- In addition to providing in-person support services through the Counseling Center, JMU partnered with VCU and Virginia Tech to enter a system-wide agreement with TimelyCare, the leading virtual health and well-being resource for institutions of higher education, ahead of the 2022-23 academic year.
 - JMU students used TimelyCare's services heavily during the 2022-23 academic year, with more than 3,000 of JMU's roughly 22,000 students registering for the service.
 - 1,705 counseling sessions, 829 psychiatry sessions and 389 on-demand sessions with a mental health professional were provided, and students report a high level of satisfaction with the service.
- The access to telehealth provided a vital service for students and diverted traffic away from the on-campus, in-person Counseling Center, which provided nearly 8,500 in-person counseling sessions during the same time period.
- The funding would allow continued and increased access to TimelyCare for students as well as providing this valuable service to employees of JMU.

General Fund Request

2024-25: \$609,840

2025-26: \$609,840

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](#) (2020)

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 [that a report related to issues of constitutionally protected speech](#) be submitted to the Governor and the Chairmen 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
 - [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.
- Beginning Fall 2023, first year and transfer students will participate in an orientation on free speech and free expression upon their arrival on campus in a session jointly offered by CCE and the divisions of Student Affairs and Diversity, Equity, and Inclusion. The initial orientation will be 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)

The recent achievement of R2 Carnegie Classification status offers new opportunities for incentivizing and enhancing collaborative research networks throughout campus. In response, Research and Scholarship created the [Research Academic Institute and Center Plan](#), which will 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 Office of Research and Scholarship 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 AICs will initially be housed in Research and Scholarship; they will be transferred for future operations to different colleges as they mature.
- 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.
 - *Center for Innovation in Early Childhood Development (CIECD)*: CIECD 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

JMU launched a Research Development (RD) unit in Fall 2022 to strategically support efforts by JMU constituents related to pursuing external funding.

- RD provides external funding opportunity support at the college, program, and individual level including access to RD resources and expertise, learning programs, strategic research alliances, dissemination of funding agency opportunities, and fostering of partner relationships with JMU research communities.
- In its inaugural year of operation, RD:
 - Held 50 consultations with college faculty and leadership.
 - Led 25 research development presentations.
 - Saw an 87% increase in new Sponsored Programs Information Network (SPIN) database profiles. SPIN is a searchable database of 40,000+ funding opportunities from current national and international government and private funding sources.
 - Launched the Madison Research Club and hosted six workshops with over 120 faculty registrations and nine guest speakers.
 - Sponsored two site visits.

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 is 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, including:
 - Booksavers of Virginia
 - Dynamic Aviation
 - Hardesty-Higgins House Visitor Center
 - Shirley's Popcorn
 - SKS Artworks
 - With Simplicity

Economic Development and Commercialization

- Moving forward, JMU's priorities related to economic development include:
 - Pursuing the APLU/UEDA Innovation and Economic Prosperity designation.
 - The JMU University Economic Development Council (UEDC) will guide, establish priorities, measure, and share progress towards growing regional and commonwealth economic engagement.
 - Within 2-3 years, the UEDC will produce an updated economic impact report.
 - Partnering with Commonwealth of Virginia initiatives to enhance partnerships with regional businesses and non-profit groups to grow research commercialization and work-based learning experience opportunities, including:
 - Virginia Innovation Partnership Corporation (VIPIC): Develop Entrepreneur in Residence (EIR) and Eminent Researcher Recruitment (ERR) partnerships.
 - Commonwealth Cyber Initiative (CCI): Create and expand researcher recruitment and retention funds
 - SCHEV/V-TOP Work Based Learning Initiatives: Develop regional pathways (Region 8) to grow business/non-profit participation in work-based learning and internship programming
 - Growing and supporting a research-to-implementation pipeline with community partners by:
 - Developing partnerships with TreMonti, Serco, and consultants to review JMU's research portfolio and guide research translation development.
 - Developing the Madison Center for Community Development to enhance services to community partners and support regional funding pursuits.
 - Partnering with the Harrisonburg Innovation Hub, Valley Makers Association, Shenandoah Community Capital Fund, JMU X-Labs, JMU Libraries, Shenandoah Valley Small Business Development Center, Shenandoah Valley Partnership, Shenandoah Valley Technology Council, and others to support the innovation ecosystem and technology entrepreneurs in Region 8.
 - Pursuing NSF and EDA funding opportunities to develop regional centers of excellence and to grow the innovation ecosystem.
- JMU is currently seeking applicants to serve as a Regional Internship Project 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.
 - Funded by SCHEV, this project will build capacity and opportunity to connect students with internship and work-based learning opportunities in the Shenandoah Valley region, including the cities of Buena Vista,

Harrisonburg, Lexington, Staunton, Waynesboro, and Winchester along with the counties of Augusta, Bath, Clarke, Frederick, Highland, Page, Rockbridge, Rockingham, Shenandoah, and Warren.

- 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.
- The Office of Technology Innovation and Economic Development (TIED), housed in Research and Scholarship, supports JMU economic development and commercialization efforts.
 - TIED serves the faculty, staff, and students through:
 - promoting innovation through protecting and commercializing intellectual property developed at JMU;
 - creating research opportunities by connecting faculty and students with business and industry; and
 - fostering economic development through business partnerships and launching startup companies.
 - TIED recently received five IP disclosures with two moving forward to receive patent and copyright or patent protection support.
 - There are two projects in pipeline development that have either received a patent or are patent pending and receiving commercialization support. These innovations represent the medical device and computational modeling fields.

James Madison University

2023 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	
		Planned Charge	% Increase	Planned Charge	% Increase
In-State UG Tuition	\$7,914	\$8,302	4.9%	\$8,709	4.9%
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%
In-State UG Mandatory non-E&G Fees	\$5,662	\$5,830	3.0%	\$6,003	3.0%
In-State UG Total	\$13,576	\$14,132	4.1%	\$14,712	4.1%
Out-of-State UG Tuition	\$24,542	\$25,033	2.0%	\$25,534	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	\$5,830	3.0%	\$6,003	3.0%
Out-of-State UG Total	\$30,790	\$31,449	2.1%	\$32,123	2.1%

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. DO NOT INCLUDE STIMULUS FUNDS.
 In line 25, enter E&G GF revenues for the current biennium. The formulas will automatically hold that constant for the remaining years.

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.

NOTE: In light of ongoing budget negotiations, please complete the template assuming only what has already been signed into law as the baseline 2022-23 and 2023-24 appropriation. In the event that a new budget results in additional funding for

Items	2022-2023 (Actual)		2023-2024 (Estimated)		2024-2025 (Planned)		2025-2026 (Planned)		2026-2027 (Pro Forma)		2027-2028 (Pro Forma)		2028-2029 (Pro Forma)		2029-2030 (Pro Forma)		2022-2030 Chg	CAGR
	Total Collected Tuition Revenue	Total Collected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg			
E&G Programs																		
Undergraduate, In-State	\$123,371,623	\$132,260,953	7.2%	\$136,744,837	3.4%	\$140,524,374	2.8%	\$139,178,620	-1.0%	\$138,265,561	-0.7%	\$137,700,040	-0.4%	\$137,136,698	-0.4%	11%	1.5%	
Undergraduate, Out-of-State	\$107,061,451	\$106,075,177	-0.9%	\$108,528,142	2.3%	\$112,695,464	3.8%	\$112,609,911	-0.1%	\$112,453,238	-0.1%	\$112,399,920	0.0%	\$112,385,280	0.0%	5%	0.7%	
Graduate, In-State	\$12,833,482	\$12,737,636	-0.7%	\$12,841,934	0.8%	\$13,195,182	2.8%	\$13,123,180	-0.5%	\$13,151,768	0.2%	\$13,066,001	-0.7%	\$13,139,062	0.6%	2%	0.3%	
Graduate, Out-of-State	\$8,931,429	\$6,573,872	-26.4%	\$6,545,021	-0.4%	\$6,685,774	2.2%	\$6,678,345	-0.1%	\$6,700,632	0.3%	\$6,656,057	-0.7%	\$6,700,632	0.7%	-25%	-4.0%	
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	\$5,799,811	\$5,953,267	2.6%	\$6,012,750	1.0%	\$6,072,827	1.0%	\$6,133,506	1.0%	\$6,194,792	1.0%	\$6,256,689	1.0%	\$6,319,204	1.0%	9%	1.2%	
Total E&G NGF Revenue	\$257,997,796	\$263,600,905	2.2%	\$270,672,684	2.7%	\$279,173,621	3.1%	\$277,723,562	-0.5%	\$276,765,991	-0.3%	\$276,078,707	-0.2%	\$275,680,876	-0.1%	7%	1.0%	
E&G GF Revenue (assume flat after 2024)	\$163,805,747	\$175,753,186	7.3%	\$175,753,186	0.0%	\$175,753,186	0.0%	\$175,753,186	0.0%	\$175,753,186	0.0%	\$175,753,186	0.0%	\$175,753,186	0.0%	7%	1.0%	
Total E&G Revenue	\$421,803,543	\$439,354,091	4.2%	\$446,425,870	1.6%	\$454,926,807	1.9%	\$453,476,748	-0.3%	\$452,519,177	-0.2%	\$451,831,893	-0.2%	\$451,434,062	-0.1%	7%	1.0%	

Auxiliary Revenue	2022-2023 (Actual)		2023-2024 (Estimated)		2024-2025 (Planned)		2025-2026 (Planned)	
	Total Revenue	Total Revenue	Chg	Total Revenue	Chg	Total Revenue	Chg	
In-State undergraduates	\$78,013,127	\$81,085,237	3.9%	\$82,621,221	1.9%	\$83,597,707	1.2%	
All Other students	\$23,302,622	\$23,578,397	1.2%	\$24,361,442	3.3%	\$25,569,801	5.0%	
Total non-E&G fee revenue	\$101,315,749	\$104,663,634	3.3%	\$106,982,663	2.2%	\$109,167,508	2.0%	
Total Auxiliary Revenue	\$248,768,567	\$259,776,594	4.4%	\$275,698,469	6.1%	\$295,187,690	7.1%	

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$123,371,623	\$5,493,936	4.5%	\$11,008,860	\$0	\$7,452,021	\$130,823,644	5.7%	-\$4,943,429 Compliant
Undergraduate, Out-of-State	\$107,061,451	\$4,767,618	4.5%	\$221,920	\$1,698,274	\$419,924	\$109,179,649	1.9%	
Graduate, In-State	\$12,833,482	\$571,495	4.5%	\$0	\$0	\$1,344,610	\$14,178,092	9.5%	
Graduate, Out-of-State	\$8,931,429	\$397,732	4.5%	\$0	\$0	\$58,141	\$8,989,570	0.6%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$252,197,985	\$11,230,781	4.5%	\$11,230,780	\$1,698,274	\$9,274,696	\$263,170,955	4.2%	

2023-24 (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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$132,260,953	\$6,094,460	4.6%	\$11,637,566	\$0	\$3,903,605	\$136,164,558	2.9%	-\$4,956,168 Compliant
Undergraduate, Out-of-State	\$106,075,177	\$4,887,844	4.6%	\$234,594	\$2,591,458	\$177,019	\$108,843,654	2.5%	
Graduate, In-State	\$12,737,636	\$586,938	4.6%	\$0	\$0	\$512,577	\$13,250,213	3.9%	
Graduate, Out-of-State	\$6,573,872	\$302,918	4.6%	\$0	\$0	\$58,336	\$6,632,208	0.9%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$257,647,638	\$11,872,160	4.6%	\$11,872,160	\$2,591,458	\$4,651,537	\$264,890,633	2.7%	

2024-25 (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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$136,744,837	\$6,573,367	4.8%	\$12,470,893	\$0	\$5,235,725	\$141,980,562	3.7%	-\$5,280,210 Compliant
Undergraduate, Out-of-State	\$108,528,142	\$5,216,981	4.8%	\$251,392	\$2,647,723	\$180,534	\$111,356,399	2.5%	
Graduate, In-State	\$12,841,934	\$617,316	4.8%	\$0	\$0	\$537,335	\$13,379,269	4.0%	
Graduate, Out-of-State	\$6,545,021	\$314,621	4.8%	\$0	\$0	\$59,506	\$6,604,527	0.9%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$264,659,934	\$12,722,285	4.8%	\$12,722,285	\$2,647,723	\$6,013,100	\$273,320,757	3.2%	

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$140,524,374	\$6,999,339	5.0%	\$13,334,009	\$0	\$6,671,407	\$147,195,781	4.5%	-\$5,677,435 Compliant
Undergraduate, Out-of-State	\$112,695,464	\$5,613,216	5.0%	\$268,791	\$2,699,502	\$184,123	\$115,579,089	2.5%	
Graduate, In-State	\$13,195,182	\$657,235	5.0%	\$0	\$0	\$562,794	\$13,757,976	4.1%	
Graduate, Out-of-State	\$6,685,774	\$333,010	5.0%	\$0	\$0	\$60,700	\$6,746,474	0.9%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$273,100,794	\$13,602,800	5.0%	\$13,602,800	\$2,699,502	\$7,479,024	\$283,279,320	3.6%	

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$139,178,620	\$6,970,870	5.0%	\$13,334,009	\$0	\$7,646,879	\$146,825,499	5.2%	-\$5,705,854 Compliant
Undergraduate, Out-of-State	\$112,609,911	\$5,640,155	5.0%	\$268,791	\$2,699,502	\$184,123	\$115,493,536	2.5%	
Graduate, In-State	\$13,123,180	\$657,285	5.0%	\$0	\$0	\$562,794	\$13,685,974	4.1%	
Graduate, Out-of-State	\$6,678,345	\$334,490	5.0%	\$0	\$0	\$60,700	\$6,739,045	0.9%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$271,590,056	\$13,602,800	5.0%	\$13,602,800	\$2,699,502	\$8,454,496	\$282,744,054	3.9%	

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$138,265,561	\$6,951,216	5.0%	\$13,334,009	\$0	\$8,737,675	\$147,003,236	5.9%	-\$5,721,596 Compliant
Undergraduate, Out-of-State	\$112,453,238	\$5,653,517	5.0%	\$268,791	\$2,699,502	\$184,123	\$115,336,863	2.5%	
Graduate, In-State	\$13,151,768	\$661,197	5.0%	\$0	\$0	\$562,794	\$13,714,562	4.1%	
Graduate, Out-of-State	\$6,700,632	\$336,870	5.0%	\$0	\$0	\$60,700	\$6,761,332	0.9%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$270,571,199	\$13,602,800	5.0%	\$13,602,800	\$2,699,502	\$9,545,292	\$282,815,993	4.3%	

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)	Implied Discount Rate
Undergraduate, In-State	\$137,700,040	\$6,942,006	5.0%	\$13,334,009	\$0	\$9,595,577	\$147,295,617	6.5%
Undergraduate, Out-of-State	\$112,399,920	\$5,666,527	5.0%	\$268,791	\$2,699,502	\$184,123	\$115,283,545	2.5%
Graduate, In-State	\$13,066,001	\$658,709	5.0%	\$0	\$0	\$562,794	\$13,628,795	4.1%
Graduate, Out-of-State	\$6,656,057	\$335,558	5.0%	\$0	\$0	\$60,700	\$6,716,757	0.9%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$269,822,018	\$13,602,800	5.0%	\$13,602,800	\$2,699,502	\$10,403,194	\$282,924,714	4.6%

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)	Implied Discount Rate
Undergraduate, In-State	\$137,136,698	\$6,925,421	5.1%	\$13,334,009	\$0	\$10,573,294	\$147,709,992	7.2%
Undergraduate, Out-of-State	\$112,385,280	\$5,675,471	5.1%	\$268,791	\$2,699,502	\$184,123	\$115,268,905	2.5%
Graduate, In-State	\$13,139,062	\$663,524	5.1%	\$0	\$0	\$562,794	\$13,701,856	4.1%
Graduate, Out-of-State	\$6,700,632	\$338,383	5.1%	\$0	\$0	\$60,700	\$6,761,332	0.9%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$269,361,672	\$13,602,799	5.1%	\$13,602,800	\$2,699,502	\$11,380,911	\$283,442,085	5.0%

* 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 (and GF when indicated) 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 other than for salaries, health insurance and VITA charges per the instructions below. 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.

Funding amounts shall assume an annual 2% salary increase for each year from FY2025 to FY2030 for those employees eligible for the state-supported salary increases in the 2022-2024 biennium. Funding amounts shall also assume an annual 3% health insurance increase and a 5.36% VITA cost increase. Institutions shall calculate the GF portion of these increases in columns H and L using the appropriate fund share, which can be found in Tab 4b. If an institution plans to use its own funds to provide additional salary increases, add lines below the "increased fringe benefits costs" and specify salary amount by employee type and associated fringe benefit costs, but do not put any dollar amount in Columns H and L.

NOTE: In light of ongoing budget negotiations, please complete the template assuming only what has already been signed into law as the baseline 2022-23 and 2023-24 appropriation. In the event that a new budget results in additional funding for institutions in 2023-24, OpSix will provide guidance at that time on whether and how to modify or resubmit plans.

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

Total Estimated 2022-23 E&G Expenditures	\$421,803,543
Total Estimated 2023-24 E&G Expenditures	\$439,354,091

2024-2025
(Auto-calculated)

Implied GF share	51.4%
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2025-2026
(Auto-calculated)

Implied GF share	51.4%
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		Incremental amounts relative to 2023-24 estimated baseline													Explanation Please be brief; reference specific narrative question for more detail. Explicitly share key
		2024-2025				2025-2026				2026-2027	2027-2028	2028-2029	2029-2030		
Short Title		Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	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		\$2,560,335	\$0	\$1,244,323	\$1,316,012	\$5,170,175	\$0	\$2,512,705	\$2,657,470	\$7,831,791	\$10,546,650	\$13,315,770	\$16,140,274	Annual 2% salary increase for filled teaching and research faculty positions as of April 2023.	
Increase Admin. Faculty Salaries		\$830,162	\$0	\$403,459	\$426,703	\$1,676,744	\$0	\$814,898	\$861,846	\$2,540,037	\$3,420,602	\$4,318,741	\$5,234,874	Annual 2% salary increase for filled administrative and professional faculty positions as of April 2023.	
Increase Classified Staff Salaries		\$1,171,555	\$0	\$569,376	\$602,179	\$2,366,503	\$0	\$1,150,121	\$1,216,382	\$3,585,323	\$4,828,490	\$6,096,595	\$7,390,021	Annual 2% salary increase for filled classified positions as of April 2023.	
Increase University Staff Salaries		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Increase GTA Salaries		\$71,654	\$0	\$34,824	\$36,830	\$144,741	\$0	\$70,344	\$74,397	\$219,289	\$295,328	\$372,888	\$450,566	Annual 2% increase for graduate assistantships and teaching assistantships.	
Increase Adjunct Faculty Salaries		\$266,781	\$0	\$129,656	\$137,125	\$539,305	\$0	\$262,103	\$277,202	\$817,696	\$1,102,081	\$1,392,589	\$1,683,608	Annual 2% increase for adjunct faculty positions.	
3% annual state health insurance cost		\$1,222,705	\$0	\$594,235	\$628,470	\$2,481,600	\$0	\$1,206,058	\$1,275,542	\$3,779,270	\$5,115,715	\$6,493,520	\$7,912,685	Annual 3% increase for state health insurance costs.	
Minimum Wage		\$126,678	\$0	\$126,678		\$513,736	\$0	\$513,736		\$786,619	\$786,619	\$786,619	\$786,619	Minimum wage cost increase to \$13.50 on January 1, 2025, and to \$15.00 on January 1, 2026.	
Faculty/Staff Promotions/In-Band Adjustments		\$1,050,000	\$0	\$1,050,000		\$2,100,000	\$0	\$2,100,000		\$2,800,000	\$3,500,000	\$4,200,000	\$4,900,000	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 51	

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

Inflationary non-personnel cost increases															
	5.36% annual VITA charge increase		\$2,808	\$0	\$1,365	\$1,443	\$5,767	\$0	\$2,803	\$2,964	\$8,884	\$12,168	\$15,628	\$19,274	Annual 5.36% Virginia Information Technologies Agency (VITA) charge increase.
	Contractual services		\$1,136,000	\$1,000,000	\$136,000		\$2,272,000	\$2,000,000	\$272,000		\$3,408,000	\$4,544,000	\$5,680,000	\$6,816,000	Annual 3% inflation adjustment in select contractual nonpersonal services.
	Utilities		\$275,082	\$0	\$275,082		\$501,202	\$0	\$501,202		\$748,135	\$1,190,586	\$1,658,645	\$2,159,696	Average 2% increase in utility costs.
Financial aid expansion															
	Add'l In-State Student Financial Aid from Tuition Rev		\$833,327	\$0	\$833,327		\$1,696,443	\$0	\$1,696,443		\$1,696,443	\$1,696,443	\$1,696,443	\$1,696,443	Increase in Financial Aid due to tuition and fee increases.
	Add'l Out-of-State Student Financial Aid from Tuition Rev		\$16,798	\$0	\$16,798		\$34,197	\$0	\$34,197		\$34,197	\$34,197	\$34,197	\$34,197	Increase in Financial Aid due to tuition and fee increases.
New/expanded academic programs															
	Expansion of Physician Assistant Program		\$202,935	\$0	\$202,935		\$352,935	\$0	\$352,935		\$352,935	\$352,935	\$352,935	\$352,935	Expansion of Physician Assistant Program to help meet shortages in PAs within the Commonwealth. Reference E.1.
	Supporting Growth of the Computer Science and Information Technology Majors		\$531,277	\$0	\$531,277		\$952,266	\$0	\$952,266		\$952,266	\$952,266	\$952,266	\$952,266	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 E.1.
	Meet the Commonwealth's Mental Health Needs		\$0	\$0	\$0		\$299,272	\$0	\$299,272		\$683,440	\$683,440	\$683,440	\$683,440	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 E.1.

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

Other academic & student support strategies & initiatives															
	Early Student Success System		\$376,257	\$0	\$376,257		\$573,801	\$0	\$573,801		\$665,306	\$756,583	\$756,583	\$756,583	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		\$546,187	\$0	\$546,187		\$1,616,180	\$0	\$1,616,180		\$2,366,180	\$3,116,180	\$3,866,180	\$4,616,180	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.
Other non-academic strategies & initiatives															
	Carrier Library - Expansion		\$0	\$0	\$0		\$380,057	\$0	\$380,057		\$782,898	\$806,399	\$830,616	\$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	Staffing and utility costs associated with the renovation section of Carrier Library. Expected completion date is January 2026.
Total Additional Funding Need			\$11,220,541	\$1,000,000	\$7,071,779	\$3,148,762	\$23,938,519	\$2,000,000	\$15,572,716	\$6,365,803	\$34,630,399	\$44,329,532	\$54,110,189	\$64,065,951	

	Must not be greater than incremental Tuit Rev in Part 2
	2024-2025 2025-2026
	\$0 \$0
If result is < \$0, please provide explanation in these fields.	

Part 4b General Fund Share in FY2022

Institution	GF Share FY2022
Christopher Newport University	60.5%
George Mason University	49.7%
James Madison University	51.4%
Longwood University	60.3%
Norfolk State University	48.2%
Old Dominion University	56.3%
Radford University	59.0%
University of Mary Washington	59.4%
University of Virginia	31.3%
University of Virginia at Wise	56.9%
Virginia Commonwealth University	50.4%
Virginia Military Institute	42.1%
Virginia State University	47.1%
Virginia Tech	38.2%
William & Mary	38.2%
Richard Bland College	62.0%
Virginia Community College Sys	62.8%
Total, All Institutions	48.2%

Source: SCHEV 2022 Base Adequacy Calculation.

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

James Madison University

Instructions: No new data needs to be added on this tab; it is entirely comprised by formulas. The top section pulls in data from the previous tabs to calculate a pro forma budget surplus/deficit for the 6 years. The following section calculates what T&F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 2022-23 GF/NGF split. At the bottom is a blended scenario calculator that a user can leverage to calculate custom "shared" scenarios where deficits can be covered by a combination of expenditure reduction, T&F increases, and GF increases. Cells D28:30 should be set by the user (so long as they add up to 100%) and the results will flow into the rows below that automatically. This analysis is intended to be directional and pro forma; it is not intended to be interpreted as a projection or plan/budget of any kind.

Note: this pro forma does not include any of the additional GF requests in the following tab; those requests would require GF funding on top of what is calculated in this tab. It does account for the salary/health insurance/VITA increases from tab 4, including the corresponding GF increases.

	From FY23-FY30															Total Chg	Avg Annual Chg
Baseline Pro Forma Surplus/Deficit	2022-2023 (Actual)	2023-2024 (Estimated)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg		
Total E&G GF Revenue (includes tab 4, not tab 6)	163,805,747	175,753,186	7%	178,901,948	2%	182,118,989	2%	185,407,280	2%	188,768,193	2%	192,204,126	2%	195,712,468	2%	19%	3%
Tuition discount rate	4.2%	2.7%	-1.435pt	3.2%	0.434pt	3.6%	0.424pt	3.9%	0.352pt	4.3%	0.385pt	4.6%	0.302pt	5.0%	0.336pt	0.798pt	%
Total E&G NGF Revenue	257,997,796	263,600,905	2%	270,672,684	3%	279,173,621	3%	277,723,562	-1%	276,765,991	0%	276,078,707	0%	275,680,876	0%	7%	1%
Incremental E&G NGF Revenue vs. prior yr	5,603,109	7,071,779	26%	8,500,937	20%	(1,450,059)	-117%	(957,571)	-34%	(687,284)	-28%	(397,831)	-42%	(107%)			
Total E&G Revenue	421,803,543	439,354,091	4%	449,574,632	2%	461,292,610	3%	463,130,842	0%	465,534,184	1%	468,282,833	1%	471,393,344	1%	7%	1%
Implied GF % of E&G	38.8%	40.0%	1.2pt	39.8%	-0.2pt	39.5%	-0.3pt	40.0%	0.6pt	40.5%	0.5pt	41.0%	0.5pt	41.5%	0.5pt	2.7pt	%
Total E&G Expenditures	421,803,543	439,354,091	4%	449,574,632	2%	461,292,610	3%	471,984,490	2%	481,683,623	2%	491,464,280	2%	501,420,042	2%	19%	3%
Incremental E&G Expenditures vs. 2023-24				11,220,541		23,938,519	113%	34,630,399	45%	44,329,532	28%	54,110,189	22%	64,065,951	18%	471%	
Reallocation of existing dollars (flat after 2025-26)				1,000,000		2,000,000	100%	2,000,000		2,000,000		2,000,000		2,000,000			
Pro Forma Surplus/Deficit	-	-	%	-	%	-	%	(8,853,648)	%	(16,149,439)	82%	(23,181,447)	44%	(30,026,698)	30%	%	%
Incremental Surplus/Deficit	-	-	%	-	%	-	%	(8,853,648)	%	(7,295,791)	-18%	(7,032,008)	-4%	(6,845,251)	-3%	%	%

What would a constant GF/NGF ratio at 2022-23 levels imply for T&F and GF increases?																	
	2022-2023 (Actual)	2023-2024 (Estimated)	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%	38.8%	0pt	38.8%	0pt	38.8%	0pt	38.8%	0pt	38.8%	0pt	38.8%	0pt	38.8%	0pt	0pt	0pt
Implied incremental T&F increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	1.9%	%	1.6%	-0.3pt	1.6%	-0.1pt	1.5%	0pt	%	%
Implied incremental GF Increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	1.9%	%	1.5%	-0.4pt	1.4%	-0.1pt	1.4%	-0.1pt	%	%

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

	2022-2023 (Actual)	2023-2024 (Estimated)	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%	40.0%	1.2pt	39.8%	-0.2pt	39.5%	-0.3pt	40.0%	0.6pt	40.5%	0.5pt	41.0%	0.5pt	41.5%	0.5pt	2.7pt	0.4pt

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

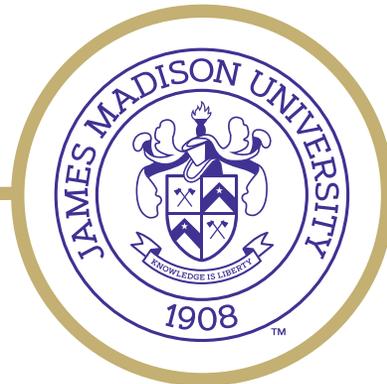
Instructions: Indicate items for which you anticipate making a request for state general fund in the 2024-26 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement 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.

NOTE: In light of ongoing budget negotiations, please complete the template assuming only what has already been signed into law as the baseline 2022-23 and 2023-24 appropriation. In the event that a new budget results in additional funding for institutions in 2023-24, OpSix will provide guidance at that time on whether and how to modify or resubmit plans.

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 Veterans Through the Virginia Military Survivors and Dependent Education Program	Enrollment management	\$5,332,593	\$5,332,593	\$6,770,812	\$6,770,812	Request state general funds to address the increased cost of the Virginia Military Survivors and Dependents Education Program (VMSDEP) waivers, as the number of participants continues to grow. Reference E1.
2	Fund Operations and Maintenance of the Renovated and Expanded Carrier Library	OTHER (Operation & Maintenance)	\$0	\$0	\$380,057	\$380,057	Request six-months of state general funds to meet the increased operating and maintenance expenses resulting from the expansion of Carrier Library. Reference E1.
3	Retain Excellent Employees	OTHER (Workforce Retention)	\$500,000	\$500,000	\$750,000	\$750,000	Request state general funds to offer increased employee compensation and additional methods to incentivize retention in the university's non-faculty workforce. Reference E1.
4	Increase Enrollment of Pell -Eligible Students	Financial Aid	\$1,280,000	\$1,280,000	\$1,280,000	\$1,280,000	Request state general funds to permanently expand the university's Pell-eligible student body by 40 students annually. Reference E1.
5	Produce More Nurses Through New "Fast Flex" BSN Program	Degree Pathways	\$997,816	\$997,816	\$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.
6	Create a New Partnership School Program (Lab School w/RCPS)	Degree Pathways	\$1,169,886	\$1,169,886	\$1,337,181	\$1,337,181	Request state general funds to establish the Lab School for Innovation and Career Exploration, a lab school program that would serve grades 9-12 students in rural Virginia. Reference E1.
7	Grow Your Own: Licensing Paraprofessionals with Degrees	Degree Pathways	\$1,056,000	\$1,056,000	\$1,056,000	\$1,056,000	Request state general funds to expand JMU's innovative teacher preparation program, in collaboration with ODU and Longwood, that moves teachers into classrooms more quickly and at a greatly reduced cost and that will produce up to 300 new licensed teachers per year (after three years). Reference E1.
8	Support Growing Commonwealth Healthcare Needs with Advanced Degrees: BSN to DNP	Degree Pathways	\$1,267,776	\$1,267,776	\$1,267,776	\$1,267,776	Request state general funds to expand its current nursing program to offer a direct BSN to DNP option, allowing undergraduate students to transition into a doctoral program and obtain their nurse practitioner advanced practice certification more quickly to help meet the Commonwealth needs for more primary care healthcare workers. Reference E1.
9	Strengthen Student Access to Internships and Support Local Business	Career Readiness & Placement	\$303,024	\$303,024	\$303,024	\$303,024	Request state general funds to create and staff an on-campus internship center that would examine currently available internships, increase the visibility and opportunities for internships and other work-based learning experiences in the area, and build bridges among economic development and business support, educational institutions, employers and students. Reference E1.
10	Meet the Commonwealth's Mental Health Needs	Curriculum			\$615,786	\$316,514	Request state general funds to maintain and grow its existing PhD program in Counseling and Supervision (K-12 School Counselors) and increase the number of mental health professionals and clinicians produced to support community wellness and meet the needs of the Commonwealth. Reference E1.
11	Support Student and Employee Mental Health	OTHER (Mental Health)	\$609,840	\$609,840	\$609,840	\$609,840	Request state general funds to support its student contract with TimelyCare (currently paid for by the university), increase the number of psychiatry appointments available to students, and expand the service to faculty and staff. Reference E1.
			\$12,516,935	\$12,516,935	\$15,368,292	\$15,069,020	

JMU VALOR

Tim Miller
Vice President, Student Affairs



Overview

- Student Population
 - 150 Veterans or Active Military
 - 1,050 Dependents
 - 55 Faculty and Staff members
 - Veteran Parent interest as well
- Student population has increased significantly the past few years
- Vision: JMU can become one of the best places for military-connected students in Virginia and in the nation



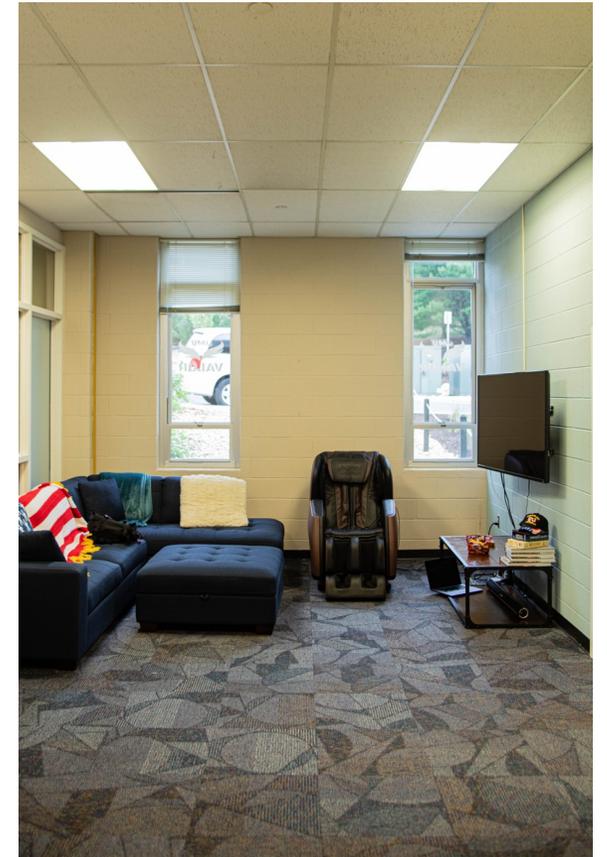
JMU VALOR Resource Center

- Home for all JMU VALOR students, faculty, and staff
- Located on the first floor of Taylor Hall with 24/7 access for affiliated students and staff
- Programming and community building opportunities in VALOR and around campus



Partnership with Virginia Department of Veteran Services and Veteran Family Services

- Will staff an office within the JMU VALOR Resource Center
- Students, local veterans, and their families can use this resource and be supported
- Closest DVS offices are in Staunton, Charlottesville, and Front Royal
- Location near VFW and American Legion
- Bus stop and available parking nearby



What Made this Possible

- AT&T Sponsorship – \$25,000, over two years
- Madison Trust – hosted by University Advancement
 - Received seed funding for the first two years thanks to the support of several JMU alumni and friends
- Student Affairs and Graduate School – graduate student



JMU VALOR Opening

- Took place Aug. 29 at 4 p.m.
- We were proud to be joined by Delegate Tony Wilt, representatives from AT&T, Department of Veteran Services, VFW and American Legion members, JMU ROTC, staff from Ben Cline's office and many members of the University community.



Tony Wilt @DelTonyWilt · 19h

This afternoon I had the opportunity to attend the grand opening of James Madison University's VALOR Resource Center. This Center serves as a 24 hour resource center for all military connected students, faculty, and staff.



The Future

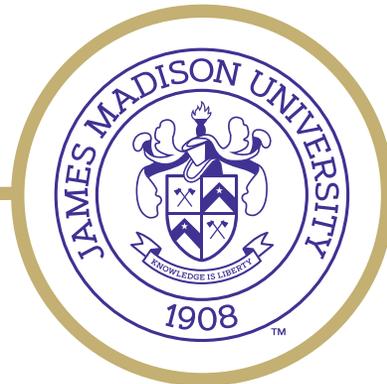
- Hopes for a full-time position
- Application for "Military Friendly Schools" Program





BIG IDEAS

Chris Orem, Executive Director, Planning, Analytics and Institutional Research
Sheila Smith, Associate Vice President, Planning & Operations
Campaign Manager



Running a Multi-Million Dollar Enterprise

"How do we meet our goals (e.g., financial, student success, enrollment, service quality) in the year ahead?"

Advancing Current Objectives

"How do I build and sustain institutional momentum to inflect near-term priorities?"

Long-Range Vision for the Future University

"How do we ensure our institution's relevance, sustainability, and position 5-10 years from now?"

"It's taking all of our institutional capacity for change to run the organization today, not to mention make progress on current strategic goals..."

...we know that's not enough, but we haven't had the bandwidth—and don't have enough information and data—for a longer-range vision."

JAMES MADISON UNIVERSITY STRATEGIC PLAN 2014-2020



THE MADISON PLAN

MAJOR INITIATIVES

James Madison University's full strategic plan comprises hundreds of objectives established by every university department. Following is a summary of five major initiatives aimed at achieving our vision to be the national model of the engaged university.

- 1 Further Enhance High-Quality Academic Programs
- 2 Expand Engagement
- 3 Make a Positive and Measurable Impact on Society
- 4 Improve Facilities
- 5 Increase Private Support

■ Expand Access to JMU.

- Seek greater private support to increase merit-based assistance, such as Madison Achievement Scholarships.
- Increase need-based scholarships by meeting 50 percent of need.
- Establish Valley Scholars, a new program targeting first-generation students, in academic year 2014-15.
- Seek greater private support to expand Centennial Scholars and Professors in Residence programs.
- Increase the Preparing Future Faculty program and partnerships with two additional historically black colleges and universities by academic year 2016-17.

Expand Engagement

- **Engaged Learning.** Increase the number of opportunities for students to participate in engaged-learning experiences.
 - Increase the percentage of students who Study Abroad from 25 to 33 by academic year 2017-18
 - Ensure that all majors have an integrating Capstone Experience by academic year 2016-17.
 - Expand experiential Learning/Mentoring/Networking opportunities.
 - Establish a Student Research Center and a Research Mini-Grant program to encourage more Undergraduate Research and Creative Accomplishments beginning in academic year 2014-15

- Expand Career and Academic Planning Internship and Fellowship services by academic year 2015-16.
- Expand co-curricular Leadership Activities opportunities.

- **Civic Engagement.** Coordinate all curricular and co-curricular activities aimed at elevating civic knowledge and action; plan and implement hallmark civic engagement academic activities on campus and with James Madison's Montpelier starting in academic year 2015-16.

- **Community Engagement.** JMU already is recognized as a national leader by the Carnegie Foundation. We will increase community engagement experiences for students, including Service Learning and Alternative Break, by 40 percent by academic year 2019-2020.

Make a Positive and Measurable Impact on Society

- **Consolidate Leadership in Assessment.** The JMU Center for Assessment and Research Studies already is a nationally recognized leader in assessing learning outcomes. We will further expand those efforts by designing and implementing processes that assess the connection between a JMU experience and citizens who lead productive and meaningful lives, by academic year 2016-2017. As a byproduct, we will gather assessment data demonstrating that our graduates are known for possessing the following traits:

JAMES MADISON UNIVERSITY.

VALLEY
Scholars



**James Madison Center
for Civic Engagement**

JAMES MADISON UNIVERSITY.



Purpose – Big Ideas

- Source visionary ideas that might not otherwise be considered
- Inform JMU's next strategic plan
- Inform fundraising priorities in our next comprehensive campaign



What is a Big Idea?

Big Ideas inspire a broad array of the JMU community to leverage our distinctive strengths and create pathways to new opportunities that contribute to a better university and a better world.



Big Ideas Criteria

- Leverage existing strength *or* create pathways to new strengths
- Collaborative
- Positive Impact
- Differentiates the University





jmu.edu/bigideas

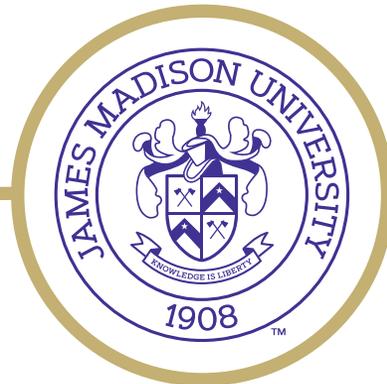
Proposal link opened: September 1
Proposal submission deadline: March 8, 2024



Thank you

James Madison University Career Outcomes Report

Libby Westley, Director, University Career Center
Myles Surrett, Associate Vice President, Student Affairs



Presentation Components:

Career Outcomes Overview

Class of 2022 Data

JMU Graduates' Local Impact

University Career Center Employer Engagement



What is a Career Outcome?

The outcome of a college education within six months of one's graduation date.



Full or Part-Time Work



Internships 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 2022

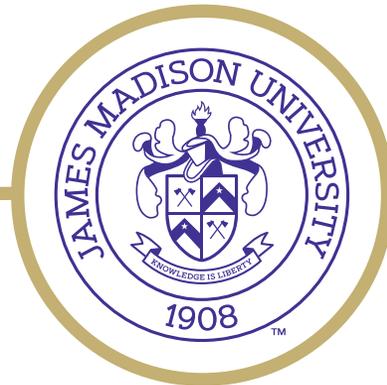
Career Outcomes Overview

96.3% of Degree Recipients Have a Career Outcome

Primary Activity	Bachelor's	Advanced Degree	All Graduates
Working	74.1%	92.9%	76.6%
Continuing Education	21.5%	3.9%	19.2%
Military	0.5%	0.4%	0.5%
Total with a Career Outcome	96.1%	97.2%	96.3%
Still Seeking (employment or education)	3.5%	2.8%	3.4%
Not Seeking (due to life events, travel, etc.)	0.4%	0.0%	0.3%
Total Without a Career Outcome	3.9%	2.8%	3.7%

The data reflects knowledge of 3,351 bachelor's degree recipients and 509 advanced degree recipients, for a knowledge rate of 75.6%.

Class of 2022 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	908	94.7%
Business	1,037	97.5%
Education	169	100%
Health and Behavioral Studies	1,309	96.8%
Integrated Science and Engineering	398	95.2%
Science and Math	289	93.9%
Visual and Performing Arts	249	92.4%
University Studies	74	96.2%
JMU Bachelor's Overall	4,433	96.1%

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=3,351 (Number of Bachelor's Degree Recipients with a Career Outcome)



Bachelor's-Degree Recipients

Top Employers of 2022 Graduates

9 of the 12 Organizations Hiring the Most JMU Graduates Hire Students from Multiple Colleges

Employer	Arts & Letters Hires	Health & Behavioral Studies Hires	Integrated Science & Engineering Hires	Business Hires	Education Hires	Visual & Performing Arts Hires	Science & Math Hires
Sentara Healthcare		✓					✓
Carahsoft	✓		✓	✓	✓		
Deloitte	✓		✓	✓	✓	✓	✓
KPMG	✓		✓	✓			✓
Accenture Federal Services	✓	✓	✓	✓			
Inova Health System		✓					
RSM				✓			
Booz Allen Hamilton	✓	✓	✓	✓			✓
Amazon	✓	✓	✓	✓	✓		✓
VCU Health		✓					
CoStar Group	✓	✓	✓	✓			
James Madison University	✓	✓	✓	✓	✓	✓	



Undergraduate Career Outcomes Salary Distribution by College

College ¹ of Graduate's Primary Major	Average Salary
Arts and Letters	\$53,080
Business	\$62,300
Education	\$45,500
Health and Behavioral Studies	\$50,025
Integrated Science and Engineering	\$71,280
Science and Math	\$51,715
Visual and Performing Arts	\$42,100
University Studies	\$67,600
JMU Bachelor's Overall	\$57,615

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=1,347 (Number of bachelor's-degree recipients employed full-time who provided salary data)

Career Outcomes

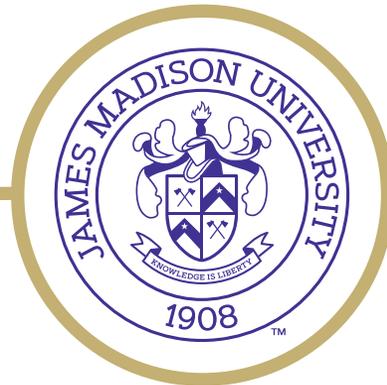
Bachelor's-Degree Recipients Comparative Data

NACE ¹ Averages	Class of 2020	Class of 2021	Class of 2022
JMU	88.0%	95.9%	96.1%
National	82.4%	83.8%	
R2 Institutions	83.0%	87.5%	

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 2022 Advanced Degree Recipients





Advanced-Degree Outcomes Rate Academic College Breakdown

College ¹ of Graduate's Primary Major	# in College ²	Outcomes Rate
Arts and Letters	51	93.0%
Business	125	98.1%
Education	323	96.2%
Health and Behavioral Studies	247	100%
Integrated Science and Engineering	13	90.9%
Science and Math	22	90.0%
Visual and Performing Arts	30	100%
JMU Advanced Degree Overall	811	97.2%

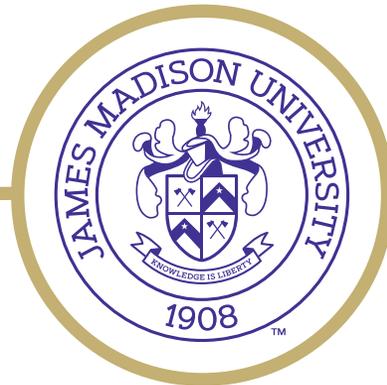


Advanced Degree Salary Distribution by College

College ¹ of Graduate's Primary Major	Average Salary
Arts and Letters	\$58,050
Business	\$102,627
Education	\$57,100
Health and Behavioral Studies	\$76,500
Integrated Science and Engineering	\$104,250
Science and Math	\$53,400
Visual and Performing Arts	\$53,000
JMU Advanced Degree Overall	\$70,040

N=272 (Number of employed advanced degree recipients who provided salary data)

Local Impact of JMU Graduates

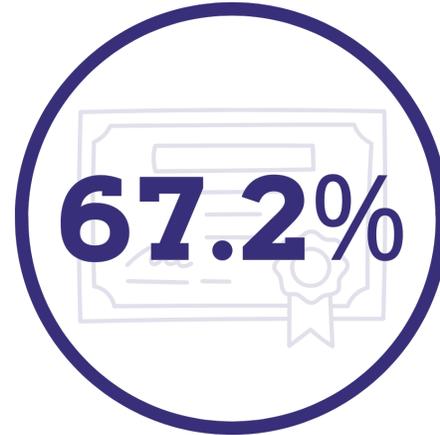




Continued Virginia Connection for Graduates



of *employed*
bachelor's-degree
recipients are working
in Virginia



of bachelor's-
degree recipients
are continuing their
education
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	44.5%
Central Virginia	24.4%
Shenandoah Valley	16.8%
Hampton Roads	10.1%
Virginia Mountains	2.9%
Southwest Virginia	0.6%
Southern Virginia	0.4%
Chesapeake Bay	0.2%
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 Nursing Majors Across Virginia



Top Employers of Nursing Graduates in Virginia

20+ Hires
Inova Health System Sentara Health System
10-20 Hires
Virginia Commonwealth University Health
6-9 Hires
UVA Health System Augusta Health Bon Secours Health System



65.5% JMU Nursing Majors who indicated they are employed post-graduation are employed in Virginia.



116 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

20+ Hires
Fairfax County Public Schools
Harrisonburg City Public Schools
14-20 Hires
Chesterfield County Public Schools
Loudoun County Public Schools
Prince William County Public Schools
10-13 Hires
Augusta County Public Schools
Virginia Beach City Public Schools



188 JMU graduates indicated they are teaching in Virginia.



73.7% of JMU graduates teaching indicated they are teaching in Virginia.



Top Employers of Bachelor's-Degree Graduates in Virginia

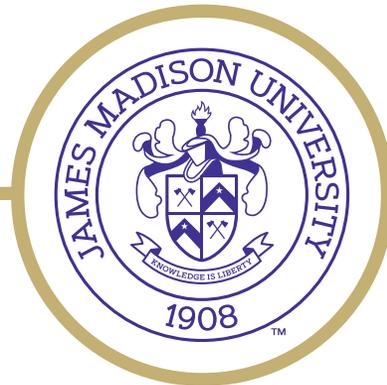
25+ Hires
Inova Health System
James Madison University ¹
Sentara Health Systems

15-25 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
	Prince William County Public Schools
CoStar Group	RSM
Cvent	Target
Enterprise Holdings	University of Virginia
Ernst & Young	UVA Health
Fannie Mae	

N= 1,396 (Number of employed bachelors' degree graduates who indicated an employer located in Virginia.)

University Career Center Employer Engagement



UCC Employer Engagement 2022-2023



Total Jobs Posted	Organizations Posting Jobs	Organizations Recruiting Beyond Job Postings
104,085	9,522	613

Engagement Type	Employer Engagement
Career Fairs	621
Info Sessions & Tables	188
Student Reserved Interview Rooms	116
Interviews	107
Panels	116
Practice Interview & Networking	20

Top Employers in 2022-2023 by Employer Engagement with UCC



4+ Engagements
Addison Group
ALKU
Booz Allen Hamilton
CGI
Deloitte
Eight Eleven Group -
Fast Enterprises, LLC
JMU
Summit Human Capital

3+ Engagements	
Accenture Federal Services	Frederick County Public Schools - Maryland
Appalachian Conservation Corps	Gartner
Arlington VA Public Schools	Live Oak Bank
Cvent Inc.	New Energy Equity
Defense Intelligence Agency	Richmond Public Schools
EY LLP	Thermo Fisher Scientific
Federal Bureau of Investigation	Vertosoft LLC
Federal Reserve Bank of Richmond	Wolf Trap Foundation for the Performing Arts

Career Fairs & Key Career Programs



Career Fairs:

University Career Fair

- Tuesday 9/26, 11am-3pm
- Wednesday 9/27, 11am-3pm

CISE Career & Internship Fair

- Tuesday 9/12, 11am-3pm

Hart School Career & Internship Fair

- Wednesday 11/8, 11am-3pm

Nurse Recruitment Day

- Thursday 9/14, 11am-3pm

Other career fairs: **Teacher Recruitment Day, Meet the Firms**



Key Career Programs:

Rosé & Resume

- Friday 9/8, 4-6pm

Clothes, Cookies & Resumes

- Tuesday 9/19, 1-4pm
- Wednesday 9/20, 1-4pm

Practice Interview Event (PIE)

- Friday 11/3

Success Suits You Event

- Sunday 9/17, 3-6pm

Graduate School Fair

- Tuesday 9/19, 3-6pm

Free Professional Headshots

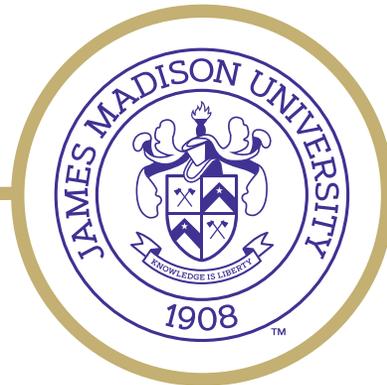
Student Attendance: Career Fair

Student Year	2021 Career Fair	2022 Career Fair
First Year	123	579
Sophomore	507	756
Junior	908	1,330
Senior	1,243	1,704
Graduate	127	135
Total Attending	2,908	4,504





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%); phone calls made to students (13%); LinkedIn or other online searches (23%); National ClearingHouse Data (8%); and data retrieved from JMU faculty or staff (5%).

Class of 2022 Graduate Quick Facts

- The Class of 2022 includes those who graduated in August 2021, December 2021 and May 2022.
- There were 5,244-degree recipients for the Class of 2022:
 - 4,433 earning a Bachelor's degree
 - 811 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 3,860 graduates (73.6% of the total 5,244-degree recipients for the Class of 2022). Thus our "knowledge rate" of the "first destination outcomes" for the Class of 2022 cohort is 73.6%.

Definitions



- **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 survey or who the Career Center 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.
- **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.
- **First Destination Outcomes:** Activities of graduates occurring within 6 months of graduation.
- **Employment:** Includes working full-time or part-time in an organization, fellowship, internship, volunteering, self-employed or freelance
- **Military:** Actively serving within a branch of the U.S. Military
- **Continuing Education:** pursuing additional education with an institution of higher education
- **Still Seeking:** Students who indicated they are actively searching for employment or a graduate school program
- **Not Seeking:** Students who indicated they were not interested in seeking employment or education (because they were taking a gap year, traveling, etc.)

Source: www.naceweb.org/job-market/graduate-outcomes/first-destination/standards-and-protocols



Closed Session

