

Board of Visitors Retreat

March 23, 2026



BOARD OF VISITORS

JMU Board of Visitors Retreat – March 23, 2026

9:00 – 9:15 a.m. | Welcome and Retreat Context Setting

Facilitators: Jack White

Overview: Agree upon discussion priorities for the day with a focus on governance and high-level vision; discuss rules of engagement that will allow hearing everyone's perspective, build consensus, and keep moving forward in a limited amount of time; discuss types of goals and deliverables.

Goal: Establishing goals and deliverables for each session; clear, shared expectations for the board discussion

9:15 a.m. – 11:00 a.m. | Trustees Discussion – Strategic Plan

Facilitators: Terrie Edwards, Jim Schmidt

Staff Joining 9:15-10:15 am: Bethany Blackstone, Chris Orem

Focus: Priority areas the board believes should lead strategy; risks, opportunities, and tradeoffs; metrics document discussion; guidance for leadership as implementation begins.

Goal: Clear board perspective on strategic direction with focus on metrics.

Prompts: Key questions arising from Vision Teams; metrics-driven discussion

11:00-11:30 a.m. | Conversation with George Keith Martin (McGuireWoods) on Virginia P3 Policy and Procedures

12:00 – 1:00 p.m. | Lunch

1:00 – 3:00 p.m. | Campus Planning & Development: Vision, Tradeoffs, and Board Alignment

Facilitators: Dave Rexrode and Jack White

Staff Joining: Jack Knight, Tim Miller, Towana Moore

Overview: An integrated presentation and trustee discussion connecting long-term campus vision with near-term development decisions and board guidance; presenting long-term campus vision and development strategy, including land use, academic and infrastructure needs, and partnership opportunities; facilitated board discussion focused on strategic direction, sequencing, risk tolerance, and alignment with the university's academic mission and Commonwealth priorities.

Goal: Achieve board alignment on campus planning and development direction, including:

- **Affirmation of the long-term vision** for residential development and its alignment with academic priorities and student success.
- **Agreement to utilize a Public-Private Partnership (P3) process**, provided that it:
 - Results in lower total costs for students over a 10–20 year horizon compared to traditional delivery methods;
 - Is fiscally responsible for the university; and
 - Enables a more accelerated project timeline.
- **Clear understanding that approval of this framework does not authorize construction.**
- **Clear understanding that approval does not represent an agreement with any specific private partner**, but rather authorization to proceed through the state-approved process to identify and evaluate a P3 option.
- **Agreement to move decisively** on the first phase of residential development.
- **Agreement to immediately begin identifying alternative space solutions** for programs currently housed in Godwin.

- **Agreement to prioritize state funding requests** for permanent academic homes for programs displaced from Godwin.
- **Direction to explore potential health care partners** as part of a broader, integrated development strategy.
- **Commitment to return to the board this summer** with a specific proposal for the first residential buildings.

3:00 p.m. | Trustees Discussion – Alignment and Path Forward

Focus: A shared understanding of the most important strategic priorities emerging together; clarity on areas of alignment and any remaining tensions or open questions; agreement on the implications of today’s discussion for leadership action, board oversight, and future agenda items.

Goal: Wrap-up with clear direction for April board meeting regarding three items: master plan, campus development plan, and strategic plan.

The Madison Promise

Vision Statement:

We will deliver on the Madison Promise by advancing the public good through distinctive teaching and learning, impactful research, strong partnerships, an innovative campus community, and investment in our people.

Guidepost Goals:

To achieve this vision, we are establishing the following guidepost goals. These audacious outcomes will keep us focused on the future as we develop strategies, create new initiatives, and allocate resources:

By 2040, JMU will:

- Set the standard among peer institutions for undergraduate student success and career outcomes, consistently achieving:
 - positive career outcomes¹ of 98% within 12 months of graduating,
 - retention rates of at least 95%,
 - four-year graduation rates of 75% or above.
- Rank in the top 50 nationally among public universities.
- Achieve a 54% acceptance rate.
- Grow overall student enrollment to 30,000.
- Increase the on-campus housing capacity to at least 60% of the student body.
- Increase our economic impact to \$2 billion, and be known as the Commonwealth's preferred partner and a catalyst for regional innovation, collaborating with industry, government, and community organizations to translate discovery into impact.
- Create and expand graduate and professional programs responsive to the Commonwealth's needs, achieving top-tier research status:
 - surpassing \$75 million in annual research expenditures, and
 - awarding at least 80 research doctoral degrees annually.
- Achieve sustained philanthropic giving exceeding \$75 million annually, expanding scholarships, faculty support, and strategic initiatives.

¹ A career outcome is defined as full or part-time employment, continued education, military involvement, or service/volunteer engagement.

JMU 2032 Strategic Plan Draft Pillars

To realize our 2040 vision, we must begin with steady, strategic progress. The first milestone is our 2032 strategic plan, which outlines the key pillars that will guide our priorities over the next six years. Through targeted strategies and initiatives, we will advance these pillars and lay the foundation for continued momentum toward our bold long-term goals.

1. Enhance the Value, Purpose, and Impact of a JMU Education

Anchored in pathbreaking education, discovery-driven innovation, and real-world application, a JMU education is marked by the distinctive set of skills and knowledge that all JMU graduates develop during their undergraduate career. When considered holistically, these JMU Distinctives set the JMU graduate apart from their peers. Through the strategic plan, we identify specific strategies to enhance these distinctives such that by 2040, JMU Distinctives truly separate a JMU graduate from all others.

The JMU Distinctives:

- **Leader Development:** As one of only 25 institutions to receive the Carnegie Leadership for Public Purpose designations, JMU's leadership development practices permeate JMU's unique change culture and highlight both curricular and co-curricular training for students, faculty, staff, alumni, and external stakeholders.
- **Ethical Reasoning:** For over a decade, JMU's first-year welcome experience has emphasized ethical reasoning. By engaging with the Eight Key Questions (8KQ) framework, students develop the skills to explore morally complex situations with curiosity, evaluate multiple ethical viewpoints, and make intentional decisions.
- **Discovery & Innovation:** Through a teacher-scholar model that integrates rigorous inquiry with exceptional teaching, JMU prepares students at every level to engage deeply with knowledge. Undergraduates learn through inquiry and discovery, professional graduates apply scholarship to practice, and doctoral candidates advance their disciplines through original research.
- **Civic Engagement:** JMU graduates engage thoughtfully and responsibly in civic life by developing skills in dialogue, deliberation, critical thinking, collaboration, and civic action, practiced throughout the undergraduate experience in academic and co-curricular settings.
- **Service for Public Purpose:** JMU graduates contribute to the greater good through community-based curricular and co-curricular experiences. Our Community Engagement Carnegie classification illustrates our national prominence in this area

and the commitment of our students, faculty, and staff to service locally and globally.

- **Power Skill Development:** JMU will embed the development of *power* skills — essential capacities for engaging productively in careers and continuing education — through all aspects of the JMU experience. All students will develop measurable skills in communication, problem-solving, and the ability to work in teams.
- **Well-being:** As the only institution in Virginia to sign the Okanagan Charter, JMU is committed to a vision of health that extends beyond individual wellness, embracing the Charter's focus on people, place, and planet across every dimension of university life.

The strategic plan highlights strategies to grow and strengthen these Distinctives as core features of the JMU experience. We have such strong confidence in the value, purpose, and impact of a JMU education that we guarantee JMU graduates will possess the skills, purpose, and confidence to create the future. This is a shared commitment between the university and its students, families, employers, and society that JMU will provide a dynamic, future-focused education that develops the knowledge, skills, and character graduates need to thrive. Students commit to pursuing academic excellence and personal development, engaging fully in the academic and co-curricular life of the university, and contributing to a community grounded in curiosity, collaboration, and civic responsibility.

Two guarantees highlight this component of the Madison Promise:

- **The Employment Guarantee.** JMU is committed to ensuring that every graduate will achieve a positive career outcome — employment, continued education, volunteer experience, or military service — within one year of graduation. Graduates who have not yet reached that milestone will receive personalized support through career coaching, alumni and employer networking, and access to additional education or internship opportunities at no cost.
- **The Employer Guarantee.** JMU stands behind the career readiness of every graduate. If an employer identifies a gap in a graduate's power skills — communication, problem-solving, and the ability to work in teams — within five years of graduation, JMU will provide access to coaching services and a personalized series of asynchronous, non-credit modules at no cost to the graduate or the employer.

How will we measure success?

By 2032:

- We will consistently achieve:
 - retention rates of at least 93%,
 - four-year graduation rates of at least 71%, and
 - positive career outcomes of 97% within 12 months of graduating.
- JMU will be among the top 65 public institutions nationally, according to U.S. News and World Report.
- JMU's acceptance rate will be at or below 60%.
- Annual philanthropic giving will exceed \$50 million.

What strategies will we use to ensure that JMU upholds its end of the guarantees?

- **Implement the Employer and Employment Guarantees.** Successful implementation requires funding the training and coaching needed to provide alumni with the resources offered by the Guarantees.
- **Create a JMU Distinctives team.** Create a cross-divisional team to establish a university-wide process for elevating JMU Distinctives in the student experience. This team will lead efforts to design curricular and co-curricular experiences that emphasize and enhance the development of JMU Distinctives among students.
- **Embed civic engagement and deliberative dialogue within the student experience.** JMU will prepare students for a polarized world where they can engage in constructive dialogue across difference. Through a shared curriculum, which includes constitutional literacy, civic leadership, and civil discourse, we will ensure that all students develop the capacity to listen critically, question with curiosity, consider differing ideas with fairness, and approach difficult conversations with confidence.
- **Create a coordinated mentorship ecosystem throughout a student's undergraduate experience.** This scaffolded, three-tiered mentorship pathway will span all four undergraduate years. The first year promotes overall well-being through a peer-to-peer mentoring model. Faculty and staff mentoring in year two promotes academic integration. Juniors and seniors work with alumni and professionals as mentors to ensure they are career ready at commencement.
- **Expand access to high-quality Work-Based Learning Experiences on- and off-campus.** JMU will ensure that students can apply their knowledge in professional settings and build professional relationships through Work-Based Learning

Experiences (WBLEs). WBLEs may include internships, research roles, community projects, student employment, and course-embedded collaborations. JMU will also deliberately expand the number of on-campus student employment roles that meet WBLE criteria — providing professional supervision, defined learning outcomes, structured reflection, mentorship and feedback — so that more students gain substantive professional development through the work they do on campus. A micro-credentialing and badging model will provide tangible evidence of completion for students to showcase their WBLE to future employers.

- **Expand student work opportunities across campus.** JMU will expand access to meaningful on-campus work that contributes to learning, belonging, and preparation for life after graduation. On-campus student employment leads to better student outcomes, improves the affordability of a JMU education, and can address vacancies in high-turnover professional positions. This initiative will lead to cost savings related to health insurance and benefits that can be reallocated to address employee compensation as well as other strategic initiatives. JMU will also establish student employment opportunities that provide tuition assistance in exchange for work, and elevate certain student work employment to include supervision, mentoring, and skill development that prepares the student for future career opportunities.
- **Pilot a work-to-learn program.** JMU will launch a competitive work-to-learn pilot for students, offering full in-state tuition and fees for 15 hours of weekly work during the academic year and 30+ hours of work during the summer and university breaks. Students may participate for up to four years, advancing in skills, responsibilities, and learning outcomes aligned with Work--Based Learning Experiences (WBLE) standards. Chosen through an application process, the university will prioritize in-state students and full Pell recipients, though all students will be encouraged to apply. This program is a specific initiative contained under the broader strategy to expand student work opportunities.
- **Leverage athletics.** In a rapidly evolving collegiate athletics landscape, JMU Athletics will contribute to institutional transformation through targeted investments in student athletes, coaches, support staff, and facilities.

2. Chart a New Path as a National Research University

James Madison University has distinguished itself for a quarter century by blending inspired teaching with rigorous scholarship through its distinctive teacher scholar model, transforming from a respected regional comprehensive university into a nationally recognized R2 doctoral research institution. This integration infuses classrooms with the energy of discovery, fuels transformative education, attracts exceptional talent and vital resources, and generates societal impact across health, technology, sustainability, and more. Guided by our new strategic plan, JMU will elevate its national prominence by expanding this model through selective growth in high impact graduate programs, increased scholarship and external funding, and an unwavering commitment to signature undergraduate excellence.

How will we measure success?

By 2032

- JMU will increase research expenditures² to exceed \$55 million.
- JMU will identify strategic areas to increase doctoral degree awards that are responsive to the needs of the region and the Commonwealth.
- JMU will be ranked among the top 65 public institutions nationally according to U.S. News and World Reports.
- Economic Impact will exceed \$1.2 billion.
- Annual philanthropic giving will exceed \$50 million.

What strategies will we use to successfully chart this new path as a research institution?

- **Expand the research infrastructure that supports faculty and graduate student productivity.** JMU will invest in research infrastructure and faculty development, strengthen interdisciplinary collaboration, and expand partnerships with federal agencies, corporations, and foundations to grow sponsored programs and advance discovery. Work will focus on hiring additional faculty in strategic areas, centralizing graduate student support—including graduate housing, embedding dedicated

² As defined by the HERD survey

research administrators within each college, and expanding library and IT infrastructure.

- **Integrate opportunities for authentic undergraduate research throughout the curriculum:** JMU will build on its strengths in student research by making participation in undergraduate research and creative inquiry a core part of the JMU student experience. The university will expand opportunities for students to engage in research in all disciplines and recognize faculty contributions to this work in hiring, development, and promotion.
- **Strategically expand doctoral programs and research in areas where Commonwealth needs, bipartisan funding durability, and institutional strengths align.** JMU will expand graduate programs in fields of existing research strength and workforce demand. Graduate students will play a central role in the university's research enterprise and mentoring undergraduate researchers. Programs/research areas to consider adding include:
 - Artificial Intelligence
 - Biotech/Pharma Research
 - Civic Education
 - Intelligence Analysis
 - Rural Health
 - **Create new research centers of excellence.** JMU will establish interdisciplinary centers that bring together faculty, graduate students, and external partners to address pressing regional and national challenges. Each center will be selected based on alignment between Commonwealth workforce needs, external funding opportunity, demonstrated faculty research activity, and institutional expertise. Centers will pursue both national research distinction and measurable regional impact.

3. Become the Preferred Partner to Meet the Needs of the Commonwealth, and Beyond

JMU will be the Shenandoah Valley and Commonwealth's most trusted, responsive, innovative, and preferred university partner. We will link students and faculty with industry, government, and nonprofit collaborators to translate discovery into real-world solutions that fuel entrepreneurship, innovation, and economic development in and beyond the Shenandoah Valley. Through collaborative partnerships, JMU will position Virginia as a national and global leader.

How will we measure success?

By 2032:

- Economic Impact will exceed \$1.2 billion.
- Increase research expenditures to at least \$55 million.
- Annual philanthropic giving will exceed \$50 million.

What strategies will we implement to become the preferred partner in the area?

- **Develop academic programs aligned with workforce and economic development priorities to strengthen regional talent pipelines in strategic areas.** JMU will utilize, expand, and create academic programs and partnerships that prepare our students to serve the Commonwealth and the region's workforce demands. The university will collaborate with industry, nonprofit, and government sectors on customized workforce-development initiatives, develop revenue-generating stackable credentials, certificates, undergraduate and graduate programs aligned with industry needs, and scale lifelong learning opportunities for alumni and the broader Virginia community. We will focus our efforts on creating and expanding offerings in the areas such as:
 - Advanced Manufacturing
 - Agricultural Technology and Food Systems
 - Artificial Intelligence, Data Science and Applied Analytics
 - Cybersecurity and Cloud Computing
 - Education (primary, middle, and secondary)
 - Energy, Sustainability, and Environmental Resilience
 - Engineering (civil, environmental, systems, and automation)
 - Healthcare, with an emphasis on rural health
 - Real Estate
 - Supply Chain, Logistics, and Operations Management
 - **Establish a coordinated university structure for responsive partner service and improved project management.** This structure will clearly define cross-functional responsibilities to provide responsive partner service, guide external stakeholders through university processes, manage complex projects, collect and communicate economic impact data, and create transparent, repeatable pathways for internships, applied research,

and workforce training. This structure will elevate and integrate existing efforts while maintaining distributed expertise and shared accountability.

- **Lead a regional commercialization network.** JMU will lead a Shenandoah Valley commercialization and entrepreneurship network, convening schools, businesses, medical systems, and community organizations to turn discoveries into new businesses, quality jobs, and community impact while attracting investment to the region.
- **Expand the College of Health and Behavioral Studies.** This expansion will help support increased enrollment in key programs with high workforce demand, helping to meet local and Commonwealth needs in key areas such as health care.

4. Create an Innovative Campus Community

To support our vision for next-generation learning, research, and partnership experiences, JMU will transform its physical environment to be sustainability-focused and deeply integrated with its community. The campus of the future isn't just a place of learning; it is an anchor and hub for cultural, educational, and economic collaboration that will bring in revenue to allow for further investment in our mission.

How will we measure success?

By 2032:

- JMU will increase on-campus housing capacity to at least 40% of the student body.
- JMU's economic impact will exceed \$1.2 Billion.
- Retention rates will exceed 93%.
- Four-year graduation rates will exceed 71%.
- Annual philanthropic giving will exceed \$50 million.

What strategies will we use to successfully create an innovative campus community?

- **Build new residential facilities.** To improve the student experience, address affordable housing needs within the local community, and revitalize areas of campus with aging infrastructure, JMU will increase student housing to support at least 40% of students by 2032. By increasing campus density, JMU will create a campus that provides the academic, social, and basic needs to support the student experience and allow students to thrive.

- **Create and execute a strategic enrollment management plan.** To position JMU for success, the institution must identify how to manage enrollment growth among different populations. This plan will guide decision-making, establish realistic benchmarks, and ensure that our student population changes in ways that are predictable and planned. This plan will also include a scholarship growth plan to ensure we can recruit the best and brightest students.
- **Establish new university practices and structures designed to increase community collaboration and maximize facility use.** JMU will serve as an anchor for the region’s cultural, recreational, industry, and athletic events by hosting concerts, tournaments, and conferences in campus venues. The university will expand youth camps and corporate retreats and partner with regional tourism to drive year-round events and community engagement. Systems will be re-imagined to improve space scheduling and availability to members of campus and to the broader community.
- **Design and build the Madison District.** JMU will transform the neighborhood on the east side of Bridgforth Stadium into the new center of campus: a vibrant hub that unites learning, living, and community engagement. The redevelopment will include a new student union, student housing, and mixed-use spaces that stimulate local economic growth and enhance campus life.
- **Establish the JMU Living Lab Institute to connect university programs, people, and places.** JMU will reimagine the relationship between campus and community through mixed-use development on and near campus that brings together corporate research, student and community housing, and other community-facing amenities. These hubs will be developed based on existing and distinctive areas of academic strength and themed to give maximum focus on the distinctiveness of what JMU offers.

5. Invest in Our People

JMU’s ability to deliver on the Madison Promise depends on the strength, capacity, and well-being of the people who bring the university’s mission to life. At JMU, we are all educators; investment in our people is investment in the mission itself. Faculty and staff are central to the student experience, the advancement of research and discovery, the success of community partnerships, and the vitality of campus life. As the university pursues an ambitious strategic vision, JMU will ensure that expectations for innovation and growth are matched with the workforce capacity, resources, and support necessary for success. Through strategic investments in recruitment, professional development,

compensation, and workload alignment, JMU will strengthen the conditions that allow faculty and staff to thrive and enable the success of the Madison Promise.

How will we measure success?

By 2032:

- JMU's economic impact will exceed \$1.2 Billion.
- Retention rates will exceed 93%.
- Four-year graduation rates will exceed 71%.
- JMU will rank among the top 65 national public institutions.

What strategies will we use to ensure we are supporting our faculty and staff?

- **Aligning faculty and staff workload, incentives, administrative and data support, and responsibilities with strategic priorities.** The strategic plan proposes a series of bold initiatives that will require faculty and staff engagement to be successful. We will commit to a review of faculty and staff responsibilities, incentive structures, and support mechanisms to identify pathways for maintaining appropriate workloads.
- **Establish procedures for sunset activities.** We will implement a process to strategically sunset university activities to allow better alignment of faculty and staff workload, positively affecting student success and increasing retention and graduation rates.
- **Increase compensation.** JMU will use multiple strategies to increase compensation for faculty and staff, including advocating at the state level to increase funding, resourcing tools for compensation increases (e.g. in-band adjustments (IBAs) for classified and part-time employees, target salary actions for administrative and professional staff), and focus efforts to address faculty compression and inversion.
- **Enhance employee well-being.** JMU will build a campus culture in which the health and flourishing of faculty and staff is understood as a shared institutional responsibility. We will advance that commitment by sustaining and scaling the work of the President's Council on Health and Well-Being and embedding holistic support across policies, practices, and campus environments.
- **Advance Reengineering Madison.** Modernize the technology infrastructure that faculty and staff use to reduce administrative burden and enable more effective collaboration. Reengineering Madison will ensure that expectations for innovation are matched with the systems faculty and staff need to do their work effectively.

Funding the Promise: Aligning Mission and Investment

The Madison Promise will align investment with our mission to prepare our students to be educated and enlightened citizens leading productive and meaningful lives. The rapidly evolving landscape of higher education — catalyzed by the rise of artificial intelligence, enrollment pressures, and workforce demands — requires us to reexamine our distinctive place and future direction within the sector. JMU’s rise in national prominence will be powered by a comprehensive effort to attract and secure transformative investment in the university. To accomplish our vision, we will:

- Launch our third comprehensive campaign to attract philanthropic supporters — including alumni, parents, and friends — as well as public and private foundations, corporations, and individual investors.
- Actively engage state and federal partners to support JMU initiatives that are mutually beneficial to the university and the Commonwealth.
- Pursue local, state, and federal grants.
- Consider thoughtful approaches to tuition and fee increases.
- Strategically realign institutional resources to elevate strategic priorities.

As we look ahead, we have identified a set of promising ideas that will shape our next chapter. Our work now is to engage, resource, and implement these priorities — recognizing that tensions will emerge and committing to continuously reassessing scope, scale, and feasibility so that we remain excellent stewards of our people, mission, and resources. This is an open invitation to join us in shaping the future of higher education through shared vision and commitment. Together, we will build a university that leads with purpose, innovation, and public impact.

The Madison Promise: JMU Strategic Plan 2040

Vision:

We will deliver on the Madison Promise by advancing the public good through distinctive teaching and learning, impactful research, strong partnerships, an innovative campus community, and investment in our people

Foundational Principles: The public good, academic freedom and free inquiry, teacher-scholar integration, human dignity and mutual respect, shared governance, stewardship of public resources, public trust, ethics and accountability.

Guidepost Goals:

To achieve this vision, we are establishing the following guidepost goals. These audacious outcomes will keep us focused on the future as we develop strategies, create new initiatives, and allocate resources:

At least 98% of bachelor's degree earners will have a positive career outcome within 12 months of graduating
At least 95% of our new students will return for a second year
At least 75% of students will graduate within four years of beginning at JMU
JMU will rank among the top 50 national public institutions
JMU will improve its acceptance rate to 54%
Overall student enrollment will grow to 30,000
Increase on-campus housing capacity to 60% of the student body
JMU's economic impact will exceed \$2 billion
JMU's research expenditures will exceed \$75 million
JMU's annual philanthropic giving will exceed \$75 million
JMU will award at least 80 research doctoral degrees annually

Pillars	Alignment with Guidepost Goals	2025	2032 Target	2040 Target
1. Enhance Value, Purpose, and Impact of a JMU Education JMU Distinctives: <ul style="list-style-type: none"> • Leader development • Ethical reasoning • Discovery and innovation • Civic engagement • Service for public purpose • Power skill development • Well-being 	Increase the first-to-second year retention rate	91.3%	93%	95%
	Increase our four-year graduation rate	68%	71%	75%
	Achieve a high career outcomes rate for bachelor's degree earners after 12 months	95%	97%	98%
	Improve our selectivity (acceptance rate)	66%	60%	54%
	Improve our ranking among public national universities	79	65	<50
	Increase overall student enrollment	23,157	26,000	30,000
2. Chart a New Path as a National Research University	Increase annual research expenditures	\$34M	\$55M	\$75M+
	Increase the number of research doctorates awarded annually	47	63	80
	Improve our ranking among public national universities.	79	65	<50
	Increase sustained philanthropic giving	\$32.8M	\$50M	\$75M
	Increase overall student enrollment	23,157	26,000	30,000
3. Become the Preferred Partner to Meet the Needs of the Commonwealth, and Beyond.	Increase state-wide economic impact	\$793M	\$1.2B	\$2B
	Increase annual research expenditures	\$34M	\$55M	\$75M
	Increase sustained philanthropic giving	\$32.8	\$50M	\$75M
4. Create an Innovative Campus Community	Increase the on-campus housing capacity	28%	40%	60%
	Increase state-wide economic impact	\$793M	\$1.2B	\$2B
	Increase the first-to-second year retention rate	91.3%	93%	95%
	Increase our four-year graduation rate	68%	71%	75%
	Increase sustained philanthropic giving	\$32.8M	\$50M	\$75M
	Improve our selectivity (acceptance rate)	66%	60%	54%
5. Invest in Our People	Increase overall student enrollment	23,157	26,000	30,000
	Improve our ranking among public national universities	79	65	<50
	Increase the first-to-second year retention rate	91.3%	93%	95%
	Increase our four-year graduation rate	68%	71%	75%
	Increase sustained philanthropic giving	\$32.8M	\$50M	\$75M

*All goals and targets are currently being reviewed and revised. Targets noted here should be considered preliminary and subject to change

Pillars	Strategic Initiatives	Risk Assessment
<p>1. Enhance Value, Purpose, and Impact of a JMU Education</p> <p>JMU Distinctives:</p> <ul style="list-style-type: none"> • Leader development • Ethical reasoning • Discovery and innovation • Civic engagement • Service for public purpose • Power skill development • Well-being 	<ul style="list-style-type: none"> • Implement the Employer and Employment Guarantees • Create a JMU Distinctives Team • Embed civic engagement and deliberative dialogue into the student experience • Expand access to high-quality Work-Based Learning Experiences on- and off- campus. • Create a coordinated mentorship ecosystem throughout a student’s undergraduate experience • Expand student work opportunities across campus • Pilot a Work-to-Learn Program • Leverage athletics 	<ul style="list-style-type: none"> • Guarantees may pose legal and financial liabilities • Identifying enough work-based learning experiences locally may stretch organizations • Supply of faculty and opportunities for the multi-course sequence may not meet demand • Transitioning vacant jobs to student employment could affect local job market • Faculty and staff workloads may be taxed further if asked to mentor without shifting responsibilities • SCHEV must approve enrollment projections and has cautioned institutions about being too aggressive in projecting growth • Resources must be identified to implement these ideas
<p>2. Chart a New Path as a National Research University</p>	<ul style="list-style-type: none"> • Expand the research infrastructure that supports faculty and graduate student productivity • Integrate opportunities for authentic undergraduate research throughout the curriculum • Strategically expand doctoral programs and research in areas where Commonwealth needs, bipartisan funding durability, and institutional strengths • Create new research centers of excellence 	<ul style="list-style-type: none"> • We may not be able to overcome a mindset shift from a primarily teaching-focused institution to one that values, celebrates, and excels at both teaching and research • SCHEV does not allow JMU to have more than 10 doctoral degrees • Faculty and staff workloads may be taxed further if asked to mentor without shifting responsibilities • Resources must be identified to implement these ideas
<p>3. Become the Preferred Partner to Meet the Needs of the Commonwealth, and Beyond.</p>	<ul style="list-style-type: none"> • Develop academic programs aligned with workforce and economic development priorities to strengthen regional talent pipelines in strategic areas • Establish a coordinated university structure for responsive partner service and improved project management • Lead a regional commercialization network • Expand the College of Health and Behavioral Studies 	<ul style="list-style-type: none"> • Expanding CHBS requires state funding, which is not guaranteed • Resources have not been identified to implement these ideas • The state requires certain processes to be followed when considering public-private partnerships, which could hinder our ability to enter into these agreements
<p>4. Create an Innovative Campus Community</p>	<ul style="list-style-type: none"> • Build new residential facilities • Create and execute strategic enrollment management plan • Establish new university practices and structures designed to increase community collaboration and maximize facility use • Design and build the Madison District • Establish the JMU Living Lab Institute to connect university programs, people, and places. 	<ul style="list-style-type: none"> • Campus transformation will require heavy investment from multiple sources • Investment in infrastructure such as dining and public transit will need to be expanded • Student demand for housing may not meet growth expectations • Godwin Hall must be demolished to build a new campus commons, displacing faculty and students in large majors
<p>5. Invest in Our People</p>	<ul style="list-style-type: none"> • Align faculty and staff workload, incentives, administrative and data support, and responsibilities with strategic priorities • Establish procedures for sunseting activities • Enhance employee well-being • Increase compensation • Advance Reengineering Madison 	<ul style="list-style-type: none"> • It will be difficult to find consensus around changing workload expectations and new incentive structures • Procedures for sunseting activities may be viewed as favoring some areas over others • Increasing workforce housing will be resource-intensive and likely require partnerships with private property owners and the city • Increasing compensation is resource-intensive and must align with human resource management rules

*All goals and targets are currently being reviewed and revised. Targets noted here should be considered preliminary and subject to change



**JAMES MADISON
UNIVERSITY®**

STRATEGIC PLAN 2026-2040

The Madison Promise

A New Standard for Public Higher Education



The Madison Promise

A New Standard for Public Higher Education

James Madison University has adopted an ambitious plan to redefine the role of national public research universities. **The Madison Promise**, which will guide JMU's strategic direction through 2040, presents a new social contract between JMU, its students, families, the Commonwealth of Virginia, employers and society.

Guaranteed Opportunities and Outcomes

At the plan's heart is a bold commitment: JMU now offers an **Employment Guarantee** to every prospective student who actively engages in the Madison Experience. If they do, JMU guarantees that students will achieve a positive post-graduation outcome within one year. If not, the university will provide career coaching, networking opportunities, or additional education at no cost.

The Madison Promise also emphasizes the development of a set of "signature power skills," enabling all graduates to build strong abilities in communication, critical thinking, problem solving and working on teams—**qualities that AI cannot easily replace**. JMU will provide additional coursework and coaching at no cost if an employer identifies gaps in our graduates' key professional competencies.

The Madison Promise also includes **work-based learning opportunities for students**, alongside mentorships and undergraduate research so that every graduate applies classroom knowledge to real-world settings. The curriculum and co-curriculum also will further emphasize civic learning and dialogue across differences, equipping students and graduates to engage constructively with complex issues in their careers and communities.

A New Kind of Research University

JMU will pursue a distinctive vision of a modern research university. We will expand research and graduate education aligned with the Commonwealth's workforce and innovation needs. Our approach positions JMU as a model for the modern public research university, one where teaching and research are not competing priorities, but

mutually reinforcing purposes driving discovery, opportunity and service.

Partnerships That Drive Impact

With the Madison Promise, JMU will become the Commonwealth's preferred university partner, connecting students and faculty with industry, government and nonprofits, building regional talent pipelines, supporting economic development, and translating discoveries into real-world solutions. Collaborations in areas such as advanced manufacturing, rural health, education and agriculture will strengthen the Shenandoah Valley and position Virginia as a national leader in innovation and workforce development.

An Innovative Campus Community

Supporting all the ambitions of **The Madison Promise** will be a transformed campus environment designed to accommodate twice the current amount of on-campus housing, employing the latest thinking to integrate living, learning, research and community collaborations in bold new modes. This vision also reimagines the core of campus through expanded retail and dining, and a vibrant town square that reflects the future of the student lifestyle experience.

A Promise to the Future

The Madison Promise reflects a conviction that universities must evolve to meet the changing expectations of students, employers and society. By combining guaranteed outcomes, experiential learning for all, meaningful research and strong regional partnerships, JMU confidently sets a new standard for public higher education.



Budget Update & Planning



BOARD OF VISITORS



Overview of Major Cost Increases



- Mandatory salary increases for faculty and staff



- academic resources, student and institutional support services



- Rising fringe benefit rates



- **Future Planning**
 - § Strategic Communications
 - § IT Infrastructure
 - § Student Recruitment



- Inflationary pressures on contractual services

Why These Increases Are Necessary



- Salary adjustments ensure competitive compensation for faculty and staff



- Higher fringe benefit rates reflect healthcare and retirement obligations



- Inflation increases operational costs across campus services



- Investment in academic success & enhanced student services support success

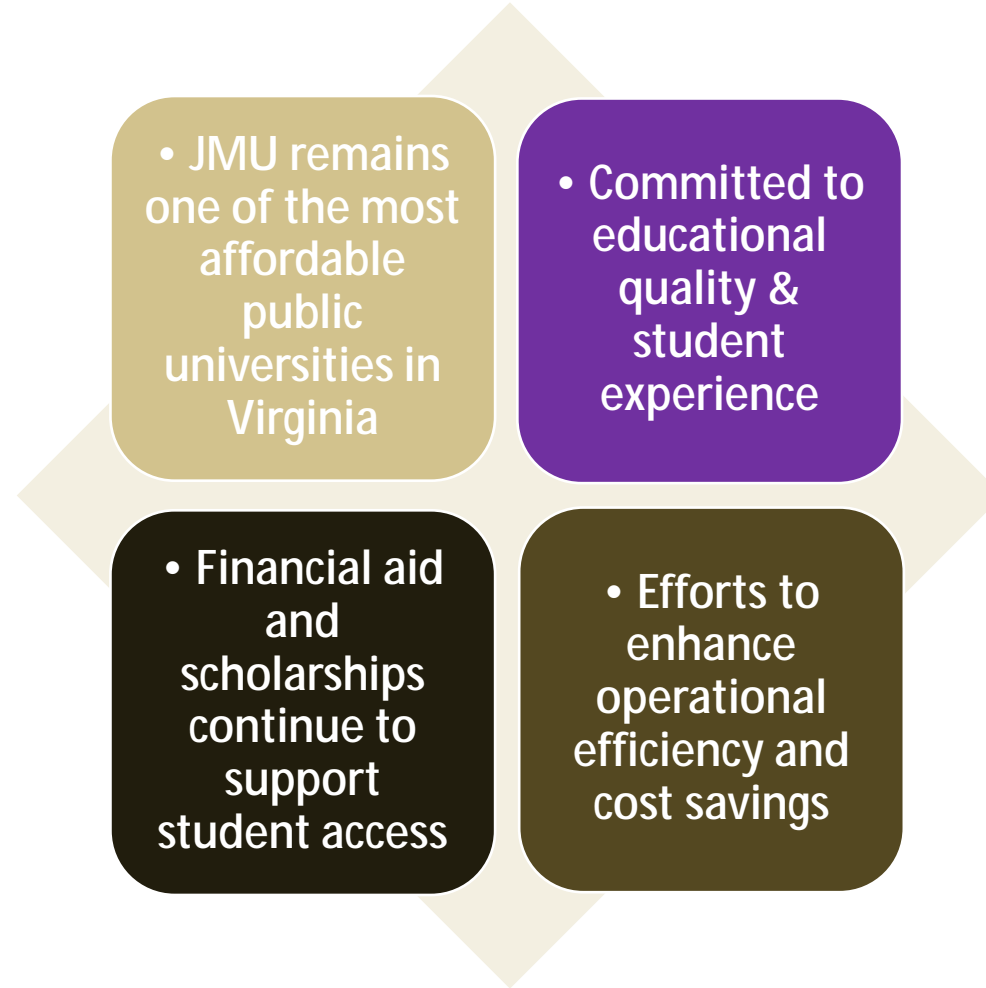


- Forward looking strategies strengthen long-term viability and enable continued innovation





Maintaining Affordability





JMU Compared to Peer Institutions

§ JMU maintains a lower total cost compared to many peer institutions in Virginia (FY 2025-26 Peer Data)

	In-state Tuition and Mandatory E&G Fees		Out-of-state Tuition and Mandatory E&G Fees		Mandatory Non-E&G Fees		Average Room and Board ⁽¹⁾		Total In-state		Total Out-of-state	
		\$		\$		\$		\$		\$		\$
1	W&M	\$ 19,407	UVA	\$ 56,607	VMI	\$ 10,998	W&M	\$ 16,601	W&M	\$ 43,057	UVA	\$ 75,216
2	UVA	\$ 16,747	W&M	\$ 45,676	LU	\$ 7,290	UVA	\$ 15,318	UVA	\$ 35,356	W&M	\$ 69,326
3	VCU	\$ 14,035	VMI	\$ 41,960	W&M	\$ 7,049	VCU	\$ 15,128	VMI	\$ 33,016	VMI	\$ 64,608
4	VT	\$ 13,656	VCU	\$ 37,199	CNU	\$ 6,802	LU	\$ 14,570	VCU	\$ 32,368	VCU	\$ 55,532
5	CNU	\$ 10,417	VT	\$ 36,107	*JMU/\$234/3.9%	\$ 6,222	GMU	\$ 14,440	LU	\$ 30,820	GMU	\$ 53,752
6	GMU	\$ 10,392	GMU	\$ 35,388	UMW	\$ 5,958	ODU	\$ 14,417	CNU	\$ 29,975	VT	\$ 51,877
7	VMI	\$ 10,368	ODU	\$ 29,166	UVA-Wise	\$ 5,432	*JMU/\$690/5.3%	\$ 13,732	VT	\$ 29,426	ODU	\$ 48,827
8	UMW	\$ 9,406	*JMU/\$436/1.7%	\$ 26,354	ODU	\$ 5,244	UVA-Wise	\$ 13,196	GMU	\$ 28,756	*JMU/\$1,360/3.0%	\$ 46,308
9	LU	\$ 8,960	CNU	\$ 24,638	NSU	\$ 4,228	UMW	\$ 13,036	*JMU/\$1,158/4.2%	\$ 28,500	CNU	\$ 44,196
10	RU	\$ 8,818	UMW	\$ 22,912	RU	\$ 4,134	VT	\$ 12,900	UMW	\$ 28,400	LU	\$ 43,750
11	*JMU/\$234/2.8%	\$ 8,546	RU	\$ 22,600	GMU	\$ 3,924	VSU	\$ 12,860	ODU	\$ 27,737	UMW	\$ 41,906
12	ODU	\$ 8,076	UVA-Wise	\$ 22,578	VSU	\$ 3,772	CNU	\$ 12,756	RU	\$ 25,575	UVA-Wise	\$ 41,206
13	VSU	\$ 6,646	LU	\$ 21,890	UVA	\$ 3,291	RU	\$ 12,623	UVA-Wise	\$ 24,976	RU	\$ 39,357
14	UVA-Wise	\$ 6,348	VSU	\$ 19,632	VCU	\$ 3,205	NSU	\$ 11,736	VSU	\$ 23,278	VSU	\$ 36,264
15	NSU	\$ 6,228	NSU	\$ 18,778	VT	\$ 2,870	VMI	\$ 11,650	NSU	\$ 22,192	NSU	\$ 34,742

* - JMU planning purposes - FY 2026-27 Tuition & Fees & Room and Board

(1) Charges shown in the table represent the weighted average double occupancy room charge and the maximum weekly meal plan offered, not necessarily the plan used by most students. The JMU Purple 14 meal plan is shown in the chart as this is the most popular plan at the university and the plan approved by the Board of Visitors & the lowest room rate.

Source: SCHEV FY 2025-26 Tuition and Fees Report, August 2025



Budget Development Planning

	2025-26	2026-27	\$ Change	% Chg
VIRGINIA UNDERGRADUATE STUDENT				
Tuition & Fees	\$ 8,312	\$ 8,546	\$ 234	2.8%
Comprehensive Fee	5,988	6,222	234	3.9%
TOTAL COMMUTER COSTS	\$ 14,300	\$ 14,768	\$ 468	3.3%
Room & Board	13,042	13,732	690	5.3%
TOTAL ON-CAMPUS COSTS	\$ 27,342	\$ 28,500	\$ 1,158	4.2%
NON-VIRGINIA UNDERGRADUATE STUDENT				
Tuition & Fees	\$ 25,918	\$ 26,354	\$ 436	1.7%
Comprehensive Fee	5,988	6,222	234	3.9%
TOTAL COMMUTER COSTS	\$ 31,906	\$ 32,576	\$ 670	2.1%
Room & Board	13,042	13,732	690	5.3%
TOTAL ON-CAMPUS COSTS	\$ 44,948	\$ 46,308	\$ 1,360	3.0%



What is the Student Value?

- § Higher Lifetime Earnings
- § Access to Networks & Internships
- § Personal Development & Specialized Skills
- § Student Engagement
- § Campus Resources
- § Research Opportunities



Conclusion and Next Steps

- § Tuition and fee increases are driven by necessary cost adjustments
- § JMU remains committed to affordability and academic excellence
- § Ongoing engagement with students, families, and stakeholders
- § Continued focus on transparency and responsible budgeting
- § Public comment and April Board meeting