

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 (Request Not Submitted to DPB)

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) (Request Not Submitted to DPB)

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.

Optional] Section J: Collaboration

J1. [OPTIONAL] Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions (and other state agencies as appropriate) in furthering the goals outlined in sections B-D. What is the expected impact and in what timeframe? What is the timeline for the initiative and how far along is it? What (if anything) would be required from a budget or policy perspective to facilitate the success of the initiative?

JMU is highly committed to working across the Commonwealth to leverage the best opportunities for all students. Included here are several significant initiatives.

4-VA Network

In 2023, the 4-VA workgroup updated the goals of the network. Moving forward, the involved institutions – JMU, UVA, VT, and GMU – will support cross-institutional research collaborations through research seed funding awards and undertake the development of across-the-Commonwealth resources related to current and emergent education and research topics. Specifically, in AY23-24, emphasized topics will include artificial intelligence and higher education.

Higher Education Technical Systems

With Reengineering Madison, JMU is implementing significant technology platforms, including an enterprise CRM and new data solutions for managing and visualizing data, as well as replacing current PeopleSoft Enterprise Resource Management Finance, Human Resources, and Student Administration applications that are reaching the end of their useful life, through a seven-year, multiphase project.

To explore the potential for collaboration, we are involved in conversations with other Virginia higher education institutions. These discussions aim not only to achieve potential cost savings but also to leverage mutual benefits and shared efficiencies.

Grow Your Own: Licensing Paraprofessionals with Degrees

To move more teachers into classrooms more quickly and at a greatly reduced cost than traditional teacher preparation programs, JMU has partnered with VDOE to launch an innovative teacher preparation program. JMU has engaged two strong teacher-producing universities (Old Dominion University and Longwood University) to offer the same online module-based learning.

Online Virginia Network

JMU is active in the Online Virginia Network (OVN) and has been an excellent steward of its resources. With support from OVN funds, JMU increased the overall percentage of online/hybrid course sections from ~7% in 2019 to ~14% in 2023, representing an increase of ~400 fully online students pre-COVID to ~1,025 in 2022.

JMU has used OVN funds in a variety of ways, including:

- Developing a partnership with SCHEV and VCU to contact ~105,000 Virginians with some college and no degree to see how online options can help them earn a degree;
- Adding four instructional designers in the JMU Libraries, enabling additional investments in digital course materials, media production services, and learning technology staffing;
- Supporting five online instructors for the online Grow Your Own Teacher Education Program, which was developed in response to market research;
- Sponsoring 16 online Bachelor of Individualized Studies (BIS) students, including 2 VCCS students, to participate in high-impact experiential learning programs abroad in Summer 2023;
- Securing IT/software licenses that allow students to have remote access to software housed in on-campus computer labs; and

- Providing faculty grants for the development of projects to enhance hybrid/online teaching and learning.

Open Educational Resources (OER)

JMU focuses on providing students with the [most affordable textbook options](#) available through multiple programs for students and faculty.

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 OER efforts led by the JMU Libraries beginning in 2022, more than 10% of courses for Fall 2022 were listed as low- or no-cost, and saved 5,259 students an estimated \$1,062,000 in out-of-pocket expenses in FY 2022.

To help ensure faculty buy-in, the university offers many opportunities for them to learn about the benefits of free and low-cost textbooks. JMU Libraries has [provided grants](#), similar to those offered by VIVA, for faculty to try OER options and makes available multiple resources for finding and evaluating OER sources.

SCHEV/ Virginia Talent + Opportunity Partnership (V-TOP) Partnership Grant

JMU was awarded a SCHEV Innovative Internship Program Round 3 award for FY 24 to develop regional (Region 8) pathways to grow business/non-profit participation in work-based learning and internship programming. The funded program will provide coordination among educational institutions, employers, and students in the region to expand local internship opportunities in the Shenandoah Valley.

With this funding, JMU has hired an internship 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. 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.

However, this award is limited to two years.

Virtual Library of Virginia

Membership in the Virtual Library of Virginia (VIVA) consortium and participation in interlibrary loan agreements with partner institutions extends the reach of library collections and provides students at participating institutions with access to a larger universe of information. Contracts are also negotiated to allow the general public access to licensed resources on public stations in the libraries. In addition, cooperative agreements with other Virginia universities provide access to an expanded collection of e-journals.

As a leader for VIVA, JMU manages procurement for the 39 state-assisted colleges and universities involved. Membership in VIVA brings \$5 of value for every \$1 spent through VIVA's cooperative purchasing of resources, saving the institution money and personnel hours by avoiding duplication of collections and enabling shared agreements and central invoicing.

[Optional] Section K: State Policy

K1. [OPTIONAL] Use this section to outline any state policy changes you have not already mentioned in this narrative that would enhance your ability to achieve greater success on the topics, strategies, and initiatives referenced in this narrative. What existing policies, if any, are hindering your ability to maximize outcomes and value for students? What new policies might create conditions that are more conducive to achieving those goals? What strategies or initiatives would these policy changes enable your institution to do or try that you are not yet able to do today? Please be as specific as possible.

JMU appreciates the opportunity to highlight possible state policy and procedure changes that would enhance success at JMU.

Budgeting and Financial Aid

- Allow institutions to allocate funding toward cloud-based software purchases through the Higher Education Equipment Trust Fund program. Guidelines need to be revised to include the increasing changes of technology to meet the needs of academic programs and students.
- JMU would benefit from a modification to the SCHEV financial aid funding model that results in enhancing state support.

Increased State Funding

- As with other higher education institutions in Virginia, JMU would greatly benefit from additional resources and options to fund ongoing mental health support.
- While the VMSDEP program is an excellent benefit for veterans and their families, consider reviewing current state program policy with federal veteran benefit funding allocations.

SCHEV Policies

- JMU seeks clarification of its place in institutional groupings within the Commonwealth. As an R2, we would like to be considered a research institution by Virginia. In addition, we would like to be able to offer an increased number of doctoral degrees, which is currently limited (SCHEV curriculum policy, VIII. Degree Level Authorization, pgs. 9-10).

Governance

- Currently, JMU is limited to two out-of-state Board of Visitor members (§ 23.1-1601. Membership). This has the possibility to raise issues of equity and representation, and JMU would like to explore modifying this requirement.

Tech Talent Investment Program

- The Tech Talent Investment Program (TTIP) at JMU has had a significant impact on the growth of the Computer Science program, increasing the number of graduates by 43% from FY19 to FY23. Based on our current JMU-CS enrollment trends, the TTIP investment and associated investments by JMU will continue to produce increasing numbers of graduates well into the future, sufficient to achieve and exceed our TTIP commitments.
 - However, due to the unexpected reductions in CS degree production counts during the COVID years, our cumulative degree production totals have not yet fully recovered. JMU fully anticipates meeting targets by the end of AY2024-25 (if not sooner), and in this context respectfully request that our MOU be updated to provide additional time to fully realize the intent of the TTIP and the associated ROI for the Commonwealth.

- In accordance with the provisions outlined in the legislative act Virginia Code- §23.1-1241. *Approval and update of memorandum of understanding*, we ask that the following language be considered for incorporation into our TTIP Memorandum of Understanding:

Addendum: The “grace period” years will be extended through the end of academic year 2024-25 in recognition of the extended impact COVID had on the cumulative number of new degrees produced during the initial six years of the TTIP initiative.

[Optional] Section L: Additional Information

L1. [OPTIONAL] Use this final section to provide any additional context and/or supporting materials you feel should be incorporated into the six-year planning process.

Economic Impact

- JMU is largest employer in northern Shenandoah Valley.
- The university is a catalyst for economic development and innovation in the region through hosting or partnering with entities such as the Shenandoah Valley Partnership, Shenandoah Valley Technology Council, Small Business Development Center, and the Valley Makers Association. JMU's Center for Entrepreneurship also plays a key role.

Community Impact

- JMU is active in the local community and dedicated to intentional engagement that supports those in the region. Two substantial examples are included here.
- The university provides significant public health services for the local community through programs including the Institute for Innovation in Health and Human Services (IIHHS).
 - The institute offers 19 community-based programs and partners with academic units to support ten clinics. In 2022-23, 999 students engaged in IIHHS programs, representing 39 undergraduate and graduate degree programs. During this time, 15,465 community clients received institute services.
- JMU annually offers the Volunteer Income Tax Assistance (VITA) program, providing free tax preparation and e-filing for low-income community members.
 - A joint collaboration between the School of Accounting and the Department of Foreign Languages, Literatures and Cultures, services are delivered in English and Spanish. In 2023, over 500 taxpayers were assisted.
- JMU's role as a community-engaged anchor institution has expanded.
 - A recent focus on co-creating new services for the local and regional communities in response to their priorities and the receipt of a substantial grant resulted in advancement in early childhood development programming through JMU's Early Childhood Initiatives.
- JMU is a national leader in civic education, [celebrating free speech](#), and drawing attention to our role as citizens, led by the nonpartisan Madison Center for Civic Engagement
 - The university's work in elevating free speech to counter threats to democracy was highlighted in a recent highly favorable [Associated Press article](#). JMU has joined a national coalition of universities dedicated to developing resources on these topics, the Institute for Citizens & Scholars.

INSTRUCTIONS FOR SUBMITTING 2023 INSTITUTIONAL SIX-YEAR PLAN

Due Date: July 17, 2023

PLEASE READ INSTRUCTIONS CAREFULLY

Six-year Plan Requirement

The Higher Education Opportunity Act of 2011 (TJ21) requires Virginia's public institutions of higher education to prepare and submit six-year plans. (See below for complete code reference.) During the 2015 General Assembly session, joint resolutions approved by the House (HJR 555) and Senate (SJ 228) also require that the mission, vision, goals, and strategies expressed in the Virginia Plan, the statewide strategic plan, guide the development of the strategic plan and six-year plan at each public institution of higher education, as well as the agency plan for SCHEV, and that SCHEV report annually on the Commonwealth's progress toward achieving these goals and targets to the Governor, General Assembly, institutions of higher education and the public.

2023 Six-Year Plan Format

The 2023 Six-Year Plan consists of a workbook and an accompanying narrative. The workbook has an Instructions page, Institution ID page and eight parts/worksheets: Enrollment, Undergraduate Tuition and Fee Increase Rates, Revenue, Financial Aid, Academic-Financial, General Fund (GF) Request, and Pro Forma. **Note: Shaded cells contain formulas.** Instructions for the narrative are provided in a separate attachment. Though the Enrollment/Degree Projections are being developed in a separate process, institutions are required to provide a summary of enrollment projections in Tab 1 so they can be considered as part of the six-year planning process alongside the financial projections and pro forma analysis.

The 2023 Six-Year Plans are due July 17, 2023. The review group (referred to as Op Six) as outlined in § 23.1-306 - see Legislative Reference section below - will meet with each institution in August to review the institution's plan and provide comments. If changes to the plans are recommended, revised institutional submissions are due no later than October 1 or immediately following an institution's Board of Visitors' meeting, if it is later than October 1.

INSTRUCTIONS FOR SECTIONS

1. Undergraduate Tuition and Fee Increase Rate Plan

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.

2. Revenue

For FY2023- FY2026: 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.

For 2027-FY2030: 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.

3. Financial Aid

Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid. 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.

4. Academic-Financial Plan

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 bienium and 2028-2030 bienium, 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.

Pathways to Opportunity: The Virginia Plan for Higher Education. In the column labeled "VP Goal," identify the goal of the The Virginia Plan (VP) that applies to each institutional strategy using the appropriate number (i.e., 1, 2, or 3). The three VP goals are listed below. In the Narrative document (Section B), institutions should provide more detailed information.

The Virginia Plan has three major goals (please refer to the Plan at <https://www.schev.edu/research-publications/strategic-plan> for more information about the strategies under each goal):

GOAL 1 EQUITABLE: CLOSE ACCESS AND COMPLETION GAPS.

GOAL 2 AFFORDABLE: LOWER COSTS TO STUDENTS.

GOAL 3 TRANSFORMATIVE: EXPAND PROSPERITY.

5. Six-Year Pro Forma Calculations

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.

6. General Fund (GF) Request

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.

Enrollment/Degree Projections: Detailed six-year enrollment/degree projections are being collected through a separate process. These projections will be incorporated in the Six-Year Plan as part of the July and August institutional meetings with the Op Six.

BOV Approval: Final board approval of the Six-Year Plan should be done at the earliest possible fall meeting. HB 897 (2018) specified that initial plans do not get posted on the General Assembly's website and that final plans should be submitted to DLAS no later than December 1. However, we are requesting that institutions submit final plans with their responses to Op Six Comments on October 1 (or as soon after fall board meetings as possible) as has been done in the past. We post the responses and final plans for review by the Op Six for a period of time prior to posting to SCHEV's website.

Accessibility: All files need to be checked for accessibility prior to submitting them. Information on accessibility is provided at this link on SCHEV's website: <http://schev.edu/index/accessibility/creating-accessible-content>. The first link, "How to Make Your MS Office Documents Accessible" can be used to learn how to check documents. Only errors, not warnings, must be addressed.

Contacts for Questions:

General Questions - Thomas Allison (tomallison@schev.edu)

Academic - Joe DeFilippo (joedefilippo@schev.edu)

Finance - Yan Zheng (yanzheng@schev.edu)

Financial Aid - Lee Andes (leeandes@schev.edu)

Enrollment/Degree Projections - Tod Massa (todmassa@schev.edu)

Legislative Reference:**§ 23.1 - 306. Institutional Six-Year Plans.**

- A. The governing board of each public institution of higher education shall (i) develop and adopt biennially and amend or affirm annually a six-year plan for the institution; (ii) submit such plan to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance no later than July 1 of each odd-numbered year; and (iii) submit amendments to or an affirmation of that plan no later than July 1 of each even-numbered year or at any other time permitted by the Governor or General Assembly to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance. Each such plan and amendment to or affirmation of such plan shall include a report of the institution's active contributions to efforts to stimulate the economic development of the Commonwealth, the area in which the institution is located, and, for those institutions subject to a management agreement set forth in Article 4 (§ 23.1-1004 et seq.) of Chapter 10, the areas that lag behind the Commonwealth in terms of income, employment, and other factors.
- B. The Secretary of Finance, Secretary of Education, Director of the Department of Planning and Budget, Executive Director of the Council, Staff Director of the House Committee on Appropriations, and Staff Director of the Senate Committee on Finance, or their designees, shall review each institution's plan or amendments and provide comments to the institution on that plan by September 1 of the relevant year. Each institution shall respond to any such comments by October 1 of that year.
- C. Each plan shall be structured in accordance with, and be consistent with, the objective and purposes of this chapter set forth in § 23.1-301 and the criteria developed pursuant to § 23.1-309 and shall be in a form and manner prescribed by the Council, in consultation with the Secretary of Finance, the Secretary of Education, the Director of the Department of Planning and Budget, the Director of the Council, the Staff Director of the House Committee on Appropriations, and the Staff Director of the Senate Committee on Finance, or their designees.
- D. Each six-year plan shall (i) address the institution's academic, financial, and enrollment plans, including the number of Virginia and non-Virginia students, for the six-year period; (ii) indicate the planned use of any projected increase in general fund, tuition, or other nongeneral fund revenues; (iii) be based upon any assumptions provided by the Council, following consultation with the Department of Planning and Budget and the staffs of the House Committee on Appropriations and the Senate Committee on Finance, for funding relating to state general fund support pursuant to §§ 23.1-303, 23.1-304, and 23.1-305 and subdivision 9; (iv) be aligned with the institution's six-year enrollment projections; and (v) include:
1. Financial planning reflecting the institution's anticipated level of general fund, tuition, and other nongeneral fund support for each year of the next biennium;
 2. The institution's anticipated annual tuition and educational and general fee charges required by (i) degree level and (ii) domiciliary status, as provided in § 23.1-307;
 3. Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families as described in subdivision 9, including the projected mix of grants and loans;
 4. Degree conferral targets for undergraduate Virginia students;
 5. Plans for optimal year-round use of the institution's facilities and instructional resources;
 6. Plans for the development of an instructional resource-sharing program with other public institutions of higher education and private institutions of higher education;
 7. Plans with regard to any other incentives set forth in § 23.1-305 or any other matters the institution deems appropriate;
 8. The identification of (i) new programs or initiatives including quality improvements and (ii) institution-specific funding based on particular state policies or institution-specific programs, or both, as provided in subsection C of § 23.1-307; and
 9. An institutional student financial aid commitment that, in conjunction with general funds appropriated for that purpose, provides assistance to students from both low-income and middle-income families and takes into account the information and recommendations resulting from the review of federal and state financial aid programs and institutional practices conducted pursuant to subdivisions B 2 and C 1 of § 23.1-309.
- E. In developing such plans, each public institution of higher education shall consider potential future impacts of tuition increases on the Virginia College Savings Plan and ABLE Savings Trust Accounts (§ 23.1-700 et seq.) and shall discuss such potential impacts with the Virginia College Savings Plan. The chief executive officer of the Virginia College Savings Plan shall provide to each institution the Plan's assumptions underlying the contract pricing of the program.
- F. 1. In conjunction with the plans included in the six-year plan as set forth in subsection D, each public institution of higher education, Richard Bland College, and the Virginia Community College System may submit one innovative proposal with clearly defined performance measures, including any request for necessary authority or support from the Commonwealth, for a performance pilot. If the General Assembly approves the proposed performance pilot, it shall include approval language in the general appropriation act. A performance pilot shall advance the objectives of this chapter by addressing innovative requests related to college access, affordability, cost predictability, enrollment management subject to specified commitments regarding undergraduate in-state student enrollment, alternative tuition and fee structures and affordable pathways to degree attainment, internships and work study, employment pathways for undergraduate Virginia students, strategic talent development, state or regional economic development, pathways to increase timely degree completion, or other priorities set out in the general appropriation act.
2. A performance pilot may include or constitute an institutional partnership performance agreement, which shall be set forth in a memorandum of understanding that includes mutually dependent commitments by the institution, the Commonwealth, and identified partners, if any, related to one or more of the priorities set forth in subdivision 1 or set forth in a general appropriation act. No such institutional partnership performance agreement shall create a legally enforceable obligation of the Commonwealth.
 3. No more than six performance pilots shall be approved in a single session of the General Assembly.
 4. Development and approval of any performance pilot proposal shall proceed in tandem with consideration of the institution's six-year plan, as follows:
 - a. An institution that intends to propose a performance pilot shall communicate that intention as early as practicable, but not later than April 1 of the year in which the performance pilot will be proposed, to the reviewers listed in subsection B, the co-chairmen of the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education, and the Governor. In developing a proposed performance pilot, the institution shall consider the Commonwealth's educational and economic policies and priorities, including those reflected in the Virginia Plan for Higher Education issued by the Council, the economic development policy developed pursuant to § 2.2-205, the strategic plan developed pursuant to § 2.2-2237.1, relevant regional economic growth and diversification plans prepared by regional councils pursuant to the Virginia Growth and Opportunity Act (§ 2.2-2484 et seq.), and any additional guidance provided by the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education and the Governor.
 - b. An institution that submits a performance pilot shall include the one innovative proposal with clearly defined performance measures, and any corresponding authority and support requested from the Commonwealth, with its submission of the preliminary version of its six-year plan pursuant to clause (ii) of subsection A or with its preliminary amendment or affirmation submission pursuant to clause (iii) of subsection A.

c. The reviewers listed in subsection B, or their designees, shall review and comment on any proposed performance pilot in accordance with the six-year plan review and comment process established in subsection B and may expedite such review and comment process to facilitate the executive and legislative budget process or for other reasons. No later than October 15 of the relevant year, the reviewers shall communicate to the Governor and the Chairmen of the House Committee on Appropriations and the Senate Committee on Finance their recommendations regarding each performance pilot proposal. Such recommendations shall include the reviewers' comments regarding how the proposed performance pilots, individually and collectively, support the strategic educational and economic policies of the Commonwealth.

d. Each performance pilot proposal shall include evidence of its approval by the institution's governing board and, if accepted, shall be referenced in the general appropriation act.

Six-Year Plans (2023): 2024-25 through 2029-30

Due: July 15, 2023

Institution:

Institution UNITID:

Individual responsible for plan

Name(s) & Title(s):

Email address(es):

Telephone number(s):

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.

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

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.

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	\$12,737,836	-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.

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%

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

		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.		

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	

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

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	
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 Chg	Avg Annual	
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. This budget request was not submitted to the Department of Planning and Budget.
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. This budget request was not submitted to the Department of Planning and Budget.
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	