

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 Statement 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 launched 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 teachers, scholars, and mentors engaged in a broad array of creative and intellectual endeavors across disciplines and emerging fields of study. Their research and scholarship drive innovation, shape our educational approaches, and provide 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 is a data-informed, formal, feedback system that proactively reaches out to students in identified 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 base adequacy, philanthropic giving, 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 we will continue to invest in this strength. The university currently boasts post-graduate placement rates for both bachelor's and advanced degree candidates 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 learning experiences. 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 classification reflects JMU's significant level of research-active faculty who often provide research opportunities for JMU students, as well as our excellent doctoral programs and acquisition of external funding. 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 within 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. Developing 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. Embarking 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. Establishing 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 to deliver close faculty and student interactions and extraordinary teacher-scholars 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.

- Operating Requests (General Fund)
 - The Virginia Military Survivors and Dependents Education Program (VMSDEP) has experienced significant growth in recent years and is expected to continue growing. The requested amount of \$4.9 million reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less the State Council of Higher Education for Virginia's estimated base allocation transfer of \$1.3 million to be distributed Fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the commonwealth to bolster the long-term sustainability of this crucial program.
 - JMU is the top producer of nurses in the state among public four-year colleges and universities. The university is seeking \$1M per year in ongoing funding to launch the "Fast Flex" nursing program. This non-traditional program would graduate 30 more undergraduate nurses per year and would allow students to complete core nursing course work in one calendar year. Course work would be partially online and would take place on nights and weekends, as would clinical placements.
- Capital Requests (General Fund)
 - Johnston Hall is a 94-year-old academic building on campus that currently houses Graduate Psychology. The building is currently not accessible to individuals with disabilities and lacks an elevator. A significant renovation of the current space (19,974 gsf) is needed to ensure ADA compliance and to meet building code standards. A small addition of 13,421 gsf is also being requested to accommodate an elevator as well as house additional academic space. JMU was successful in securing planning funding for the project in the 2024 General Assembly session and will be seeking state support for the project's construction phase in 2025. By starting this project in Summer 2025, we estimate that the university could save up to \$2M in escalation and inflationary costs, as well as efficiencies that could be realized from renovating Johnston Hall at the same time we are renovating another building fewer than 90 feet away. By reducing time to completion for both projects, we could also minimize disruption to the heart of our campus by up to two years.
- Other Policy Requests
 - State Code Section [23.1-1309](#) was enacted in 2015 in response to concerns over the amount of mandatory student fees used to subsidize athletic programs at Virginia institutions. In the nine years since this language was enacted, the NCAA has passed 750 new rules, laws, and regulations on member institutions, which have driven up costs for institutions not foreseen when the legislation was enacted. For that reason, we will consider seeking changes to that code section that would allow institutions to adequately respond to the changing landscape of college athletics.
 - Campus law enforcement officers are the foundation keeping our university community safe. However, campus law enforcement officers are not allowed access to enhanced retirement benefits offered to other qualified law enforcement officers, such as state or local police. They specifically do not receive a monthly "hazardous duty supplement" as part of their retirement package, which is currently valued \$1,222 per month. Despite campus law enforcement duties being recognized as "hazardous duty," the supplement is not available to campus law enforcement through their pension plan. We are asking the commonwealth to explore these inequities in law enforcement pensions as it poses significant challenges to the recruitment and retention of campus law enforcement officers.

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 three 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 affected 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, such as a recently approved Doctor of Education, 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 Application in 2022, leading to record applications for 2022, 2023, and 2024.

- 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 introduction of the Common App.
- Once this target has been reevaluated, JMU intends to maintain enrollment targets for new undergraduate students over the next six years.
- JMU is working to increase retention rates of returning students to improve student success and strengthen its 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 served as the Quality Enhancement Plan (QEP) for JMU's reaffirmation of accreditation with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). The program was approved in April 2023 with no revisions from the SACSCOC on-site team.

Graduate Enrollment

JMU anticipates maintaining overall graduate enrollment targets, with growth in targeted areas.

- The institution is focused on stabilizing and sustainably growing existing graduate degree and certificate program enrollments in areas of high need and demand to support workforce needs and priorities of the university and commonwealth.
- We are also identifying and developing new graduate degree and certificate programs in high growth and high demand workforce education that are currently underserved by existing program offerings, such as healthcare programs, in the region and the commonwealth.

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 in the past three years. Overall projections call for stable or slight declines in enrollment over the next six years.

JMU anticipates exceeding targets for first-year enrollment in Fall 2024, with much of this growth projected to be out-of-state students.

- 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 number of in-state students) beginning in Fall 2022 to maintain realistic projections. Over the past two years, however, targeted recruitment strategies and increased efforts to retain student groups, including out-of-state students, has led to an increase in out-of-state students. We continue to anticipate increasing challenges in recruiting and enrolling out-of-state students over the next several years; thus, the institution's current plan is to maintain lower targets for out-of-state students to ensure fiscal health.
- 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 anticipated 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 2024 (Third Year of Common App)		
Residency	Number of Pell Admits	% Increase from Prior Year
In-State	2,407	7.26%
Out-of-State	1,450	1.26%
Total	3,857	4.92%

As part of the Free Application for Federal Student Aid (FAFSA) and associated Federal Methodology (FM) changes for AY 2024-25, the Expected Family Contribution (EFC) is being replaced by the Student Aid Index (SAI). FAFSA filing among high school seniors for the 2024-25 school year was down nationwide due to challenges with the process, and many of the FAFSA’s received by schools could not be administered during the recruitment period.

- The number of Pell eligible FAFSAs received from first-year admitted students in 2023-24 increased 26%. That did not translate into a 26% increase in Pell Grant offers as many of the FAFSA’s received for 2024-25 could not be processed due to problems with the applications.
- The SAI is expected to create more financial aid across the student body. For first-year students offered aid in the Preliminary Financial Aid awarding process (recruitment period):
 - 2023-24: 43.72% of those offered a federal Pell Grant had a \$0 EFC.
 - 2024-25: 62.25% of students offered a federal Pell Grant had an SAI equal to -\$1500 to \$0.
 - This data only includes first-year students admitted to JMU for the applicable school year. Additional data will be analyzed that includes all undergraduates enrolled during the 2024-25 school year.

In the future, JMU anticipates an increase in

- the number of Pell Grant students applying and being accepted to the university.
- the number of matriculating Pell Grant students based solely on changes to the FAFSA and the new SAI.
- 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 2017 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%) is informed by national trends among public universities and 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 increasing 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 (80%) and aspirational target (84%).

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's overall six-year graduation rate has remained relatively stable over the past twenty years, fluctuating between 80% and 84%. To support retaining all students through 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 students 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 space and programming that create a shared connection to the university experience.
 - 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, which are specifically marketed to Centennial Scholars, Valley Scholars, and the larger first-gen demographic.
 - 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 opened 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 with a local resource.
 - 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.
- 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 five years.

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.
- 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.

C3. How will you use existing/recently provided resources to execute those strategies? Will you be requesting incremental state resources? Please state the request and rationale and explicitly tie to Part I of your planning template.

JMU will use general fund resources received as part of the commonwealth's 2024-26 biennium budget to maintain student affordability, provide additional financial aid resources to those families most in need, and support JMU employees, as well as continuing development of Reengineering Madison.

The resources are reflected as a surplus on Tab 5 – Six-Year Pro Forma in Part I of the planning template, representing the state portion of salary/benefits increases and additional financial aid. The surplus also includes general fund resources provided for affordable access and unavoidable costs. These resources were allocated to cover inflationary costs for the university and continued funding for Reengineering Madison.

Inflationary costs include:

- Utilities
- Library materials
- Teacher education field experiences
- Advising costs
- Contractual software price increases
- Travel costs
- Other contractual obligations

Reengineering Madison is a multi-year, high-resource project that will change how JMU uses and thinks about data, which will allow better planning and alignment of resources supporting all students. As part of Reengineering Madison, 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

As further outlined in Section E, the university will request additional general fund resources to support the costs of the Virginia Military Survivors and Dependents Education Program and increase the number of nursing graduates in the "Fast Flex" program.

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 receive 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.
 - Student loan interest resumed Sept. 1, 2023, with payments due in October.
 - JMU contracted with a third-party servicer to conduct borrower outreach for students who had loans and left JMU during the repayment pause (2019-20, 2020-21, and 2022-23). The servicer will help on-board these borrowers into the federal student loan repayment system.
 - 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 2022 graduates, 96.1% and 97.2% 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 2022 graduates with bachelor's degrees, 74.6% went to work full time or part time or were active in the military, and 21.5% continued their education.
 - The most popular areas for undergraduates working included Virginia; Washington, DC; and New York.
 - Of those undergraduates working in Virginia, 44.5% were working in Northern Virginia, 24.4% were in Central Virginia, and 16.8% were working in the Shenandoah Valley.
 - Education, health professions, business, management and marketing were the most popular continuing education programs pursued.
 - For those without an outcome, 3.5% were still seeking employment or education, and the remaining 0.4% were not engaged or not seeking.
- Of the 2022 graduates with advanced degrees, 97.2% achieved a career outcome.
 - Of these, 93.3% were working full time or part time or were active in the military, and 3.9% pursued additional education.
 - Virginia and Washington, DC were the most popular areas for advanced degree candidates to work.
 - Of those working in Virginia, 39.7% worked in Northern Virginia, 34.1% worked in the Shenandoah Valley, and 15.6% worked in Central Virginia.
 - 2.8% 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 Career Outcomes Report](#)
- [College of Arts and Letters Career Outcomes](#)
- [College of Business Career Outcomes](#)
- [College of Education and University Studies Career Outcomes](#)
- [College of Health and Behavioral Studies Career Outcomes](#)
- [College of Integrated Science and Engineering Career Outcomes](#)
- [College of Science and Mathematics Career Outcomes](#)
- [College of Visual and Performing Arts Career Outcomes](#)

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. The Work-Based Learning Experience (WBLE) Task Force, established in Fall 2022, was charged to investigate the landscape of internships and other related, similarly-named high impact practices (HIPs) at the university—student teaching, clinical placements, experiential learning experiences, applied learning experiences, field experiences, 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 second year, the task force:
 - reviewed the ongoing work of the SCHEV SB1280 work group and made recommendations that highlight JMU experiences and concerns.
 - assisted in preparing responses to additional requests from SCHEV and the Governor's office related to expanding WBLE opportunities.
 - positioned itself to assist with submissions for funding that may be available from SCHEV and other entities in the future. In AY 2023-24, JMU was awarded a SCHEV Institutional Internship Data Collection Grant and a SCHEV Institutional Award for Student Internship Support Grant for 2024-25.
 - continued to investigate and recommend ways to better centralize, formalize, document, and grow our WBLE operations.
 - crafted a white paper for developing a comprehensive Work-based Learning Experience initiative at JMU that will create capacity for every enrolled student to have access to a WBLE.

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; Research, Economic Development, and Innovation; 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, increased contact with more employers, and the ability to provide assistance 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.

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.

- The data indicate that, since 2016, approximately 34% of JMU graduates complete with degrees aligned with occupations that are expected to see high growth in the next five 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 created a Virginia-wide "Grow-Your-Own" pathway for classroom assistants to complete their undergraduate BS degree in education 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 led 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
 - Health Analytics (undergraduate)¹
 - Integrated Biomedical Sciences (graduate)¹
- 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.
 - Civic Engagement (undergraduate)²
 - 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% 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
 - Graphic Design and Architectural Design (undergraduate)²
 - Industrial Design, BFA (undergraduate)²
 - Musical Theatre (undergraduate)²

¹ Proposing a new degree program

² Proposing a new certificate

- JMU has a strong history of serving the Commonwealth of Virginia 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 (Graduate, current concentration)¹
 - Teacher Leadership (Graduate, current concentration)¹
 - Learning Design and Technology (Graduate, current concentration)¹
 - Transition Services in Special Education and Self-Determination (Graduate, current concentration)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.

Goals to increase funding for low- and middle-income students were met in 2021-22 when JMU provided state and/or university grants to in-state undergraduates who met the FAFSA Priority Filing Date and had 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.
- JMU offered up to 42% in state or university grants to qualifying students that equal 50% of their remaining need for the 2024-25 school year. Additional increases will be made in future years, as funding allows, until the 50% measure is met.
- JMU extended the FAFSA Priority Filing deadline beyond the current March 1 date. Future increases in state and university grant funding will be applied toward extending that date, which will increase the number of low- and middle-income students considered for this type of funding support.
- 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.
- JMU received two Pell Initiative Grants through the Commonwealth of Virginia for 2024-25, enabling the university to add an additional 56 Pell Grant students.
- A new four-year scholarship—the Building the Future Scholarship—began in 2024-25 and provides a \$6,000 award to 50 students who are also receiving Federal Pell Grant and state/university grants,

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 using 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 2024-25, JMU offered 229% more Madison Recognition Awards than were offered three years ago, in 2021-22 (579 compared to 176).
 - The 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 2024-25, JMU offered 330% more Two-Year Room Awards than were offered in 2021-22 (800 compared to 186).

The Division of University Advancement 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?

JMU developed a new strategic plan for awarding recruitment scholarships to coincide with JMU's move to the Common Application for undergraduate admissions.

- The institution is offering more scholarships, waivers, and unfunded scholarships to new students than ever before.
 - With the implementation of the Madison Award for Academic Excellence, Madison Recognition Awards, and Two-Year Room Awards (detailed in D1), JMU made 224% more offers from these three programs in 2024-25 than in 2021-22 (1,847 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 Dependents Education Program (VMSDEP).

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 for the 10-year timeframe.

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 the 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 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 and 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 and 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 and 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. The division of Research, Economic Development, and Innovation 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:
 - Biology and 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 using 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 identified as low- or no-cost, and JMU has achieved over \$2 million in student cost avoidance.
- *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.
- Research, Economic Development, and Innovation (REDI)
 - *Research Centers Strategy*: Research, Economic Development, and Innovation identified distinctive areas of research so that they could be supported in a coordinated way, avoiding duplication of research infrastructure across colleges. This approach enhances collaboration and an interdisciplinary focus while creating world-renowned expertise and recognition in the field.

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 the fall, 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 Resources 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 university is very appreciative of the commonwealth's support and appropriated funding for the Carrier Library Renovation and Expansion furnishings and equipment, East Campus Infrastructure Phase 3 project, planning for Johnston Hall Renovation, and planning for the College of Health and Behavioral Studies Expansion.

The following projects are included in the university's six-year capital outlay plan. Their continued advancement in the phased processes of planning and construction remains a top E&G funding priority for the university, listed in priority order.

- Johnston Hall Renovation and Addition
 - This project involves 33,395 gsf (19,974 in renovations and 13,421 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 13,421 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.

- If possible, timing of the project will provide synergies with the renovation of Spotswood Hall, which is taking place directly across the street from Johnston in Summer 2025. Those opportunities include shared laydown space; singular closing of the shared alley between the two, providing a smaller window of inconvenience and disruption to students/faculty/staff who travel through and occupy nearby spaces; and the potential of combining heating/cooling production facilities to create shared resources resulting in significant energy savings for outyears.
 - 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.

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.

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 FY 2026.

Nongeneral Fund Support (partial list)

1. Salary and Benefit Increases for Existing Employees

Increase Institutional Instructional Faculty Salaries, Administrative and Professional Faculty Salaries, and Classified Salaries. The university is very appreciative of the commonwealth's support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-2025: \$3,593,937

2025-26: \$7,294,133

Increase Adjunct Faculty & Graduate Assistantships Pay. As competition for adjunct faculty increases, compensation continues to be a challenge for the university. With funding to support the general fund cost from the state, the university will provide a three percent increase in both years of the FY 2024-26 biennium.

Nongeneral Fund Support

2024-25: \$154,689

2025-26: \$314,019

Health Insurance Premiums. Medical insurance increased 6.3% percent for fiscal year 2024-25 and anticipated to remain flat in FY 2025-26

Nongeneral Fund Support

2024-25: \$1,517,741

2025-26: \$1,517,741

Faculty Promotions and Classified In-Band Adjustments: Recognizing 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.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$1,050,000

Reallocations

2024-25: \$921,000

2025-26: \$921,000

2. 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.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$362,120

Reallocations

2024-25: \$0

2025-26: \$1,000,000

4. New and Expanded Academic Programs

Expansion of Physician Assistant Program: In 2024 we increased 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.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$150,000

Reallocations

2024-25: \$201,787 (1.0 FTE)

2025-26: \$201,787 (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.

- The IT major is growing according to predictions and interest in Computer Science continues to remain extremely high.
- 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.

Nongeneral Fund Support

2024-25: \$0 (0.00 FTE)

2025-26: \$573,186 (5.96 FTE)

Reallocations

2024-25: \$379,080 (3.00 FTE)

2025-26: \$379,080 (3.00 FTE)

Meet the Commonwealth's Mental Health Needs: JMU will maintain and grow its existing Counseling and Supervision (K-12 School Counselors) PhD program 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 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 changed 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.
 - Funding for a clinical faculty member 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.

Nongeneral Fund Support

2024-25: \$0

2025-26: \$615,786 (5.0 FTE)

Research Initiatives: Supporting the Growth of Research, Economic Development and Innovation: This initiative supports the infrastructure for research efforts in support of the university's current Carnegie designation of an R-2 institution.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$0 (0 FTE)

Reallocations

2024-25: \$230,722 (2.00 FTE)

2025-26: \$230,722 (2.00 FTE)

5. 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.

Nongeneral Fund Support

2024-25: \$0 (0 FTE)

2025-26: \$244,389 (2 FTE)

Reallocations

2024-25: \$329,412 (3.00 FTE)

2025-26: \$329,412 (3.00 FTE)

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

JMU requests funding to increase 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 for an innovative, fast-moving degree option to develop more nurses.
- 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 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)

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 \(2022\)](#)

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 of generating [a report related to issues of constitutionally protected speech](#), which is submitted to the Governor and the Chairs 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
 - The [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.
- First-year and transfer students participate in [Better Conversations Together](#), a free speech and free expression orientation, upon their campus arrival in a session jointly offered by CCE and the divisions of Student Affairs and Diversity, Equity, and Inclusion. The initial orientation is 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)

JMU's R2 Carnegie Classification status offers new opportunities to enhance collaborative research networks. In response, [Research, Economic Development, and Innovation \(REDI\)](#) created the [Research Academic Institute and Center Plan](#) to 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 Division of Research, Economic Development, and Innovation (REDI) 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 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.
 - JMU Center for Advancement Research in Education (JMU CARE™): JMU CARE™ 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

The [Office of Research Development](#) (RD), established Fall 2022, strategically supports efforts by JMU constituents related to pursuing external funding. RD provides external funding opportunity support at the college, program, and individual level.

RD will continue to offer and expand the following services and programs:

- Consult with college faculty and leadership.
- Coordinate virtual and on- and off-campus site visits
- Provide Research development presentations, trainings, and workshops
- Increase awareness of the external funding landscape in addition to the resources available at JMU within colleges by supporting individual faculty interest in external funding.
- Managing sponsored programs databases for faculty and staff. There was an 87% increase in new Sponsored Programs Information Network (SPIN), a searchable database of 40,000+ funding opportunities, database profiles.
- Support external funding proposals.

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 serves as 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. In Spring 2024, X-Labs launched the Re-Imagined Internship, partnering with Ellucian Corporation, a global higher education technology company in which a cohort of undergraduate and graduate students in roles such as developer, ethicist, designer, and storyteller. Students spent a semester working on a problem offered by Ellucian, then entered a cohort-based internship. In Fall 2024, X-Labs is partnering with Dynamic Aviation in a similar fashion.
- X-Labs will continue to strategically collaborate in opportunities that create local economic impact and the creation of new knowledge and technologies to establish a pathway to the Office of Community and Economic Development for intellectual property protection and commercialization.
- REDI is focusing on building research relationships with small businesses to pursue Small Business Innovation Research and Small Business Technology Transfer funding opportunities. REDI organized efforts to submit one of these in spring 2024 and anticipate submitting at least two in fall 2024.

Economic Development and Commercialization

JMU's priorities related to economic development include:

- Attaining the APLU Innovation and Economic Prosperity (IEP) designation
- Supporting talent pipelines and retention in the region and commonwealth
 - Continue to serve as the Region 8 (Shenandoah Valley) coordinating office for the commonwealth's V-TOP initiative.
- Supporting the campus and regional innovation ecosystems by:
- Partnering with Commonwealth of Virginia initiatives to enhance partnerships with regional businesses and non-profit groups to grow research commercialization activities, including
 - Virginia Innovation Partnership Corporation (VIPPC): Develop Entrepreneur in Residence (EIR) and Eminent Researcher Recruitment (ERR) partnerships. Support researchers pursuing VIPC Commonwealth Commercialization Fund (CCF) and related research commercialization project opportunities.
 - Commonwealth Cyber Initiative (CCI): Create and expand researcher recruitment and retention funds. VP Tongen has recently been added to the advisory board
- Fostering and supporting development of research grants that engage small businesses with JMU research efforts (e.g., SBIR/STTR collaborations)
- Growing and supporting a research-to-implementation pipeline with community partners
- Supporting campus and community collaborations that contribute to enhancing the quality of life in our communities (Placemaking)

International Research Support Services

International research is a critical component of academic exploration, yet defining its scope and functions can be challenging. As an R2, the institution is broadening its research profile and infrastructure through the implementation of an international research support unit. This unit will offer support toward

- Export controls and international compliance
- Enhancement of JMU's global research reputation
- Growth of faculty and student research and collaborations globally
- Local international research support
- Publications and publishing on the global scene
- International faculty associate and student support

- Virtual and physical global exchange
- Cross-university partnerships

Office of Research Integrity

[The Office of Research Integrity](#) upholds the university's research programs by promoting a culture of compliance, fostering collaborations, and ensuring research excellence. The office will continue to offer service and support in university-wide areas including

- University Compliance Committee
- General Data Protection Regulation (GDPR) Working Group
- Data Manager - Data Stewardship and Information Security Working Group
- Institutional Review Board (IRB)
- Institutional Animal Care and Use Committee (IACUC)
- Institutional Biosafety Committee (IBC)
- Financial Conflict of Interest (COIC – Conflict of Interest Committee)

Office of Federal Relations and Communications

The Office of Federal Relations and Communications (FRC) enhances the university's academic standing and strives for inclusive excellence by promoting faculty and student research, scholarship, and creative accomplishments while liaising with federal entities to advance university priorities and connect faculty expertise to issues of national importance. FRC serves REDI and the JMU community by

- highlighting JMU accomplishments and communicating updates to congressional offices; advocating
- advocating on behalf of JMU constituents on a variety of federal issues (e.g., immigration, athletics-Name-Image-Likeness (NIL), Department of Education negotiated rulemaking)
- managing the annual Congressionally Directed Spending request process
- responding to inquiries and facilitate campus visits for elected officials and staff
- serving on the Association of Public & Land-grant University's Council on Governmental Affairs

[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.

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.

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.

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).

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.
 - JMU kindly requests that the state consider reimplementing TTIP funding once colleges have reached our stated goals and consider expanding the program to include Information Technology degrees.

[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 2024 INSTITUTIONAL SIX-YEAR PLAN

Due Date: July 1, 2024

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 2024 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 2024 Six-Year Plans are due July 1, 2024. 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. In line 25, enter E&G GF revenues for the current bienium and 2024-26 biennium if there is a final budget. The formulas will automatically hold that constant for the remaining years.

For FY2027-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 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. 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.

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.

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.

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

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*
 - 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 (2024): 2024-25 through 2029-30

Due: July 1, 2024

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*	
		Board Approved Charge	% Increase		Planned Charge	% Increase
In-State UG Tuition	\$7,914	\$8,150	3.0%	\$8,550	4.9%	
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%	
In-State UG Mandatory non-E&G Fees	\$5,662	\$5,816	2.7%	\$5,990	3.0%	
In-State UG Total	\$13,576	\$13,966	2.9%	\$14,540	4.1%	
Out-of-State UG Tuition	\$24,542	\$24,910	1.5%	\$25,408	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	\$5,816	2.7%	\$5,990	3.0%	
Out-of-State UG Total	\$30,790	\$31,312	1.7%	\$31,984	2.1%	

Institutional Notes:

* The tuition and fee rates shown for FY 2025-26 are based on planning costs and for modeling purposes only.

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.
 In line 25, enter E&G GF revenues for the current biennium and 2024-26 biennium if there is the final budget. The formulas will automatically hold that constant for the remaining years of 2026 to 2030.

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 (Actual)	Chg	2024-2025 (Estimate)	Chg	2025-2026 (Planned)	Chg	2026-2027 (Pro Forma)	Chg	2027-2028 (Pro Forma)	Chg	2028-2029 (Pro Forma)	Chg	2029-2030 (Pro Forma)	Chg	2022-2030	CAGR
	Total Collected Tuition Revenue	Total Collected Tuition Revenue		Total Projected Tuition Revenue		Total Projected Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Total Calculated Tuition Revenue		Chg	
E&G Programs																	
Undergraduate, In-State	\$123,308,572	\$131,706,611	6.8%	\$138,203,564	4.9%	\$142,720,282	3.3%	\$141,513,152	-0.8%	\$140,756,257	-0.5%	\$140,576,612	-0.1%	\$140,692,369	0.1%	14%	1.9%
Undergraduate, Out-of-State	\$107,066,748	\$114,965,647	7.4%	\$115,149,846	0.2%	\$119,433,768	3.7%	\$120,167,348	0.6%	\$119,446,295	-0.6%	\$119,200,861	-0.2%	\$119,206,035	0.0%	11%	1.5%
Graduate, In-State	\$12,847,174	\$12,321,652	-4.1%	\$11,531,414	-6.4%	\$11,804,504	2.4%	\$11,786,629	-0.2%	\$11,910,540	1.1%	\$11,856,561	-0.5%	\$11,946,454	0.8%	-7%	-1.0%
Graduate, Out-of-State	\$8,917,302	\$6,440,895	-27.8%	\$5,603,036	-13.0%	\$5,713,190	2.0%	\$5,735,645	0.4%	\$5,859,131	2.2%	\$5,843,447	-0.3%	\$5,914,163	1.2%	-34%	-5.7%
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	\$6,574,488	\$6,551,421	-0.4%	\$6,859,542	4.7%	\$6,926,261	1.0%	\$6,993,642	1.0%	\$7,061,698	1.0%	\$7,130,437	1.0%	\$7,199,864	1.0%	10%	1.3%
Total E&G NGF Revenue	\$258,714,284	\$271,986,226	5.1%	\$277,347,402	2.0%	\$286,598,005	3.3%	\$286,196,416	-0.1%	\$285,033,921	-0.4%	\$284,607,918	-0.1%	\$284,958,885	0.1%	10%	1.4%
E&G GF Revenue (assume flat after 2026)	\$163,805,747	\$184,623,850	12.7%	\$196,147,227	6.2%	\$200,724,184	2.3%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	\$200,724,184	0.0%	23%	2.9%
Total E&G Revenue	\$422,520,031	\$456,610,076	8.1%	\$473,494,629	3.7%	\$487,322,189	2.9%	\$486,920,600	-0.1%	\$485,758,105	-0.2%	\$485,332,102	-0.1%	\$485,683,069	0.1%	15%	2.0%

Auxiliary Revenue	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Estimated)	Chg	2025-2026 (Planned)	Chg
	Total Revenue	Total Revenue		Total Revenue		Total Revenue	
In-State undergraduates	\$76,306,955	\$81,681,552	7.0%	\$82,624,263	1.2%	\$84,110,999	1.8%
All Other students	\$24,361,851	\$26,077,751	7.0%	\$25,469,697	-2.3%	\$26,841,665	5.4%
Total non-E&G fee revenue	\$100,668,806	\$107,759,303	7.0%	\$108,093,960	0.3%	\$110,952,664	2.6%
Total Auxiliary Revenue	\$248,106,904	\$270,452,096	9.0%	\$276,172,539	2.1%	\$299,774,060	8.5%

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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$123,308,572	\$5,521,006	4.5%	\$11,121,150	\$4,750	\$7,548,253	\$130,861,575	10.0%	-\$5,032,488 Compliant
Undergraduate, Out-of-State	\$107,066,748	\$4,793,795	4.5%	\$157,904	\$1,693,524	\$155,055	\$108,915,327	6.1%	
Graduate, In-State	\$12,847,174	\$575,218	4.5%	\$7,562	\$0	\$642,094	\$13,489,268	9.0%	
Graduate, Out-of-State	\$8,917,302	\$399,262	4.5%	\$2,665	\$714,280	\$53,359	\$9,684,941	12.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$252,139,796	\$11,289,281	4.5%	\$11,289,281	\$2,412,554	\$8,398,761	\$262,951,111	8.4%	

2023-24 (Actual)									
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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$131,706,611	\$5,459,347	4.1%	\$10,656,083	\$0	\$6,156,831	\$137,863,442	8.4%	-\$4,685,993 Compliant
Undergraduate, Out-of-State	\$114,965,647	\$4,765,421	4.1%	\$346,408	\$2,339,938	\$184,811	\$117,490,396	6.2%	
Graduate, In-State	\$12,321,652	\$510,743	4.1%	\$0	\$0	\$668,135	\$12,989,787	9.1%	
Graduate, Out-of-State	\$6,440,895	\$266,980	4.1%	\$0	\$0	\$68,833	\$6,509,728	5.2%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$265,434,805	\$11,002,491	4.1%	\$11,002,491	\$2,339,938	\$7,078,610	\$274,853,353	7.4%	

2024-25 (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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$138,203,564	\$6,255,718	4.5%	\$11,858,023	\$0	\$6,086,733	\$144,290,297	8.6%	-\$5,080,341 Compliant
Undergraduate, Out-of-State	\$115,149,846	\$5,212,203	4.5%	\$385,481	\$2,809,022	\$124,293	\$118,083,161	6.9%	
Graduate, In-State	\$11,531,414	\$521,964	4.5%	\$0	\$0	\$571,709	\$12,103,123	9.0%	
Graduate, Out-of-State	\$5,603,036	\$253,619	4.5%	\$0	\$0	\$86,978	\$5,690,014	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$270,487,860	\$12,243,504	4.5%	\$12,243,504	\$2,809,022	\$6,869,713	\$280,166,595	7.8%	

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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$142,720,282	\$6,487,088	4.5%	\$12,311,735	\$0	\$6,336,025	\$149,056,307	8.6%	-\$5,288,095 Compliant
Undergraduate, Out-of-State	\$119,433,768	\$5,428,642	4.5%	\$400,230	\$3,396,116	\$126,721	\$122,956,605	7.3%	
Graduate, In-State	\$11,804,504	\$536,552	4.5%	\$0	\$0	\$599,789	\$12,404,293	9.2%	
Graduate, Out-of-State	\$5,713,190	\$259,683	4.5%	\$0	\$0	\$88,663	\$5,801,853	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,671,744	\$12,711,965	4.5%	\$12,711,965	\$3,396,116	\$7,151,198	\$290,219,058	8.0%	

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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$141,513,152	\$6,443,025	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,849,177	8.6%	-\$5,332,071 Compliant
Undergraduate, Out-of-State	\$120,167,348	\$5,471,160	4.6%	\$400,230	\$3,396,116	\$126,721	\$123,690,185	7.3%	
Graduate, In-State	\$11,786,629	\$536,639	4.6%	\$0	\$0	\$599,789	\$12,386,418	9.2%	
Graduate, Out-of-State	\$5,735,645	\$261,141	4.6%	\$0	\$0	\$88,663	\$5,824,308	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$279,202,774	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$289,750,088	8.0%	

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)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$140,756,257	\$6,436,933	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,092,282	8.7%	-\$5,330,120 Compliant
Undergraduate, Out-of-State	\$119,446,295	\$5,462,406	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,969,132	7.3%	
Graduate, In-State	\$11,910,540	\$544,682	4.6%	\$0	\$0	\$599,789	\$12,510,329	9.1%	
Graduate, Out-of-State	\$5,859,131	\$267,944	4.6%	\$0	\$0	\$88,663	\$5,947,794	6.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$277,972,223	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,519,537	8.1%	

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)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,576,612	\$6,440,180	4.6%	\$12,311,735	\$0	\$6,336,025	\$146,912,637	8.7%
Undergraduate, Out-of-State	\$119,200,861	\$5,460,901	4.6%	\$400,230	\$3,396,116	\$126,721	\$122,723,698	7.3%
Graduate, In-State	\$11,856,561	\$543,180	4.6%	\$0	\$0	\$599,789	\$12,456,350	9.2%
Graduate, Out-of-State	\$5,843,447	\$267,704	4.6%	\$0	\$0	\$88,663	\$5,932,110	6.0%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,477,481	\$12,711,965	4.6%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,024,795	8.1%

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)	Discount Rate (Cols. (C+F+G)/H)
Undergraduate, In-State	\$140,692,369	\$6,438,950	4.6%	\$12,311,735	\$0	\$6,336,025	\$147,028,394	8.7%
Undergraduate, Out-of-State	\$119,206,035	\$0	%	\$400,230	\$3,396,116	\$126,721	\$122,728,872	2.9%
Graduate, In-State	\$11,946,454	\$0	%	\$0	\$0	\$599,789	\$12,546,243	4.8%
Graduate, Out-of-State	\$5,914,163	\$0	%	\$0	\$0	\$88,663	\$6,002,826	1.5%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$277,759,021	\$6,438,950	2.3%	\$12,711,965	\$3,396,116	\$7,151,198	\$288,306,335	5.9%

* Please note that the totals reported here will be compared with those reported by the financial aid office on the institution's annual S1/S2 report. Since the six-year plan is estimated and the S1/S2 is "actual," the numbers do not have to match perfectly but these totals should reconcile to within a reasonable tolerance level. Please be sure that all institutional offices reporting tuition/fee revenue used for aid have the same understanding of what is to be reported for this category of aid.

Institutional Note:

** "Tuition Revenue for Financial Aid" distributed based on proportionality of total revenue collections by category. Education and General revenues are pooled and are not allocated by revenue type per expense.

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

Instructions: The Academic Plan should contain academic, finance, and support service strategies the institution intends to employ in meeting state needs/goals as found in the Virginia Plan. (Please see the main instructions sheet in this workbook for more detailed information about The Virginia Plan. Please provide short titles to identify institutional strategies and other expenditure increases. Provide a concise description in the "Notes" column (column O), including a % increase where relevant and a specific reference as to where more detailed information can be found in the Narrative document.

Complete the lines appropriate to your institution, adding lines within the relevant categories as needed. As completely as possible, the items should represent a complete picture of your anticipated use of projected tuition revenues and strategic focus areas. Categories are listed in bold; you may not change the categories but you may add lines where indicated. Please update total cost formulas if necessary. For every line, the total amount and the sum of the reallocation and tuition revenue 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. 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.

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

Total Estimated 2022-23 E&G Expenditures	\$422,520,031
Total Estimated 2023-24 E&G Expenditures	\$456,610,076

Short Title	Incremental amounts relative to 2023-24 estimated baseline											Explanation Please be brief; reference specific narrative question for more detail.
	2024-2025			2025-2026			2026-2027	2027-2028	2028-2029	2029-2030		
	Total Amount	Reallocation	Amount from Tuition Revenue	Total Amount	Reallocation	Amount from Tuition Revenue	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	\$1,974,218	\$0	\$1,974,218	\$4,006,396	\$0	\$4,006,396	\$5,400,749	\$6,822,334	\$8,271,421	\$9,748,977	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Admin. Faculty Salaries	\$683,545	\$0	\$683,545	\$1,387,292	\$0	\$1,387,292	\$1,870,209	\$2,362,463	\$2,864,243	\$3,375,964	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Classified Staff Salaries	\$936,174	\$0	\$936,174	\$1,900,445	\$0	\$1,900,445	\$2,562,570	\$3,237,959	\$3,926,846	\$4,629,491	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase University Staff Salaries	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Increase GTA Salaries	\$54,225	\$0	\$54,225	\$110,077	\$0	\$110,077	\$167,046	\$225,154	\$284,424	\$344,879	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Increase Adjunct Faculty Salaries	\$100,464	\$0	\$100,464	\$203,942	\$0	\$203,942	\$309,490	\$417,149	\$526,961	\$638,969	Represents JMU net cost related to salary/benefit Increases (3% FY25-26 & 2% FY27-30)	
Health Insurance Premiums	\$1,517,741	\$0	\$1,517,741	\$1,517,741	\$0	\$1,517,741	\$2,205,144	\$2,913,779	\$3,643,647	\$4,394,747	Represents JMU net cost related to salary/benefit Increases (6.3% FY25 & 3% FY27-30)	
Minimum Wage & Other Salary/Benefit Changes	\$682,046	\$587,237	\$94,809	\$974,295	\$587,237	\$387,058	\$1,247,178	\$1,247,178	\$1,247,178	\$1,247,178	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Minimum wage cost increase to \$13.50 on January 1, 2025, and to \$15.00 on January 1, 2026.	
Faculty Promotion/IBA	\$921,000	\$921,000	\$0	\$1,971,000	\$921,000	\$1,050,000	\$2,671,000	\$3,371,000	\$4,071,000	\$4,771,000	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Recognize faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks. In response to changes in the classified workforce, provide additional resources for employee retention, changes in job duties, and salary compression. Reference E1.	
Inflationary non-personnel cost increases												
Contractual services	\$0	\$0	\$0	\$1,136,000	\$1,000,000	\$136,000	\$2,272,000	\$3,408,000	\$4,544,000	\$5,680,000	Annual 3% inflation adjustment in select contractual nonpersonal services.	
Utilities	\$0	\$0	\$0	\$226,120	\$0	\$226,120	\$473,053	\$915,504	\$1,383,563	\$1,851,622	Average 2% increase in utility costs.	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Financial aid expansion												
Add'l In-State Student Financial Aid from Tuition Rev	\$1,201,940	\$1,201,940	\$0	\$1,655,652	\$1,201,940	\$453,712	\$1,655,652	\$1,655,652	\$1,655,652	\$1,655,652	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	
Add'l Out-of-State Student Financial Aid from Tuition Rev	\$39,073	\$39,073	\$0	\$53,822	\$39,073	\$14,749	\$53,822	\$53,822	\$53,822	\$53,822	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Increase in Financial Aid due to tuition and fee increases.	

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

New/expanded academic programs												
Expansion of Physician Assistant Program	\$201,787	\$201,787	\$0	\$351,787	\$201,787	\$150,000	\$351,787	\$351,787	\$351,787	\$351,787	\$351,787	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Expansion of Physician Assistant Program to help meet shortages in PAs within the Commonwealth. Reference E1.
Supporting Growth of the Computer Science and Information Technology Majors	\$379,080	\$379,080	\$0	\$952,266	\$379,080	\$573,186	\$952,266	\$952,266	\$952,266	\$952,266	\$952,266	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. 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 E1.
Meet the Commonwealth's Mental Health Needs	\$0	\$0	\$0	\$615,786	\$0	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	\$615,786	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 E1.
Research Initiatives	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$0	\$230,722	\$230,722	\$230,722	\$230,722	\$230,722	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
Other academic & student support strategies & initiatives												
Early Student Success System	\$329,412	\$329,412	\$0	\$573,801	\$329,412	\$244,389	\$665,306	\$756,583	\$756,583	\$756,583	\$756,583	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. 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	\$88,879	\$88,879	\$0	\$1,082,113	\$88,879	\$993,234	\$1,832,113	\$2,582,113	\$3,332,113	\$4,082,113	\$4,082,113	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. 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.
Academic/Student Support Initiatives	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$0	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	\$1,098,255	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives												
Carrier Library Expansion	\$0	\$0	\$0	\$380,057	\$0	\$380,057	\$782,898	\$806,399	\$830,616	\$855,549	\$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	\$624,741	Staffing and utility costs associated with the renovation section of Carrier Library. Expected completion date is January 2026.
Information Technology Security and Institutional Operational Initiatives	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$0	\$841,344	\$841,344	\$841,344	\$841,344	\$841,344	Reallocation represents actual tuition over budget in FY24 as the 1st year class exceeded budget. Support the university research efforts as an R2 Institution. Reference E1.
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Additional Funding Need	\$11,279,905	\$5,918,729	\$5,361,176	\$21,530,508	\$6,918,729	\$14,611,779	\$28,830,080	\$35,454,099	\$42,088,763	\$48,801,447	\$48,801,447	

Must not be greater than incremental Tuit Rev in Part 2	
2024-2025	2025-2026
\$0	\$0

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

James Madison University

Instructi

From FY23-FY30

Baseline Pro Forma Surplus/Deficit	2022-2023 (Actual)	2023-2024 (Actual)	Chg	2024-2025 (Est.)	Chg	2025-2026 (Plan)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Total E&G GF Revenue from Tab2, flat after 2025-26	163,805,747	184,623,850	13%	196,147,227	6%	200,724,184	2%	200,724,184	0%	200,724,184	0%	200,724,184	0%	200,724,184	0%	23%	3%
Tuition discount rate	8.4%	7.4%	-0.975pt	7.8%	0.395pt	8.0%	0.19pt	8.0%	0.013pt	8.1%	0.034pt	8.1%	0.014pt	5.9%	-2.184pt	-2.513pt	%
Total E&G NGF Revenue	258,714,284	271,986,226	5%	277,347,402	2%	286,598,005	3%	286,196,416	0%	285,033,921	0%	284,607,918	0%	284,958,885	0%	10%	1%
Incremental E&G NGF Revenue vs. prior yr		13,271,942		5,361,176	-60%	9,250,603	73%	(401,589)	-104%	(1,162,495)	189%	(426,003)	-63%	350,967	-182%	-97%	
Total E&G Revenue	422,520,031	456,610,076	8%	473,494,629	4%	487,322,189	3%	486,920,600	0%	485,758,105	0%	485,332,102	0%	485,683,069	0%	6%	1%
Implied GF % of E&G	38.8%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	%
Total E&G Expenditures	422,520,031	456,610,076	8%	461,971,252	1%	471,221,855	2%	478,521,427	2%	485,145,446	1%	491,780,110	1%	498,492,794	1%	18%	3%
Incremental E&G Expenditures vs. 2023-24		11,279,905		21,530,508	91%	28,830,080	34%	35,454,099	23%	42,088,763	19%	48,801,447	16%	333%			
Reallocation of existing dollars (flat after 2025-26)		5,918,729		6,918,729	17%	6,918,729		6,918,729		6,918,729		6,918,729		6,918,729			
Pro Forma Surplus/Deficit	-	-	%	11,523,377	%	16,100,334	40%	8,399,173	-48%	612,659	-93%	(6,448,008)	-1152%	(12,809,725)	99%	-211%	-30%
Incremental Surplus/Deficit	-	-	%	11,523,377	%	4,576,957	-60%	(7,701,161)	-268%	(7,786,514)	1%	(7,060,667)	-9%	(6,361,717)	-10%	-155%	-22%

Surplus does not represent actual available funds but is General Fund revenue with associated expenses not reflected in the template. Associated expenses include: GF portion of salary/benefit increases, financial aid and inflationary and other necessary/planned costs.

What would a constant GF/NGF ratio at 2023-24 levels imply for T&F and GF increases?																	
	2022-2023 (Actual)	2023-2024 (Actual)	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%	40.4%	1.7pt	41.4%	1pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	41.4%	0pt	2.7pt	0.4pt
Implied incremental T&F increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	-2.4%	%	-0.9%	1.5pt	1.6%	2.5pt	1.6%	0pt	1.5%	-0.1pt	1.3%	-0.1pt	%	%

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

	2022-2023 (Actual)	2023-2024 (Actual)	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%	40.4%	1.7pt	41.4%	1pt	41.2%	-0.2pt	41.2%	0pt	41.3%	0.1pt	41.4%	0pt	41.3%	0pt	2.6pt	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.

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 Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP)	Enrollment management	\$0	\$0	\$4,904,791	\$4,904,791	Request state general funds for the Virginia Military Survivors and Dependents Education Program (VMSDEP). This critically important program has experienced significant growth in recent years and is expected to continue growing. The requested amount reflects the estimated cost of FY24 actual foregone revenue of \$6.2 million less SCHEV's estimated base allocation transfer of \$1.3 million to be distributed fall 2024. This amount has not been adjusted for additional one-time state support resulting from the 2024 Special Session I. The university is committed to partnering with the Commonwealth to bolster the long-term sustainability of this important program. Reference E1.
2	Produce More Nurses Through New "Fast Flex" BSN Program	Degree Pathways	\$0	\$0	\$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.
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$5,902,607	\$5,902,607	