

James Madison University: Six-Year Plan Part II

A. Mission and Priorities

A1. Describe how your institutional strategic plan goals align to your institution's mission. Please share any plans you have to change your mission over the six-year period.

Since being founded in 1908 as a state teacher's college, James Madison University has established itself as an excellent institution of higher education and a strong partner to the commonwealth. We are proud to have long maintained this reputation as we move into a new era.

- JMU's seventh president, Dr. James Schmidt, joined the university on July 1, 2025. With new leadership, we anticipate opportunities to look at JMU with a new lens while determining how to maintain our distinctiveness. In addition, JMU reached the planned end of its existing strategic plan, with development of new goals and objectives to formally begin this fall.
- President Schmidt met with the JMU Board of Visitors in June, and they began discussing the strategic plan. They agreed on a [shared vision](#) for the university and on the elements that must be sustained within the strategic plan. Those requirements include, among others:
 - Prioritize the exceptional student experience, preparation and success for which JMU is already known and which sets us apart.
 - Build upon our successful partnerships throughout the community and the Commonwealth of Virginia, and expand our collaborations to create new opportunities.
 - Accelerate and support a culture of innovation.
- Creation of the strategic plan will also integrate the feedback of our faculty, students, staff, alumni and valued partners.
- We believe our mission continues to reflect JMU's purpose. However, as we begin the process of developing a new strategic plan under Dr. Schmidt's leadership, we intend to review our mission and vision to ensure they continue to align with our values and guide our priorities.

A2. What are your institution's greatest strengths and areas of distinctiveness that it should continue to invest in? Looking ahead, 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. Our faculty are excellent teachers and active researchers, and our staff are engaged, supportive professionals committed to the university. We strive to invest in the people and academic programs that have helped to define JMU and establish our distinctive position in Virginia.

- We follow a teacher-scholar model, in which faculty are teachers, scholars, and mentors who engage in a broad array of creative and intellectual endeavors across disciplines and emerging fields of study. Their research is integrated with their teaching as they advance innovative ideas that drive scholarship and ensure students have engaged learning opportunities in and beyond the classroom.
- One of JMU's strengths is our historical service to the Commonwealth of Virginia. We provide students with a range of academic programs that provide intellectual stimulation, promote critical thinking, and help to meet state needs. We are a good partner to the commonwealth in offering programs that benefit the state and have proven to be excellent stewards of resources.

- JMU offers popular, established health care academic programs at multiple levels in a variety of specialties, and we are well-positioned to leverage this strength.
 - With our unique place in the Shenandoah Valley, we are able to provide health care in high-need, rural areas; we also collaborate with a variety of organizations across the state, allowing our students to practice in high-density areas as well.
 - In response to increasing need, we have developed nimble processes for developing and initiating academic programs for healthcare professions.
- JMU has been recognized as the best university for getting a job in Virginia, and we will continue to invest in this strength by increasing opportunities for students to participate in work-based and experiential learning.
 - We are taking an active leadership role in the commonwealth's initiative to promote internships and other work-based learning experiences. We are frequent collaborators with local businesses, such as Merck, in creating workforce development partnerships that lead to employment for graduates.
 - 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.
- We maintain high standards, for students, for faculty and staff, and for the university as a whole. A review of our priorities (A3) illustrates our goals as we build on our strengths.

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 statewide strategic plan for higher education, to the strengths and/or opportunities for improvement mentioned above, and will ultimately drive better outcomes for students. If the strategy has a general fund component (operating and/or capital, equipment, renovation) please include the operating request in the "General Fund Request" tab and the capital or equipment request in the "Capital" tab of the excel file.

James Madison University offers a strong academic reputation, engaged faculty, and a vibrant campus life that provide a good value for the commonwealth by:

- Offering the fifth lowest total cost in Virginia (tuition, fees, and housing) for in-state students
- Holding one of the highest graduation rates in the state at 80%
- Having 95% of our graduates get jobs within their first six months of graduating

We strive to continue offering an excellent education that prioritizes students while maintaining our reputation for engaged teaching and meaningful research. The priorities below are designed to maximize JMU's potential at an affordable cost.

Priority 1. Ensure Access and Affordability

In a period of inflationary costs, we strive to keep tuition increases to a minimum by working with state and private partners to address significant budget challenges:

- **Continuation of one-time FY25 state support.** Amendments to the 2024-26 budget only allotted one-time funds for FY25 in the below areas to hedge against economic uncertainty. JMU's top priority is to have the following funds made ongoing. Funding includes \$3.9M in Access & Affordability funding, \$968,000 in Financial Aid, and \$1M to expand our undergraduate Nursing program. Additionally, \$30.5M in funds to renovate and expand Johnston Hall (excludes previously received planning funds; includes construction & equipment

funding) to be ADA compliant and better serve students and faculty were vetoed from the budget. We are seeking to restore that funding.

- **Support Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP).** Additional state support of \$10.0M annually is needed 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 university is committed to partnering with the Commonwealth to bolster the long-term sustainability of this important program.
- **SCHEV Grants Financial Aid.** In 2022, the General Assembly granted SCHEV one-time financial aid funds for distribution among institutions. JMU received \$1M, which we used to enroll 18 new Centennial Scholars (a need-based full ride scholarship program), and \$750,000, used to grant 40 Pell Grant students an additional \$6,250 in financial aid annually throughout their college career. Those state funds will be exhausted in 2026-27. JMU has been extremely successful in graduating Pell and first-generation students. The Centennial Scholars program boasted an overall 3.4 GPA for Spring 2025. Without new additional ongoing financial aid funding of \$629,000 annually to support the next cohort, the Centennial Scholars program will be cut back to its original size, and we will have less aid to offer Pell-eligible students.
- **Operating Support for Carrier Library Expansion.** (\$1.0M total; \$520,034 GF FY 27 and \$520,034 GF FY 28). In 2022, the state generously funded a large-scale renovation and expansion of JMU's main library, Carrier Library. However, the state does not provide additional operating support when campuses add new space. When Carrier Library reopens in Fall 2026, JMU will be responsible for the utilities and maintenance of more than 56,000 new gsf of library space. We are seeking support for those operating expenses.

Priority 2. Expand the College of Health and Behavioral Studies Building

The College of Health and Behavioral Studies (CHBS) is the largest college at James Madison University, with more than 7,000 undergraduate and graduate students enrolled. Majors and programs housed in the college include Health Sciences, Psychology, Physician Assistant Studies, Communication Sciences and Disorders, Dietetics, and Nursing. JMU graduates more nurses than any other public four-year college or university in Virginia, graduating nearly 300 nurses in 2023-24.

- Multiple workforce-focused health care majors are at capacity because they do not have physical space on campus to expand. JMU cannot produce more nurses without additional teaching labs, including a simulation lab, due to accreditation standards dictating how many students can use learning spaces. Without enough support spaces, offices for several faculty members as well as associated clinics and labs currently reside in other facilities.
- JMU is requesting \$115.3M (excluding previous preplanning GF; including planning and construction) to expand the current CHBS building. The proposed five-story, 125,637 gsf addition would be adjacent to the current building. We completed the project planning phase with funding secured from the commonwealth in 2024.
- Benefits of the additional space and operating support would result in accommodating growing college enrollments, increasing capacity in our health-related disciplines, and expanding the Nursing and Physician Assistant programs outlined in our six-year plan proposals

Priority 3. Promote Student, Faculty, and Staff Success (\$12.6M FY 27 & \$13.7M FY 28)

JMU receives the least amount of funding from the state on a per-student basis. While we continue to create incredible outcomes for our graduates, we are beginning to see more pronounced challenges to student outcomes and faculty/staff retention due to our combination of relatively low

state funding, lower than average tuition, and a modest endowment. The university is seeking to increase our base funding from the state per student.

With additional state support, we would be able to improve outcomes, increase financial assistance, retain state workers, and enhance operations. Examples include:

- Enhanced and Supported Pathways to Graduation (\$2.8M FY 27 & \$3.8M FY 28)
 - JMU is known for strong student retention and completion, but six-year graduation rates have dipped slightly in recent years from a high of 84.2% in 2019 to 80.9% in 2023. While many factors are at play, we know professional academic advisors are crucial to students' success at JMU. The growth of our student body has outpaced our ability to staff advisors, with some advisors carrying caseloads of up to 600 students. We are seeking funding to hire additional academic advisors to normalize the student to advisor ratio across majors, ensure structures are in place for veteran/military success, provide academic accommodation specialists and provide faculty and support staff in growth programs.
- Support for Students with Disabilities (\$655,605 FY 27 & \$655,605 FY 28)
 - Our Office of Disability Services seeks funding to address an increasing demand for student disability accommodation and ensure compliance with legal obligations. Nearly 2,600 students sought accommodation in 2023-24, an 18% increase from the previous year representing 11% of the total student body. The office would like to provide more proactive coaching to help students needing accommodations succeed academically and personally.
- Mental Health Resources (\$334,640 FY 27 & \$334,640 FY 28)
 - The student mental health crisis on college campuses continues to escalate, and JMU has funded multiple efforts to support students' mental health. We currently seek state support to hire at least three much needed staff positions, including one clinical case manager, to ensure that students have access to life-saving mental health support services.
- Student Financial Assistance (\$3.5M FY 27 and \$3.5M FY 28)
 - To reach more of the unmet financial need of our students and make progress toward reaching the university's 50% of remaining need goal, the university will invest in additional undergraduate student financial assistance.
- Staff Retention (\$750,000 FY 27 & \$750,000 FY 28)
 - JMU is the largest employer in the northern part of the Shenandoah Valley and has long been known as a great place to work. However, in recent years we have seen both turnover and vacancy numbers increase, especially in high-demand fields. The university seeks funding to grant small raises to classified staff (administrative support, facilities management, etc.) who have taken on an increased workload or provided performance justifying a modest raise. Additionally, we are considering across the board raises for both classified staff and A&P faculty in high-demand fields (police, procurement, IT, etc.).
- Faculty Retention (\$1.0M FY 27 & \$1.0M FY 28)
 - Recruiting and retaining faculty in high-demand fields such as health care, business, and engineering has become increasingly challenging. It is also crucial to address salary compression and inversion issues affecting faculty in these disciplines
- Increased Business Engagement and Industry Partnerships/Workplace Experiences and External Funding (\$1.3M FY 27 & \$1.3M FY 28)
 - Positions for external business engagement, X-Labs, Student Work-based Learning Coordinators, etc.

- Research Infrastructure (\$1.0M FY 27 & \$1.0M FY 28)
 - JMU has an opportunity to better position the university to develop our research infrastructure in ways that will better able the university to solicit and secure external funding. We are seeking funding to support positions for grant writers, compliance officers, and other support positions.
- Operating – Contractual Services Inflationary Costs (\$1.3M FY 27 & \$1.3 FY 28)
 - The university is seeking increased financial support to address the impact of rising inflationary pressures. This includes an annual inflationary adjustment of two percent to help sustain the quality and continuity of its programs and services.

Priority 4. Offer or Expand Academic Offerings with Strong Workforce Need

JMU has long been a good support to the commonwealth in developing academic programs that lead students to find careers in areas needed by the state. Based on previous successful creation of academic programming requested by the state and anticipated needs, we are seeking funding in specific areas.

- Grow Healthcare Programs (\$1.3M FY 27 & \$2.1M FY 28)
 - Multiple healthcare programs we offer are at capacity and must turn students away from these much-needed offerings. Specifically, we are seeking funding to expand:
 - The Physician Assistant program, which has turned away over 600 applicants for each of the past few years
 - The Doctor of Nursing Practice program, which produces both Nurse Practitioners and Nursing Faculty
 - Healthcare certifications offered to meet growing and specific needs
- Increase Current Size of Engineering Programming (\$564,448 FY 27 & \$951,007 FY 28)
 - JMU started an engineering program about 20 years ago. As a generalist program, students do not have to specialize in a single type of engineering, making it different from others in the state. Our graduates are highly sought by engineering, consulting, construction, and civil engineering firms due to this distinction. The program currently has more student interest than we can meet.
- Advance Academic Programming – Education Quality (\$707,698 FY 27 & \$788,918 FY 28)
 - A Center for Quality Education will support school engagement initiatives that are focused on the development of birth-12th grade educators and administrators, as well as recruitment and retention of quality personnel. The center will act as a conduit to align and coordinate efforts between initiatives to ensure that consistency and continuity remains seamless.
- Establish Real Estate Program (\$0 FY 27 & \$364,241 FY 28)
 - Nationwide demand for real estate programs is growing due to industry expansion and complexity. Offering specialized coursework which covers valuation, real estate finance and law would allow JMU to become known as a market leader in preparing skilled professionals for this career path. In support of the new Real Estate program, the College of Business anticipates receiving a gift to help initiate the proposal and provide scholarships for student support.
- Create Agriculture Industry Studies Program and Research Center (\$0 FY 27 & \$1.6M FY 28)
 - Leveraging our unique position in the Shenandoah Valley, we are planning an Agriculture Industry Studies undergraduate program. The degree will offer a multidisciplinary approach to understanding the modern agricultural sector that combines business, technology,

sustainability, science, and public policy, with a focus on needs in the valley. Funding will combine academics with the development of an Agriculture Research Center to enhance JMU's education and research engagement in this area.

Priority 5. Web-based Technology Infrastructure (\$3.0M FY & \$3.0M FY 28)

Current enterprise systems and applications, including our HR/Finance/Student systems, are reaching end-of-life.

- An updated Enterprise Resource Planning (ERP) system is required to provide enhanced service delivery and data analytics while creating streamlined workflows and business processes. We are seeking one-time funding in each year of the biennium for ERP implementation expenditures.

A4. Please explain how your institution has engaged your Board of Visitors and institution leadership in the mandatory review of the Pell Initiative for Virginia.

JMU's Interim Provost and Vice President for Academic Affairs, as well as the Vice President for Access and Enrollment, jointly serve as senior sponsors of the university-wide Pell Initiative for Virginia (PIV). One component of their leadership is overseeing a 15-member PIV Task Force—with representation from academic affairs, enrollment management, and student support areas—to ensure the initiative is effective and aligns with institutional priorities.

- The JMU model has been well-received, with our Director of Financial Aid & Scholarships invited to present on our multi-divisional approach at a recent Virginia Council of Presidents meeting.
- We pledged institutional funding to extend PIV student support through the 2027–28 academic year, ensuring student support beyond the state's original funding window. The Board of Visitors received an update on financial aid and Pell student enrollment at their April 2025 meeting.
- We completed our first PIV implementation in AY 2024–25. The sponsors will provide a comprehensive update to the Board of Visitors at a fall 2025 meeting to highlight initial outcomes, future plans for sustaining aid, and continued efforts to promote access and student success.

B. Strategic Deep Dive – Enrollment Volume & Composition

B1. What do you see as the primary drivers of recent enrollment trends for your institution? Further, describe your 2023 enrollment projections and explain why those projections have (or have not) resulted as projected. Please reference any specific academic programs that have had a significant (positive or negative) effect on enrollment, if relevant.

Our 2023 enrollment projections indicated stable enrollment over the next six years. Specifically, we forecast:

- AY 2023-24 Enrollment: 22,178
- AY 2024-25 Enrollment: 22,124

These numbers were based on an assumption that our first-year cohorts would remain stable at 4,650 students.

- Our actual enrollment in 2023-24 was 22,758; in 2024-25, it was 22,879. Our actual enrollment exceeded projections for two main reasons:
- JMU has seen an influx in applications over the past four years, resulting in greater demand for attendance among those who were accepted. Our first-year cohorts in 2023 and 2024 exceeded the 4,650 targets by 250 and 340 students respectively, accounting for over half the difference between actual and projected enrollment.
- As shown in the Fact Pack Enrollment Trends Chart (A), JMU's enrollment growth has varied based on the type of program:
 - The number of bachelor's students has grown 11.7% over the past ten years.
 - The number of master's degree students has declined by 2.3% since 2015. This decline was largely due to the implementation of a four-year education major, which supplanted the need for a five-year M.A.T. degree, a popular choice for students pursuing a career in teaching.
 - Enrollment in graduate certificates has increased by 245% over the past decade, highlighting the increased emphasis in these types of programs, particularly within our College of Education.

B2. Please summarize your institution's enrollment management strategy to align with recent demographic and enrollment trends. Consider online education enrollment in your response. What is the level of confidence in your 2025 enrollment projections, considering potential risks and unknowns such as economic factors, shifting student preferences, and regional demographic changes? 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.

Undergraduate Enrollment

Since 2022, JMU has received a record number of applications each succeeding year. While we began using the Common Application in 2022, our application numbers continue to buck the trends typical for the Common App. Applications to most institutions level out after the second year, while ours continue to increase, speaking to JMU's growing national reputation and increasing student interest.

Given JMU's growing national reputation and desire to maintain financial stability, we have a goal to increase our proportion of out-of-state first-time students to 30% over the next six years. Maintaining this percentage among first year students will help the university maintain an overall percentage of 25% out-of-state undergraduate students.

We have a high degree of confidence in our 2025 enrollment projections.

- Current deposits met our desired target
- Current projections, which assume a stable melt rate, indicate that our first-year cohort should meet, or come very close to, our target.

The main source of data informing our projections continues to be our historical enrollment counts, which have reliably projected enrollment for many years.

Continuing Enrollment

For continuing students, fall-to-spring progression rates are in line with recent years, and current efforts to promote student success and limit attrition through our Quality Enhancement Plan are anticipated to result in stable retention rates. Our current fall enrollment among continuing students remains above last year's level, further supporting our confidence in our projections.

Graduate Enrollment

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

We are 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.

The institution regularly evaluates graduate tuition and fees to ensure these programs remain cost competitive both for in-state and out-of-state students.

Online Enrollment

At JMU, online education makes up a relatively small percentage of our student population and is largely concentrated at the graduate level.

- Off-campus enrollment has increased over the past few years, and we expect a continued, modest increase.
- There are no current plans to greatly expand or decrease the number of online programs or the possible enrollment within our current programs.

Enrollment Risk

A major risk with potential to influence our enrollment this fall concerns recent federal workforce cuts.

- As a high percentage of JMU's student body is drawn from Northern Virginia, it is possible that a percentage of our student body may experience financial hardships as a result of the workforce reduction.
- While we see no signs of this issue affecting Fall 2025 enrollment, we continue to monitor the situation moving forward.

B3. 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).

JMU's enrollment strategy continues to emphasize access and affordability, particularly for students from low and middle income backgrounds.

Shifting to the Common App in 2022 and implementing the new FAFSA methodology (SAI replacing EFC) have increased applications and aid eligibility for Pell-eligible students, especially those in-state.

Resulting financial implications include:

- **Revenue Pressures.** Although overall enrollment remains stable, increasing low-income student enrollment leads to higher institutional aid expenditures and lower average net tuition revenue.
- **Aid Expansion.** We expanded need-based aid through our In-State Undergraduate Grant Strategic Plan, using a three-tier model to support affordability. For 2025–26:
 - The 50% of the Cost Of Attendance (COA) Strategy continues, awarding aid to all eligible students with SAI ≤ 50% of the COA.
 - The Remaining Need Strategy increased to 46%.
 - The FAFSA priority filing date was extended for Pell-eligible students to April 1.

Additionally, the Pell Initiative for Virginia provides new support for increasing Pell enrollment.

2025 Federal Pell Grant Recipients

All Undergraduates (In-State + Out-of-State)

Aid Year	Fall UG Enrollment	Unduplicated Pell Fall Headcount	Unduplicated Pell All Terms*	% UG Pell (Fall)	% UG Pell (All Terms*)
2022–23	19,968	2,796	2,952	14.00%	14.78%
2023–24	20,499	2,947	3,055	14.38%	14.90%
2024–25	21,112	3,513	3,674	16.64%	17.40%

In-State Undergraduates Only

Aid Year	Fall UG Enrollment	Unduplicated Pell Fall Headcount	Unduplicated Pell All Terms*	% UG Pell (Fall)	% UG Pell (All Terms*)
2022–23	15,740	2,473	2,612	15.71%	16.59%
2023–24	15,958	2,605	2,694	16.32%	16.88%
2024–25	15,910	3,068	3,216	19.28%	20.21%

*Includes students receiving Pell Grants in any term (Summer, Fall, or Spring) within the aid year.

JMU's financial model is adapting to better serve a more socioeconomically diverse student body. While this reduces per-student net tuition, it aligns with institutional mission priorities and is supported by strategic aid planning and external funding.

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 and how you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030). Also include information on recent changes in completion outcomes. When responding please reference the “Completion” section of your institution’s fact pack data.

JMU has held an impressive completion rate for many years and continues to provide excellent support to help students complete their studies.

- We strive for a six-year completion rate at or above 80%. Our aspirational target of 84% was defined by our highest achieved rate over the past ten years and is stated on our website for compliance with SACSCOC standards.
- Recent data indicates that our six-year rate has hit 79.7%, as shown in the Fact Pack. We are monitoring this target and believe that the downward trend over the past few years may be close to reversing as efforts to increase retention rates have begun to yield results.
- Beginning with the 2018 cohort, JMU experienced three of four years with retention rates below 90%. To reverse these trends, the university resourced our early student success initiative to focus on increasing retention rates particularly among underrepresented populations of students (e.g., students of color, Pell-eligible students, transfer students).
 - We have seen retention rates increase over the past two years and expect these efforts will eventually raise our completion rates above our threshold for acceptability.
- As part of our Quality Enhancement Plan, the Early Student Success System, retention rates are monitored by sub-population. The goal is to decrease the difference between retention rates of underrepresented students and the overall rate by five percent over the next three years. Specific groups include students of color, Pell-eligible, first-generation, and transfer students. As we raise the retention rates of these populations, we expect long-term improvements in their completion rates.

C2. Please describe efforts at your institution to ensure all students are graduating in a timely manner. Reference data from the “Program Alignment and Performance” section of your fact pack.

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.
 - These programs also assist students in developing a sense of community, fostering belonging and engagement on-campus, and connecting students with other student success resources.

- We developed and have implemented an 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 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.
 - ESSS combines current and new data insights to identify students who are potentially struggling and connect them with people, offices, and resources on campus so that they are empowered and more likely to reach their goals.
- JMU 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.
- 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.

C3. 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 does 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. When responding please reference the "Post Completion" section of your institution's fact pack data (linked here).

Career Outcomes

To gather career outcomes data, JMU actively engages in the industry standard process of NACE's First Destinations survey. We distribute the survey to graduates, then pursue the best information possible via text campaigns, phone calls, and LinkedIn searches.

- For the class of 2023, this effort resulted in a knowledge rate of 74.3%.
- Data gathered includes:
 - Outcome rate: 95.4%
 - Salary data: \$59,686 for bachelor's degree recipients; \$73,652 for advanced degrees.
(All data references the class of 2023)
- We disaggregate the data in a variety of ways: by specific college, critical workforce needs, and local impact are key measures. These rates are monitored closely each year to determine resource allocation and programming.
- JMU has a powerful history – present – for career outcomes after graduation. Our traditionally 95% outcomes rates speak to the value of the degree and learning process and compares favorably to our peers.

Student Debt and Loan Repayment

The Financial Aid Office (FAO) monitors student debt and loan repayment trends as key indicators of post-completion financial outcomes. Each year, the FAO tracks:

- Average loan debt for in-state and out-of-state spring graduates
- Cohort Default Rate (CDR) and fluctuations in borrowing patterns across federal, private, and mixed loan portfolios

JMU's CDR has remained below 2.3% since FY 2012 and was 0.0% during the federal repayment pause (FY 20–FY 24).

- With repayments resuming in fall 2023 and collections restarting in May 2025, JMU proactively engaged a third-party servicer (April 2024) to conduct borrower outreach and support re-entry into repayment for students who exited during the pause.
- This approach supports financial wellness and mitigates default risk as students transition into repayment under new federal guidelines.

C4. 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, work-based learning) during their time at your institution? How will you draw on successes/challenges from prior initiatives? Please describe how you intend to use existing/provided resources to execute the strategies.

JMU is actively involved in implementing programs to improve workforce preparation and early career exposure.

Previously, a new task force was charged to identify ways to grow work-integrated learning opportunities for students assessed the landscape of workforce preparation on campus, both curricular and cocurricular, and suggested next steps to continue this work.

- This led to the creation of the Work-Based Learning Experience (WBLE) Committee, a university-level group, which was established to oversee further growth of this initiative.
- The committee commissioned and received a recent review by Paré Consulting to launch the next implementation phase.

To provide additional support for career readiness, the University Career Center was designated as the coordinating hub for work-based learning experiences, and a position was created to lead this coordination.

Based on this foundation, multiple areas are leveraging community-engaged internship opportunities:

- The University Career Center subsidizes unpaid internships through a scholarship created with career fair revenue.
 - UCC also added an early arrival program for new transfer students to engage them in their career development and planning.
- The Center for Global Engagement added a live brief, team-based program called the Global Career Accelerator, allowing students to acquire course credit while working with some of the largest employers in the world on projects.
- Multiple areas are coordinating to grow a first-year seminar with career components integrating into the curriculum.

- The Office of Economic and Community Development coordinates the Valley Internship Workgroup through the Virginia Talent and Opportunity Program to place JMU students in subsidized regional internships.
- The division of Research, Economic Development and Innovation is targeting future growth in migrating on-campus employment into work-based learning experiences and scaling in-class pedagogy that incorporates career learning.
- JMU X-Labs successfully piloted a new type of internship program with a global education technology company in which a team of students earn credit in a preparatory course and then move as a cohort to their paid internship.

C5. For which specific workforce needs is your institution best positioned to supply talent, based on regional, industry, or occupation alignment? When responding please reference the “Workforce Alignment” section of your institution’s fact pack data.

There is a long history of alignment between JMU’s degree programs and high-growth occupations in the Commonwealth of Virginia.

- 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.
- We continue to build on the noted positive historical alignment. We are currently providing or preparing to provide opportunities in the areas below.
 - **Healthcare.** JMU is currently expanding its successful nursing programs, leading to a more rapid education and certification for nurses with BSNs and PhDs. This is a high budget priority for the university.
 - **Teaching: Obtaining Licensure.** 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.
 - **Teaching: Post-Licensure Options.** In addition, we recently added a graduate program designed to allow currently licensed teachers to obtain content knowledge in an area that has been noted as a “critical need area” in Virginia. The one-year, hybrid Master of Arts in Physical and Health Education – Teacher Education is unique to the commonwealth.
 - **Computer Occupations.** The Information Technology major, which provides the knowledge and skills needed to meet the ever-evolving computer technology needs of business, government, healthcare, education, and other organizations, is at capacity. Obtaining funds to expand the program is a high budget priority.

C6. Explain any additional initiatives or partnerships the institution is currently involved in to improve workforce alignment of academic programs.

The division of Research, Economic Development and Innovation (REDI) – in collaboration with academic units in the division of Academic Affairs – spearheads many efforts to promote workplace alignment.

- Within REDI, the Office of Economic & Community Development oversees the Virginia Talent + Opportunity Partnership - Valley Internship Experience Workgroup to administer the grant we were awarded by SCHEV.
- REDI strives to strengthen training for university-industry partnerships, including:
 - Faculty development and matchmaking with regional businesses
 - Cross-campus coordination for scalable innovation and workforce engagement

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.

We are committed to student affordability by maintaining market-competitive tuition and fees while carefully managing the overall cost of attendance.

Of the 15 Virginia public institutions of higher education:

- JMU's FY 24-25 in-state tuition is lower than all but four schools.
- JMU's FY 24-25 combined in-state tuition, E&G fees, and mandatory non-E&G fees are lower than all but five schools.

Affordability & Time to Degree

The overall student cost of attendance annual growth rate has increased by 3.3% over the last 10-year period, which is slightly higher than inflation rates.

- The percentage of students borrowing has decreased from 41% in FY 2016 to 31% in FY 2024.
- Annual borrowing per student has remained relatively consistent over the 10-year period.
- Annual borrowing per student FTE - annual growth is 1% from 2014 to 2024, significantly less than inflation.
- Net price annual growth has risen slightly higher at 2.5% but remains under inflation rates.
- Average time to degree for first-time bachelor's degree students is approximately 4.2 years, which has remained stable at JMU since 2013.

We continue to focus resources toward student success and improving retention and graduation rates, reducing cost-per-degree through the implementation of the institution's early alert system, and expanding advising and student support.

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? Further describe your institution's discounting by type and if this is sustainable in future years.

JMU's proposed tuition and nongeneral fund revenues for both years of the biennium are based on multiple financial modeling practices and assumptions, including historical analysis, projected tuition rates by student classifications, enrollment forecasts-accounting for both volume and demographics, and anticipated state support.

- We used the most recent market data available for in-state and out-of-state student costs.
- The average net student price (adjusted for 2023 inflation) has decreased. (FY14-23)

Our graduates maintain an exceptionally low student loan default rate of 0.8%, significantly below the national average of 1.8% for public four-year institutions.

- While the state-funded financial aid growth is substantial, it remains relatively small in comparison to institutional aid increases. JMU receives less in-state financial aid per in-state student compared to the average for Virginia's public institutions by \$1,353. If state support

continues to lag behind institutional efforts, the university may need to adjust financial strategies while advocating for increased state funding.

The university will continue to focus on providing lower net tuition costs for Pell-eligible, low- and middle- income students through institutional, state and philanthropic resources.

- An analysis of past discounting trends indicates the effectiveness of our current practices in achieving our enrollment and retention goals without compromising overall net tuition revenue. We will continue to review, monitor, and adjust for changing market conditions and student demographics.

Financial Health

Per the Joint Legislative Audit & Review Commission (JLARC), JMU currently has a very low viability risk.

- Measuring financial health and stability, the university-calculated net operating revenue ratio average for 2017 to 2023 is 2%, remaining stable with positive financial management.

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? Please reference the “Financial Health” slides of your institution’s fact pack.

JMU is committed to making a high-quality education accessible and affordable for all students, with a strategic focus on in-state, low-income, first-generation, and Pell Grant-eligible students.

- While we continue to adapt the process developed in 2023 for awarding recruitment scholarships, it has proven successful as we are steadily offering more scholarships, waivers, and unfunded scholarships to new students. JMU establishes a yield goal for each scholarship, which we evaluate annually.

We anticipate minimal additional financial aid to students beyond adjustments for increases in tuition and fees and state mandates associated with the Virginia Military Survivors and Dependent Educational Program (VMSDEP).

- The VMSDEP program has grown from 111 participants in FY 20 to 663 participants in FY 25. As a result, JMU allocated an additional \$7.5 million to fund the program in FY 25 over FY 20 to support this state mandate. We appreciate the current state funding yet anticipate needing additional resources due to a significant rise in costs and projected continued growth.
- JMU expects that participation in the program will continue to grow to \$14.5 million in resources being allocated to the program over the biennium.

D4. Reflect on the categories/subcategories of cost that have recently experienced the most significant increases on an absolute or per-student basis. What have been the primary drivers of those increases? Please be specific.

Based on institutional data, several patterns emerge regarding JMU’s spending priorities in several Education & General expenditure areas.

- **Academic Priorities.** 59% of the university’s expenditures is spent on General Academic Instruction (4.7% annual growth rate), the largest spending area.
 - Libraries (5.0% annual growth rate) and Academic Administration (5.9% annual growth rate) show steady investment, reinforcing our commitment to academic infrastructure and faculty development.
- **Student Support.** Expenditures for Counseling and Career Guidance (12.9% annual growth rate) have expanded at a much higher rate than other areas, highlighting our focus on student well-being and career readiness.

- Student Well-Being. We expanded counseling staff and entered into a system-wide agreement for virtual health and well-being resources in partnership with VCU and Virginia Tech.
- Student Advising. Over this period, JMU created a student success center and expanded University Advising and Pre-Professional Health Advising. We also launched a program designed to decrease the retention gaps between traditionally underrepresented students and the rest of the JMU population. This program was influential in our achievement of a 91.9% first-year undergraduate retention rate in 2023, a 1.7% increase over the year before and among the highest rates in the nation for large, public research universities.
- **General Administrative Services.** Despite only representing 5% of FY 23-24 university E&G expenditure, the annual growth rate for administrative services was 13.5%. The university invested in information technology, human resources, federal compliance, data stewardship, and data analytics. Growth also encompassed salary and fringe benefit increases and information technology growth to enhance teaching and learning, as well as being used to streamline administrative processes, ensure cybersecurity safety, and improve student support services, planning, analytics, and institutional research.
- **Public Relations and Development.** This annual growth rate (8.1%) reflects increasing investment in institutional outreach, fundraising, and brand positioning and also includes university growth in research, economic development, and innovation.
 - JMU has deliberately invested to enhance external visibility, alumni engagement, and fundraising capacity as part of our efforts to diversify revenue streams and reduce reliance on tuition through partnerships, grants, and philanthropic support. These investments, if effectively leveraged, can provide long-term financial resilience and amplify institutional impact.
 - As an R2 doctoral university with high research activity, we have expanded our efforts to support and advocate for faculty and student research while maintaining high-quality teaching. The university actively pursues resources, partnerships, and collaborations that advance our mission and vision.

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. Include the costs with a general fund request in the Excel file in the “GF Request” tab. Please reference the “Fastest Growing Expenditures” and “Financial Health” tables in your institution’s fact pack data.

The university's annual budget process carefully assesses and prioritizes new expenditures, ensuring that limited resources are directed toward the university’s strategic initiatives and academic and student priorities that uphold institutional values and advance its mission. The university continually seeks ways to streamline operations and invest in technologies that support high-quality academic and student services to enhance efficiency.

With constrained new resources, university departments must strategically identify opportunities to improve operational efficiency through financial reallocation, leveraging advanced technology and streamlined business processes. By focusing on cost savings and containment before new resources are allocated, the university reinforces a sustainable financial strategy.

- The university will continue to focus resource allocation on academic and student success and improving retention and graduation rates, reducing cost-per-degree through the implementation of the institution's early alert system, expanding advising and student support.
- Reengineering Madison is a seven-year initiative which involves implementing new technology platforms such as an enterprise CRM (Customer Relationship Management) and new data solutions for managing and visualizing JMU's data as well as investing in human resources and finance solutions that will serve the university with updated technology into the future.

Reengineering Madison goals 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.
- To assist in optimizing space utilization, the university recently began using the efficiency and utilization component of the event management system (EMS), which will allow us to review and analyze the use of campus institutional space. We will also continue to review the process and best practices for departmental space assignment and corresponding utilization.
- We continue to participate in the Virginia Association of State College & University Purchasing Professionals (VASCUPP), the Virginia Higher Education Procurement Consortium (VHEPC), and the Virtual Library of Virginia (VIVA) to collaborate on cooperative procurements and leverage institutional spending by creating efficiency and value. The university's estimated savings from the cooperative contract language is \$6.4 million over the last two years with a total of \$11.8 million from 2018 to 2024.
- Demonstrating the university's commitment toward making education more accessible, a campus-wide effort led by JMU Libraries encourages the use of free affordable text books in JMU courses. By assigning open educational resources (OER), instructors can build their courses around texts licensed for free online use, lessening the student costs of pursuing a college degree. Since Fall 2019, JMU instructors who have adopted OER have saved students more than \$2.3 million. The university will continue focusing on student cost savings and the creation and dissemination of open resources amongst the campus.
- Through university restructuring, an estimated \$1.0 million dollars was reallocated to support student financial assistance with a Pell initiative focus.
- Reducing energy on JMU campus is a major priority in Facilities Management's sustainability plan. The university's guidelines for reducing energy on both an individual and management level are outlined in JMU policy. Benchmarking, commissioning, and energy auditing are a few avenues Facilities Management has undertaken or is exploring to assess energy usage on campus. All new construction and major renovations are required to be LEED certified or alternative green building rating systems.
 - Anticipated completion results of the East Campus Infrastructure (ECI) Distribution project phase 3 includes an increase in energy efficiency and system redundancy to mitigate future failures. Continued investments in energy-efficient solutions and campus upgrades should assist in keeping long-term costs manageable.

Financial Health

The financial health metrics are just a few measures of financial health. As previously reported by the APA, JMU has experienced steady long-term enrollment growth resulting in debt-funded projects to support that enrollment. As quoted by the APA in their 2020 report, “Institutions with recent debt-funded projects or in periods of high growth in enrollment are likely to see lower ratios.” As a result of many debt-funded projects in the 2015-19 timeframe, the ratios measuring resources—like the primary reserve and viability ratio—are below benchmark. Since 2019, JMU has issued very little debt and is well positioned to increase our financial health metrics. Additionally, JMU’s FY 24 debt ratio was just above 6.2%, well below our BOV approved limit of 10%.

- In reviewing the most recent data, JMU’s updated Financial Health Table calculations for the past three years (2021-2023), shows some solid financial strengthening per the updated calculations for FY 21 to FY 23. (Data updates from Fact Pack)
 - JMU’s updated calculated viability ratio increased to 0.906 in 2023, remaining slightly below the established benchmark of 1.0
 - The university’s updated Composite Financial Index (CFI) between fiscal years 2020 and 2023 demonstrated significant improvement, rising from 1.860 to 4.060. The upward trajectory reflects enhanced financial health and continued sustainability. The increase to 4.060 in FY 2023 surpasses the threshold benchmark of 3.0.

D6. Please describe the data in your fact pack under “Expenditures by Category” and “Personnel.” Provide an overview of any challenges present and what your institution is doing to get ahead of any anticipated challenges.

Analysis of Personnel Growth Per Student FTE

This data examines personnel numbers and salary expenditures per student Full-Time Equivalent (FTE) over time.

- JMU’s combined Education & General budget and financial aid budget are composed of 73% personnel costs, 11% financial assistance and scholarships and 16% other nonpersonal expenditures.
 - Compensation and health insurance increases were the major personnel cost drivers.
 - Our number of employees—in both categories—remained consistent and under inflation.
 - Our full-time instructional staff ratio has remained stable at 34-35%. Instructional staffing levels remained relatively stable in proportion to student demand, despite fluctuating student enrollment.
 - The full-time instructional salary (salary expenditures per student FTE) outlays as a percentage of total expenditures has remained around 45-47%. Increasing faculty compensation remains a significant priority and a consistent portion of institutional spending.
 - Pay-related challenges continue in two main areas: maintaining competitive salaries across various workforce sectors and addressing issues of compression and inversion. Specific market competitive areas include faculty salaries in business, engineering, computer science, and health professions. Outside of instructional faculty, salaries for multiple workforce areas suffer in comparison to the market, including information technology, public safety, finance & business operations, athletics & coaching staff, and facilities management. A 2024 study conducted by the JMU Compensation Advisory Committee found that compression and inversion issues exist within all instructional faculty ranks, with

most accruing at the level of Associate Professor. We are seeking ways to provide competitive compensation consistently over time.

Analysis of Growth in Education and General Institutional/Administrative Expenditure and Per-Student Expenditure

This data covers the previous 10-year period.

Institutional/administrative spending has outpaced inflation, while per-student expenditure growth has remained relatively flat over the last five years.

- JMU spent an estimated 14% less in FY 22 than similar institutions nationwide according to JLARC's 2024 peer analysis report.
- We have increased investments in personnel and state salary and fringe benefit changes.
- We have invested significant resources in technology for mission critical advancement. Reengineering Madison, a multi-year, multi-project initiative that began in Fall 2021, is dramatically transforming our campus technology and platforms, modernizing our systems and business processes.
 - Includes implementing significant technology platforms, such as an enterprise CRM and new data solutions for managing and visualizing JMU's data. The CRM will include functionality for Undergraduate Admissions, Advising/Student Success, Orientation, and Advancement, among others.
 - Involves replacing current PeopleSoft ERP Finance, Human Resources, and Student Administration applications as well as current applications used to manage JMU constituents' identities. This set of projects will take at least seven years to fully implement and provide continued opportunities for change management and streamlined business processes.
- Within institutional/administrative spending, Public Relations operations expenditure growth was primarily driven by execution of the university's largest ever fundraising campaign, Unleashed. 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 invested in infrastructure and staffing to support our high quality student-centered undergraduate education.
- JMU also increased investments in financial management, human resources, and compliance to strengthen operations, meet regulatory demands, and ensure long-term financial success.
- Areas of highlighted growth in auxiliary enterprise expenditure include both state salary and fringe benefit costs and the following costs:
 - Dining food services and supply; labor and facilities maintenance
 - Telecommunication and IT services
 - Residential maintenance; new facility and operations
 - Athletic compensation, operations, and new facilities

D7. Please discuss how statewide salary and health insurance premium increases impact your institution (please reference your institution's estimated cost impact from the salary and health insurance calculator file). Further describe any challenges or the ability to support the NGF portion of the statewide increases. If statewide salary and health insurance premium increases occur and you do not receive additional state support above the general fund share, please describe how you will manage the NGF portion of these increases.

Faculty and staff compensation continue to be a top priority for the university administration and employees. As the cost of living continues to rise due to inflation and increases in general

household expenses, competitive salaries have become even more essential. Provided through state assistance, recent salary increases helped mitigate the impact of rising costs and reinforced our commitment to investing in our workforce. An ongoing funding partnership with the commonwealth will help the university ensure a qualified and experienced workforce.

Within the projections of the six-year planning document, the university's nongeneral fund cost split of the statewide salary and health insurance premium increases for the 2026-28 biennium are projected to be covered by institutional nongeneral fund revenues generated from tuition changes.

- With a nongeneral fund split of 50.8%, the university's portion of the estimated salary and medical insurance increase costs are projected to be \$3.1M in FY 27 and \$6.2M in FY 28.
- The NGF portion for the 2% salary adjustments and 1% health insurance premium increase utilizes 65% of estimated tuition revenue for the 2026-28 biennium available for unavoidable costs.
- The remaining 35% will be used for other unavoidable costs to the university, which include maintaining financial aid support levels, supporting student support initiatives we previously committed to, operating and maintenance for Carrier Library, and covering inflation for contractual services and utilities.

D8. Using the information from the ProForma tab of the Excel file please describe any present funding concerns (if relevant) and how your institution plans to address any potential concerns.

A review of the financial proforma tab indicates no current funding concerns within the next two years and highlights specific observations to note in the future.

- The proforma tab assumes only one new university initiative: expanding the Physician Assistants program from 36 to 48 students annually. All other costs included are unavoidable costs to implement initiatives that have already been committed to, maintain financial aid at the current funding levels and to fund salary/benefit and inflationary cost increases.
- The proforma indicates—with additional state support to maintain the current general fund support operations percentages—the university could cover operations with tuition increases consistent with previous years.
- We will need to continue discussions regarding future university funding available to implement or expand programs to meet commonwealth needs or address the service expectations of our students without a combination of tuition increases, additional state support, and the implementation of further university reallocations and efficiency strategies.

E. Economic Development Annual Report

E1. 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

Link to JMU [Economic Impact Report 2025](#).

F. Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought

F1. Provide a copy of any policy or reports your institution has produced and provide information about annual training or orientation related to this topic.

We are 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.

With the Father of the U.S. Constitution, President James Madison, as the eponym of the university, we strive to develop students who are able to participate in the life of their community, and we focus on creating a culture of civic engagement.

We demonstrate our 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 concomitant individual responsibilities as citizens.

A list of various related programs and initiatives is 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 "The 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."

- 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.
 - 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](#).

G. New Schools, Sites, And Mergers

G1. 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 our existing presence in the Northern Virginia area by leveraging existing relationships with corporate partners and alumni groups to establish multiple workforce training/education sites throughout the region and explore the prospect of an expanded permanent presence in response to research indicating JMU-provided programming is desired.
- We do not anticipate any additional schools or mergers.

H. Research

H1: 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?

The division of Research, Economic Development and Innovation (REDI) is, at its core, an agent for faculty and student scholarship development and promotion, resource identification, and community outreach. REDI prioritizes collaboration, building relationships with campus and external stakeholders—including the Commonwealth of Virginia—to cultivate a robust network of opportunities for faculty, students, local businesses, and others that would benefit from the wide range of opportunities these relationships offer.

In particular, REDI has established itself as a trusted partner to the commonwealth, responding to requests for assistance in high-need areas and ensuring our faculty and students are responsible stewards of state, federal, and university resources.

Strategic Research Priorities, Programs, or Key Areas of Investment

Beyond the REDI-supported efforts related to developing innovative internships, administering the VTOP Valley Internship Experience Workgroup, and working to more broadly incorporate career learning previously referenced in this plan, REDI has targeted multiple other areas for development over the next six years. A few examples are:

Launch New Interdisciplinary Research Centers

REDI is successfully meeting its goal of establishing fully functional, self-sustaining, high-research academic institutes and centers that promote interdisciplinary innovation and enhance a culture of research that responds to urgent local and global issues and opportunities.

- REDI is currently focused on:
 - Rural and regional innovation
 - Data-driven athlete injury prevention and monitoring in collaboration with JMU Athletics
 - Disparities in health and wellbeing

Modernize Commercialization Infrastructure

The *Research to Impact* office connects researchers and innovators with resources to advance their ideas to implementation, and educates and supports students, faculty, and community innovators in the process of intellectual property protection, commercialization, and licensing. Areas of upcoming focus include:

- Implementing and education stakeholders on streamlined IP disclosures, licensing, and contracts
- Increasing support for faculty innovation and startup formation through outreach and development assistance

Grow Federal Innovation Funding Participation

We strive to assist JMU community members with finding external funding for their research, scholarship, creative works, and other projects. Areas designated for attention include:

- Expansion of SBIR/STTR grant engagement to increase non-dilutive funding to develop technology and plan for future commercialization
 - Goal: 200% increase in applications by 2030)
- Development and launch of a non-credit certificate in federal contracting (co-developed with School of Professional and Continuing Education) to support commercialization readiness and federal contracting workforce needs

Develop a Shenandoah Valley Agricultural Innovation Center

Briefly mentioned earlier in A3. and in Part I, the Shenandoah Valley Agricultural Innovation Center is designed to be distinct from and complimentary to offices in the Virginia Cooperative Extension, focusing on commercial innovation and prototype development, industry-partnered research and development, providing an incubator space for ag-tech startups, and integrating academic and private sector research. The center will:

- Complement Virginia Tech and Virginia State University Extension services with applied innovation and commercialization
- Address intergenerational farm transitions and labor gaps
- Address farmer mental health issues
- Advance sustainable practices in agriculture, value-added agri-processing (e.g., packaging, specialty foods, fermentation products, regenerative soil practices), and agri-tourism

Strengthen Infrastructure and Training for University-Industry Partnerships

We are in the process of better positioning JMU for success in research by developing our research infrastructure to assist in soliciting and securing external funding (referenced in A3., Priority 3), with a strong focus on expanding partnerships between JMU and industry. Future opportunities include:

- Faculty development and matchmaking with regional businesses
- Cross-campus coordination for scalable innovation and workforce engagement

Anticipated Benefits to Faculty and Students

We have expanded our efforts to support and advocate for faculty and student research while maintaining high-quality teaching since becoming a high research institution. Moving ahead, we see numerous benefits to faculty and students through the implementation of our targeted goals.

- Faculty Attraction and Retention
 - Competitive research support and access to interdisciplinary funding
 - Clear pathways to translational impact and industry engagement
 - Greater capacity to launch startups and license technologies
- Student Value Proposition
 - Applied learning experiences with real-world economic impact
 - Participation in research-to-commercialization pipelines (e.g., SBIR/STTR, ag-tech innovation)
 - Career preparation in high-demand sectors including federal contracting, sustainable agriculture, and technology commercialization

Impact on Economic Competitiveness of the Commonwealth

Our priorities for the upcoming years result in positive outcomes for the state as well as the institution, primarily as they:

- Expand Virginia's share of federal innovation funding through increased SBIR/STTR grants, federal contracting readiness, and alignment with USDA, NSF, and DOE priorities
- Stimulate regional innovation economies, especially in:
 - Agriculture and agri-tech (sustainable practices, value-added processing, regional supply chains)
 - Clean technology (biochar, circular economy models, carbon-smart agriculture)
 - Early childhood education and workforce development
 - Athlete injury prevention saves costs of rehabilitation
- Strengthen small and mid-sized businesses in rural Virginia by:
 - Providing access to applied university research and prototyping support
 - Building commercialization capacity and entrepreneurial networks
 - Creating pipelines of trained graduates for agriculture, manufacturing, and tech-adjacent roles
- Drive startup and IP generation, with:
 - Increased patents and university-affiliated licensing agreements
 - Faculty- and student-led ventures across sectors including health tech and education
 - Growth in university-supported spinouts in emerging markets
- Retain and attract talent to rural and underserved regions by:
 - Creating meaningful applied research roles for students from farming communities
 - Offering return-to-region pathways for graduates to contribute to home economies
 - Enhancing regional alumni engagement in research and workforce development initiatives

I. Collaboration

I1. Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions and the K-12 sector (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?

In addition to being an excellent partner to the state, we are committed to working with peers across the commonwealth to leverage the best opportunities for all students. Several significant initiatives are listed here.

Commonwealth-wide Artificial Intelligence institute (CAII)

Virginia can, and should, serve as a leader in responsible artificial AI – in business, education, research, and policy.

- To help realize this goal, a number of Virginia universities (UVA, GMU, JMU, ODU, VCU, VT, VSU, and William & Mary) are planning for a commonwealth-wide AI institute (CAII).
- The CAII will coordinate industry, higher education, and government entities throughout the state for four purposes:
 - education and workforce development;
 - innovation and economic development;
 - research and discovery; and
 - serving as a trusted source of AI expertise for local, state, and national government.

The next 12 months will serve as a planning phase, with the objective of delivering an operational blueprint and budget for the Institute.

- This goal requires developing partnerships; informing and convening stakeholders in government, education, industry, and communities across the commonwealth; and determining the strategy and operational details of the CAII.
- A coordinated AI Institute will position Virginia as a top AI state by enabling resource-sharing, increasing efficiency, and reducing redundancies. It will enable Virginia to leverage expertise across the state to meet the substantial challenges and opportunities presented by AI.

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.

J. State Policy

J1. 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.

- SCHEV Policies
 - We seek clarification of our 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).
- Changes to § 23.1-1309 – Intercollegiate Athletics Financing
 - Virginia code caps the percentage of student fees that a college can use to support their athletics programs through a formula. In the decade since the law was established, college athletics landscape has changed greatly. Institutions are facing massive cost drivers outside of their control such as back damages owed to college athletes, new NCAA regulations, and increased supports for student-athlete mental and physical health. Universities need some level of immediate relief from the current code section to ensure competitiveness and student-athlete wellness.
- Modify existing Base Funding and Financial Aid formulas/models
 - Despite JMU's excellent student outcomes, JMU currently receives \$3,089 less in operating funding on per in-state FTE student than the average of all other public four-year colleges and universities in Virginia. JMU's annual base appropriation would have to increase by about \$51M to reach the average funding level.
 - Additionally, JMU receives \$1,353 less in financial aid on per in-state FTE student than the average of all other public four-year colleges and universities in Virginia. JMU's annual financial aid appropriation would have to increase by about \$23M to reach the average financial aid level. JMU would strongly support the state looking at the underlying formulas and models that dictate the large inequity in state support.
- Streamline the Academic Program Approval Process
 - JMU is working to offer programs in rapid response to changing workforce needs. We have historically found SCHEV's program review process to hinder quick deployment of necessary programs. We look forward to continuing conversations related to the program approval process so that we can respond more rapidly to market needs.

Six-Year Plans (2025): 2026-27 through 2031-32

Due: July 3, 2025

Institution:

James Madison University

Institution UNITID:

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Individual responsible for plan

Name(s) & Title(s):

Towana Moore, Vice President Administration & Finance

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Telephone number(s):

540-568-6434

Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2026-28 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 2026-28 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				
	2025-26 Charge (BOV approved)	2026-27		2027-28	
		Planned Charge	% Increase	Planned Charge	% Increase
In-State UG Tuition	\$8,312	\$8,520	2.5%	\$8,732	2.5%
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%
In-State UG Mandatory non-E&G Fees	\$5,988	\$6,196	3.5%	\$6,380	3.0%
In-State UG Total	\$14,300	\$14,716	2.9%	\$15,112	2.7%
Out-of-State UG Tuition	\$25,332	\$25,840	2.0%	\$26,356	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	\$5,988	\$6,196	3.5%	\$6,380	3.0%
Out-of-State UG Total	\$31,906	\$32,622	2.2%	\$33,322	2.1%

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

Part 2: Revenue: 2024-25 through 2031-32

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 bienium, including any funds administratively transferred into your E&G programs during the fiscal year. The GF amount in each year of 2027-2032 should remain the same as the 2025-26 general fund for E&G. The formulas will automatically hold that constant for the remaining years of 2027 to 2032

Items	2024-2025 (Actual)	2025-2026 (Estimated)	Chg	2026-2027 (Planned)	Chg	2027-2028 (Planned)	Chg
	Total Collected Tuition Revenue	Total Collected Tuition Revenue		Total Projected Tuition Revenue		Total Projected Tuition Revenue	
E&G Programs							
Undergraduate, In-State	\$133,755,482	\$137,833,884	3.0%	\$138,665,900	0.6%	\$141,406,854	2.0%
Undergraduate, Out-of-State	\$124,054,355	\$131,256,779	5.8%	\$135,610,584	3.3%	\$136,554,834	0.7%
Graduate, In-State	\$13,093,958	\$12,627,625	-3.6%	\$12,551,795	-0.6%	\$12,893,850	2.7%
Graduate, Out-of-State	\$5,676,262	\$6,186,562	9.0%	\$6,280,170	1.5%	\$6,448,487	2.7%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%
Other NGF	\$6,419,157	\$6,571,296	2.4%	\$6,632,436	0.9%	\$6,694,190	0.9%
Total E&G NGF Revenue	\$282,999,214	\$294,476,146	4.1%	\$299,740,885	1.8%	\$303,998,215	1.4%
E&G GF Revenue (assume flat after 2026)	\$192,117,001	\$192,124,705	0.0%	\$192,124,705	0.0%	\$192,124,705	0.0%
E&G Tuition Offset Waiver	\$5,299,300	\$4,628,000	-12.7%	\$4,628,000	0.0%	\$4,628,000	0.0%
Total E&G Revenue	\$480,415,515	\$491,228,851	2.3%	\$496,493,590	1.1%	\$500,750,920	0.9%

	2024-2025 (Actual)	2025-2026 (Estimated)	Chg	2026-2027 (Planned)	Chg	2027-2028 (Planned)	Chg
	Total Revenue	Total Revenue		Total Revenue		Total Revenue	
Auxiliary Revenue							
In-State undergraduates	\$84,818,378	\$87,486,877	3.1%	\$89,857,597	2.7%	\$92,310,775	2.7%
All Other students	\$28,879,180	\$29,729,883	2.9%	\$31,314,719	5.3%	\$31,900,059	1.9%
Total non-E&G fee revenue	\$113,697,558	\$117,216,760	3.1%	\$121,172,316	3.4%	\$124,210,834	2.5%
Total Auxiliary Revenue	\$282,625,676	\$297,572,950	5.3%	\$316,586,882	6.4%	\$336,611,335	6.3%

Revenue

Part 2: Revenue: 2024-25 through 2031-32
James Madison University

Instructions: Provide a pro forma analysis of total tuition revenue in years 2029-2032 by holding T&F constant at the planned 2027-28 rate while incorporating your institution's submitted enrollment projections for each year through 2032. 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.

2028-2029 (Pro Forma)		2029-2030 (Pro Forma)		2030-2031 (Pro Forma)		2031-2032 (Pro Forma)			
Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	2024-2032 Chg	CAGR
\$141,337,387	0.0%	\$141,262,697	-0.1%	\$141,604,747	0.2%	\$141,604,747	0.0%	6%	0.8%
\$134,393,398	-1.6%	\$134,193,245	-0.1%	\$133,522,434	-0.5%	\$134,200,774	0.5%	8%	1.1%
\$12,544,224	-2.7%	\$12,627,743	0.7%	\$12,578,604	-0.4%	\$12,675,248	0.8%	-3%	-0.5%
\$6,362,104	-1.3%	\$6,389,192	0.4%	\$6,370,342	-0.3%	\$6,397,514	0.4%	13%	1.7%
\$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	%	%	%
\$6,756,562	0.9%	\$6,819,553	0.9%	\$6,883,179	0.9%	\$6,947,438	0.9%	8%	1.1%
\$301,393,675	-0.9%	\$301,292,430	0.0%	\$300,959,306	-0.1%	\$301,825,721	0.3%	7%	0.9%
\$192,124,705	0.0%	\$192,124,705	0.0%	\$192,124,705	0.0%	\$192,124,705	0.0%	0%	0.0%
\$4,628,000	0.0%	\$4,628,000	0.0%	\$4,628,000	0.0%	\$4,628,000	0.0%	-13%	-1.9%
\$498,146,380	-0.5%	\$498,045,135	0.0%	\$497,712,011	-0.1%	\$498,578,426	0.2%	4%	0.5%

Part 3: Financial Aid Plan: 2025-26 through 2031-32
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.)

The methodology used for completing this report MUST match the methodology used by the institution's financial aid office for completing the annual financial aid data file and related reports.

"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

*2024-25 (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	\$133,755,482	\$5,745,801	4.3%	\$11,640,035	\$0	\$8,770,650	\$142,526,132	10.2%	- \$5,354,164 Compliant
Undergraduate, Out-of-State	\$124,054,355	\$5,329,066	4.3%	\$197,848	\$2,359,077	\$170,031	\$126,583,463	6.2%	
Graduate, In-State	\$13,093,958	\$562,484	4.3%	\$22,414	\$0	\$846,374	\$13,940,332	10.1%	
Graduate, Out-of-State	\$5,676,262	\$243,838	4.3%	\$20,893	\$0	\$43,623	\$5,719,885	5.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$276,580,057	\$11,881,189	4.3%	\$11,881,190	\$2,359,077	\$9,830,678	\$288,769,812	8.3%	

2025-26 (Estimate)

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	\$137,833,884	\$6,519,223	4.7%	\$13,181,481	\$0	\$11,666,441	\$149,500,325	12.2%	- \$6,065,001 Compliant
Undergraduate, Out-of-State	\$131,256,779	\$6,208,141	4.7%	\$435,751	\$3,106,500	\$359,419	\$134,722,698	7.2%	
Graduate, In-State	\$12,627,625	\$597,257	4.7%	\$0	\$0	\$1,032,432	\$13,660,057	11.9%	
Graduate, Out-of-State	\$6,186,562	\$292,610	4.7%	\$0	\$0	\$92,242	\$6,278,804	6.1%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$287,904,850	\$13,617,231	4.7%	\$13,617,232	\$3,106,500	\$13,150,534	\$304,161,884	9.8%	

Allocation of Tuition Revenue Used for Student Financial Aid

2026-27 (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)
Undergraduate, In-State	\$138,665,900	\$6,603,141	4.8%	\$13,510,910	\$0	\$14,272,317	\$152,938,217	13.6%
Undergraduate, Out-of-State	\$135,610,584	\$6,457,650	4.8%	\$446,642	\$3,467,500	\$427,362	\$139,505,446	7.4%
Graduate, In-State	\$12,551,795	\$597,705	4.8%	\$0	\$0	\$1,061,261	\$13,613,056	12.2%
Graduate, Out-of-State	\$6,280,170	\$299,056	4.8%	\$0	\$0	\$94,138	\$6,374,308	6.2%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$293,108,449	\$13,957,552	4.8%	\$13,957,552	\$3,467,500	\$15,855,078	\$312,431,027	10.7%
2027-28 (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)
Undergraduate, In-State	\$141,406,854	\$6,807,083	4.8%	\$13,853,730	\$0	\$14,657,107	\$156,063,961	13.8%
Undergraduate, Out-of-State	\$136,554,834	\$6,573,515	4.8%	\$457,975	\$3,486,500	\$484,724	\$140,526,058	7.5%
Graduate, In-State	\$12,893,850	\$620,688	4.8%	\$0	\$0	\$1,088,288	\$13,982,138	12.2%
Graduate, Out-of-State	\$6,448,487	\$310,419	4.8%	\$0	\$0	\$96,103	\$6,544,590	6.2%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$297,304,025	\$14,311,705	4.8%	\$14,311,705	\$3,486,500	\$16,326,222	\$317,116,747	10.8%
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	\$141,337,387	\$6,865,323	4.9%	\$13,853,730	\$0	\$14,657,107	\$155,994,494	13.8%
Undergraduate, Out-of-State	\$134,393,398	\$6,528,026	4.9%	\$457,975	\$3,486,500	\$484,724	\$138,364,622	7.6%
Graduate, In-State	\$12,544,224	\$609,323	4.9%	\$0	\$0	\$1,088,288	\$13,632,512	12.5%
Graduate, Out-of-State	\$6,362,104	\$309,033	4.9%	\$0	\$0	\$96,103	\$6,458,207	6.3%
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%
Total	\$294,637,113	\$14,311,705	4.9%	\$14,311,705	\$3,486,500	\$16,326,222	\$314,449,835	10.9%

Allocation of Tuition Revenue Used for Student Financial Aid

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)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$141,262,697	\$6,865,522	4.9%	\$13,853,730	\$0	\$14,657,107	\$155,919,804	13.8%	-\$6,374,486 Compliant
Undergraduate, Out-of-State	\$134,193,245	\$6,521,939	4.9%	\$457,975	\$3,486,500	\$484,724	\$138,164,469	7.6%	
Graduate, In-State	\$12,627,743	\$613,722	4.9%	\$0	\$0	\$1,088,288	\$13,716,031	12.4%	
Graduate, Out-of-State	\$6,389,192	\$310,522	4.9%	\$0	\$0	\$96,103	\$6,485,295	6.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$294,472,877	\$14,311,705	4.9%	\$14,311,705	\$3,486,500	\$16,326,222	\$314,285,599	10.9%	

2030-31 (Pro Forma)								Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
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)		
Undergraduate, In-State	\$141,604,747	\$6,891,431	4.9%	\$13,853,730	\$0	\$14,657,107	\$156,261,854	13.8%	- \$6,350,140 Compliant
Undergraduate, Out-of-State	\$133,522,434	\$6,498,092	4.9%	\$457,975	\$3,486,500	\$484,724	\$137,493,658	7.6%	
Graduate, In-State	\$12,578,604	\$612,159	4.9%	\$0	\$0	\$1,088,288	\$13,666,892	12.4%	
Graduate, Out-of-State	\$6,370,342	\$310,023	4.9%	\$0	\$0	\$96,103	\$6,466,445	6.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$294,076,127	\$14,311,705	4.9%	\$14,311,705	\$3,486,500	\$16,326,222	\$313,888,849	10.9%	

2031-32 (Pro Forma)								Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
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)		
Undergraduate, In-State	\$141,604,747	\$6,872,684	4.9%	\$13,853,730	\$0	\$14,657,107	\$156,261,854	13.8%	
Undergraduate, Out-of-State	\$134,200,774	\$6,513,338	4.9%	\$457,975	\$3,486,500	\$484,724	\$138,171,998	7.6%	
Graduate, In-State	\$12,675,248	\$615,184	4.9%	\$0	\$0	\$1,088,288	\$13,763,536	12.4%	
Graduate, Out-of-State	\$6,397,514	\$310,499	4.9%	\$0	\$0	\$96,103	\$6,493,617	6.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$294,878,283	\$14,311,705	4.9%	\$14,311,705	\$3,486,500	\$16,326,222	\$314,691,005	10.8%	

* 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: 2026-27 through 2031-33
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 Q), including a 2% salary increase and 1% health insurance premium 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, not an annual increase. Please update total cost formulas if necessary. Institutions should assume no general fund (GF) support in 2026-28 in this tab aside from the instructed assumptions for salary and health insurance premium increases. A separate tab (Tab 6) is provided for institutions to request additional GF support for 2026-28. 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 collect the estimated E&G expenditures of 2024-25 and 2025-26 as baselines for Tab 5 Pro Forma.

For the 2028-30 biennium and 2030-2032 biennium, total amounts should be provided as estimates of future expenditures on these items but delineation of reallocation vs. tuition revenue vs. GF does not need to be provided by the institution.

Funding amounts shall assume an annual 2% salary increase for each year from FY2027 to FY2032 for those employees eligible for the state-supported salary increases in the 2024-2026 biennium. In columns H and L, institutions should use the estimated GF share of these increases provided in the salary and health insurance calculator file. If an institution plans to use its own funds to provide additional salary increases, add lines below the "increased state health insurance cost" and specify salary amount by employee type and associated fringe benefit costs, but do not put any dollar amount in Columns H and L.

Please estimate total E&G expenditures for 2024-25 and 2025-26

Total Estimated 2024-25 E&G Expenditures	\$480,415,515
Total Estimated 2025-26 E&G Expenditures	\$491,228,851

2026-2027 (Auto-calculated)
Implied GF share
49.2%

2027-2028 (Auto-calculated)
Implied GF share
49.22%

Incremental amounts relative to 2025-26 estimated baseline

		2026-2027				2027-2028				2028-2029	2029-2030	2030-2031	2031-2032	Explanation Please be brief; reference specific narrative question for more detail.
Short Title	Virginia Strategic Plan Goal(s)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	
Salary & benefit increases for existing employees														
2% annual state salary increase cost	Affordable	\$5,505,407	\$0	\$2,746,631	\$2,758,776	\$11,120,925	\$0	\$5,548,197	\$5,572,728	\$16,848,752	\$22,691,135	\$28,650,367	\$34,728,782	2% annual salary increases for full-time staff, adjuncts and graduate assistants. Estimates provided by DPB
1% annual state health insurance increase cost	Affordable	\$525,048	\$0	\$316,160	\$208,888	\$1,050,096	\$0	\$632,319	\$417,777	\$1,259,399	\$1,689,166	\$2,123,230	\$2,561,637	
Faculty Promotions	Transformative	\$493,242	\$0	\$493,242	\$0	\$986,484	\$0	\$986,484	\$0	\$1,479,726	\$1,972,968	\$2,466,210	\$2,959,452	Faculty Promotions & Tenure salary adjustments
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Inflationary non-personnel cost increases														
Contractual services	Affordable	\$449,089	\$250,000	\$199,089	\$0	\$832,024	\$500,000	\$332,024	\$0	\$2,106,218	\$3,380,412	\$4,654,606	\$5,928,800	Inflationary adjustments for IT contracts, maintenance contracts, library materials, etc.
Utilities	Affordable	\$490,107	\$250,000	\$240,107	\$0	\$775,632	\$500,000	\$275,632	\$0	\$1,311,157	\$1,846,582	\$2,382,007	\$2,917,432	Inflationary adjustments for utility costs
[Add lines & descriptions here]		\$0	\$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	\$0	
Financial aid expansion														
Addt'l In-State Student Financial Aid from Tuition Rev	Equitable	\$329,429	\$0	\$329,429	\$0	\$672,249	\$0	\$672,249	\$0	\$1,001,678	\$1,331,107	\$1,660,536	\$1,989,965	Increase in financial aid. Working toward the institutional goal of meeting 50% of remaining need.
Addt'l Out-of-State Student Financial Aid from Tuition Rev	Equitable	\$10,891	\$0	\$10,891	\$0	\$22,224	\$0	\$22,224	\$0	\$33,115	\$44,006	\$54,897	\$65,788	Increase in financial aid. Working toward the institutional goal of meeting 50% of remaining need.
[Add lines & descriptions here]		\$0	\$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	\$0	

Part 4: ACADEMIC-FINANCIAL PLAN: 2026-27 through 2031-33
James Madison University

		2026-2027				2027-2028				2028-2029	2029-2030	2030-2031	2031-2032	Explanation
Short Title		Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Please be brief; reference specific narrative question for more detail.
New/expanded academic programs														
Physician Assistance Program Expansion	Transformative	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$376,069	\$376,069	\$376,069	\$376,069	Expansion of Physician Assistant program from 36 to 48 students to support the healthcare needs in the Commonwealth.
[Add lines & descriptions here]		\$0	\$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	\$0	
[Add lines & descriptions here]		\$0	\$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	\$0	
Other academic & student support strategies & initiatives														
Early Student Success System - SACSCOC	Equitable	\$93,537	\$0	\$93,537	\$0	\$197,074	\$0	\$197,074	\$0	\$290,611	\$384,148	\$477,685	\$571,222	Planned expansion of Early Student Success System as outlined in SACSCOC review to improve student retention, graduation rates and workforce readiness.
Academic/Student Support Initiatives	Affordable	\$815,619	\$250,000	\$565,619	\$0	\$835,832	\$250,000	\$585,832	\$0	\$1,185,832	\$1,535,832	\$1,885,832	\$2,235,832	
[Add lines & descriptions here]		\$0	\$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	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives														
O&M - Carrier Library (6 months)	Transformative	\$520,034	\$250,000	\$270,034	\$0	\$520,034	\$250,000	\$270,034	\$0	\$520,034	\$520,034	\$520,034	\$520,034	6 months of O&M for Carrier Library with construction scheduled to be completed January 2026.
[Add lines & descriptions here]		\$0	\$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	\$0	
[Add lines & descriptions here]		\$0	\$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	\$0	
Total Additional Funding Need		\$9,232,403	\$1,000,000	\$5,264,739	\$2,967,664	\$17,012,574	\$1,500,000	\$9,522,069	\$5,990,505	\$26,412,591	\$35,771,459	\$45,251,473	\$54,855,013	

Auto Check Match=0 (Must not be greater than incremental Tuit Rev in Part 2). If not match, please provide explanations

2026-2027	2027-2028
\$0	\$0

Part 5: Six-year Pro Forma Calculations: 2024-25 through 2031-32
James Madison University

Instructions: No new data needs to be added on this tab; it is entirely comprised by formulas. The top section pulls in data from the previous tabs to calculate a pro forma budget surplus/deficit for the 6 years. The following section calculates what T&F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 2024-25 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.

From FY25-FY32																Total Chg	Avg Annual Chg
Baseline Pro Forma Surplus/Deficit	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027 (Est.)	Chg	2027-2028 (Plan)	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	Chg		
Total E&G GF Revenue from Tab2, flat after 2027-28	197,416,301	196,752,705	0%	199,720,369	2%	202,743,210	2%	205,665,430	1%	208,752,546	2%	211,899,289	2%	215,106,830	2%	9%	1%
Tuition discount rate	8.3%	9.8%	1.5%	10.7%	0.8%	10.8%	0.1%	10.9%	0.1%	10.9%	0.0%	10.9%	0.0%	10.8%	0.0%	10%	1%
Total E&G NGF Revenue	282,999,214	294,476,146	4%	299,740,885	2%	303,998,215	1%	301,393,675	-1%	301,292,430	0%	300,959,306	0%	301,825,721	0%	7%	1%
Incremental E&G NGF Revenue vs. prior yr		11,476,932	%	5,264,739	-54%	4,257,330	-19%	(2,604,540)	-161%	(101,245)	-96%	(333,124)	229%	866,415	-360%	-92%	-13%
Total E&G Revenue	480,415,515	491,228,851	2%	499,461,254	2%	506,741,425	1%	507,059,105	0%	510,044,976	1%	512,858,595	1%	516,932,551	1%	5%	1%
Implied GF % of E&G	41.1%	40.1%	-1.0%	40.0%	-0.1%	40.0%	0.0%	40.6%	0.6%	40.9%	0.4%	41.3%	0.4%	41.6%	0.3%	4%	1%
Total E&G Expenditures	480,415,515	491,228,851	2%	499,461,254	2%	506,741,425	1%	516,141,442	2%	525,500,310	2%	534,980,324	2%	544,583,864	2%	13%	2%
Incremental E&G Expenditures vs. 2025-26		9,232,403	%	17,012,574	84%	26,412,591	55%	35,771,459	35%	45,251,473	27%	54,855,013	21%	64,459,526	17%	49%	7%
Reallocation of existing dollars (flat after 2027-28)				1,000,000	50%	1,500,000	50%	1,500,000		1,500,000		1,500,000		1,500,000	0%	50%	7%
Pro Forma Surplus/Deficit	-	-	%	-	%	-	%	(9,082,337)	%	(15,455,334)	70%	(22,121,729)	43%	(27,651,313)	26%	%	%
Incremental Surplus/Deficit	-	-	%	-	%	-	%	(9,082,337)	%	(6,372,998)	-30%	(6,666,395)	5%	(5,529,584)	-17%	%	%

What would a constant GF/NGF ratio at 2025-26 levels imply for T&F and GF increases?																Total Chg	Avg Annual Chg
	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	Chg		
GF % of E&G	41.1%	41.1%	0%	41.1%	0%	41.1%	0%	41.1%	0.0%	41.1%	0.0%	41.1%	0.0%	41.1%	0.0%	0%	0%
Implied incremental T&F increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	1.8%	1.8%	1.2%	-0.5%	1.3%	0.1%	1.1%	-0.2%	%	%
Implied incremental GF increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	1.8%	1.8%	1.3%	-0.6%	1.3%	0.0%	1.1%	-0.2%	%	%

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

	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	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%	%	0.0%	%	%	%
Implied incremental T&F increase (%)	0.0%	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%	%	0.0%	%	%	%
Implied GF % of E&G	41.1%	40.1%	-2.5%	40.0%	-0.2%	40.0%	0.1%	40.6%	1.4%	40.9%	0.9%	41.3%	1.0%	41.6%	0.7%	3.9%	1%

Part 6: General Fund (GF) Requests in 2026-2028 Biennium
James Madison University

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 4 and place it in bold print to draw attention to its connection to Part 6. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Note: If your institution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
1	Provide On-going Continuation Funding for Access & Affordability	Student Success	\$3,938,900	\$3,938,900	\$3,938,900	\$3,938,900	Request state general funds for the continuation of one-time FY 25 access and affordability operating funds. Narrative Reference A3 Priority 1.
2	Provide On-going Continuation Funding for Undergraduate Financial Aid	Financial Aid	\$968,000	\$968,000	\$968,000	\$968,000	Request state general funds for the continuation of one-time FY 25 financial assistance funds. Narrative Reference A3 Priority 1.
3	Provide On-going Continuation Funding to Expand Undergraduate Nursing Program - Fast Flex	Degree Pathways	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	Request continuation state general funds for the continuation of one-time FY25 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. Narrative Reference A3 Priority 1.
4	Support Growth for the Virginia Military Survivors and Dependents Education Program (VMSDEP)	Financial Aid	\$10,000,000	\$10,000,000	\$10,000,000	\$10,000,000	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 university is committed to partnering with the Commonwealth to bolster the long-term sustainability of this important program. Narrative Reference A3 Priority 1.
5	Provide On-going funding for SCHEV Financial Aid Grant - Pell Initiative	Financial Aid	\$0	\$0	\$628,720	\$628,720	Request general funds for the continuation of one-time SCHEV financial aid grants for need-based scholarship programs which are set to expire in fiscal year 2027. Provides full scholarships for 18 Pell/First-Generation students and an additional \$6,250 financial aid for 40 Pell eligible students. Narrative Reference A3 Priority 1.
6	Fund Operations and Maintenance of the Renovated and Expanded Carrier Library	OTHER (Operation & Maintenance)	\$1,019,674	\$520,034	\$1,019,674	\$520,034	Request twelve months of state general funds to meet the increased operating and maintenance expenses resulting from the expansion of Carrier Library. Narrative Reference A3 Priority 1.
7	Address Base Funding Disparity - Promote Student, Faculty and Staff Success	Student Success	\$12,640,369	\$12,640,369	\$13,706,387	\$13,706,387	The university is seeking to increase our per student base funding from the state. With additional state support, we would be able to improve outcomes, provide needed student services, student financial aid, and retain state workers. JMU receives the least amount of funding from the state on a per-student basis. While we continue to create incredible outcomes for our graduates, we are starting to see more pronounced challenges to student outcomes and faculty/staff retention due to our combination of relatively low state funding, lower than average tuition and a modest endowment. Narrative Reference A3 Priority 3.
8	Strengthen the Virginia Workforce Through Academic Programming - Health Care	Degree Pathways	\$1,311,216	\$1,311,216	\$2,149,307	\$2,149,307	The university requests state general funds to expand the Physician Assistance Program, Expand Doctor of Nursing Practice Program and expand Healthcare & Wellness programs with Graduate Certificates. Narrative Reference A3 Priority 4.
9	Strengthen the Virginia Workforce Through Academic Programming - Engineering	Degree Pathways	\$564,448	\$564,448	\$951,007	\$951,007	The university requests state general funds to expand capacity and retain students in the Engineering Program. The students in this program are highly sought by engineering consulting, construction and civil engineering firms. The program currently has more student interest than we are able to enroll. With this expansion, we can accommodate 150 additional students in the program. Narrative Reference A3 Priority 4.
10	Strengthen the Virginia Workforce Through Academic Programming - Education Quality	Degree Pathways	\$707,698	\$707,698	\$788,918	\$788,918	The university requests state general funds for the Center for Quality Education to support school engagement initiatives that are focused on the development of birth-12th grade educators and administrators, as well as recruitment and retention of quality personnel. The center will act as a conduit to align and coordinate efforts between initiatives to ensure that consistency and continuity remains seamless. Narrative Reference A3 Priority 4.
11	Strengthen the Virginia Workforce Through Academic Programming - Real Estate Program	Degree Pathways	\$0	\$0	\$364,241	\$364,241	The university requests state general funds to begin a new program in real estate. Nationwide demand for these programs is growing due to industry expansion and complexity. Offering specialized coursework which covers valuation, real estate finance and law would allow JMU to become known as a market leader in preparing skilled professionals for this career path. In support of the new Real Estate program, the College of Business anticipates receiving a gift to help initiate the proposal and provide scholarships for student support. Narrative Reference A3 Priority 4.

Part 6: General Fund (GF) Requests in 2026-2028 Biennium
James Madison University

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 4 and place it in bold print to draw attention to its connection to Part 6. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Note: If your institution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
12	Strengthen the Virginia Workforce Through Academic Programming - Agriculture Industry Studies & Research	Degree Pathways	\$0	\$0	\$1,648,103	\$1,648,103	The university requests state general funds for an Agriculture Industry Studies degree, offering a multidisciplinary approach to understanding the modern agricultural sector that combines business, technology, sustainability, science and public policy, with a focus on needs in the Shenandoah Valley. Funding will combine academics with the development of an Agriculture Research Center to enhance JMU's education and research engagement in this area. Narrative Reference A3 Priority 4.
13	Service Delivery & Web-based Technology Integration Project - ERP	Technology Infrastructure	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	Resource investment toward transforming and updating end-of-life enterprise systems and applications. One-time funding in each year of the biennium for ERP implementation expenditures to provide enhanced service delivery and data analytics while creating streamlined workflows and business processes. Narrative Reference A3 Priority 5.
			\$35,150,305	\$34,650,665	\$40,163,257	\$39,663,617	

Part 7: E&G Capital Requests in 2026-2028 Biennium
James Madison University

Instructions: Indicate E&G capital projects for which you anticipate making a request for state general fund in the 2026-28 biennium to complete a project. Projects should include planning costs and then funding for construction. Describe in the Notes column the justification, alternatives explored, and how the projects align with enrollment growth and facility condition index. If the project has other fund sources, please indicate source.

E&G Capital Projects Requests Biennium 2026-2028 (7/1/26-6/30/28) <input type="checkbox"/>										
Priority Ranking	Capital Project / Building	Category (Select best option from dropdown menu)	Facility Condition Index (for renovation projects only) if available	2026-2027			2027-2028			Notes/Explanation Please be brief; reference specific justification, alternatives and additional fund sources.
				Total Amount	NGF Support	GF Support	Total Amount	NGF Support	GF Support	
1	Johnston Hall Renovation and Expansion	Improvements-Life Safety Code	0.6161	\$28,750,000	\$0	\$ 28,750,000	\$0	\$0	\$0	Complete life-cycle renovation of 1929 building with addition to meet building/life safety code and accessibility standards. The renovation will also provide synergies with the Graduate Psychology program by providing office, classroom and lab space in one location. Planning for the project is complete and ready for the construction phase to begin.
2	Johnston Hall Renovation and Expansion Furnishings & Equipment	Improvements-Life Safety Code	0.6161	\$1,780,000	\$0	\$ 1,780,000	\$0	\$0	\$0	Furnishing and equipment for Johnston Hall is included in the same biennium, as planning for the project has already been performed. Construction completion and occupancy of the building will take place within the biennium.
3	College of Health and Behavioral Studies Expansion	New Construction		\$115,320,000	\$0	\$ 115,320,000	\$0	\$0	\$0	The expansion is to the original CHBS building from 2016. The 2016 new construction did not fully meet the university needs and the expansion will allow for enrollment growth in high demand professions such as: nursing, physician assistants, occupation therapist, etc. The space will allow for an innovative learning environment, including academic course work, research and modern laboratory space and classrooms.
4	Moody Hall Renovation and Expansion	Improvements-Life Safety Code	0.5130	\$49,130,000	\$0	\$ 49,130,000	\$0	\$0	\$0	Since its original construction in 1961, only a few renovations have been carried out. The upcoming renovation and addition aims to update the existing structure to meet current codes, be ADA compliance, and meet current building standards. This renovation and expansion will create modern classrooms, meeting rooms, and support spaces, provide space to house various departments of the College of Arts and Letters in a centralized location, consolidating programs that are presently dispersed throughout the campus.
5	Keezell Hall Renovation	Improvements-Life Safety Code	0.5442	\$37,270,000	\$0	\$ 37,270,000	\$0	\$0	\$0	Keezell Hall, which was originally built in 1927, has fulfilled various roles for the university. Situated on our historic Quad, the structure has undergone minimal renovations and improvements in the last 98 years. The planned renovations will encompass life-cycle upgrades to the building's systems, ensure ADA compliance, and accommodate offices and classrooms for the Philosophy, Religion, and Social Anthropology departments, along with the addition of a much-needed classroom that can hold 160 people.
6	Physics and Chemistry Building Addition	New Construction-Improvements		\$70,190,000	\$0	\$ 70,190,000	\$0	\$0	\$0	The project scope includes an expansion of the current Physics/Chemistry Building to house the College of Science and Math, along with general education classrooms and offices that will be moved from Roop Hall. This project was identified as a priority in both the 2017 Campus Master Plan update and the current 2027 Campus Master Plan update. This relocation aims to position these departments nearer to the ISAT campus, where there is a higher demand for these classes.
				\$302,440,000	\$0	\$302,440,000	\$0	\$0	\$0	

Part 8: Degree/Certificate Programs in 2026-2028 Biennium
James Madison University

Instructions: In the table below indicate which degree and/or certificate programs the institution plans to establish, grow, and close in the upcoming 2026-28 biennium. SCHEV's new degree program approval process will require all new degree programs for the upcoming biennium to be included in the Six-Year Plan table below.

Academic Degree/Certificate Programs Biennium 2026-2028					
Degree Designation	Program Name	Establish/Grow/Close	CIP Code	Anticipated Start/End Date	Explanation (please describe projected costs/savings from program establishment, growth, or closure)
BFA	Architectural Design	Establish	4.0201	Fall 2026 or Spring 2027	Resource neutral (already existing as a major)
BS	Agriculture Industry Studies	Establish	1.0100	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
GC	Communication, Advocacy and Social Justice	Establish	9.0900	Fall 2026	Resource neutral (self-sustaining): Administered through the School of Professional and Continuing Education
GC	Healthcare Administration Certificate	Establish	51.0701	Dependent on available resources	GF required. Administered through the School of Professional and Continuing Education Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3. Expand Healthcare & Wellness Programs with Graduate Certificates
MEd	Transition Services in Special Education	Establish	13.1099	Fall 2026	Resource neutral (already existing) due to current program structure (use of existing courses)
BA/BFA	Dance	Establish	50.0301	Fall 2026 (Earlier, if possible)	Resource neutral (already existing) due to current program structure (currently offered as a major)
MS	Data Leadership	Establish	11.0000	Fall 2029	Resource neutral (internal reallocation). Established cohort of UG Data Science graduates will provide baseline to establish the MS Data Leadership degree and supplement existing faculty resources
BS	Data Science	Establish	30.7001	Fall 2027	Resource neutral (internal reallocation) We have begun laying the groundwork for this anticipated program by reallocating resources. For example, a recent cohort hire included a faculty member qualified to teach in this area.
GC	Data Science	Establish		Fall 2026	Resource neutral (self-sustaining) Administered through the School of Professional and Continuing Education
BA/BS	Environmental Earth Science	Establish	3.0199	Fall 2025	Resource neutral (already existing) due to current program structure (currently offered as a major)
BFA	Graphic Design	Establish	50.0409	Fall 2026 or Spring 2027	Resource neutral (already existing) due to current program structure (currently offered as a major)
BS	Industrial Design	Establish	50.0404	Fall 2026 or Spring 2027	Resource neutral (already existing) due to current program structure (currently offered as a major)
BA/BFA	Musical Theatre	Establish	50.0509	Fall 2026 or Spring 2027	Resource neutral (already existing) due to current program structure (currently offered as a major)
GC	Nature-based Healthcare	Establish	51.3303	Dependent on financial viability and feedback on SYP initiatives	Resource neutral (self-sustaining) Administered through the School of Professional and Continuing Education

Part 8: Degree/Certificate Programs in 2026-2028 Biennium
James Madison University

Instructions: In the table below indicate which degree and/or certificate programs the institution plans to establish, grow, and close in the upcoming 2026-28 biennium. SCHEV's new degree program approval process will require all new degree programs for the upcoming biennium to be included in the Six-Year Plan table below.

Academic Degree/Certificate Programs Biennium 2026-2028					
Degree Designation	Program Name	Establish/Grow/Close	CIP Code	Anticipated Start/End Date	Explanation (please describe projected costs/savings from program establishment, growth, or closure)
GC	Nursing Certificate	Establish	51.3800	Dependent on financial viability and feedback on SYP initiatives	Resource neutral (self-sustaining) Administered through the School of Professional and Continuing Education
DPT	Physical Therapy	Establish	51.2308	Dependent on available resources and approval of a future SYP initiative request	GF required . A future SYP request will outline costs associated to initiate the DPT program. As healthcare disciplines require significant initial investments of capital, equipment, personnel, etc., and advanced degrees require a long development process, this degree is included to indicate our intention for the future of this program.
BS	Real Estate	Establish	52.1501	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
MSW	Social Work	Establish	44.0701	Dependent on financial viability and feedback on SYP initiatives	Resource neutral (self-sustaining) Administered through the School of Professional and Continuing Education pending outcome of program format (on-line, in-person or hybrid)
GC	Sport Coaching	Establish	36.0108	Fall 2026	Resource neutral (self-sustaining) Administered through the School of Professional and Continuing Education and self-sustaining
BFA	Theatre	Establish	50.0501	Fall 2026 or Spring 2027	Resource neutral (already existing) due to current program structure (currently offered as a major)
DNP	Nursing Practice	Grow	51.3818	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
BA	Engineering expansion	Grow	14.0101	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
BSN	Nursing	Grow	51.3801	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
MPAS	Physician Assistant	Grow	51.0912	Dependent on available resources and feedback on SYP initiatives	GF required. Detailed in SYP Part I: Tab 6: General Fund Requests and in Part II: Section A.3.
BA	Art	Close	50.0701	Fall 2025	Reallocation: Cost savings from this closure will be reallocated to support other academic programs
BS	Athletic Training	Close	51.0913	Fall 2026	Reallocation: Cost savings from this closure will be reallocated to support other academic programs
MS/MSEd	Health Education	Close	51.0000	Fall 2026	Reallocation: Cost savings from this closure will be reallocated to support other academic programs
MEd	Hearing Disorders	Close	51.0000	Fall 2026	Reallocation: Cost savings from this closure will be reallocated to support other academic programs