



**JAMES MADISON  
UNIVERSITY**

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## 2022 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: James Madison University

### OVERVIEW

The totality of the six-year plan should describe the institution's goals as they relate to state goals found in the *Pathways to Opportunity: The Virginia Plan for Higher Education*; the Higher Education Opportunity Act of 2011 (TJ21); and the Restructured Higher Education Financial and Administrative Operations Act of 2005.

The instructions under institutional mission and alignment to state goals, below, ask for specific strategies, in particular related to equity, affordability and transformative outcomes. Other sections will offer institutions the opportunity to describe additional strategies to advance institutional goals and state needs. *Please be as concise as possible with responses and save this narrative document with your institution's name added to the file name.*

### SECTIONS

**Section A. Pandemic Impact:** Briefly discuss, in one to two paragraphs, how the pandemic has impacted your institution. What things did your institution already have in place that proved helpful? What lessons were learned? What short-term changes have been made? What long-term changes will be made? What are the concerns moving forward?

### RESPONSE:

During JMU's move to online delivery necessitated by COVID, the university's established processes and technologies, operations generally continued successfully. JMU already delivered many online and hybrid classes and has multiple faculty who are experienced in multi-modal teaching, despite offering a majority of in-person courses. JMU benefited from several consolidated procedures that facilitated a complete move to operating virtually, ranging from centralized development of academic policies and resources to improve online teaching and learning to centrally-located decision-making regarding budgets.

As we think about the future, JMU anticipates growth in online courses and programs in identified areas where engagement and rigor are equal to or greater than that achieved during in-person classes. JMU will focus on creating additional virtual, online, and hybrid classes to reach non-traditional students and close the equity gap. We will make good use of the technology we have acquired to improve our course design and delivery. The university also plans to implement lessons learned about teleworking during the pandemic and deployment of that learning through policy and best practices.

**Section B. Institutional Mission, Vision, Goals, Strategies, and Alignment to State Goals:** Provide a statement of institutional mission and indicate if there are plans to change the mission over the six-year period.

Provide a brief description of your institutional vision and goals over the next six years, including numeric targets where appropriate. Include specific strategies (from Part 3 – Academic-Financial Plan and Part 4 – General Fund Request) related to the following state themes and goals:

- **Equitable:** Close access and completion gaps. Remove barriers to access and attainment especially for Black, Hispanic, Native American and rural students; students learning English as a second language; students from economically disadvantaged backgrounds; and students with disabilities.
- **Affordable:** Lower costs to students. Invest in and support the development of initiatives that provide cost savings to students while maintaining the effectiveness of instruction.
- **Transformative:** Expand prosperity. Increase the social, cultural and economic well-being of individuals and communities within the Commonwealth and its regions. This goal includes efforts to diversify staff and faculty pools.

Strategies also can cross several state goals, notably those related to improved two-year and four-year transfer, and should be included here. If applicable, include a short summary of strategies related to research. The description of any strategy should be one-half page or less in length. Be sure to use the

same short title as used in the Part 3 and Part 4 worksheets. If federal stimulus funds will fund activities and are included in Part 3 as reallocations, please note how they will be used.

**RESPONSE:**

**Institutional Mission**

We are a community preparing students to be educated and enlightened citizens who lead productive and meaningful lives.

**Institutional Vision**

To be the national model for the engaged university; engaged with ideas and the world.

**Institutional Strategic Priorities**

To align the management of fiscal, human, and material resources, JMU established *strategic priorities*. When the university is determining where to invest resources or how to assess performance, these priorities serve as the starting points for consideration.

*Priority #1 – Being the Change at Work and in the World*

We will be an innovative engine powering student lifelong learning and providing the skill sets and solutions that education, business, government, and other constituents have come to expect from JMU as we are truly being the change.

*Priority #2 – Advancing Diversity, Equity, and Inclusion*

We will advance access and affordability for students from all backgrounds, and we will champion and foster a welcoming and inclusive environment for faculty, staff, and students.

*Priority #3 – Attracting the Students of Tomorrow*

Our approach to enrollment management will be visionary and innovative, astutely anticipating national demographic trends, meeting community needs, and fueling Virginia's commitment to be the most well-educated state.

*Priority #4 – Recovering and Learning from COVID-19 in 2020-21 and Beyond*

As we join our local and regional communities, the commonwealth, and the nation in recovery from the impact of COVID-19, we will diligently restore systems and processes to optimum operation, improve policies and practices to prepare for future disruptions, and capitalize on continued innovation and new adaptations so that they become new-normal best practices.

**Academic & Financial Assistance Strategies**

VA Plan	Virginia Plan Strategies	JMU Six Year Plan Academic/Financial Strategies & General Fund (GF) Requests
<b>Goal 1 - Equitable: Close access and completion gaps</b>		
	1.1 Expand postsecondary opportunities and awareness to Virginians who may not view higher education as an option.	7. Additional Financial Assistance R/13. Establish a Lab School Within the College of Education A/10. Grow Your Own - Teacher Recruitment and Retention
	1.2 Advance digital access, adoption and literacy as well as high-quality, effective remote-learning programs.	
	1.3 Strengthen student support services for persistence and completion: mental health, mentoring, career services, social, student basic needs, information technology, disability support and other services.	8. Early Alerts: Improving Retention and Closing the Equity Gap GF3 Support Resources for Student Mental Health Services
<b>Goal 2 - Affordable: Lower costs to students</b>		
	2.3 Update and reform funding models and policies to improve equity, affirm return on investment, and encourage increased and consistent levels of state funding.	
	2.4 Foster program and administrative innovations that enhance quality, promote collaboration and improve efficiency.	R/15. Address Operational Costs, Inflationary Alignment & Strategic Initiatives
<b>Goal 3 - Transformative: Expand prosperity</b>		
	3.1 Support experiences that improve students' employment outcomes, income and community engagement.	12. Support Increased Research Activities and Opportunities GF1. Support Growing Commonwealth Healthcare Needs with Advanced Degrees
	3.2 Improve the alignment between post-secondary academic programs and labor market demands.	A/9,GF2. Implement and Grow a High-Demand Technology Degree
	3.3 Cultivate a climate of inclusion and innovation through scholarship, research, a diverse faculty and other programming.	6. Provide Targeted Institutional Instructional Faculty Promotions 14. Leverage Academic Affairs DEI Actions A/11. Establish an Innovation Center for Youth Justice

**Additional Financial Assistance (University Strategy #7)**

In 2021-22, the university met an average of 32% of remaining need for those with estimated family contribution (EFC) up to \$15,000 (approximately 3,083 students). For future strategies, we will continue investigating new programs to assist in the matriculation of low-income students and to provide additional support for middle-income students. Our primary goals are to annually increase the EFC used for grant

awards to equal 50% of the Cost of Attendance (COA) while working toward increasing the award to equal an average of 50% of remaining need. We have met the 50% of COA goal, but have work to do with the 50% of remaining need goal.

In order to reach more of the unmet need, the university will rely on a combination of state general fund support, institutional support, and private dollars. Additional institutional resources include funding for the Valley Scholars program for first-generation students, base budget expansion, and costs associated with tuition changes.

- FY 2022-23 \$0 salary + benefits + \$2,402,433 operating costs
  - Total Cost \$2,402,433
- FY 2023-24 \$0 salary + benefits + \$8,407,705 operating costs
  - Total Cost \$8,407,705

### **Early Alerts: Improving Retention and Closing the Equity Gap (University Strategy #8)**

There is a growing decline in the overall higher education retention rates for students from underrepresented groups: Black, Indigenous, Students of Color (BISOC); low-income; and first-generation college students, in addition to an increasing equity gap. JMU is creating a data-informed early alert advising system to improve retention rates for these segments of students. This formal, proactive feedback system will notify involved areas of issues related to targeted student segments so the appropriate staff and faculty can take action to intervene with personalized attention to student-specific needs.

- FY 2022-23 4.16 FTE, \$412,721 salary + benefits + \$131,000 operating costs
  - Total Cost \$543,721
- FY 2023-24 17.21 FTE, \$821,879 salary + benefits + \$171,842 operating costs
  - Total Cost \$993,721

### **Implement and Grow a High-Demand Technology Degree (University Strategy #A9)**

With an increasing number of innovative companies being established within the commonwealth, there is an ever-growing need for technical talent in Virginia's workforce. To meet this need, JMU finalized approval for and implemented a Bachelor of Science in Information Technology degree program that prepares students to serve as a link between computer technology and its users.

- FY 2022-23 4.30 FTE, \$435,000 salary + benefits + \$15,000 operating costs
  - Total Cost \$450,000
- FY 2023-24 4.30 FTE, \$435,000 salary + benefits + \$165,811 operating costs
  - Total Cost \$600,811

### **Grow Your Own - Teacher Recruitment and Retention (University Strategy #A10)**

Virginia continues to face a growing teacher shortage. To strengthen the teacher pipeline and to increase teacher retention, we will partner with the Virginia Community College System for a "Grow Your Own" initiative, a nationally recognized strategy for teacher recruitment and retention. The program creates pathways to increase access to quality teacher education for those from diverse geographic and demographic areas. Through this initiative, students entering JMU will receive high-quality support throughout their academic career, then induction support during their first three years of teaching.

- FY 2022-23 8.53 FTE, \$185,080 salary + benefits + \$1,730,288 operating costs
  - Total Cost \$1,915,368
- FY 2023-24 9.27 FTE, \$185,080 salary + benefits + \$2,044,626 operating costs
  - Total Cost \$2,229,706

### **Establish an Innovation Center for Youth Justice (University Strategy #A11)**

The university has aligned with the Robert F. Kennedy National Resource Center for Juvenile Justice to create the Innovation Center for Youth Justice (ICYJ). Based on our shared goal of equal and fair justice for all youth, we envision the proposed ICYJ as the national and international pacesetter in promoting positive transformation of policy and practice in youth justice systems. The ICYJ will feature field-based practice and policy innovation; partnerships with prominent juvenile justice leaders from across the country;

and a ground-breaking undergraduate minor curriculum featuring an internship program that will train the future workforce in transformative youth justice practice.

- FY 2022-23 1.84 FTE, \$56,913 salary + benefits + \$93,087 operating costs
  - Total Cost \$150,000
- FY 2023-24 1.84 FTE, \$56,913 salary + benefits + \$93,087 operating costs
  - Total Cost \$150,000

### **Support Increased Research Activities and Opportunities (University Strategy #12)**

JMU's evolution has included the growth of our doctoral programs, combined with over \$5 million in research expenditures. In response, Carnegie classified JMU as a Doctoral University: High Research Activity (R2) in 2022. This re-classification is a recognition of our ongoing faculty research, outstanding academic programs, and commitment to undergraduate and graduate students. To continue and adequately support our trajectory, we will support academic programs with additional faculty and increased doctoral assistantships. Other plans will strengthen the university's research infrastructure and increase the visibility of JMU scholarship.

- FY 2022-23 0.00 FTE, \$0 salary + benefits + \$0 operating costs
  - Total Cost \$0
- FY 2023-24 2.00 FTE, \$244,696 salary + benefits + \$19,729 operating costs
  - Total Cost \$264,425 Reallocation

### **Establish a Lab School within the College of Education (University Strategy #R13)**

Pursuant to the College Partnership Laboratory Schools Fund in the FY 2023 state budget, the JMU College of Education intends to apply for the planning grant to pursue the creation of two new college partnership laboratory schools to include: 1) The Lab School at JMU, in partnership with Rockingham County Public Schools; and 2) expansion of the Young Children's Program.

- FY 2022-23 Total Cost (Net Cost \$0/Grant Request & Institutional Reallocation)
- FY 2023-24 Total Cost (Net Cost \$0/Grant Request & Institutional Reallocation)

### **Leverage Academic Affairs DEI Actions (University Strategy #14)**

As an institution of higher education in the Commonwealth of Virginia, JMU shares a responsibility to address the lack of diversity and equity on campus. Academic Affairs has adopted an explicit, proactive *Anti-Racist and Anti-Discrimination Agenda* to cultivate and sustain institutional excellence through increased diversity efforts. Examples include expanding cohort hiring, reviewing budget allocations through an anti-racist and anti-discrimination lens, and increasing advising and support for BIPOC faculty and students to increase retention. There are also plans to diversify the curriculum through the support of interdisciplinary centers and increased curriculum development grants to cultivate and sustain institutional excellence through increased diversity efforts.

- FY 2022-23 1.00 FTE, \$94,462 salary + benefits + \$5,000 operating costs
  - Total Cost \$99,462
- FY 2023-24 1.00 FTE, \$94,462 salary + benefits + \$5,000 operating costs
  - Total Cost \$99,462

### **General Fund Request Strategies 2023-24**

#### **Support Growing Commonwealth Healthcare Needs with Advanced Degrees (University GF Strategy #1)**

##### *Online Accelerated Advanced Degree - Leadership in Health Care Systems (BSN to DNP)*

JMU has a thriving post MSN to DNP (Doctor of Nursing Practice) program. With this proposed online program, students with a BSN may complete the DNP with a focus on leadership in health care systems after three years. Strategic planning, program management, and interprofessional leadership are central to the curriculum, as is active participation in a virtual Simulation Laboratory where a dynamic learning environment mimics the acute care practice setting.

### *Online Certificate in Health Policy & Administration*

Healthcare workers in a variety of clinical fields, including Nursing, Occupational Therapy, and Physicians Assistant, frequently participate in developing policies and advocacy efforts for health-related issues. This post-baccalaureate certificate will be an interdisciplinary, flexible, cost-effective option for individuals to grow their knowledge and skills in health policy and administration development, advocacy, and analysis.

- FY 2022-23 0 FTE, \$0 salary + benefits + \$0 operating costs
  - Total Cost \$0
- FY 2023-24 11.97 FTE, \$1,165,324 salary + benefits + \$89,234 operating costs
  - Total Cost \$1,254,558

### **Implement and Grow a High-Demand Technology Degree (University GF Strategy #2)**

With an increasing number of innovative companies being established within the commonwealth, there is an ever-growing need for technical talent in Virginia's workforce. To meet this need, we established and implemented a Bachelor of Science in Information Technology degree program that prepares students to serve as a link between computer technology and its users. We anticipate this program to expand annually.

- FY 2022-23 0.00 FTE, \$0 salary + benefits + \$ operating costs
  - Total Cost \$0
- FY 2023-24 4.98 FTE, \$454,638 (GF) salary + benefits + \$150,811 (NGF) operating costs
  - Total Cost \$605,449 (GF + NGF)

### **Support Resources for Student Mental Health Services (University GF Strategy #3)**

Request resource investment in student mental health services. While we look forward to continuing to address mental health system-wide, many of our students are struggling now and we couldn't wait to act. We recently procured a virtual care service that provides students with free access to licensed counselors. JMU, Virginia Tech and Virginia Commonwealth University entered into a system-wide agreement for telehealth and tele-mental health services. As a part of the university's mental health programs, JMU is also providing faculty and staff with additional training to increase the understanding and awareness of mental health.

- FY 2022-23 0 FTE, \$0 salary + benefits + \$0 operating costs
  - Total Cost \$0
- FY 2023-24 0.00 FTE, \$0 salary + benefits + \$478,143 operating costs
  - Total Cost \$478,143

**Section C. In-state Undergraduate Tuition and Fee Increase Plans: Provide information about the assumptions used to develop tuition and fee information the institution provided in the Excel workbook Part 1. 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 institution's mission, market capacity and other factors.**

### **RESPONSE**

James Madison University was established as a college for teachers and is, today, the second largest producer of teachers in Virginia. The nursing program has grown tenfold since it started in 1980, and JMU continues to grow programs in the STEAM-H areas, giving undergraduates access to hands-on research opportunities and meeting the needs of tomorrow's workforce. For a third year in a row, JMU is the Best College for Getting a Job in Virginia. The institution prides itself on creating a culture of professionals with technical skills who can also think critically, reason ethically, and communicate proficiently.

In the last decade, JMU has answered Virginia's call to increase enrollment, providing access to more Virginians seeking a quality education at an affordable price. JMU's in-state undergraduate enrollment has grown 23%, almost 3,000 students, in the last ten years. This is the second highest growth among schools in the commonwealth.

While the university is very appreciative of funding received from the commonwealth, state appropriations for JMU have not kept pace with the institution's exponential growth. As of FY 2020-21, JMU receives the least amount of money per in-state full-time student from the commonwealth. The university receives 25%

(or \$2,050) less per in-state student than the average four-year public school in Virginia. In 2021-22, JMU transitioned its Carnegie Classification to a R2 Doctoral University. When compared to William and Mary, the only other institution currently classified as R2 in the state, JMU receives 39% (or \$4,021) less per in-state student.

JMU has previously offset the state funding disparity with out-of-state tuition revenue. An out-of-state enrollment decline from around 30% in 2010 to 21% in Fall 2021 has resulted in a significant revenue loss.

Despite financial pressures, JMU remains committed to keeping tuition affordable and maintains the fifth lowest tuition in the commonwealth. The institution is very grateful for the additional state support for FY 2023. An in-state tuition increase of 3.9% for the upcoming year was approved by the Board of Visitors at their April meeting. However, after receiving additional state resources, the board decided to revisit the tuition increase. The Executive Committee of the board met in June to approve a tuition decrease to 3% and to approve a one-time scholarship to cover the cost of the tuition increase to help keep costs down for families. While tuition will rise, the scholarship will offset the increase for all Virginia undergraduate students, essentially keeping their tuition flat in fiscal year 2023.

While the university continues to be impacted by substantial cost factors including compensation increases, high inflationary pressures, and operational and strategic investments, the university's priorities of access and affordability remain, along with the alignment of efficiency and fiscal stewardship to the university's mission, strategic plan, and goals.

However, a formula of relatively low state appropriations, decreasing out-of-state revenues, and very low in-state tuition is not a sustainable funding model. JMU wants to continue providing access and affordability, but without continued increased state support more equal to peer institutions, we may be unable to keep tuition down.

The university's proposed tuition and fees are based on planning assumptions including enrollment projections, the higher education market, and projected costs of university investments.

**Section D. Tuition and Other Nongeneral Fund (NGF) Revenue:** Provide information about factors that went into the calculations of projected revenue, including how stimulus funds may mitigate tuition increases.

#### **RESPONSE**

The university's proposed tuition and nongeneral fund revenues for both years of the 2022-24 biennium are based on financial modeling practices and assumptions, which include historical analysis, proposed tuition rates for student classifications, and enrollment projections (volume and demographic). At this time, revenue projections do not include stimulus funds due to their limited and one-time nature.

**Section E. Other Budget Items:** This section includes any other budget items for which the institution wishes to provide detail. Descriptions of each of these items should be one-half page or less.

#### **RESPONSE**

##### **Increase Institutional Instructional Faculty Salaries (University Strategy #1)**

Faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. The university is very appreciative of the commonwealth's support of instructional faculty compensation and providing the associated funding for the general fund costs for a five percent salary increase in both years of the FY 2022-24 biennium.

- FY 2022-23 \$6,127,148 salary + benefits
  - Total Cost \$6,127,148
- FY 2023-24 \$12,236,936 salary + benefits
  - Total Cost \$12,236,936

##### **Increase Institutional Administrative and Professional Faculty Salaries (University Strategy #2)**

Faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. The university is very appreciative of the commonwealth's support of Administrative and Professional faculty employee compensation and providing the associated funding for the general fund costs for a five percent salary increase in both years of the FY 2022-24 biennium.



- FY 2022-23 \$1,722,694 salary + benefits
  - Total Cost \$1,722,694
- FY 2023-24 \$3,517,470 salary + benefits
  - Total Cost \$3,517,470

**Increase Classified Salaries (University Strategy #3)**

The university is very appreciative of the commonwealth’s support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a five percent salary increase in both years of the FY 2022-24 biennium.

- FY 2022-23 \$2,786,854 salary + benefits
  - Total Cost \$2,786,854
- FY 2023-24 \$0 salary + benefits
  - Total Cost \$5,555,503

**Increase Adjunct Faculty & Graduate Assistantships Pay (University Strategy #4)**

The university is very appreciative of the commonwealth’s support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a five percent increase in both years of the FY 2022-24 biennium for adjunct faculty and graduate assistantship pay.

- FY 2022-23 \$439,055 salary + benefits
  - Total Cost \$439,055
- FY 2023-24 \$0 salary + benefits
  - Total Cost \$899,804

**Bonus Pay for Full-time Staff (University Strategy #5)**

The university is very appreciative of the commonwealth’s support of state employee compensation as faculty and staff compensation continues to be a challenge for the university and represents one of our most important areas of emphasis. With funding to support the general fund cost from the state, the university will provide a one-time bonus in December 2022 for full-time employees.

- FY 2022-23 \$2,500,710 salary + benefits one-time
  - Total Cost \$2,500,710 one-time
- FY 2023-24 \$0 salary + benefits
  - Total Cost \$0

**Provide Targeted Institutional Instructional Faculty Promotions. (University Strategy #6)**

Recognizing faculty who reach the highest levels of teaching and scholarship performance and achieve tenure within the academic ranks helps us to attract and retain high-quality professors. We plan to provide resources to acknowledge faculty promotions. The targeted faculty promotions are not across the board.

- FY 2022-23 \$491,872 salary + benefits + \$0 operating costs
  - Total Cost \$491,872
- FY 2023-24 \$983,744 salary + benefits + \$0 operating costs
  - Total Cost \$983,744

**Address Operational Costs, Inflationary Alignment, and Strategic Initiatives. (University Strategy #R15)** The university has allocated funding in both years of the 2022-24 biennium to provide resources for operational costs, inflationary costs and strategic initiatives. A summary of specific areas of investment includes:

*Service and Operational Costs and Inflationary Costs.* Additional resources for continued operations, minimum wage increases, and impacts of inflation across the university.

- FY 2022-23 11.00 FTE, \$936,498 salary + benefits + \$3,735,298 operating costs
  - Total Cost \$4,671,796
- FY 2023-24 11.00 FTE, \$936,498 salary + benefits + \$3,735,298 operating costs
  - Total Cost \$4,671,796

*University Strategic Plan Initiatives.* University investment in student mental health initiatives, disability services, information technology, data analysis, student recruitment, admissions, business processes, and future strategic plan strategies of emphasis.

- FY 2022-23 11.00 FTE, \$1,000,294 salary + benefits + \$2,544,457 operating costs
  - Total Cost \$3,544,751
- FY 2023-24 11.00 FTE, \$1,000,294 salary + benefits + \$2,544,457 operating costs
  - Total Cost \$3,544,751

*Phase I, Digital Transformation Project.* Additional resources will be required for annual technology costs for the university's digital transformation project. Funding to address on-going costs will be needed during the multiple phases of project implementation. This project will provide university-wide service delivery and web-based technology integration.

- FY 2022-23 0.00 FTE, \$0 salary + benefits + \$1,000,000 operating costs
  - Total Cost \$1,000,000
- FY 2023-24 0.00 FTE, \$0 salary + benefits + \$1,500,000 operating costs
  - Total Cost \$1,500,000

**Section F. Enrollment Projections:** Include in this section information about how your institution developed its enrollment projections, whether your institution is concerned about future enrollment trends, and, if so, what planning is underway to address this concern. How have enrollment plans been impacted by the pandemic? For example, does your institution plan on enrolling more online students?

**RESPONSE**

JMU's Director of Institutional Research and Enrollment developed these projections based on historical enrollment numbers, percentages, and ratios, which were informed by guidance from faculty, staff, and administrators with an understanding of factors that may affect future enrollment trends. Projections are initially based on the figures from the preceding year, as we have found past enrollment the best predictor of future enrollment. Given the unprecedented nature of Fall 2020, the projections for Fall 2021 and beyond used historical percentages and ratios from Fall 2019. We based this decision on the assumption that enrollment trends in Fall 2021 for groups including on-campus and off-campus students will more closely resemble pre-pandemic levels and are a better predictor of future enrollment. Additionally, given high deferral rates and larger than usual discontinuations due to concerns over the pandemic, we anticipate Fall 2021 to have a higher than usual number of transfer students and number of readmitted students than in a traditional year.

Since 2017, JMU has experienced a period of relatively flat enrollment, precipitated by a decision to slow the growth of entering classes to more realistically meet targets, and we expect to see overall enrollments remain consistent. The pandemic affected overall enrollment somewhat, mostly due to more first-year and upper-level students taking online courses, significantly decreasing the number of on-campus students enrolled overall. We expect many students who deferred or stopped out in Fall 2020 to enroll (or re-enroll) in Fall 2021. We also anticipate a return to a ratio of in-person to online courses more closely resembling that of Fall 2019. Thus, we project a bump in Fall 2021 enrollment as students who delayed attendance due to the pandemic enroll. After Fall 2021, we expect our enrollments to slightly decline, due largely to smaller than projected first-year cohorts from Fall 2017 to Fall 2020, before a period of modest growth later in this six-year period.

Although the university is not attempting to expand enrollments, any period of decline is concerning. We believe that factors such as shifting high school student demographics, increasing competition for out-of-state students, and the general uncertainties surrounding post-pandemic life are affecting first-year enrollments. As a result, we believe that a short-term increase in first-year in-state students, followed by a

period of fixed targets, will help to maintain enrollment near the levels seen previously. While increasing first-year in-state targets in Fall 2022, we have lowered future targets for out-of-state first-year students. These new targets are more realistic within the current higher education landscape, given the continued competitiveness for out-of-state students and lingering recruitment challenges relative to the pandemic. While the institution may see a brief period of lower undergraduate enrollments, we anticipate an upward trend returning by FY25, driven largely by increasing our graduate enrollment and professional and continuing education programs. Increasing the first-year in-state enrollment targets while concurrently lowering targets for first-year out-of-state enrollments acknowledges the growing challenges in enrolling this demographic and illustrates our commitment to educating Virginia's residents.

While the anticipated number of Virginia high school graduates remains relatively stable through 2024, the geographic area where JMU recruits will see a decline. The university is identifying strategies to distinguish high schools in new geographic areas and develop relationships, as well as exploring new scholarship strategies. Marketing what makes the university unique and the success of our graduates will be key to encouraging students to consider JMU. In addition, JMU will begin participation in the Common App beginning Fall 2021.

JMU is also addressing projected enrollment declines by emphasizing increasing student success outcomes. For Fall 2022, JMU is planning initiatives to increase its already strong first-to-second year retention rates, which have seen mild declines over the past several years. As JMU approaches its Southern Association of Colleges and Schools Commission on Colleges reaffirmation, we have created a Quality Enhancement Plan focused on improving the retention of at-risk students. *Early Alerts: Improving Retention and Closing the Equity Gap* is a data-informed, formal, proactive, feedback system that sends notifications about targeted student segments to JMU practitioners who can take action to intervene. This comprehensive system, currently in the first phase of development, will assist in reversing the decline in the overall retention rates and narrow the equity gap observed for students from underrepresented groups; Black, Indigenous, Students of Color (BISOC); low-income; and first-generation college students at JMU. *Early Alerts* is anticipated to be fully implemented by Fall 2023. The university can bolster enrollments by retaining more current students, thus off-setting the need to increase first-year student cohorts more than necessary.

**Section G. Programs and Instructional Sites:** Provide information on any new academic programs, including credentials and certificates, new instructional sites, new schools, or mergers supported by all types of funding, that the institutions will be undertaking during the six-year period. Note that as part of the revised SCHEV program approval process, institutions will be asked to indicate if a proposed new program was included in its six-year plan. Also, provide information on plans to discontinue any programs.

## **RESPONSE**

### **Anticipated Academic Proposals**

- African, African American, and Diaspora Studies graduate certificate
- Applied Behavioral Analysis, MA
- Applied Nutrition, MS (in progress)
- Business Law undergraduate certificate
- Civic Engagement undergraduate certificate
- Communication Sciences and Disorders, BA and BS (in progress)
- Computer Science, graduate certificate
- Dance, BA (in progress)
- Data Science, graduate certificate
- Environmental Earth Science, BA and BS (in progress)
- Educational Leadership, EdD (in progress)
- Health Analytics, BS
- Health Policy and Administration, post-bac certificate
- Health Sciences, BS (in progress)

- Industrial Design, BFA (in progress)
- Integrated Biomedical Sciences, MS
- Leadership in Health Care Systems, post-BSN to DNP
- Management, MS
- Media Arts and Design, BA and BS
- Multidisciplinary Studies, BA/BS
- Music, BA (in progress)
- Musical Theatre, BA Philosophy and Religion, BS
- Social Work, MSW
- Women, Gender, and Sexuality Studies, BS

**Anticipated New Instructional Sites, Schools, or Mergers**

- None

**Section H. Financial Aid:** Discuss plans for providing financial aid, not including stimulus funds, to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families, including the projected mix of grants and loans. Virginia’s definitions of low-income and middle-income are based on HHS Poverty Guidelines. A table that outlines the HHS guidelines and the definitions is attached.

**RESPONSE:**

The university is very appreciative of the state’s commitment to providing additional general funds for student financial assistance in the 2020-22 biennium. These additional state resources continue to provide opportunities for our students, supporting state and institutional goals for access and engagement.

In 2008-09, the percentage of undergraduate students receiving a Federal Pell Grant was 9.5%. We are striving to increase this number to help attract and assist more low-income students in attending JMU. While we have been successful in doing so, our efforts in this area will continue. The percentage of undergraduate students receiving a Federal Pell Grant for the three most recent award years is:

- 2021-22: 15.4%
- 2020-21: 15.3%
- 2019-20: 15.2%

If we just look at the percentage of in-state undergraduate students receiving a Federal Pell Grant, that figure was 11.5% in 2008-09. For the three most recent award years the figures are:

- 2021-22: 17.4%
- 2020-21: 17.8%
- 2019-20: 17.9%

By leveraging the Federal Pell Grant, VSFAP program, and institutional dollars, we have the ability to impact low income in-state students more than out-of-state students. As a result, our primary efforts in providing additional grant dollars to low income students focuses on in-state residents.

We are providing resources to assist low-income students and dedicating more resources toward middle income families. Our long-term plan for Virginia undergraduates who qualify for the Virginia Student Financial Assistance Programs (VSFAP) has two components.

The first is annually increasing the EFC cutoff used to determine VSFAP eligibility to equal 50% of the Cost of Attendance (COA). That goal was met in the 2021-22 award year.

The second has been to provide a VSFAP grant (or equivalent) equal to 50% of a student’s remaining need. However, that goal was modified beginning with the 2021-22 award year. In 2021-22, the average remained at 32% for all eligible students. Instead of increasing the grant percentage for all students above 32%, an additional University Grant of \$2,000 was offered to students receiving a Pell Grant and VSFAP award. While the overall percentage used in the remaining need calculation remained unchanged, this population

of students received an increase in their total grant package compared with prior years. This provided higher institutional resources to low-income students (Pell Grant) than to other groups of students.

Moving forward, the \$2,000 University Grant philosophy will remain intact. In 2022-23, the average remaining need grant percentage increased to 33%, which is a percentage point above the prior year. The percentage breaks down as follows:

- Commonwealth Award = 31%
- VGAP Freshmen = 32%
- VGAP Sophomore = 33%
- VGAP Junior = 34%
- VGAP Senior = 35%

JMU awards financial aid based on the U.S. Department of Education’s Federal Methodology (FM). FM is used in all of JMU’s aid packaging that includes institutional, state, and federal funding. Data elements other than household income are considered to determine the amount of aid a student is eligible for, including household size, number of family members in college, assets of students and parents, and Adjusted Gross Income. Consequently, some families whose household income falls into the high- or middle-high income ranges may receive need-based aid because of the combination of data elements considered in the formula.

James Madison’s financial aid packaging processes and procedures target the neediest enrolled applicants, as required under state and federal law. Based on the Health and Human Services poverty levels<sup>11</sup>, about 37-41% of JMU’s enrolled undergraduate applicants for federal financial aid fall into the low- and middle-income range. The tables below reflect all applicants (Table 1) and applicants who are active students (Table 2).

**Table 1. All Applicants**

Applications for Financial Aid by Income Level			
Undergraduates			
Income Level	2020-21	2021-22	Projected 2022-23
Low Income	16%	16%	16%
Middle Income	22%	21%	21%
High Income	62%	63%	63%

**Table 2. Active Students**

Active Students for Financial Aid by Income Level			
Undergraduates			
Income Level	2020-21	2021-22	Projected 2022-23
Low Income	17%	17%	17%
Middle Income	24%	23%	24%
High Income	59%	60%	59%

James Madison University uses institutional, state, and federal funding to help mitigate the effect of rising college costs on students from low- and middle-income families. Our definition of low-income and middle-income within the financial aid plan is as follows:

- A. Low Income Students in 2021-22 (In-state):
  - Definition = Expected Family Contribution (EFC) of \$0 – \$5,846 (Pell Grant eligible students)

- Number of students receiving aid from institutional dollars = 1,912
- B. Middle Income Students:
  - Definition = Expected Family Contribution (EFC) of \$5,847 - \$15,000
  - Number of students receiving aid from institutional dollars = 1,171

For 2022-23, the EFC cutoff for awarding VSFAP and university grants to on-time, in-state, and undergraduate financial aid filers will be \$15,500. This is an increase to the \$15,000 EFC used in 2021-22.

**Section I. Capital Outlay:** Discuss the impact, if any, that the pandemic has had on capital planning, such as decreasing the need for space or other aspects. Provide information on your institution’s main Education and General Programs capital outlay projects, including new construction as well as renovations that might be proposed over the Six-Year Plan period that could have a significant impact on strategies, funding, student charges, or current square footage. Do not include projects for which construction (not planning) funding has been appropriated. *Special Note: The requested information is for discussion purposes only and inclusion of this information in the plans does not signify approval of the projects.*

**RESPONSE:**

JMU re-evaluated its prioritization of capital projects in light of the pandemic, which is reflected in the capital six year plan. The impact of the pandemic and physical distancing requirements has shown it is essential that our existing and new spaces be flexible to better serve our students. We must also develop functional exterior spaces adjacent to buildings for collaboration and outdoor teaching opportunities. The six year capital outlay plan focuses on renovations and upgrades to existing building systems to meet the air exchange and filtration requirements recommended by CDC and ASHRAE. The goal is to provide students, faculty, and staff spaces that align with the university’s strategic plan while integrating their technology, health, and safety needs.

The following projects are included in the university’s six year capital outlay plan and are top priorities for the university:

***Education & General Projects***

- East Campus Infrastructure Phase 2 – Plant Upgrades \$38,500,000 (GF & NGF)
  - o The university purchased the East Campus Power Plant from the City of Harrisonburg in May 2017. The plant provides steam and chilled water to East Campus and provides the opportunity to increase capacity for the entire campus to meet current needs and planned future development. Phase 1 of the project was an emergency amendment included in Chapter 552 to replace existing boiler and chiller equipment that was at end of life and at risk of catastrophic failure that would have resulted in the need to shutter buildings. Phase 2 includes renovating 93,030 gross square feet (gsf) of the existing steam plant with an 11,000 gsf of additional space. The additional space will be used to add an 80,000 pph boiler that will expand the steam plants capacity from 180,000 pph to 250,000 pph, which will cover existing and proposed future loads of the university. Total project cost for this phase includes \$26,950,000 in general funds and \$11,550,000 in bond funding. This project was approved in Chapter 2, 2022 Special Session I.
  
- Carrier Library Renovation and Expansion \$95,725,000 (GF & NGF)
  - o Originally constructed in 1938, Carrier Library does not meet today’s basic life safety, circulation, and accessibility standards. As a part of the university’s master plan, a third party concluded that our current library facilities are inadequate to serve current and future user populations. Adequate library facilities are necessary to support the academic mission of the university. Additions were completed in 1969, 1980, and 1991, but there have been no comprehensive renovations in the last 80 years. This project proposes upgrades throughout the entire 121,200 gsf of building systems to include fire protective systems, upgrades to the existing fire wall separations, life safety and ADA-driven improvements to student circulation, and egress to be accomplished through efficient use of existing space. The project will also provide 69,300 gsf of additional space to transform the library from a traditional warehouse of print collections to the campus main gathering space for collaboration and technical research

through access to digital resources. Planning and construction costs (excluding furnishings and equipment) includes \$94,625,000 in general funds and \$1,100,000 in Higher Education Operating Funds. Currently, the university has approval to work through detail planning. This project was approved to move into construction in Chapter 2, 2022 Special Session I.

- Johnston Hall Renovation \$17,919,000 (GF)
  - o Johnston Hall was originally constructed in 1929 as a residence hall and converted into faculty offices in the early 1970s. Significant modifications are required to meet program requirements, building code standards, and ADA accessibility requirements. The project proposes upgrades throughout the entire 26,272 gsf of building systems to include fire protective systems and life safety and ADA-driven improvements. After renovation, Johnston Hall will continue to provide faculty offices, labs, and multiuse instructional spaces that will better serve the student, faculty, and staff using the academic building. The total project costs include planning and construction costs (excluding furnishings and equipment).

### ***Auxiliary Projects***

- Village Student Housing Phase 1 \$60,000,000 (NGF)
  - o Currently, the Village student housing consists of nine buildings located in the center of campus that were constructed between 1966-73. The finishes and buildings systems have exceeded their normal life cycle and are inadequate to meet the needs of the students, as no significant renovations have occurred. The proposed Phase 1 will replace approximately 500 beds to meet current building codes and CDC and ASHRAE recommendations as well as meet the modern-day expectations of technology, study rooms, learning spaces, and food services. The project will replace the \$49,000,000 renovation of Eagle Hall that was approved in 2019. Total project cost (including furnishings and equipment) for this phase includes \$49,000,000 in bond funding and \$11,000,000 in Higher Education Operating Funds. This project was approved in Chapter 2, 2022 Special Session I.

**Section J. Restructuring:** Provide information about any plans your institution has to seek an increased level of authority, relief from administrative or operational requirements, or renegotiation of existing management agreements.

### **RESPONSE:**

After many years of progressive delegated authority and as part of the university's financial strategic planning process, James Madison University entered into a management agreement with the Commonwealth of Virginia and received Level III delegated authority effective February 2019. The university continues its commitment to leveraging and utilizing the delegated authority opportunities under our current management agreement. In fiscal year 2022, the Joint Legislative Audit and Review Commission (JLARC) reviewed JMU's compliance with its management agreement as required by §23.1-1007 of the Code of Virginia. Per the June 8, 2022 report,<sup>2</sup> "JMU is operating its business functions consistent with the terms of its management agreement and meeting nearly all relevant business function performance standards."

**Section K. Evaluation of Previous Six-Year Plan:** Briefly summarize progress made in strategies identified in your institution's previous six-year plan. Note how additional general fund support and reallocations were used to further the strategies.

### **RESPONSE:**

Along with all other higher education institutions in Virginia, JMU was confronted with many financial and operational challenges in FY21. University resources were constrained due to the pandemic; however, early planning, budget restructuring/reductions, fiscal conservatism, and increased state general funds allowed JMU to remain focused on continuing academic success and student access, as well as provide for the health and well-being of faculty and staff. There is much optimism for FY22 due to planned continued investments in the commonwealth's workforce with pay increases and continued institutional support in university opportunities to advance the state and institutional goals.

## Academic Budget Strategies

JMU appreciates the support we received from the commonwealth during the uncertain times of the last year. Our focus during the pandemic was matching innovation to current needs, allowing us to maintain – and in some cases, exceed – the high-quality experiences that JMU students are accustomed to in and outside of the classroom. General funds were used to support operations, primarily in response to COVID-19. With limited nongeneral fund revenues and a reduction in out-of-state student enrollment, the state's assistance was supplemented by internal re-allocations. Tech Talent funding was successfully used to support our growing Computer Science programs, with resources providing new faculty lines and the ability to make needed renovations for the academic program. Funding related to the Online Virginia Network (OVN) allowed JMU to fill needed gaps related to our development of virtual teaching. OVN funding is also being used to investigate and identify those academic areas that have been neglected with the intent of targeting programs where they are most needed.

- **Increase Access Through Virtual Learning and Alternative Credentials.** JMU's traditionally residential academic programming provides an engaged learning experience facilitated by teaching-focused faculty, experiences we are committed to providing virtually to increase access to JMU and broaden the opportunity and social mobility afforded by higher education. We are maximizing the delivery of high-quality online courses, certificates, and degree programs in targeted, high-need areas by developing innovative programming at the undergraduate, master's, and doctoral levels, largely in cooperation with the Online Virginia Network (OVN).
- **Address Academic and Institutional Support Resource Needs.** The student-to-faculty and student-to-staff ratios are in line with stated objectives. Strategic efforts to reallocate resources have allowed the university to remain focused on quality of classroom instruction and student services.
- **Improve Student Success and Timely Degree Completion.** JMU established the *Dukes Succeed!* program, an academic support program for undeclared, first-year students on academic probation following their first semester of JMU enrollment. The university officially launched a two-week winter session to the academic calendar after four years of pilot trials. *Transferology* was implemented to assist students and advisers in finding degree applicable transferable credit from other schools to JMU. JMU created two new online teacher licensure tracks in early childhood education and elementary education in the Adult Degree Program and worked with the Veterans Benefits Coordinator to continue to have multiple JMU programs approved for VA Benefits.
- **Establish the Libraries as an Innovative Learning and Creativity Nexus.** The Libraries enabled cross-disciplinary connections and fostered creative exploration and innovations in digital research and scholarly communication, as well as advanced teaching and learning by partnering with faculty to bring the Libraries' resources and expertise to students and produce and offer more affordable course materials. Libraries also undertook a process of reorganization to optimize their staffing and services. No additional funds were allocated to the modifications listed here, with the exception that Libraries became part of a VIVA pilot project to provide free digital textbooks for all available titles being taught by our faculty in academic year 2020-21.
- **Emphasize Innovation, Creativity, Collaboration and Entrepreneurship.** We created a ChangeMaker task force that identified ways in which we could bring an entrepreneurial mindset broadly into the curriculum. We have been working with sister schools in Virginia on projects funded by the Commonwealth Cyber Initiative (CCI). To date, approximately \$500,000 has been received to fund CCI efforts. We continue to offer course work in virtual and augmented reality.
- **Increase Graduates in Strategic Talent Areas (Performance Plan).** We have grown our Computer Science program with the help of funding from the Tech Talent initiative (8% increase in majors between 2018 and 2020). A data analytics minor began enrolling students in Fall 2019 and has since graduated 12 students (two in May 2020 and 10 in May 2021); there are currently 48 students in this program. We continue to offer summer workshops for K-12 teachers in cyberhygiene and cybersecurity, though workshops were put on hold in Summer 2020 due to the pandemic. JMU continues to sponsor the First Lego League robotics competition for K-12 students and provides workshops for teachers interested in participating.



- **Expand Cyber Intelligence Program.** Since this certificate began in 2018, enrollment and completion of this certificate has grown. We have invested \$60K of internal funds over the last two years to complete the curriculum development and broaden the marketing and recruiting.
- **Address Teacher Shortages in Virginia.** The College of Education is partnering with VDOE and Virginia State University in a Teacher Induction Program that supports 750 first- and second-year teachers, including a large number of STEM teachers. This initiative is focused on retention of teachers due to both the teacher shortage and COVID-19 pandemic, and it is approximately \$650K.
- **Grow Digital Design Programs in Emerging Disciplines.** Absent new faculty lines, the College of Visual Performing Arts reallocated several one-year positions and added adjunct funding for Graphic Design and Architecture Design, the most in-demand programs in the college. Through budget reallocations in the College of Arts and Letters (CAL), we have invested in staffing and equipment for the Wilson Hall History Studio, a prominent digital creation space containing a podcast studio and equipment for digital humanities work. We have also hired two assistant professors with expertise in digital humanities, one in English and another in History, as part of CAL's recent cohort hire.
- **Emphasize Community Involvement.** The Center for Music Engagement (CIME) was given funding of \$3,000 per year from the CVPA budget and coverage for 1-2 course releases per year from the School of Music to support their ongoing projects and the development of new projects. CIME also received an endowment and expendable gift worth \$125,000 in total. Enrollment in the Honors program has grown by 50%. The curriculum was restructured to include options for individual pathways for learning and completion. The Honors College reallocated funding to hire an Associate Dean for Diversity, Equity, and Inclusion. The James Madison Center for Civic Engagement had a leadership role in ensuring an accurate count for the 2020 Census in the local community. The center organized 11 town halls which brought presidential candidates and surrogates, as well as candidates for US Senate, House, and City Council from across the political spectrum into conversation with students and community members leading up to the election. Each event was moderated by students and broadcast on Facebook Live, thus expanding the reach and inclusivity of our programs. These events were coupled with the distribution of voter registration and nonpartisan education materials to promote learning and action.

#### **Other Budget Strategies:**

- **Provide Additional Undergraduate Student Financial Aid.** The long-term plan for Virginia undergraduates who qualify for the Virginia Student Financial Assistance Programs (VSFAP) has contained two components. The first was to annually increase the EFC cutoff used to determine VSFAP eligibility to equal 50% of the Cost of Attendance (COA). That goal was met in the 2021-22 award year. For 2021-22, the EFC cutoff for awarding VSFAP and university grants was \$15,000. This is an increase to the \$14,000 EFC used in 2020-21 and \$12,000 EFC used in 2019-20. The second has been to provide a VSFAP grant (or equivalent) equal to 50% of a student's remaining need. However, that goal has been modified beginning with the 2021-22 award year. In 2021-22, the average will remain at 32% for all eligible students. Instead of increasing the grant percentage for all students above 32%, an additional University Grant of \$2,000 will be offered to students receiving a Pell Grant and VSFAP award. While the overall percentage used in the remaining need calculation will remain unchanged, this population of students will receive an increase in their total grant package compared with prior years. This focuses a higher amount of institutional resources on low-income students (Pell Grant) than on other groups of students.

JMU has received student emergency aid from the Coronavirus Aid, Relief, and Economic Security Act (CARES) and the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA). Both of these funds were used in two capacities:

- o Offering block grants to students with EFC's below a specific threshold (this included all Pell Grant students).
- o Allowing students who did not qualify for the block grant offer to appeal for assistance based on their qualifying circumstances.

It should be noted the CARES and CRRSAA funds cannot be included as part of a student's regular financial aid package, and the funds are non-renewable in the future. These were one-time awards.

- **Increase Institutional Instructional Faculty, Administrative and Professional (A&P) Faculty and Classified Salaries.** Faculty and staff compensation remained a top priority for the university administration and employees. In FY22, with state assistance, the university provided an average 5% salary increase for Instructional Faculty and Administrative and Professional Faculty and a 5% increase for classified employees.
- **Operation and Maintenance - New Facilities.** The expanded College of Business academic building opened April 2020. This facility included 216,763 gross square feet of classrooms, faculty offices, and meeting/conference space and a ground-level food venue. Twelve months of additional operation and maintenance costs have been funded in the FY20-22 biennium.
- **Address Nongeneral Funds for Current Operations.** Additional state and institutional resources were required for cost-to-continue needs, such as increases in wages, Virginia Retirement System rates and medical insurance premiums over the biennium period.

**Section L. Diversity, Equity and Inclusion (DEI) Strategic Plan:** Provide an update on the completion status of your institution's plan that is being coordinated with the Governor's Director of Diversity, Equity and Inclusion. If a copy of the plan is available, please include it when your institution submits its initial plan. If a copy of the plan is not available for July 1 or if changes are made, please provide a copy with your institution's final plan submission on October 1.

#### **RESPONSE**

Diversity, equity, and inclusivity have long been core elements of JMU's strategic planning process. Diversity was a stated central university value and has been one of our principle defining characteristics since the 1990s. Our focus was sharpened when the university introduced its updated strategic plan in July 2020, where issues of diversity are integrated throughout.

A task force, led by the Vice President for Access and Enrollment, created JMU's *Diversity, Equity and Inclusion (DEI) Strategic Plan*, which was specifically created in coordination with the Governor's Director of Diversity, Equity, and Inclusion. That plan was submitted on October 1, 2021.

**Section M. Economic Development Annual Report:** Provide a copy of any report your institution has produced about its economic development contributions.

#### **RESPONSE**

Included and posted for review are:

- [2022 JMU University Economic Development Council Summary Report](#)
- [The REV Initiative 2021; 2022 Update: Initiative funded by the Economic Development Administration October 2021](#)
- [2022 HERD Survey](#)

**Section N. Freedom of Expression and Inquiry, Free Speech, Academic Freedom and Diversity of Thought:** Provide a copy of any reports your institution has produced and provide information about annual training or orientation related to this topic.

James Madison University is committed to supporting freedom of expression and inquiry, free speech, academic freedom, and diversity of thought for faculty, staff and students. Free speech and civil discourse are discussed as important values in a variety of student, faculty, and staff orientation sessions, and the campus community is regularly educated about the rights guaranteed by the First Amendment. In conjunction with other Virginia public institutions of higher education, JMU is also currently exploring additional educational sessions and initiatives on this topic.

These rights are codified in policies and practices throughout the university, as detailed below, as well as through

- JMU's overarching university policy regarding speech that is constitutionally protected as well as the process to report incidents of disruption of such constitutionally protected speech is available online at <https://www.jmu.edu/jmu-policy/policies/1121.shtml>. The policy states:
  - “The university encourages civic engagement, including vigorous and civil discourse and debate on topics of public interest, both on and off campus... Nothing is more central to the concept of engagement in the higher education setting than free expression and civil discourse.”
- [Policy 1209. Electronic Messaging](#) details the responsibilities and principles directing the use of JMU's electronic messaging systems, both internally and as part of the global electronic community. It includes a section on message content that specifies, in part, “the university will not regulate messages based on content or views expressed by the sender or implied by the receipt.”
- [Policy 1508. Media Relations and Social Media Publishing](#) states that university employees are to make clear whether they are speaking as private citizens or as a university representative in all public communications.
- [Policy 1323. New Employee Orientation](#) specifies that “New employees are required within 30 days of hire to electronically acknowledge their awareness of all university policies and agree to adhere to them.”
- The [Faculty Handbook](#) opens by stating, “The primary functions of an academic community – learning, teaching, scholarship, and professional service – must be characterized by a fundamental commitment to academic freedom and maintained through reasoned discourse, intellectual honesty, mutual respect, and openness to constructive criticism and change. Faculty members, as central to this community, serve as scholars pursuing the search for knowledge and its free expression, as teachers instructing students, and as professionals and citizens contributing special knowledge and skills through professional service and community participation. In the performance of all these functions, faculty members are held accountable to the university in accordance with state and federal laws and with policies and procedures established by the BOV, which is responsible to the people of the Commonwealth of Virginia” (III.A.1. Introduction). The handbook goes on to define academic freedom and its importance at JMU.
- Faculty's right to exercise academic freedom carries with it concomitant responsibilities, including but not limited to:
  - o III.A.2.b.(5) A faculty member must be respectful of others, including students, colleagues, other university employees and those outside of the institution, and must consider and evaluate others' ideas, theories and arguments in a fair-minded way.
  - o III.A.2.b.(9) A faculty member must strive to communicate concepts, knowledge, theory, data, and all other information and ideas clearly and accurately.
  - o III.A.2.b.(10) A faculty member engaged in instruction must not act to deprive their students of the exercise of academic freedom and must teach the responsibilities that go with such freedom.
  - o III.A.2.b.(11) A faculty member engaged in instruction must refrain from interjecting material that serves no pedagogical purpose into their teaching.
  - o III.A.2.b.(22) A faculty member must act professionally in voicing any legitimate criticism of the university.
  - o III.A.2.b.(24) A faculty member must make it clear when he or she is speaking or writing as a private citizen or expert in an area of expertise and when he or she is speaking or writing as an official representative of the university.
- The [University Counsel website](#) provides resources related to freedom of speech. In addition, attorneys in this office regularly consult with university employees, including administrators, faculty, and the student conduct office, with regard to the First Amendment and its application to JMU.
- Various policies within the Division of Academic Affairs detail requirements related to academic freedom and freedom of speech for faculty and students. For example, [AA policy 12. Disruption of Class](#) states, “Civil expression, disagreement or debate as permitted within the class as permitted by a

faculty member is not, in itself, disruptive behavior and is not prohibited” and “faculty members are also responsible for protecting their students in the exercise of their academic freedom and for teaching them the responsibilities that go with such freedom.”

- One of JMU’s primary initiatives is the [James Madison Center for Civic Engagement](#), with a mission “to educate and inspire people to address public issues and cultivate a just and inclusive democracy.” A key action of the center is to “provide resources for students to learn about and discuss public issues in an academic environment, and to develop and implement plans for informed participation in civic life,” with an emphasis on “values that embrace pluralism, open-mindedness, empathy, respect, diversity and inclusion.” At the national level, JMU and the Madison Center are heavily engaged in discussions about how to incorporate free speech issues, debate, and civic discourse in and outside the curriculum.
- The JMU Debate Program is one of the preeminent debate programs in the nation with consistent top 10 finishes in the national rankings and consistent recognitions as one of the top public debate teams in the nation. Debate Across the Curriculum (DxC) works with faculty members to incorporate the skills of debate based on facts, evidence, and research into their pedagogy for all academic disciplines and has engaged over 40 faculty in high impact learning practice integration in courses across the university. DxC has also worked with universities across the state and with partners in the Colonial Academic Alliance. These efforts strive to bring in students and faculty from a wide range of disciplines and backgrounds and place free and open inquiry at the center of their efforts.
- The [Student Handbook](#) specifies students’ rights and responsibilities, including “The student, as a citizen, has the rights of freedom of speech, freedom of the press, freedom of peaceful assembly and association, freedom of political beliefs and freedom from personal force and violence, threats of violence and personal abuse. In keeping with the right to freedom of speech, the University has adopted [policy 1121](#) that fully describes this right and how to file complaints if the student feels freedom of speech rights have been violated.”
- Students are also encouraged to express themselves in less formal ways. An example is the [tradition of Spirit Rock](#), which “has been a beacon of free speech since 2011 and has promoted dozens of clubs, organizations and causes. Not only does it give students a place to be creative, but it serves as a means to raise awareness of issues students think are important.

<sup>[1]</sup> For 2022 [Academic Year (AY) 2021-22, HHS Poverty was determined as \$13,590 for the first person and \$4,720 for each additional person. For 2021 (AY) 2020-21, these thresholds were \$12,880 and \$4,540. For 2020 (AY 2019-20), these thresholds were \$12,760 and \$4,4480. Based on SCHEV guidelines, Low Income is defined as 200% or below of HHS Poverty Guidelines and Middle Income is defined as 400% or below of the guidelines.

<sup>[2]</sup> Greer, H. (2022, June 8). *JMU Compliance with its Level 3 Management Agreement [Memorandum]*. Joint Legislative Audit and Review Committee Report to Members.