



INDIANA UNIVERSITY

“For two hundred years, Indiana University and the citizens of Indiana have been unified in a great partnership. For two hundred years, the public has trusted us with land, with resources, and with their most precious trust: the education of their children. We have returned that trust by building a community of dedicated scholars that immeasurably enriches this state and this nation....Together we can extend that partnership over the next two hundred years.”

—President Michael A. McRobbie
State of the University Address, Sept. 27, 2011

2013–2015 Operating Request and Special State Appropriation Request

August 2012

OFFICE OF THE
PRESIDENT

Mr. Adam Horst
Director
Indiana Office of Management and Budget and State Budget Agency
Indiana State House Room 212
Indianapolis, IN 43204

Ms. Teresa Lubbers
Commissioner
Indiana Commission for Higher Education
101 West Ohio Street, Suite 550
Indianapolis, IN 46204

Dear Colleagues:

On behalf of the Trustees of Indiana University, our students, faculty, staff and alumni, I am pleased to submit IU's 2013-15 operating, fee replacement, and special state appropriation requests that have been prepared consistent with the instructions jointly issued by the Indiana Commission for Higher Education (ICHE) and the State Budget Agency. Over the last few months, IU staff has prepared performance funding and other required schedules in collaboration with the ICHE staff. The performance funding outcomes produced by this process have been reviewed with the Indiana University Board of Trustees.

In recent years, Indiana University has redoubled its commitment to maintaining our role as a public institution that is affordable for all qualified Hoosiers. With fewer dollars available from the state, we have worked diligently to constrain costs by becoming more efficient, in ways large and small. We continue to foster student success by working to increase the likelihood that students persist to graduation. We are also leading the way among public universities by implementing programs that will help ensure that our students are financially literate and that they graduate without excessive debt. Above all, we remain committed to preserving and further enhancing the quality and competitiveness of an Indiana University education.

In light of changes to the biennial operating request submission process adopted by the State Budget Agency and the Indiana Commission for Higher Education, this document primarily consists of the submission of schedules related to the performance funding metrics and other specified schedules. As such, this document is a departure from past biennial requests that specified a desired level of increase to state appropriations for each Indiana University campus. We look forward to continuing to work with the ICHE and the Budget Agency over the next several months towards development of higher education funding recommendations that will be adopted in December.

Our special state appropriations request includes continued funding for the Indiana University's statewide Centers for Medical Education and for research support, albeit outside of the performance funding formula.

I also commend to you the institutional narrative portion of this document in which we discuss IU programs and initiatives that are consistent with *Reaching Higher, Achieving More*. Indiana University and Purdue University are also working on a joint research initiative request on which we plan to provide details in the coming weeks.

We welcome the opportunity to provide any additional information you and your colleagues may desire and enthusiastically look forward to opportunities to discuss IU's requests with you.

Yours sincerely,

Michael A. McRobbie
President

cc: Trustees of Indiana University

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Executive Summary

Indiana University submits a change in operating and fee replacement appropriations of \$26.1 million for the 2013-15 biennium. This submission consists of allocations of performance funding, fee replacement and special state appropriations. Schedules summarizing research expenditures are included along with special state appropriations for research focused campuses. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, high impact degree completion, student persistence incentive, on-time graduation rate, and institution defined productivity.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

Performance formula funding

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *High impact degree completion* High impact degrees are identified as specific degree types that are granted in Science, Technology, Engineering and Math (STEM) fields as defined by national standards set by Complete College America (CCA). Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values shown in the table below.
- *On-time graduation rate* provides funding for the change in the graduation rate achieved in four years by resident, undergraduate, first time, full time students. Increases in the three year average are valued as shown in the table below.
- *The institution defined productivity metric* developed by Indiana University compares funding provided by Indiana taxpayers and Hoosier families per in-state bachelor's

degree. The measure focuses on reducing the cost of attendance for students and uses a significance factor developed by ICHE to calculate the performance funding adjustment as shown in the tables below.

Performance Funding Metric Values and Amounts Submitted

	Overall Degree Completion		At-Risk Degree Completion		High Impact Degree Completion	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420	\$ 19,491	\$ 22,740
Master's Degree	\$ 3,898	\$ 4,547			\$ 14,033	\$ 16,372
Doctoral Degree	\$ 1,949	\$ 2,274			\$ 6,822	\$ 7,959
Amount Submitted	\$ 5,824,164	\$ 6,794,858	\$ 3,424,868	\$ 3,995,680	\$ 2,592,981	\$ 3,025,144

	Student Persistence Incentive		On-Time Graduation Rate		Institution Defined Productivity	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
30 Credit Hours Completed	\$ 765	\$ 893				
60 Credit Hours Completed	\$ 1,530	\$ 1,785				
Bachelor's Degree			\$ 22,921	\$ 26,741		
Amount Submitted	\$ 1,150,305	\$ 1,342,023	\$ 6,356,812	\$ 7,416,281	\$ 1,097,936	\$ 1,280,925

Total Performance Funding Submitted 2013-14: \$ 20,447,066
 Total Performance Funding Submitted 2014-15: \$ 23,854,910

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued; 2) anticipated debt service for projects authorized by prior General Assembly action; and 3) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The total amount requested for fee replacement appropriation for bonded debt in 2013-15 is \$74.9 million. This amount includes \$7.5 million in financing for the following authorized projects: Academic Core Classroom Renovation, Phase I at Bloomington, Tamarack Hall at IU Northwest, and the Education & Technology Building at IU Southeast.

Special State Appropriations

Indiana University has included a request for continuation of state research support as a line item appropriation. IU is heavily engaged in both basic scientific and translational research. Basic scientific research leads to new scientific discoveries that increase knowledge, which become the building blocks for additional discoveries. Translational research involves using scientific discoveries to produce new products and services that improve the lives of Hoosiers.

State research support funds are critical to helping IU finance the research enterprise, including administrative costs, research equipment and facilities.

IU also receives special state (“line item”) appropriations for a small number of activities. Such appropriations are specially designated because either the institution or the General Assembly wanted to be clear the funds were for a specific purpose. Consistent with the operating request, there is no assumption made for inflationary increases for ongoing operations.

Special State Appropriations

Research Expenditure Schedules BRS IX					
	2012-13	2013-14 Changes		2014-15 Changes	
	Base	Amount	Percent	Amount	Percent
Abilene Network Operations	\$ 707,707	\$ 42,462	6.0%	\$ -	0.0%
Indiana Institute for Disability and Community	\$ 2,105,824	\$ 126,349	6.0%	\$ -	0.0%
Geological Survey	\$ 2,636,907	\$ 158,214	6.0%	\$ -	0.0%
Indiana Advisory Commission on Intergovernmental Relations	\$ 48,062	\$ -	0.0%	\$ -	0.0%
Medical Education Centers Expansion	\$ 3,000,000	\$ -	0.0%	\$ -	0.0%
IU Spinal Cord/Head Injury Research Center	\$ 524,230	\$ 31,454	6.0%	\$ -	0.0%
I-Light Network	\$ 1,471,833	\$ -	0.0%	\$ -	0.0%
GigaPOP Operations	\$ 656,158	\$ 39,369	6.0%	\$ -	0.0%
Optometry Education Fund	\$ 1,500	\$ 46,746	3116.4%	\$ (46,746)	-96.9%
Totals	\$ 11,152,221	\$ 444,594	4.0%	\$ (46,746)	-0.4%
IHETS (External Agency)	\$ 491,438	\$ (56,169)	-11.4%	\$ -	0.0%

Indiana University Institutional Narrative

Introduction

Through this biennial operating request submission, Indiana University demonstrates its commitment and dedication to providing academic instruction, student services, research, economic development, and community engagements meeting the state's most critical needs. IU also provides justification for continued state financial support for these important IU services that improve opportunity for Hoosiers as well as the fortunes of the state.

First and foremost, IU is committed to offering Hoosiers academic programs of the highest standards of quality and competitiveness while remaining affordable for all qualified students. IU is also dedicated to being student-centered, evidenced by the numerous initiatives outlined in this narrative that are designed to improve the student educational experience at IU, ultimately assisting students with degree completion. As a major research institution, Indiana University conducts both basic and translational research that advances scientific knowledge as well as introducing important new treatments, services, and products. Through its Office of Economic Development and Engagement, IU has accelerated its civic and economic engagement efforts that improve the quality of life for Hoosiers.

This institutional narrative summarizes a sampling of IU's university-wide accomplishments and initiatives under the headings of the following three key objectives (success agenda items) adopted by the Indiana Commission for Higher Education (ICHE) for implementation of its latest strategic plan, *Reaching Higher: Achieving More*:

- Student Success and Completion
- Institutional Productivity
- Quality and Competitiveness

Using this framework signifies IU's commitment to assisting the Commission with meeting these objectives.

Student Success and Completion

The Unique IU Educational Experience

Students enrolling at Indiana University enjoy a unique educational experience that prepares them for success as adults in the workplace and as citizens in their community through development of the following skills:

- Written and verbal communication

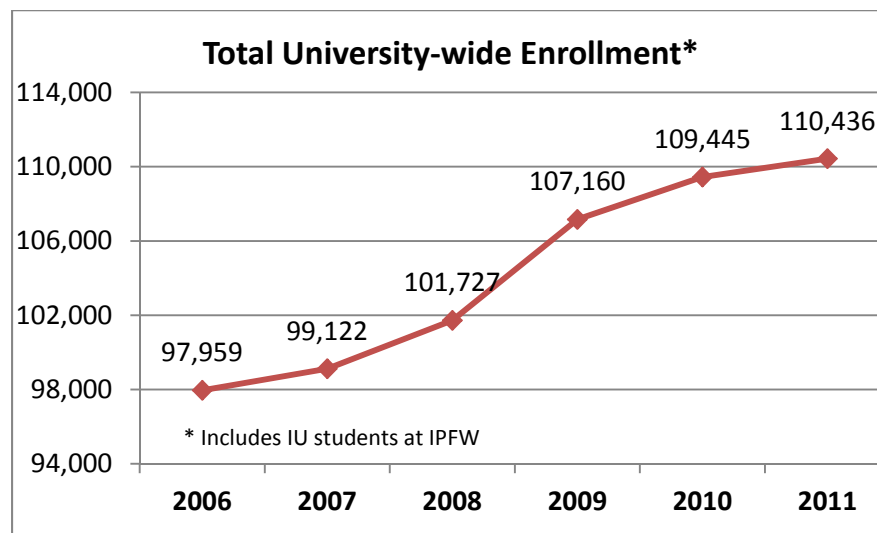
- Critical thinking, problem solving capability, and principled decision making
- Interpersonal relations
- Personal discipline, self-reliance, time management and accountability
- Leadership, through involvement with available campus organizations

IU helps ensure the success of its students by offering:

- The most current and relevant subject knowledge taught by nationally and internationally renowned faculty, most of whom hold full-time appointments and are fully engaged in teaching, research, and service
- Accessible faculty and staff, providing academic and career advising and mentoring
- High-impact special programs such as learning communities, honors programs, and international study opportunities
- Hands-on experiential learning through undergraduate research, internships, and special projects available through business and community partnerships and engaged alumni
- Exposure to diversity through interactions with students from different backgrounds
- Engagement in current events, cultural experiences, and student activities that broaden the student's horizons
- Facilities offering state-of-the-art teaching tools, including technology.

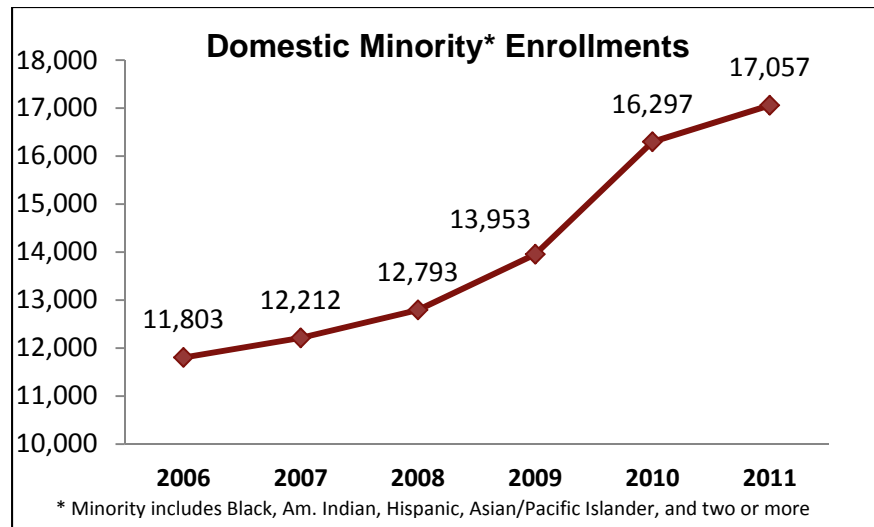
Enrollment Increases

While other institutions may receive greater recognition for increased enrollment, Indiana University's system-wide fall enrollment has increased by 12.7% from 2006 to 2011.



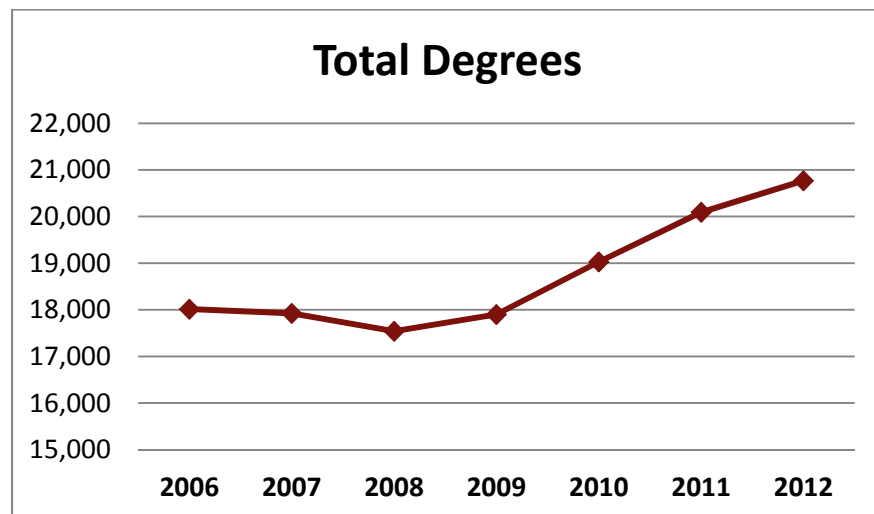
Domestic Minority Enrollment

IU enrollment of domestic minorities, a term that does not include international students, has increased from 11,803 in 2006 to 17,057 in 2011 a 44.5 % increase. Domestic minorities compose more than 15% of total IU students.

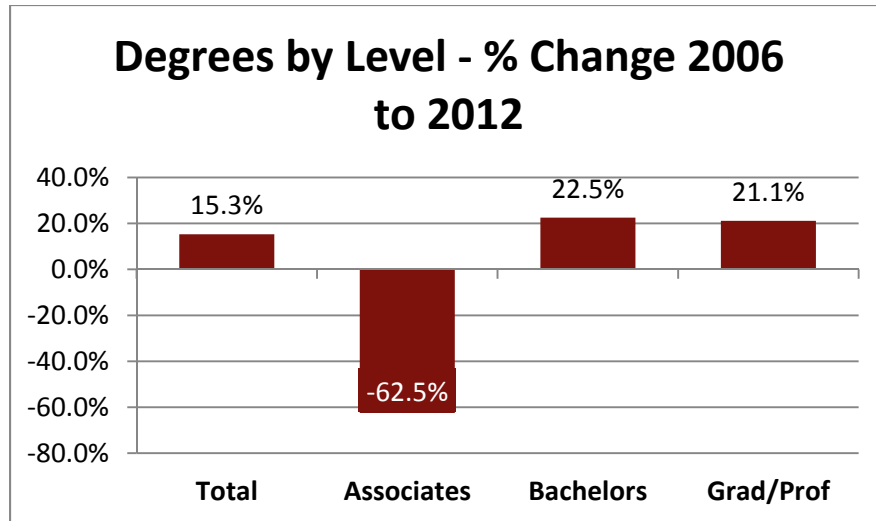


Degrees Awarded

Total degrees awarded (all levels) have increased from 18,014 in 2006 to 20,769 in 2012.

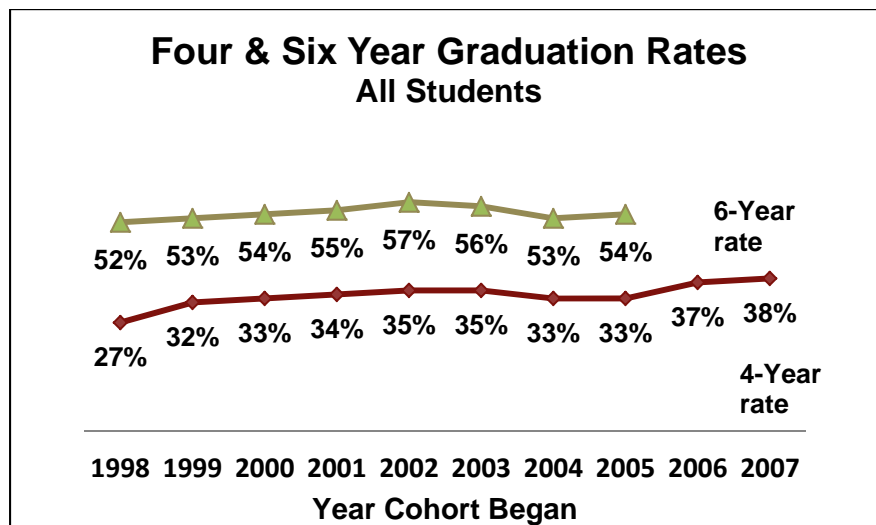


Total degree production has increased by more than 15% between 2006 and 2011 notwithstanding a 55% reduction in associate-level degrees because IU has eliminated most 2-year degrees under an agreement with Ivy Tech and the Commission for Higher Education.



Graduation Rates

Real progress has been made in increasing the system-wide four-year graduation rate and IU is working to further increase both four-year and six-year graduation rates. Graduation rates vary by campus according to the characteristics of students, with the Bloomington campus achieving a 72% six-year and 58% four-year graduation rate for the most recent cohorts.



Student Success Programs and Initiatives

Indiana University has designed student success programs on all of its campuses, tailored to the needs of each campus's students. A sampling of these programs follows.

Bloomington Campus Hudson & Holland Scholars Program (HHSP)

HHSP seeks to recruit, retain, and graduate students with diverse ethnic and socioeconomic backgrounds who possess outstanding records of academic achievement and leadership skills. Named for outstanding IU Professors Herman Hudson and James Holland, who sought to help promising undergraduate students of color overcome barriers similar to those they faced on their way to successful careers, the program currently serves nearly 800 Scholars. Hudson & Holland is not just a scholarship, but is a holistic *scholarship program* that helps students succeed academically, personally, and professionally.

The Hudson & Holland Scholars program attempts to address the three most common reasons that students leave college: lack of finances, academics, or difficulty making the transition from high school to college. To address financial need, the HHSP scholarship is \$6,000 per year for four years. To maintain their scholarship, Scholars must achieve at least a 3.0 cumulative GPA. Students who achieve a 3.7 GPA or higher are eligible for an additional \$2,000 per year and those achieving a 3.50 to 3.69 GPA are eligible for an additional \$1,000 per year. To initially qualify for the program, students generally must have achieved a high school GPA of at least 3.2, rank in the top 20% of their graduating class, and scored 1100 or higher on their math and verbal SAT exams or achieve 23 on the ACT.

To help HHSP students succeed academically, each Scholar signs an agreement that commits the student to fulfilling several requirements for continued eligibility, including participation in the Leadership Excellence Academic Diversity (L.E.A.D) Initiative. L.E.A.D activities include specialized program advising by an HHSP Advisor and Scholars are required to meet twice every semester during the freshman and sophomore years and once a semester thereafter. The Program Advisor not only provides traditional academic advising but also serves as a mentor. HHSP Scholars also participate in a number of other required activities including conferences and workshops, community service and internship experiences, and post-baccalaureate preparation programs such as practice graduate/professional school admission exams.

Finally, to assist students in making the transition to college and finding their home at a large campus, students participate in a Freshman Seminar and a peer-mentor program which assists students in STEM and business fields by connecting them with an upper-classman who will provide guidance and encouragement from a student's perspective.

Students in the Hudson & Holland Scholars program have achieved great success. Ninety percent of student scholars persist from the first year to second. The six-year graduation rate for the most recent five cohorts averaged 78.6%.

IUPUI University College Student Success Initiatives

The Indianapolis campus has won national awards for its innovative retention and student success programs, especially those targeted to specific cohorts of first-generation low-income students. These programs are offered by IUPUI's University College, which serves students who have not yet been certified into their degree-granting schools. The following programs are only some of the initiatives that have been implemented that are having a positive impact on student success at IUPUI:

- The Summer Bridge Program serves incoming freshmen (455 students in fall, 2011) and is held in August before fall classes begin. Students are divided into groups of 25 based on their interest in pursuing a particular or exploring various majors. Through participation, students develop relationships with faculty, advisors, student mentors, and librarians, as well as establish friendships with other students. They become acquainted with the campus, gain experience in using instructional technology, and begin the process of connecting with a school and major. Students also learn college-level expectations for reading and writing and receive individualized support in math.
- The Student Support Services (SSS) initiative, a federally funded US Department of Education TRIO program, provides first-generation low-income students with an extra layer of support and guidance throughout the college years. This award-winning program is one of the most successful in the nation and participating students achieve high retention and graduation rates. Students become a part of the SSS family for their entire time at IUPUI and can obtain free tutoring, academic and personal advising, obtain help with financial aid, and benefit from mentor relationships.
- Personal Development Planning (ePDP): The electronic Personal Development Planning (ePDP) is a newly implemented process which enables first year students at IUPUI to understand, implement, and mark progress towards a degree and a career goal within an electronic portfolio. Through this process, students develop a personalized plan that is flexible, enabling reevaluation and revision every semester in collaboration with an academic advisor, faculty member or other campus mentor. The ePDP is designed to increase student commitment towards earning a degree, foster academic success through goal setting and planning, and provide the student with coherence and meaning regarding curricular requirements. The Campus hopes that the ePDP will reduce the frequency in which students change majors, thereby reducing time to degree.
- Themed Learning Communities (TLC): Through TLC, three or more first-year courses are offered to first year students during the fall and spring semesters providing a structured learning environment where students can easily develop a strong sense of community and understand connections across disciplines. Students in themed learning community, enroll

as a cohort in the same linked courses selected by instructors in various academic schools who collaborate on choosing a theme and developing common learning experiences. During the fall, 2011 semester, 749 students participated in 37 course sections.

Regional Campus *Blueprint for Student Attainment*

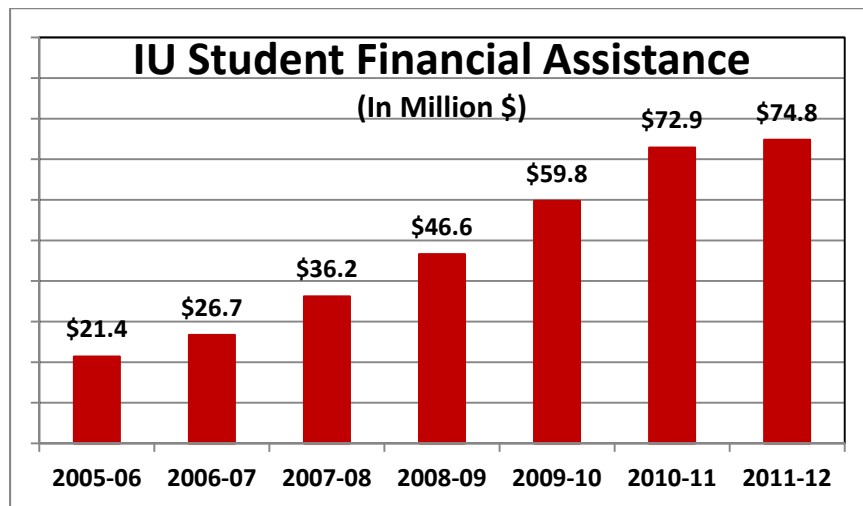
At its regional campuses, Indiana University is actively involved in implementing its *Blueprint for Student Attainment*, a comprehensive strategic plan that was released in 2011. An overriding goal of the strategic plan is pursuit of collaborative initiatives and programs to improve student success, particularly degree completion, as illustrated by the following initiatives.

- **Enhanced Student Advising:** Recognizing the critical role that effective student academic advising plays in student success, the regional campuses are ensuring that they are employing the best student advising practices, including standards set out by the National Academic Advising Association (NACADA). In addition, the campuses are pursuing an initiative to integrate career development and counseling into the student advising process to assist undecided students with selecting and declaring majors most suited to them.
- **First Generation Student Study:** During fall, 2011 43 percent of degree-seeking students enrolled at IU's regional campuses were first-generation students. Recognizing the unique challenges these students face, IU recently completed a study including focus group sessions, to examine the needs and experiences of first-generation students and to assess the effectiveness of programs and support services. Several recommendations included in the report are being pursued by the campuses.
- **FLAGS Early Alert System:** During fall, 2011, all regional campuses began using the Fostering Learning, Achievement, and Graduation Success (FLAGS) early alert system. Under FLAGS, all faculty teaching undergraduate students provide early and frequent feedback on student attendance and academic performance in classes utilizing an on-line *student performance roster*, which is also accessible to academic advisors. The goal for this initiative is to use feedback from faculty on student performance to facilitate early intervention with those students who might benefit from it.
- **Credit, Program, Degree Transfer:** The regional campuses are working with Ivy Tech to consolidate 66 single articulation agreements between Ivy Tech and the regional campuses into 11 transfer agreements. This step, combined with the creation of the statewide transfer general education core, will simplify the transfer process as well as provide students with clearer information and paths for pursuing transfer opportunities.
- **Complete College America Grant:** In 2011, the state of Indiana was awarded a \$1 million competitive grant from Complete College America, of which \$250,000 has been allocated to IU to develop programs to accelerate student completion. These funds will be used to develop structured cohort models in high-demand fields serving high proportions of low-

income students. These models are designed to give students guidance and support to help them succeed and foster a culture of completion. Models will use competency-based curricula that include block-scheduling options with summer coursework and clear degree maps and advising to support on-time completion.

Affordability

The Indiana University Trustees have kept tuition increases low despite constrained state funding. For academic years (AY) 2011-12 and 2012-13, base tuition increases ranged from 2.5% at regional campuses and IUPUI to 3.5% at the Bloomington campus. In addition, a temporary R&R fee ranging from approximately 1.0% at the regional campuses to 2.0% at the Bloomington and Indianapolis campuses was implemented due to a substantial backlog in deferred facility maintenance. Including the temporary R&R fee, the IU tuition and fee increases ranging from 3.5% to 5.5% are significantly lower than the 8.3% national average increase for public four-year institutions for AY 2010-11, the most recent year reported in the College Board’s *Trends in College Pricing 2011* annual report. The report found that state funding for public universities has been reduced in many states leading to higher tuition increases. IU has attempted to moderate tuition increases while enrolling more students and coping with reduced state operating appropriations. In addition, IU more than tripled its institutional student financial assistance since AY 2005-06, in order to ensure that an IU degree is affordable for any qualified Hoosier student, as illustrated by the chart below.



These institutional funds are merit-based and targeted to low income Hoosier undergraduate students through a number of programs such as IU’s wrap-around grants to 21st Century Scholars and Pell recipients. Automatic scholarships, such as the Bloomington campus’s Excellence Award (\$9,000), target the best Hoosier students in an attempt to keep them in Indiana for college.

Evidence of the effectiveness of IU’s institutional aid programs is borne out by net price data published annually by the U.S. Department of Education. The following table details for each IU campus the total cost of attendance, net cost to students, and net cost as a percentage of total cost of attendance. As can be determined, students’ out of pocket costs, on average, are about 50% or less of the total cost of attending college.

Academic Year 2010-11	Total Cost of Attendance*	Net Cost	Net Cost % of Total Cost
IU Bloomington	\$20,990	\$10,324	49.2%
IUPUI	\$23,221	\$11,777	50.7%
IU East	\$18,555	\$8,051	43.4%
IU Kokomo	\$19,463	\$8,337	42.8%
IU Northwest	\$23,883	\$12,337	51.7%
IU South Bend	\$19,456	\$9,491	48.8%
IU Southeast	\$21,303	\$10,128	47.5%

* For Bloomington and IUPUI, the Total Cost of Attendance is based on resident students living on campus; for regional campuses, the Total Cost of Attendance is based on students living off campus

During summer, 2012, Indiana University introduced a significant discount - 25% reduction - in tuition for summer school classes at all IU campuses. In addition to making college more affordable, the initiative seeks to improve use of facilities and allow students to graduate earlier. For students taking a full academic load during the summer session, tuition savings were about \$1,000 at the Bloomington and Indianapolis campuses and \$700 at regional campuses.

Indiana University is keenly aware and deeply concerned about the sharp increase in student debt since the 1990s and realizes that “the number one reason for students leaving college is debt and financial stress, followed by poor academic performance and social fit” (Hoffman, McKenzie & Paris, 2008; Chiang, 2007). In order to fully understand the issue and best develop a set of strategies to assist students with limiting borrowing, IU first completed a comprehensive student debt study across all campuses. With findings from the study, IU is now beginning the implementation of comprehensive student financial literacy programming, beginning with establishing a new Office of Financial Literacy. IU intends to deliver leading edge programs across all educational media – online educational coursework and tools, first year seminars, credit hour coursework, workshops, peer-to-peer counseling and near graduation programming. Key components of the program will also include annual loan statements, customized financial aid notification and metrics to identify financially at-risk students. Expected program outcomes include higher student retention, lower debt levels and default rates, and a population better equipped to navigate financial decision-making throughout life. As a result of these efforts, IU is

clearly at the forefront in the state for efforts to work with students to help them manage their student loan debt.

IU also is a leader in initiatives to reduce students' textbook costs. First, IU is a pioneer in the use of electronic textbooks, beginning their use in 2009. During the spring 2012 semester, 5,300 students enrolled in 130 class sections using IU's e-texts saw average savings of \$25 per textbook. IU has negotiated agreements with publishers and Indiana-based CourseLoad to provide students with cost savings. Second, IU introduced during fall, 2010 a textbook rental program offering students savings up to 50% compared to purchasing books, resulting in an estimated \$5 million annual savings to students.

Student Access through Distance Education

Indiana University recognizes the pervasive and permanent impact that online technologies are having in re-shaping the landscape of higher education. Accordingly, President McRobbie established the Indiana University Office of Online Education in 2011 and charged the office with providing leadership and management across all IU campuses. During its first year of operation, the Office developed a university-wide plan addressing priorities for online program offerings as well as establishing university guidelines for developing and offering additional online programs. The goal of initial efforts is to ensure that IU online education programs effectively address current student needs, serve new students and new markets, provide more comprehensive programs and services to all students, and facilitate greater efficiencies in the delivery of programs and services.

President McRobbie announced August 30, 2012 a multi-million dollar university-wide initiative to address four priorities: 1) IU's regional campuses to jointly offer online undergraduate degrees, 2) to deliver online graduate degrees or certificates from every professional program at the Bloomington and Indianapolis campuses, 3) to offer online versions of highly subscribed undergraduate courses across all campuses of the university, and 4) to explore innovative uses of technology.

Distance education is not new at IU, especially at the Indiana University School of Nursing (IUSON), which first began distance accessible offerings more than twenty years ago. Today IUSON provides programs at all degree levels with the primary goal of maximizing accessibility for students, many of whom are working while pursuing a degree.

The school implemented its distance-accessible RN to BSN degree program in fall 2010, piloting a state-wide consortium model through which all eight of IUSON campuses have partnered to provide flexible paths of study for working registered nurses enabling them to complete their BSN degree in 12 months of full-time study or 18-24 months of part-time study. To facilitate the schedules of working students, all of the coursework is distance accessible using web-based and video technologies, permitting students to complete their coursework at times convenient for

them. The consortium model also saves the university costs by using faculty from all IU campuses to offer the single state-wide degree instead of offering the degree separately at each IUSON campus. During the 2011-12 academic year, 164 students were enrolled in the program and 66 students received their degrees.

At the Master of Science degree level, IUSON offers two tracks that are distance accessible - the MSN in Adult Health Clinical Nurse Specialist and the MSN in Nursing Education. The “core courses” for other master’s level degree programs, which includes such courses as pharmacology, pathophysiology, theory, research and statistics, are also offered via distance accessible modes. During the 2011-12 academic year, 49 students were enrolled in these two programs.

Finally, both IUSON doctoral level programs offered on the Indianapolis campus, the Ph.D. in Nursing Science and Doctor of Nurse Practice (D.N.P.), are delivered via a model that involves short intensive campus-based instruction and distance accessible coursework. During the 2011-12 academic year, 39 students were enrolled in the PhD program and 23 students were enrolled in the DNP program.

Institutional Productivity

For many years, IU has pursued efforts to be more efficient with use of its available funds. These efforts have intensified by even greater necessity in recent years as illustrated in the following subsections. Indeed, pursuit of cost efficiencies is an ongoing effort receiving high priority.

Base Operating Expense Reductions

During the FY 2009-11 biennium, Indiana University implemented a number of strategies to achieve \$36 million in ongoing, base expenditure reductions. In FY 2010-11, IU eliminated more than 250 staff positions by replacing only one of every two non-faculty members that left the university. As part of a major restructuring, individual campus purchasing operations were consolidated into a single office serving the entire university. In addition to reducing staff, this consolidation has enabled IU to increase its purchasing power through system-wide procurements. Changes to IU’s retirement vesting and the method of employee contribution payments for salaries funded by research have reduced IU’s employee retirement costs. Mandatory travel budget reductions have also reduced travel expenses. Finally, the Bloomington campus based School of Continuing Studies is being closed and most of its offerings absorbed into other academic units to accomplish greater efficiency. Savings from these actions are illustrated in the following table.

Actions	Spending Cut
Eliminated 256 staff positions	\$11.0 million
Consolidated campus purchasing offices into university-wide office	\$10.9 million
Revision to retirement policies	\$6.7 million
Reduced travel budgets	\$4.4 million
Eliminated School of Continuing Studies	\$1.8 million
Reduced University Administration on-going budget	\$1.1 million
TOTAL	\$35.9 MILLION

Benchmarking Initiative

During fall, 2010, Indiana University began work on a major “benchmarking” initiative which involves a university-wide study of administrative services and staffing facilitated with consulting assistance from the Hackett Group, a firm specializing in assisting large organizations with pursuit of best practices in organization and structure. The benchmarking initiative involves collecting information on several of IU’s business processes to assess how well IU is performing these processes in comparison to peer organizations. The project started with the collection of data on the staff mix, transaction volumes, quality indicators, and cost drivers of the administrative processes analyzed. The ultimate goal of the project is to determine ways to maximize the efficiency and effectiveness of the administrative processes analyzed and to implement strategies to achieve cost reduction while increasing the quality of services provided. The administrative functions that the initiative is focusing on include human resources, payroll, student services, marketing, and Bloomington campus physical plant operations. The student services area is discussed in greater detail below in the *Institutional Quality and Competitiveness* section.

Employee Healthcare Cost Containment and Early Retirement Program

As with many large organizations, employee healthcare costs and other benefits at Indiana University are major cost-drivers. Accordingly, IU is pursuing initiatives to constrain cost increases in these areas. In particular, IU is focusing on health care expenses and has introduced a new program, Clinical Care Services, providing access to primary care for all covered members and additional care-management for members with chronic and/or complex medical care conditions.

A separate initiative involves providing financial incentives for IU employees to select consumer-driven health plans to increase employee involvement in managing their own health care expenses. As a result, the percentage of IU employees participating in such health plans has increased dramatically from 9% in 2011 to 49% in 2012.

IU also implemented an early retirement separation plan to provide an incentive for employees nearing retirement age to retire early and providing the university with cost savings. Nearly 490

employees took advantage of the program, producing a university-wide savings estimated at nearly \$15 million over the following five years.

Other Savings Initiatives

For many years IU has executed software license agreements with major suppliers such as Microsoft and Adobe to enable students, faculty and staff to download essential software at no cost. The annual estimated savings from this program total \$40 million. IU's top Aaa bond rating from Moody's Investment Services has resulted in substantial state savings for new bond issuances and existing bonds refinancing totaling an estimated \$31 million.

Institutional Quality and Competitiveness

Definition of Quality

"High- quality" is a frequently used term in higher education, but what does it really mean? One might define high-quality using the following terms: superior and excellent; providing exceptional value and worth; essential or distinctive.

Indiana University pursues outstanding quality in all of its endeavors— academic programs and student services, research and service, and university administration, including effective financial management and the maintenance of world-class facilities and information technology infrastructure, as described in the following subsections.

Academic Program Quality

Indiana University and all of its campuses have a deep and historical commitment to academic excellence and to providing a quality education. IU employs quality assurance processes that generally include two levels of evaluation: internal academic program review and external academic accreditation. Academic program review is a process of assessing the quality of an academic unit or degree program, usually performed internally. Accreditation is a process by which a regional or national organization evaluates the quality and competence of a degree program, school or campus. This process, under the jurisdiction of the Higher Learning Commission, has been recently revised to use an evidence-based system. Finally, IU's Board of Trustees are very concerned with academic program quality and regularly receive detailed reports including program rankings.

Indiana University also ensures academic quality through excellent faculty, engaged students, and facilities and technology that promote learning. Numerous faculty have received national and international recognition as outstanding educators, scholars, and researchers. IU students have also received outstanding recognition for their academic accomplishments while enrolled at IU. In addition, IU offers dozens of academic programs that have been ranked among the best in the

nation, and thus, are highly sought out by students. Perhaps the best indication of academic quality and competitiveness is demonstrated by the high student demand for an Indiana University education, reflected in IU's high enrollments.

Ultimately, a high-quality education at Indiana University prepares a student to be competitive for desirable job positions in a field related to their degree as well as preparing students to contribute to our state and nation as responsible and engaged citizens.

Research Quality – The Indiana Clinical and Translational Science Institute (CTSI)

Indiana University expended more than \$450 million in extramural funds for research during FY 2012, more than the combined research spending of all other public and private higher education institutions in Indiana. One significant component of this, the research activities conducted by the Indiana Clinical and Translational Science Institute, is critically important to the state. The Indiana CTSI is a statewide laboratory established in 2008 through a \$25 million, five year grant from the National Institutes of Health (NIH), which was supplemented with matching funds from member institutions and business partners including Eli Lilly and Company. One of nearly 60 exclusive clinical and translational science institutes designated by the NIH, the Indiana CTSI is the only statewide translational science hub in the U.S. and is led by Indiana University in partnership with Purdue University and the University of Notre Dame. This unique collaboration brings together the best research capabilities of each institutional member.

The Indiana CTSI's mission is to speed the translation of new laboratory discoveries into new health care practices and therapies resulting in better medical outcomes for patients. In addition to benefits that accrue from introducing new medical treatments and therapies, CTSI has leveraged its initial funding, plus a portion of state research support funds, to generate an additional \$40 million in annual research funding from other sources. Finally, CTSI is engaged in economic development through its work with small start-up companies, some that were begun by CTSI scientists.

Quality in Administrative Operations: IU's Student Services Initiative

To ensure the success of Indiana University's diverse student populations, IU places high priority on providing high-quality student services. As mentioned in a preceding discussion of its benchmarking project, IU is undertaking a major initiative to improve student services while pursuing greater operational efficiency and cost savings. This Student Services Initiative (SSI) is focusing on a broad array of activities including student financial aid, admissions, student records, academic advising systems, and student financial processing (bursar). The project seeks to improve service to students by providing a "one-stop" point of service on each campus where students may receive assistance with multiple student service functions. The project also seeks to attain greater efficiency and cost savings through a "shared services" approach borrowed from private industry under which similar activities currently provided individually at each campus will be performed in

central service centers, with agreed-to levels of service expectations. IU estimates approximately \$7 million in potential staff savings through the reduction of more than 100 FTE positions, while maintaining excellent service to students.

Indiana University
Bloomington

INDIANA UNIVERSITY BLOOMINGTON
2013-15 OPERATING APPROPRIATION REQUEST

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IU BLOOMINGTON

The submitted change in operating and fee replacement appropriations for the Bloomington campus in the 2013-15 biennium is \$9.7 million. This submission consists of allocations of performance funding and fee replacement. Special state appropriations schedules, including research expenditures, are included along with other special line items in the special state appropriations section of this document. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, high impact degree completion, on-time graduation rate, and institution defined productivity.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *High impact degree completion* High impact degrees are identified as specific degree types that are granted in Science, Technology, Engineering and Math (STEM) fields as defined by national standards set by Complete College America (CCA). Increases in the three year average are valued as shown in the table below.
- *On-time graduation rate* provides funding for the change in the graduation rate achieved in four years by resident, undergraduate, first time, full time students.

Increases in the three year average are valued as shown in the table below.

- *The institution defined productivity metric* developed by Indiana University compares funding provided by Indiana taxpayers and Hoosier families per in-state bachelor’s degree. The measure focuses on reducing the cost of attendance for students and uses a significance factor developed by ICHE to calculate the performance funding adjustment as shown in the table below.

Performance Funding Metric Values and Amounts Submitted

	Overall Degree Completion		At-Risk Degree Completion		High Impact Degree Completion		On-Time Graduation Rate		Institution Defined Productivity	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420	\$ 19,491	\$ 22,740	\$ 22,921	\$ 26,741		
Master's Degree	\$ 3,898	\$ 4,547			\$ 14,033	\$ 16,372				
Doctoral Degree	\$ 1,949	\$ 2,274			\$ 6,822	\$ 7,959				
Amount Submitted	\$ 1,075,710	\$ 1,254,995	\$ 854,841	\$ 997,315	\$ 1,722,114	\$ 2,009,133	\$ 4,164,018	\$ 4,858,020	\$ 676,007	\$ 788,675

Total Performance Funding Submitted 2013-14: \$ 8,492,690

Total Performance Funding Submitted 2014-15: \$ 9,908,138

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued; 2) anticipated debt service for projects authorized by prior General Assembly action; and 3) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$12.4 million.

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 190,670,086	\$ 180,268,458	\$ 180,268,458	\$ 180,268,458	\$ (10,816,107)	\$ 169,452,351	\$ 169,452,351	\$ (12,618,792)	\$ 167,649,666	\$ 167,649,666		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 1,075,710			\$ 1,254,995		
- At-Risk Student Degree Completion							\$ 854,841			\$ 997,315		
- High Impact Degree Completion							\$ 1,722,114			\$ 2,009,133		
- Student Persistence Incentive							\$ -			\$ -		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ 4,164,018			\$ 4,858,020		
- Institution Defined Productivity Metric							\$ 676,007			\$ 788,675		
TOTAL OPERATING BUDGET SUBMISSION	\$ 190,670,086	\$ 180,268,458	\$ 180,268,458	\$ 180,268,458	\$ (10,816,107)	\$ 169,452,351	\$ 177,945,041	\$ (12,618,792)	\$ 167,649,666	\$ 177,557,804	-1.3%	-0.2%
B. Debt Service (3)	\$ 40,374,820	\$ 22,981,646	\$ 15,668,143	\$ 15,649,360			\$ 17,457,668			\$ 28,030,948	11.4%	60.6%
C. Line Items (4)												
- General Fund	\$ 6,412,280	\$ 5,498,684	\$ 5,451,938	\$ 5,451,938			\$ 5,825,709			\$ 5,778,963	6.9%	-0.8%
- Dedicated Funds	\$ 2,127,991	\$ 2,127,991	\$ 2,127,991	\$ 2,127,991			\$ 2,167,360			\$ 2,167,360	1.9%	0.0%
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 239,585,177	\$ 210,876,779	\$ 203,516,530	\$ 203,497,747	\$ (10,816,107)	\$ 169,452,351	\$ 203,395,778	\$ (12,618,792)	\$ 167,649,666	\$ 213,535,075	-0.1%	5.0%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 237,457,186	\$ 208,748,788	\$ 201,388,539	\$ 201,369,756	\$ (10,816,107)	\$ 169,452,351	\$ 201,228,418	\$ (12,618,792)	\$ 167,649,666	\$ 211,367,715	-0.1%	5.0%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	35,413	35,581	36,536	37,076	36,992	36,641	36,642	36,642	36,642	0.6%	0.0%	0.0%
a. Indiana Resident	22,223	22,044	22,409	22,956	23,133	23,065	23,066	23,066	23,066	0.6%	0.0%	0.0%
b. Non-Resident	13,190	13,537	14,127	14,120	13,859	13,576	13,576	13,576	13,576	0.5%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	10,016	9,931	10,012	11,109	11,146	10,961	11,006	11,055	11,055	1.6%	0.4%	0.0%
a. Indiana Resident	3,885	3,602	3,540	3,459	3,271	3,013	3,058	3,058	3,058	-3.9%	0.0%	0.0%
b. Non-Resident	6,131	6,329	6,472	7,650	7,875	7,948	7,948	7,997	7,997	4.4%	0.6%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	973	952	946	923	1,006	1,033	1,056	1,070	1,070	1.4%	1.3%	0.0%
a. Indiana Resident	431	410	426	390	406	377	378	386	386	-2.2%	2.1%	0.0%
b. Non-Resident	542	542	520	533	600	656	678	684	684	3.8%	0.9%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	46,402	46,464	47,494	49,108	49,144	48,635	48,704	48,767	48,767	0.8%	0.1%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	30,050.7	30,644.9	31,909.6	32,679.2	32,533.4	32,659.6	32,660.0	32,660.0	32,660.0	1.4%	0.0%	0.0%
a. Indiana Resident	19,475.1	19,332.3	19,858.5	20,431.8	20,620.9	20,843.5	20,844.0	20,844.0	20,844.0	1.1%	0.0%	0.0%
b. Non-Resident	10,575.6	11,312.6	12,051.1	12,247.4	11,912.5	11,816.0	11,816.0	11,816.0	11,816.0	1.9%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	6,092.7	6,189.4	6,261.5	6,896.5	7,158.1	7,174.1	7,201.0	7,234.0	7,234.0	2.8%	0.5%	0.0%
a. Indiana Resident	1,812.4	1,727.9	1,768.5	1,856.3	1,841.7	1,803.2	1,830.0	1,830.0	1,830.0	0.2%	0.0%	0.0%
b. Non-Resident	4,280.3	4,461.5	4,493.0	5,040.2	5,316.4	5,370.9	5,371.0	5,404.0	5,404.0	3.9%	0.6%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	1,267.1	1,249.1	1,216.9	1,251.4	1,357.0	1,345.2	1,376.0	1,395.0	1,395.0	1.4%	1.4%	0.0%
a. Indiana Resident	566.5	548.6	551.2	527.5	534.4	491.4	493.0	504.0	504.0	-2.3%	2.2%	0.0%
b. Non-Resident	700.6	700.5	665.7	723.9	822.6	853.8	883.0	891.0	891.0	3.9%	0.9%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	37,410.5	38,083.5	39,388.1	40,827.0	41,048.5	41,178.8	41,237.0	41,289.0	41,289.0	1.6%	0.1%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	1,478	1,910	2,166	2,450	2,757	3,745	3,745	3,745	3,745	16.8%	0.0%	0.0%
2. High School FTE	238.0	304.4	357.9	404.4	466.9	639.0	639.0	639.0	639.0	17.9%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	8,195,831.51	8,195,831.45	8,024,952.05	7,469,589.37	-	-	-	-	-
Student Fee Bonds Series I	-	-	-	-	-	225,000.00	225,000.00	225,000.00	225,000.00
Student Fee Bonds Series J	2,488,405.22	2,492,006.53	3,042,641.71	-	-	-	-	-	-
Student Fee Bonds Series K	1,236,403.09	1,236,046.36	-	2,465,000.00	24,295,000.00	7,550,000.00	-	-	-
Student Fee Bonds Series L	1,467,212.50	1,464,300.00	1,462,950.00	1,465,750.00	-	-	-	-	-
Student Fee Bonds Series M	567,825.00	567,462.50	564,550.00	565,125.00	-	-	-	-	-
Student Fee Bonds Series N	230,986.77	230,549.72	229,333.79	227,649.73	225,775.00	-	-	-	-
Student Fee Bonds Series O	505,522.29	505,260.67	505,417.64	505,469.96	505,417.64	1,277,656.14	1,522,458.65	1,521,961.58	1,522,592.10
Student Fee Bonds Series P	2,721,448.36	2,718,033.29	2,717,216.15	2,719,632.45	2,718,163.85	2,463,936.16	2,209,524.84	2,212,707.40	3,133,031.10
Student Fee Bonds Series R	771,220.72	3,327,582.74	4,564,243.29	7,014,480.59	6,423,734.51	5,005,454.47	4,999,506.12	5,004,835.93	4,294,511.12
Student Fee Bonds Series S	-	-	4,471,160.77	4,468,393.76	4,475,593.76	4,474,293.76	4,472,793.76	4,477,093.76	4,468,431.26
Student Fee Bonds Series T-1	-	-	-	-	1,218,224.30	1,077,050.00	1,074,250.00	1,076,350.00	1,077,250.00
Student Fee Bonds Series T-2 *	-	-	-	-	512,910.49	657,109.54	657,109.54	657,109.54	657,109.54
Student Fee Bonds Series U	-	-	-	-	-	251,145.92	488,716.40	488,716.40	488,716.40
Total Existing Debt Service for Fee Replacement Projects	\$ 18,184,855.46	\$ 20,737,073.26	\$ 25,582,465.40	\$ 26,901,090.86	\$ 40,374,819.55	\$ 22,981,645.99	\$ 15,649,359.31	\$ 15,663,774.61	\$ 15,866,641.52
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
IUB Academic Core Classroom Renovation - Phase I	-	-	-	-	-	-	-	1,793,893.48	1,793,893.48
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,793,893.48	\$ 1,793,893.48
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUB School of Informatics (Fee Replaced Portion)	-	-	-	-	-	-	-	-	1,281,352.48
IUB Multidisciplinary Science Bldg - Phase III (Fee Repl Portion)	-	-	-	-	-	-	-	-	2,767,721.36
IUB Campus Utility Infrastructure Repairs	-	-	-	-	-	-	-	-	2,904,398.96
IUB Wells Library Renovation - Phase I	-	-	-	-	-	-	-	-	2,562,704.96
IUB Ernie Pyle Hall Renovation	-	-	-	-	-	-	-	-	854,234.99
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,370,412.75
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 18,184,855.46	\$ 20,737,073.26	\$ 25,582,465.40	\$ 26,901,090.86	\$ 40,374,819.55	\$ 22,981,645.99	\$ 15,649,359.31	\$ 17,457,668.09	\$ 28,030,947.75

INDIANA UNIVERSITY BLOOMINGTON, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series I	-	-	-	-	-	3,760,000.00	3,760,000.00	3,755,000.00	3,760,000.00
Student Fee Bonds Series J	302,750.55	300,537.99	-	-	-	-	-	-	-
Student Fee Bonds Series L	554,395.00	557,435.00	559,025.00	553,500.00	-	-	-	-	-
Student Fee Bonds Series N	3,750,994.48	3,751,856.53	3,754,309.96	3,752,650.27	3,756,075.00	-	-	-	-
Student Fee Bonds Series R	934,523.33	265,735.46	265,735.46	265,735.46	818,604.92	817,477.28	817,047.71	818,255.91	816,752.39
Student Fee Bonds Series S	-	-	-	-	-	-	-	-	-
Student Fee Bonds Series T-1	-	-	-	-	580,705.14	514,450.00	513,550.00	512,850.00	511,875.00
Student Fee Bonds Series T-2	-	-	-	-	245,178.09	314,107.16	314,107.16	314,107.16	314,107.16
Consolidated Revenue Bonds, Series 2008A	-	1,008,823.21	5,955,757.50	5,957,257.50	5,966,757.50	5,953,507.50	5,958,257.50	5,954,757.50	5,953,007.50
Consolidated Revenue Bonds, Series 2009A	-	-	-	3,901,086.41	5,566,768.76	5,571,018.76	5,569,518.76	5,571,718.76	5,571,743.76
Consolidated Revenue Bonds, Series 2010A	-	-	-	-	2,329,900.55	2,356,050.00	2,353,200.00	2,352,000.00	-
Consolidated Revenue Bonds, Series 2010B *	-	-	-	-	2,196,996.20	2,172,853.38	2,172,853.38	2,172,853.38	4,522,853.38
Consolidated Revenue Bonds, Series 2012A	-	-	-	-	-	853,440.00	3,648,400.00	3,644,200.00	3,649,600.00
Student Residence System 1998	2,338,538.92	1,657,765.41	-	-	-	-	-	-	-
Facility Revenue Bonds, 1994A	337,260.21	-	-	-	-	-	-	-	-
Facility Revenue Bonds, 2000	422,538.02	471,372.01	-	-	-	-	-	-	-
Certificates of Participation, Series 2009A	-	-	-	465,362.22	932,662.50	935,975.00	937,625.00	470,812.50	-
Certificates of Participation, Series 2009B *	-	-	-	268,832.56	590,120.26	590,120.26	590,120.26	1,050,120.26	1,531,922.51
Certificates of Participation, Series 2012A	-	-	-	-	-	185,719.72	1,054,656.26	1,055,406.26	1,055,956.26
Tax-Exempt Commercial Paper, 2005	-	228,391.27	-	-	-	-	-	-	-
Tax-Exempt Commercial Paper, 2007	-	727,534.49	-	-	-	-	-	-	-
Total Existing Debt Service for Other Funded Projects	\$ 8,641,000.51	\$ 8,969,451.37	\$ 10,534,827.92	\$ 15,164,424.42	\$ 22,983,768.92	\$ 24,024,719.06	\$ 27,689,336.03	\$ 27,672,081.73	\$ 27,687,817.96
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
IUB Data Network Infrastructure Upgrades	-	-	-	-	-	-	-	-	854,234.99
IUB Kelley School of Business Renovation - Phase II	-	-	-	-	-	-	-	-	2,477,281.47
IUB International Studies Classroom Building	-	-	-	-	-	-	-	-	4,527,445.44
IUB School of Informatics (Non-Fee Repl Portion)	-	-	-	-	-	-	-	-	1,281,352.48
IUB Multidisciplinary Science - Phase III (Non-Fee Repl Portion)	-	-	-	-	-	-	-	-	854,234.99
IUB Maurer School of Law Addition	-	-	-	-	-	-	-	-	2,562,704.96
IUB University East Apartments Replacement	-	-	-	-	-	-	-	-	1,452,199.48
IUB Repl Apts for BBHN (Banta, Bicknell, Hepburn, Nutt)	-	-	-	-	-	-	-	-	1,366,775.98
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,376,229.79
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ 8,641,000.51	\$ 8,969,451.37	\$ 10,534,827.92	\$ 15,164,424.42	\$ 22,983,768.92	\$ 24,024,719.06	\$ 27,689,336.03	\$ 27,672,081.73	\$ 43,064,047.75
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 26,825,855.97	\$ 29,706,524.63	\$ 36,117,293.32	\$ 42,065,515.28	\$ 63,358,588.47	\$ 47,006,365.05	\$ 43,338,695.34	\$ 45,129,749.82	\$ 71,094,995.50

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
- (2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
- (3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
- (4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 40,374,819.55	\$ -	\$ -	\$ 22,983,768.92		\$ -	\$ 63,358,588.47
2012	\$ 22,981,645.99	\$ -	\$ -	\$ 24,024,719.06		\$ -	\$ 47,006,365.05
2013	\$ 15,649,359.31	\$ -	\$ -	\$ 27,689,336.03		\$ -	\$ 43,338,695.34
2014	\$ 15,663,774.61	\$ 1,793,893.48	\$ -	\$ 27,672,081.73		\$ -	\$ 45,129,749.82
2015	\$ 15,866,641.52	\$ 1,793,893.48	\$ 10,370,412.75	\$ 27,687,817.96		\$ 15,376,229.79	\$ 71,094,995.50
2016	\$ 15,863,717.73	\$ 1,793,893.48	\$ 10,370,412.75	\$ 27,670,410.78		\$ 15,376,229.79	\$ 71,074,664.53
2017	\$ 15,802,988.54	\$ 1,793,893.48	\$ 10,370,412.75	\$ 27,683,648.95		\$ 15,376,229.79	\$ 71,027,173.51
2018	\$ 16,025,147.24	\$ 1,793,893.48	\$ 10,370,412.75	\$ 27,682,357.01		\$ 15,376,229.79	\$ 71,248,040.27
2019	\$ 13,322,791.93	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,542,201.93		\$ 15,376,229.79	\$ 62,405,529.88
2020	\$ 11,878,840.88	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,546,146.24		\$ 15,376,229.79	\$ 60,965,523.14
2021	\$ 11,879,889.86	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,254,703.67		\$ 15,376,229.79	\$ 60,675,129.55
2022	\$ 10,448,615.06	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,253,756.73		\$ 15,376,229.79	\$ 59,242,907.81
2023	\$ 10,517,484.38	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,248,482.91		\$ 15,376,229.79	\$ 59,306,503.31
2024	\$ 10,514,889.83	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,250,610.66		\$ 15,376,229.79	\$ 59,306,036.51
2025	\$ 10,512,976.75	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,258,564.01		\$ 15,376,229.79	\$ 59,312,076.78
2026	\$ 8,237,195.10	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,251,635.55		\$ 15,376,229.79	\$ 57,029,366.67
2027	\$ 8,253,250.86	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,249,980.99		\$ 15,376,229.79	\$ 57,043,767.87
2028	\$ 3,069,916.99	\$ 1,793,893.48	\$ 10,370,412.75	\$ 21,253,606.92		\$ 15,376,229.79	\$ 51,864,059.93
2029	\$ 1,730,108.84	\$ 1,793,893.48	\$ 10,370,412.75	\$ 17,140,979.01		\$ 15,376,229.79	\$ 46,411,623.87
2030	\$ 1,728,801.69	\$ 1,793,893.48	\$ 10,370,412.75	\$ 10,458,158.36		\$ 15,376,229.79	\$ 39,727,496.07
2031	\$ -	\$ 1,793,893.48	\$ 10,370,412.75	\$ 9,226,521.16		\$ 15,376,229.79	\$ 36,767,057.18
2032	\$ -	\$ 1,793,893.48	\$ 10,370,412.75	\$ 9,234,407.14		\$ 15,376,229.79	\$ 36,774,943.16
2033	\$ -	\$ 1,793,893.48	\$ 10,370,412.75	\$ 9,230,301.86		\$ 15,376,229.79	\$ 36,770,837.88
2034			\$ 10,370,412.75	\$ 9,221,545.94		\$ 15,376,229.79	\$ 34,968,188.48
2035				\$ 9,223,954.30			\$ 9,223,954.30
2036				\$ 4,701,534.38			\$ 4,701,534.38
2037				\$ 4,174,371.88			\$ 4,174,371.88
2038				\$ -			\$ -

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 157,351,348.70			\$ 240,496,375.25			\$ 397,847,723.95
2012	\$ 145,739,976.44			\$ 298,382,576.55			\$ 444,122,552.99
2013	\$ 136,745,497.62			\$ 285,688,342.45			\$ 422,433,840.07
2014	\$ 127,308,895.41	\$ 20,413,606.52		\$ 272,617,550.45			\$ 420,340,052.38
2015	\$ 117,224,072.12	\$ 19,793,495.42	\$ 118,010,087.24	\$ 259,069,707.00		\$ 174,973,770.21	\$ 689,071,131.99
2016	\$ 106,656,580.85	\$ 19,137,727.94	\$ 114,425,254.50	\$ 245,161,201.70		\$ 169,658,532.21	\$ 655,039,297.20
2017	\$ 95,653,421.45	\$ 18,444,253.82	\$ 110,634,293.88	\$ 230,795,141.45		\$ 164,037,668.03	\$ 619,564,778.63
2018	\$ 83,903,321.15	\$ 17,710,904.94	\$ 106,625,353.02	\$ 215,950,000.00		\$ 158,093,604.15	\$ 582,283,183.26
2019	\$ 74,179,238.32	\$ 16,935,388.50	\$ 102,385,898.06	\$ 203,685,000.00		\$ 151,807,756.60	\$ 548,993,281.48
2020	\$ 65,484,856.47	\$ 16,115,279.86	\$ 97,902,674.44	\$ 190,905,000.00		\$ 145,160,472.82	\$ 515,568,283.59
2021	\$ 56,376,047.77	\$ 15,248,014.97	\$ 93,161,665.47	\$ 177,865,000.00		\$ 138,130,970.21	\$ 480,781,698.42
2022	\$ 48,300,000.00	\$ 14,330,882.36	\$ 88,148,048.47	\$ 164,290,000.00		\$ 130,697,271.21	\$ 445,766,202.04
2023	\$ 39,770,000.00	\$ 13,361,014.62	\$ 82,846,148.50	\$ 150,155,000.00		\$ 122,836,134.52	\$ 408,968,297.64
2024	\$ 30,835,000.00	\$ 12,335,379.49	\$ 77,239,389.29	\$ 135,420,000.00		\$ 114,522,982.47	\$ 370,352,751.25
2025	\$ 21,480,000.00	\$ 11,250,770.33	\$ 71,310,241.41	\$ 120,045,000.00		\$ 105,731,824.17	\$ 329,817,835.91
2026	\$ 14,020,000.00	\$ 10,103,796.15	\$ 65,040,167.54	\$ 104,010,000.00		\$ 96,435,174.27	\$ 289,609,137.96
2027	\$ 6,200,000.00	\$ 8,890,870.95	\$ 58,409,564.41	\$ 87,240,000.00		\$ 86,603,967.01	\$ 247,344,402.37
2028	\$ 3,325,000.00	\$ 7,608,202.56	\$ 51,397,701.61	\$ 69,715,000.00		\$ 76,207,465.32	\$ 208,253,369.49
2029	\$ 1,695,000.00	\$ 6,251,780.73	\$ 43,982,656.70	\$ 55,530,000.00		\$ 65,213,164.79	\$ 172,672,602.22
2030	\$ -	\$ 4,817,364.65	\$ 36,141,246.70	\$ 47,410,000.00		\$ 53,586,691.98	\$ 141,955,303.33
2031	\$ -	\$ 3,300,469.64	\$ 27,848,955.63	\$ 40,215,000.00		\$ 41,291,696.98	\$ 112,656,122.25
2032	\$ -	\$ 1,696,353.17	\$ 19,079,857.82	\$ 32,715,000.00		\$ 28,289,739.76	\$ 81,780,950.75
2033	\$ -	\$ -	\$ 9,806,536.89	\$ 24,905,000.00		\$ 14,540,170.01	\$ 49,251,706.90
2034			\$ -	\$ 16,775,000.00		\$ -	\$ 16,775,000.00
2035				\$ 8,300,000.00			\$ 8,300,000.00
2036				\$ 3,990,000.00			\$ 3,990,000.00
2037				\$ -			\$ -
2038				\$ -			\$ -

**INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	4,093	4,069	3,911	3,909	4,234	4,308	4,024	4,150	126
Masters Degrees	667	637	589	577	676	712	631	655	24
Doctoral Degrees	229	215	214	234	193	230	219	219	(0)
TOTAL OVERALL DEGREES CONFERRED	4,989	4,921	4,714	4,720	5,103	5,250	4,875	5,024	150

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	551	555	526	556	702	840	544	699	155
TOTAL OVERALL DEGREES CONFERRED	551	555	526	556	702	840	544	699	155

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE III (PMS III)
HIGH IMPACT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
HIGH IMPACT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Bachelor Degrees	498	522	491	481	593	662	504	579	75
Masters Degrees	43	38	36	44	63	53	39	53	14
Doctoral Degrees	4	10	12	19	15	18	9	17	9
TOTAL OVERALL DEGREES CONFERRED	545	570	539	544	671	733	551	649	98

Notes:

- CHE provided a list of eligible degree programs to include
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment.
- Only applies to IUB, PUWL, BSU and IUPUI General Academic
- Includes all degrees conferred in identified STEM areas as reported on SIS file for a given reporting year (Bachelor, Master's, Doctoral)

**INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	4,437	4,250	4,092	4,518	4,360	4,210	4,260	4,363	103
Number of Students Receiving a Degree in 4 years	1,980	2,026	1,836	2,051	2,127	2,209	1,947	2,129	182
On-Time Graduation Rate	44.6%	47.7%	44.9%	45.4%	48.8%	52.5%	45.7%	48.8%	3.1%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 73,183	\$ 72,825	\$ 75,050	\$ 73,732	\$ 67,911	\$ 65,125	\$ 73,686	\$ 68,923	\$ (4,763)

Indiana University
East

INDIANA UNIVERSITY EAST
2013-15 OPERATING APPROPRIATION REQUEST

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IU EAST

The submitted change in operating and fee replacement appropriations for the East campus in the 2013-15 biennium is \$313 thousand. This submission consists of allocations of performance funding and fee replacement. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, student persistence incentive, and institution defined productivity.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values shown in the table below.
- *The institution defined productivity metric* developed by Indiana University compares funding provided by Indiana taxpayers and Hoosier families per in-state bachelor's degree. The measure focuses on reducing the cost of attendance for students and uses a significance factor developed by ICHE to calculate the performance funding adjustment as shown in the table below.

Performance Funding Metric Values and Amounts Submitted

	Overall Degree Completion		At-Risk Degree Completion		Student Persistence Incentive		Institution Defined Productivity	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
30 Credit Hours Completed					\$ 765	\$ 893		
60 Credit Hours Completed					\$ 1,530	\$ 1,785		
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420				
Master's Degree	\$ 3,898	\$ 4,547						
Doctoral Degree	\$ 1,949	\$ 2,274						

	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Amount Submitted	\$ 439,118	\$ 512,305	\$ 231,137	\$ 269,660	\$ 139,740	\$ 163,030	\$ 31,241	\$ 36,448

Total Performance Funding Submitted 2013-14: \$ 841,237

Total Performance Funding Submitted 2014-15: \$ 981,443

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued, and 2) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$-85 thousand.

INDIANA UNIVERSITY EAST
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 7,896,005	\$ 8,330,921	\$ 8,330,921	\$ 8,330,921	\$ (499,855)	\$ 7,831,066	\$ 7,831,066	\$ (583,164)	\$ 7,747,757	\$ 7,747,757		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 439,118			\$ 512,305		
- At-Risk Student Degree Completion							\$ 231,137			\$ 269,660		
- High Impact Degree Completion							\$ -			\$ -		
- Student Persistence Incentive							\$ 139,740			\$ 163,030		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ -			\$ -		
- Institution Defined Productivity Metric							\$ 31,241			\$ 36,448		
TOTAL OPERATING BUDGET SUBMISSION	\$ 7,896,005	\$ 8,330,921	\$ 8,330,921	\$ 8,330,921	\$ (499,855)	\$ 7,831,066	\$ 8,672,302	\$ (583,164)	\$ 7,747,757	\$ 8,729,200	4.1%	0.7%
B. Debt Service (3)	\$ 2,180,670	\$ 1,399,672	\$ 1,399,262	\$ 1,399,262			\$ 1,400,666			\$ 1,314,361	0.1%	-6.2%
C. Line Items (4)												
- General Fund												
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 10,076,675	\$ 9,730,593	\$ 9,730,183	\$ 9,730,183	\$ (499,855)	\$ 7,831,066	\$ 10,072,968	\$ (583,164)	\$ 7,747,757	\$ 10,043,561	3.5%	-0.3%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 10,076,675	\$ 9,730,593	\$ 9,730,183	\$ 9,730,183	\$ (499,855)	\$ 7,831,066	\$ 10,072,968	\$ (583,164)	\$ 7,747,757	\$ 10,043,561	3.5%	-0.3%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY EAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	3,082	3,109	3,400	3,931	4,475	4,719	4,879	4,887	4,887	8.0%	0.2%	0.0%
a. Indiana Resident	2,714	2,695	2,925	3,278	3,636	3,806	3,904	3,904	3,904	6.2%	0.0%	0.0%
b. Non-Resident	55	94	146	254	369	376	438	438	438	41.3%	0.0%	0.0%
d. Reciprocity Non-Resident	313	320	329	399	470	537	537	545	545	9.4%	1.5%	0.0%
2. Graduate	171	151	152	179	166	208	287	334	334	9.0%	16.4%	0.0%
a. Indiana Resident	163	141	140	160	140	160	239	277	277	6.6%	15.9%	0.0%
b. Non-Resident	0	5	5	1	9	26	25	32	32		28.0%	0.0%
d. Reciprocity Non-Resident	8	5	7	18	17	22	23	25	25	19.2%	8.7%	0.0%
3. Professional	0	0	0	0	0	0	0	0	0			
a. Indiana Resident	0	0	0	0	0	0	0	0	0			
b. Non-Resident	0	0	0	0	0	0	0	0	0			
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	3,253	3,260	3,552	4,110	4,641	4,927	5,166	5,221	5,221	8.0%	1.1%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	1,597.4	1,621.9	1,800.4	2,111.7	2,363.3	2,609.6	2,688.0	2,693.0	2,693.0	9.1%	0.2%	0.0%
a. Indiana Resident	1,373.2	1,399.0	1,534.8	1,783.7	1,947.4	2,131.9	2,187.0	2,187.0	2,187.0	8.1%	0.0%	0.0%
b. Non-Resident	14.3	30.4	53.7	79.4	114.8	142.6	166.0	166.0	166.0	50.5%	0.0%	0.0%
d. Reciprocity Non-Resident	209.9	192.5	211.9	248.6	301.1	335.0	335.0	340.0	340.0	8.1%	1.5%	0.0%
2. Graduate	36.5	32.8	60.6	71.9	60.5	80.7	112.0	130.0	130.0	20.5%	16.1%	0.0%
a. Indiana Resident	34.4	31.6	58.0	64.0	52.6	62.8	94.0	109.0	109.0	18.2%	16.0%	0.0%
b. Non-Resident	0.0	0.6	0.7	0.3	1.8	7.3	7.0	9.0	9.0		28.6%	0.0%
d. Reciprocity Non-Resident	2.1	0.6	1.9	7.6	6.1	10.6	11.0	12.0	12.0	31.8%	9.1%	0.0%
3. Professional	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
a. Indiana Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
b. Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	1,633.9	1,654.8	1,861.0	2,183.5	2,423.8	2,690.3	2,800.0	2,823.0	2,823.0	9.4%	0.8%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	180	173	324	416	573	709	727	727	727	26.2%	0.0%	0.0%
2. High School FTE	27.2	28.8	51.7	73.1	106.5	137.7	141.0	141.0	141.0	31.6%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY EAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	235,975.00	235,974.92	231,055.25	215,065.72	-	-	-	-	-
Student Fee Bonds Series J	426,155.70	425,700.72	425,648.40	425,706.93	425,706.94	425,706.94	425,706.94	425,706.93	-
Student Fee Bonds Series K	669,574.34	670,026.72							
Student Fee Bonds Series L	571,655.00	569,127.50	570,256.25	574,000.00	-	-	-	-	-
Student Fee Bonds Series P	131,751.27	131,976.20	131,852.73	131,864.96	131,929.75	131,810.56	131,840.52	132,005.56	404,610.83
Student Fee Bonds Series R	236,762.96	391,911.78	1,064,981.99	1,056,765.64	1,623,033.03	842,154.81	841,714.24	842,953.32	841,411.34
Student Fee Bonds Series S									
Total Existing Debt Service for Fee Replacement Projects	\$ 2,271,874.27	\$ 2,424,717.84	\$ 2,423,794.62	\$ 2,403,403.25	\$ 2,180,669.72	\$ 1,399,672.31	\$ 1,399,261.70	\$ 1,400,665.81	\$ 1,246,022.17
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUE Regional Campus Projects									68,338.80
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 68,338.80
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 2,271,874.27	\$ 2,424,717.84	\$ 2,423,794.62	\$ 2,403,403.25	\$ 2,180,669.72	\$ 1,399,672.31	\$ 1,399,261.70	\$ 1,400,665.81	\$ 1,314,360.97

INDIANA UNIVERSITY EAST, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Total Existing Debt Service for Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
IUE Energy Savings Project								172,714.94	172,714.94
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 172,714.94	\$ 172,714.94
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
IUE Health, Wellness and Athletics Facility									427,117.49
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 427,117.49
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 172,714.94	\$ 599,832.43
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 2,271,874.27	\$ 2,424,717.84	\$ 2,423,794.62	\$ 2,403,403.25	\$ 2,180,669.72	\$ 1,399,672.31	\$ 1,399,261.70	\$ 1,573,380.75	\$ 1,914,193.40

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

INDIANA UNIVERSITY EAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 2,180,669.72		\$ -	\$ -	\$ -	\$ -	\$ 2,180,669.72
2012	\$ 1,399,672.31		\$ -	\$ -	\$ -	\$ -	\$ 1,399,672.31
2013	\$ 1,399,261.70		\$ -	\$ -	\$ -	\$ -	\$ 1,399,261.70
2014	\$ 1,400,665.81		\$ -	\$ -	\$ 172,714.94	\$ -	\$ 1,573,380.75
2015	\$ 1,246,022.17		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,914,193.40
2016	\$ 1,245,582.74		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,913,753.97
2017	\$ 1,245,987.25		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,914,158.48
2018	\$ 1,061,295.72		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,729,466.95
2019	\$ 575,198.47		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,243,369.70
2020	\$ 424,195.27		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,092,366.50
2021	\$ 424,537.57		\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 1,092,708.80
2022			\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 668,171.23
2023			\$ 68,338.80	\$ -	\$ 172,714.94	\$ 427,117.49	\$ 668,171.23
2024			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2025			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2026			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2027			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2028			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2029			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2030			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2031			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2032			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2033			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2034			\$ 68,338.80	\$ -		\$ 427,117.49	\$ 495,456.29
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

INDIANA UNIVERSITY EAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 7,841,573.89			\$ -			\$ 7,841,573.89
2012	\$ 7,069,101.95			\$ -			\$ 7,069,101.95
2013	\$ 6,274,939.54			\$ -			\$ 6,274,939.54
2014	\$ 5,453,732.93			\$ -	\$ 1,241,410.06		\$ 6,695,142.99
2015	\$ 4,453,593.30		\$ 777,661.20	\$ -	\$ 1,127,662.10	\$ 4,860,382.51	\$ 11,219,299.11
2016	\$ 3,403,538.55		\$ 754,037.92	\$ -	\$ 1,008,511.11	\$ 4,712,737.01	\$ 9,878,824.59
2017	\$ 2,300,143.36		\$ 729,056.30	\$ -	\$ 883,700.46	\$ 4,556,601.89	\$ 8,469,502.01
2018	\$ 1,329,591.00		\$ 702,638.24	\$ -	\$ 752,961.29	\$ 4,391,489.00	\$ 7,176,679.53
2019	\$ 807,828.00		\$ 674,701.14	\$ -	\$ 616,012.01	\$ 4,216,882.13	\$ 6,315,423.28
2020	\$ 414,183.00		\$ 645,157.66	\$ -	\$ 472,557.65	\$ 4,032,235.36	\$ 5,564,133.67
2021	\$ -		\$ 613,915.42	\$ -	\$ 322,289.20	\$ 3,836,971.39	\$ 4,773,176.01
2022			\$ 580,876.76	\$ -	\$ 164,883.00	\$ 3,630,479.76	\$ 4,376,239.52
2023			\$ 545,938.38	\$ -	\$ -	\$ 3,412,114.85	\$ 3,958,053.23
2024			\$ 508,991.03	\$ -		\$ 3,181,193.96	\$ 3,690,184.99
2025			\$ 469,919.22	\$ -		\$ 2,936,995.12	\$ 3,406,914.34
2026			\$ 428,600.77	\$ -		\$ 2,678,754.84	\$ 3,107,355.61
2027			\$ 384,906.52	\$ -		\$ 2,405,665.75	\$ 2,790,572.27
2028			\$ 338,699.85	\$ -		\$ 2,116,874.04	\$ 2,455,573.89
2029			\$ 289,836.29	\$ -		\$ 1,811,476.80	\$ 2,101,313.09
2030			\$ 238,163.08	\$ -		\$ 1,488,519.22	\$ 1,726,682.30
2031			\$ 183,518.65	\$ -		\$ 1,146,991.58	\$ 1,330,510.23
2032			\$ 125,732.18	\$ -		\$ 785,826.10	\$ 911,558.28
2033			\$ 64,622.98	\$ -		\$ 403,893.61	\$ 468,516.59
2034			\$ -	\$ -		\$ -	\$ -
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

**INDIANA UNIVERSITY EAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	173	206	182	198	250	264	187	237	50
Masters Degrees	0	0	0	5	4	27	-	12	12
Doctoral Degrees	0	0	0	0	0	0	-	-	-
TOTAL OVERALL DEGREES CONFERRED	173	206	182	203	254	291	187	249	62

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY EAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	62	76	62	75	114	137	67	109	42
TOTAL OVERALL DEGREES CONFERRED	62	76	62	75	114	137	67	109	42

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY EAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE IV (PMS IV)
STUDENT PERSISTENCE INCENTIVE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
STUDENT PERSISTENCE INCENTIVE PFF METRIC FOR FY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Campuses									
Successfully Completed 15 Credit Hours									
Successfully Completed 30 Credit Hours									
Successfully Completed 45 Credit Hours									
4 year Institutions									
Successfully Completed 30 Credit Hours	198	206	196	235	243	250	200	243	43
Successfully Completed 60 Credit Hours	208	218	197	262	304	267	208	278	70
OVERALL STUDENTS PERSISTING	406	424	393	497	547	517	408	520	113

Notes:

- Assumes undergraduate , degree-seeking, resident students only, no reciprocity
- Resident status is based on FY being reported (e.g., for reporting FY06, the student must have been an Indiana resident during 05-06)
- Based on fiscal year (summer A, fall, spring, summer B)

**INDIANA UNIVERSITY EAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	174	188	198	190	175	212	187	192	6
Number of Students Receiving a Degree in 4 years	11	17	11	9	9	18	13	12	(1)
On-Time Graduation Rate	6.3%	9.0%	5.6%	4.7%	5.1%	8.5%	7.0%	6.2%	-0.7%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY EAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 84,548	\$ 73,643	\$ 85,162	\$ 81,538	\$ 70,959	\$ 72,727	\$ 81,118	\$ 75,075	\$ (6,043)

Indiana University
Kokomo

INDIANA UNIVERSITY KOKOMO
2013-15 OPERATING APPROPRIATION REQUEST

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IU KOKOMO

The submitted change in operating and fee replacement appropriations for the Kokomo campus in the 2013-15 biennium is \$846 thousand. This submission consists of allocations of performance funding and fee replacement. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, student persistence incentive, and institution defined productivity.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values are shown in the table below.
- *The institution defined productivity metric* developed by Indiana University compares funding provided by Indiana taxpayers and Hoosier families per in-state bachelor's degree. The measure focuses on reducing the cost of attendance for students and uses a significance factor developed by ICHE to calculate the performance funding adjustment as shown in the table below.

Performance Funding Metric Values and Amounts Submitted

	Overall Degree Completion		At-Risk Degree Completion		Student Persistence Incentive		Institution Defined Productivity	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
30 Credit Hours Completed					\$ 765	\$ 893		
60 Credit Hours Completed					\$ 1,530	\$ 1,785		
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420				
Master's Degree	\$ 3,898	\$ 4,547						
Doctoral Degree	\$ 1,949	\$ 2,274						
Amount Submitted	\$ 645,686	\$ 753,300	\$ 245,813	\$ 286,782	\$ 15,810	\$ 18,445	\$ 52,799	\$ 61,599
<i>Total Performance Funding Submitted 2013-14:</i>			\$ 960,108					
<i>Total Performance Funding Submitted 2014-15:</i>			\$ 1,120,126					

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued, and 2) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$521 thousand.

INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 10,345,995	\$ 11,354,682	\$ 11,354,682	\$ 11,354,682	\$ (681,281)	\$ 10,673,401	\$ 10,673,401	\$ (794,828)	\$ 10,559,854	\$ 10,559,854		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 645,686			\$ 753,300		
- At-Risk Student Degree Completion							\$ 245,813			\$ 286,782		
- High Impact Degree Completion							\$ -			\$ -		
- Student Persistence Incentive							\$ 15,810			\$ 18,445		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ -			\$ -		
- Institution Defined Productivity Metric							\$ 52,799			\$ 61,599		
TOTAL OPERATING BUDGET SUBMISSION	\$ 10,345,995	\$ 11,354,682	\$ 11,354,682	\$ 11,354,682	\$ (681,281)	\$ 10,673,401	\$ 11,633,509	\$ (794,828)	\$ 10,559,854	\$ 11,679,980	2.5%	0.4%
B. Debt Service (3)	\$ 1,932,256	\$ 1,799,063	\$ 1,818,053	\$ 1,688,382			\$ 1,795,518			\$ 2,338,717	-1.2%	30.3%
C. Line Items (4)												
- General Fund												
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 12,278,251	\$ 13,153,745	\$ 13,172,735	\$ 13,043,064	\$ (681,281)	\$ 10,673,401	\$ 13,429,027	\$ (794,828)	\$ 10,559,854	\$ 14,018,697	1.9%	4.4%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 12,278,251	\$ 13,153,745	\$ 13,172,735	\$ 13,043,064	\$ (681,281)	\$ 10,673,401	\$ 13,429,027	\$ (794,828)	\$ 10,559,854	\$ 14,018,697	1.9%	4.4%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	3,642	3,570	3,437	3,862	4,014	4,034	4,042	4,047	4,047	1.8%	0.1%	0.0%
a. Indiana Resident	3,615	3,543	3,410	3,835	3,980	4,004	4,004	4,004	4,004	1.7%	0.0%	0.0%
b. Non-Resident	27	27	27	27	34	30	38	43	43	5.9%	13.2%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	280	278	258	257	211	192	214	214	214	-4.4%	0.0%	0.0%
a. Indiana Resident	272	276	256	253	207	185	198	198	198	-5.2%	0.0%	0.0%
b. Non-Resident	8	2	2	4	4	7	16	16	16	12.2%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	0	0	0	0	0	0	0	0	0			
a. Indiana Resident	0	0	0	0	0	0	0	0	0			
b. Non-Resident	0	0	0	0	0	0	0	0	0			
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	3,922	3,848	3,695	4,119	4,225	4,226	4,256	4,261	4,261	1.4%	0.1%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	1,875.5	1,860.7	1,780.1	2,019.0	2,098.9	2,244.9	2,249.0	2,252.0	2,252.0	3.1%	0.1%	0.0%
a. Indiana Resident	1,864.3	1,851.5	1,771.8	2,005.1	2,080.2	2,228.3	2,228.0	2,228.0	2,228.0	3.0%	0.0%	0.0%
b. Non-Resident	11.2	9.2	8.3	13.9	18.7	16.6	21.0	24.0	24.0	11.0%	14.3%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	87.1	100.5	111.9	112.4	90.4	104.2	118.0	118.0	118.0	5.2%	0.0%	0.0%
a. Indiana Resident	82.7	100.3	111.0	110.1	88.9	99.0	106.0	106.0	106.0	4.2%	0.0%	0.0%
b. Non-Resident	4.4	0.2	0.9	2.3	1.5	5.2	12.0	12.0	12.0	18.2%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
a. Indiana Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
b. Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	1,962.5	1,961.2	1,892.0	2,131.4	2,189.3	2,349.1	2,367.0	2,370.0	2,370.0	3.2%	0.1%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	270	328	365	562	638	813	813	813	813	20.2%	0.0%	0.0%
2. High School FTE	44.9	54.7	63.0	93.7	106.8	145.8	146.0	146.0	146.0	21.7%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	306,960.28	306,959.96	300,560.38	279,760.08	-	-	-	-	-
Student Fee Bonds Series J	1,041,972.73	1,039,325.29	604,544.11	604,627.24	604,627.25	604,627.24	604,627.24	604,627.25	-
Student Fee Bonds Series K	99,531.31	99,598.55							
Student Fee Bonds Series N	875,146.78	875,568.11	874,573.75	876,539.98	874,666.44	766,439.13	-	-	-
Student Fee Bonds Series P	186,984.42	187,303.66	187,128.43	187,145.78	187,237.73	187,068.57	187,111.08	187,345.30	574,232.95
Student Fee Bonds Series R	98,508.94	167,991.96	267,728.16	266,168.92	265,724.83	151,675.65	151,226.23	841,415.36	841,229.97
Student Fee Bonds Series U			-	-	-	89,252.48	745,417.25	162,130.28	162,130.28
Total Existing Debt Service for Fee Replacement Projects	\$ 2,609,104.46	\$ 2,676,747.53	\$ 2,234,534.83	\$ 2,214,242.00	\$ 1,932,256.25	\$ 1,799,063.07	\$ 1,688,381.80	\$ 1,795,518.19	\$ 1,577,593.20
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUK Regional Campus Projects									761,123.37
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 761,123.37
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 2,609,104.46	\$ 2,676,747.53	\$ 2,234,534.83	\$ 2,214,242.00	\$ 1,932,256.25	\$ 1,799,063.07	\$ 1,688,381.80	\$ 1,795,518.19	\$ 2,338,716.57

INDIANA UNIVERSITY KOKOMO, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Consolidated Revenue Bonds, Series 2008A	-	13,395.00	97,300.00	94,550.00	91,800.00	99,050.00	95,800.00	97,550.00	99,050.00
Facility Revenue Bonds, 2000	139,850.12	156,013.02							
KO Qualified Energy Savings Note 2007	-	190,245.78	190,245.78	190,245.78	190,245.78	190,245.78	190,245.78	190,245.78	190,245.78
Total Existing Debt Service for Other Funded Projects	\$ 139,850.12	\$ 359,653.80	\$ 287,545.78	\$ 284,795.78	\$ 282,045.78	\$ 289,295.78	\$ 286,045.78	\$ 287,795.78	\$ 289,295.78
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ 139,850.12	\$ 359,653.80	\$ 287,545.78	\$ 284,795.78	\$ 282,045.78	\$ 289,295.78	\$ 286,045.78	\$ 287,795.78	\$ 289,295.78
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 2,748,954.58	\$ 3,036,401.33	\$ 2,522,080.61	\$ 2,499,037.78	\$ 2,214,302.03	\$ 2,088,358.85	\$ 1,974,427.58	\$ 2,083,313.97	\$ 2,628,012.35

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT**

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 1,932,256.25		\$ -	\$ 282,045.78	\$ -		\$ 2,214,302.03
2012	\$ 1,799,063.07		\$ -	\$ 289,295.78	\$ -		\$ 2,088,358.85
2013	\$ 1,688,381.80		\$ -	\$ 286,045.78	\$ -		\$ 1,974,427.58
2014	\$ 1,795,518.19		\$ -	\$ 287,795.78	\$ -		\$ 2,083,313.97
2015	\$ 1,577,593.20		\$ 761,123.37	\$ 289,295.78	\$ -		\$ 2,628,012.35
2016	\$ 1,577,758.24		\$ 761,123.37	\$ 285,545.78	\$ -		\$ 2,624,427.39
2017	\$ 1,574,585.25		\$ 761,123.37	\$ 287,245.78	\$ -		\$ 2,622,954.40
2018	\$ 1,204,862.83		\$ 761,123.37	\$ 93,000.00	\$ -		\$ 2,058,986.20
2019	\$ 1,709,961.41		\$ 761,123.37	\$ 99,000.00	\$ -		\$ 2,570,084.78
2020	\$ 1,497,845.16		\$ 761,123.37	\$ 94,500.00	\$ -		\$ 2,353,468.53
2021	\$ 1,496,196.19		\$ 761,123.37	\$ -	\$ -		\$ 2,257,319.56
2022			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2023			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2024			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2025			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2026			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2027			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2028			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2029			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2030			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2031			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2032			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2033			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2034			\$ 761,123.37	\$ -	\$ -		\$ 761,123.37
2035				\$ -	\$ -		\$ -
2036				\$ -	\$ -		\$ -
2037				\$ -	\$ -		\$ -
2038				\$ -	\$ -		\$ -

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION**

SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 12,184,220.69			\$ 1,680,985.97			\$ 13,865,206.66
2012	\$ 10,724,553.00			\$ 1,468,599.42			\$ 12,193,152.42
2013	\$ 9,920,558.64			\$ 1,249,520.92			\$ 11,170,079.56
2014	\$ 8,998,561.45			\$ 1,018,446.65			\$ 10,017,008.10
2015	\$ 7,835,949.16		\$ 8,887,661.20	\$ 775,058.96			\$ 17,498,669.32
2016	\$ 6,616,562.79		\$ 8,398,097.34	\$ 524,025.79			\$ 15,538,685.92
2017	\$ 5,340,914.47		\$ 8,119,864.57	\$ 260,000.00			\$ 13,720,779.04
2018	\$ 4,379,050.77		\$ 7,825,633.41	\$ 180,000.00			\$ 12,384,684.18
2019	\$ 2,849,810.90		\$ 7,514,483.95	\$ 90,000.00			\$ 10,454,294.85
2020	\$ 1,459,703.60		\$ 7,185,443.40	\$ -			\$ 8,645,147.00
2021	\$ -		\$ 6,837,483.03	\$ -			\$ 6,837,483.03
2022			\$ 6,469,514.93	\$ -			\$ 6,469,514.93
2023			\$ 6,080,388.66	\$ -			\$ 6,080,388.66
2024			\$ 5,668,887.63	\$ -			\$ 5,668,887.63
2025			\$ 5,233,725.30	\$ -			\$ 5,233,725.30
2026			\$ 4,773,541.13	\$ -			\$ 4,773,541.13
2027			\$ 4,286,896.37	\$ -			\$ 4,286,896.37
2028			\$ 3,772,269.53	\$ -			\$ 3,772,269.53
2029			\$ 3,228,051.66	\$ -			\$ 3,228,051.66
2030			\$ 2,652,541.25	\$ -			\$ 2,652,541.25
2031			\$ 2,043,939.00	\$ -			\$ 2,043,939.00
2032			\$ 1,400,342.12	\$ -			\$ 1,400,342.12
2033			\$ 719,738.42	\$ -			\$ 719,738.42
2034			\$ -	\$ -			\$ -
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	256	263	282	325	321	386	267	344	77
Masters Degrees	26	30	30	33	33	55	29	40	12
Doctoral Degrees	0	0	0	0	0	0	-	-	-
TOTAL OVERALL DEGREES CONFERRED	282	293	312	358	354	441	296	384	89

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	60	66	72	92	97	143	66	111	45
TOTAL OVERALL DEGREES CONFERRED	60	66	72	92	97	143	66	111	45

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE IV (PMS IV)
STUDENT PERSISTENCE INCENTIVE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
STUDENT PERSISTENCE INCENTIVE PFF METRIC FOR FY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Campuses									
Successfully Completed 15 Credit Hours									
Successfully Completed 30 Credit Hours									
Successfully Completed 45 Credit Hours									
4 year Institutions									
Successfully Completed 30 Credit Hours	248	241	213	232	252	268	234	251	17
Successfully Completed 60 Credit Hours	243	319	313	244	307	330	292	294	2
OVERALL STUDENTS PERSISTING	491	560	526	476	559	598	526	544	19

Notes:

- Assumes undergraduate , degree-seeking, resident students only, no reciprocity
- Resident status is based on FY being reported (e.g., for reporting FY06, the student must have been an Indiana resident during 05-06)
- Based on fiscal year (summer A, fall, spring, summer B)

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	272	306	323	365	321	372	300	353	52
Number of Students Receiving a Degree in 4 years	27	27	18	31	26	26	24	28	4
On-Time Graduation Rate	9.9%	8.8%	5.6%	8.5%	8.1%	7.0%	8.0%	7.8%	-0.1%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY KOKOMO
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 72,421	\$ 71,352	\$ 66,693	\$ 56,296	\$ 61,275	\$ 52,881	\$ 70,155	\$ 56,817	\$ (13,338)

Indiana University
Northwest

INDIANA UNIVERSITY NORTHWEST
2013-15 OPERATING APPROPRIATION REQUEST

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IU NORTHWEST

The submitted change in operating and fee replacement appropriations for the Northwest campus in the 2013-15 biennium is \$4.3 million. This submission consists of allocations of performance funding and fee replacement. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, and student persistence incentive.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values are shown in the table below.

Performance Funding Metric Values and Amounts Submitted

	Overall Degree Completion		At-Risk Degree Completion		Student Persistence Incentive	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
30 Credit Hours Completed					\$ 765	\$ 893
60 Credit Hours Completed					\$ 1,530	\$ 1,785
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420		
Master's Degree	\$ 3,898	\$ 4,547				
Doctoral Degree	\$ 1,949	\$ 2,274				
Amount Submitted	\$ 278,022	\$ 324,359	\$ 221,965	\$ 258,959	\$ 302,940	\$ 353,430

Total Performance Funding Submitted 2013-14: \$ 802,927

Total Performance Funding Submitted 2014-15: \$ 936,748

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued; 2) anticipated debt service for projects authorized by prior General Assembly Action; and 3) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$4.5 million

INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNium

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 16,949,512	\$ 16,275,368	\$ 16,275,368	\$ 16,275,368	\$ (976,522)	\$ 15,298,846	\$ 15,298,846	\$ (1,139,276)	\$ 15,136,092	\$ 15,136,092		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 278,022			\$ 324,359		
- At-Risk Student Degree Completion							\$ 221,965			\$ 258,959		
- High Impact Degree Completion							\$ -			\$ -		
- Student Persistence Incentive							\$ 302,940			\$ 353,430		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ -			\$ -		
- Institution Defined Productivity Metric							\$ -			\$ -		
TOTAL OPERATING BUDGET SUBMISSION	\$ 16,949,512	\$ 16,275,368	\$ 16,275,368	\$ 16,275,368	\$ (976,522)	\$ 15,298,846	\$ 16,101,773	\$ (1,139,276)	\$ 15,136,092	\$ 16,072,840	-1.1%	-0.2%
B. Debt Service (3)	\$ 2,183,776	\$ 2,571,590	\$ 2,801,821	\$ 2,741,831			\$ 6,587,506			\$ 7,269,116	135.1%	10.3%
C. Line Items (4)												
- General Fund												
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 19,133,288	\$ 18,846,958	\$ 19,077,189	\$ 19,017,199	\$ (976,522)	\$ 15,298,846	\$ 22,689,279	\$ (1,139,276)	\$ 15,136,092	\$ 23,341,956	18.9%	2.9%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 19,133,288	\$ 18,846,958	\$ 19,077,189	\$ 19,017,199	\$ (976,522)	\$ 15,298,846	\$ 22,689,279	\$ (1,139,276)	\$ 15,136,092	\$ 23,341,956	18.9%	2.9%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	5,769	5,511	5,597	6,447	6,951	7,047	7,123	7,123	7,123	3.6%	0.0%	0.0%
a. Indiana Resident	5,675	5,429	5,507	6,346	6,852	6,925	7,000	7,000	7,000	3.6%	0.0%	0.0%
b. Non-Resident	94	82	90	101	99	122	123	123	123	4.6%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	1,102	1,065	1,072	1,028	996	859	859	899	899	-4.1%	4.7%	0.0%
a. Indiana Resident	1,093	1,050	1,060	1,012	980	851	851	891	891	-4.1%	4.7%	0.0%
b. Non-Resident	9	15	12	16	16	8	8	8	8	-1.9%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	0	0	0	0	0	0	0	0	0			
a. Indiana Resident	0	0	0	0	0	0	0	0	0			
b. Non-Resident	0	0	0	0	0	0	0	0	0			
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	6,871	6,576	6,669	7,475	7,947	7,906	7,982	8,022	8,022	2.5%	0.5%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	3,248.9	3,144.3	3,307.7	3,862.2	4,158.1	4,141.5	4,186.0	4,186.0	4,186.0	4.3%	0.0%	0.0%
a. Indiana Resident	3,206.1	3,103.6	3,267.9	3,819.7	4,112.6	4,087.8	4,132.0	4,132.0	4,132.0	4.3%	0.0%	0.0%
b. Non-Resident	42.8	40.7	39.8	42.5	45.5	53.7	54.0	54.0	54.0	4.0%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	416.9	456.6	460.0	473.0	448.6	387.6	388.0	406.0	406.0	-1.2%	4.6%	0.0%
a. Indiana Resident	413.8	448.4	453.6	466.6	441.6	382.8	383.0	401.0	401.0	-1.3%	4.7%	0.0%
b. Non-Resident	3.1	8.2	6.4	6.4	7.0	4.8	5.0	5.0	5.0	8.3%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
a. Indiana Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
b. Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	3,665.8	3,600.9	3,767.7	4,335.3	4,606.7	4,529.1	4,574.0	4,592.0	4,592.0	3.8%	0.4%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	45	69	72	227	309	338	342	342	342	40.2%	0.0%	0.0%
2. High School FTE	7.7	10.6	11.0	35.9	52.5	47.2	48.0	48.0	48.0	35.7%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	2,154,475.70	2,154,475.98	2,109,555.08	1,963,566.28	-	-	-	-	-
Student Fee Bonds Series J	776,991.75	778,116.24	950,049.26	-	-	-	-	-	-
Student Fee Bonds Series K	214,170.53	213,943.00							
Student Fee Bonds Series O	1,709,820.19	1,709,498.57	1,709,881.54	1,708,675.86	1,710,756.54	2,125,933.31	2,092,564.07	2,093,892.98	1,289,802.10
Student Fee Bonds Series P	230,362.64	230,755.94	230,540.06	230,561.44	230,674.73	230,466.32	230,518.69	230,807.26	707,448.38
Student Fee Bonds Series R	45,480.21	78,308.14	290,458.74	1,056,807.42	242,344.75	-	-	-	-
Student Fee Bonds Series U						215,189.98	418,748.08	418,748.08	1,192,893.25
Total Existing Debt Service for Fee Replacement Projects	\$ 5,131,301.02	\$ 5,165,097.87	\$ 5,290,484.68	\$ 4,959,611.00	\$ 2,183,776.02	\$ 2,571,589.61	\$ 2,741,830.84	\$ 2,743,448.32	\$ 3,190,143.73
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
IUN Tamarack Hall & Ivy Tech Comm College-Northwest								3,844,057.45	3,844,057.45
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,844,057.45	\$ 3,844,057.45
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUN Regional Campus Projects									234,914.62
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 234,914.62
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 5,131,301.02	\$ 5,165,097.87	\$ 5,290,484.68	\$ 4,959,611.00	\$ 2,183,776.02	\$ 2,571,589.61	\$ 2,741,830.84	\$ 6,587,505.77	\$ 7,269,115.80

INDIANA UNIVERSITY NORTHWEST, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series) NW Qualified Energy Savings Note 2005	210,653.30	210,653.30	210,653.30	210,653.30	210,653.30	210,653.30	210,653.30	210,653.30	210,653.30
Total Existing Debt Service for Other Funded Projects	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30
2. New Debt Service Awaiting Issuance for Approved Projects (1) a. Project (List each project)									
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Other Funded Projects (4) a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects a. Project (List each project)									
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30	\$ 210,653.30
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 5,341,954.32	\$ 5,375,751.17	\$ 5,501,137.98	\$ 5,170,264.30	\$ 2,394,429.32	\$ 2,782,242.91	\$ 2,952,484.14	\$ 6,798,159.07	\$ 7,479,769.10

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 2,183,776.02	\$ -	\$ -	\$ 210,653.30			\$ 2,394,429.32
2012	\$ 2,571,589.61	\$ -	\$ -	\$ 210,653.30			\$ 2,782,242.91
2013	\$ 2,741,830.84	\$ -	\$ -	\$ 210,653.30			\$ 2,952,484.14
2014	\$ 2,743,448.32	\$ 3,844,057.45	\$ -	\$ 210,653.30			\$ 6,798,159.07
2015	\$ 3,190,143.73	\$ 3,844,057.45	\$ 234,914.62	\$ 210,653.30			\$ 7,479,769.10
2016	\$ 3,190,701.84	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 7,269,673.91
2017	\$ 3,189,002.19	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 7,267,974.26
2018	\$ 2,865,800.66	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 6,944,772.73
2019	\$ 2,201,092.87	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 6,280,064.94
2020	\$ 1,933,029.83	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 6,012,001.90
2021	\$ 1,935,770.60	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 6,014,742.67
2022	\$ 1,192,947.31	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 5,271,919.38
2023	\$ 1,202,507.20	\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 5,281,479.27
2024		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2025		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2026		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2027		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2028		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2029		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2030		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2031		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2032		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2033		\$ 3,844,057.45	\$ 234,914.62	\$ -			\$ 4,078,972.07
2034			\$ 234,914.62	\$ -			\$ 234,914.62
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 23,032,498.50			\$ 777,123.03			\$ 23,809,621.53
2012	\$ 21,160,076.20			\$ 593,302.20			\$ 21,753,378.40
2013	\$ 19,436,645.70			\$ 402,677.53			\$ 19,839,323.23
2014	\$ 17,623,175.20	\$ 43,743,442.55		\$ 204,997.17			\$ 61,571,614.92
2015	\$ 15,255,831.65	\$ 42,414,633.05	\$ 2,727,661.20	\$ -			\$ 60,398,125.90
2016	\$ 12,760,908.03	\$ 41,009,417.01	\$ 2,592,005.35	\$ -			\$ 56,362,330.39
2017	\$ 10,134,621.81	\$ 39,523,401.04	\$ 2,506,131.04	\$ -			\$ 52,164,153.89
2018	\$ 7,698,037.36	\$ 37,951,939.15	\$ 2,415,318.95	\$ -			\$ 48,065,295.46
2019	\$ 5,813,426.84	\$ 36,290,118.20	\$ 2,319,285.17	\$ -			\$ 44,422,830.21
2020	\$ 4,107,106.07	\$ 34,532,742.55	\$ 2,217,729.45	\$ -			\$ 40,857,578.07
2021	\$ 2,310,470.63	\$ 32,674,317.80	\$ 2,110,334.27	\$ -			\$ 37,095,122.70
2022	\$ 1,183,570.08	\$ 30,709,033.63	\$ 1,996,763.87	\$ -			\$ 33,889,367.58
2023	\$ -	\$ 28,630,745.62	\$ 1,876,663.17	\$ -			\$ 30,507,408.79
2024		\$ 26,432,956.04	\$ 1,749,656.68	\$ -			\$ 28,182,612.72
2025		\$ 24,108,793.57	\$ 1,615,347.31	\$ -			\$ 25,724,140.88
2026		\$ 21,650,991.75	\$ 1,473,315.16	\$ -			\$ 23,124,306.91
2027		\$ 19,051,866.33	\$ 1,323,116.16	\$ -			\$ 20,374,982.49
2028		\$ 16,303,291.20	\$ 1,164,280.72	\$ -			\$ 17,467,571.92
2029		\$ 13,396,672.99	\$ 996,312.24	\$ -			\$ 14,392,985.23
2030		\$ 10,322,924.24	\$ 818,685.57	\$ -			\$ 11,141,609.81
2031		\$ 7,072,434.94	\$ 630,845.37	\$ -			\$ 7,703,280.31
2032		\$ 3,635,042.50	\$ 432,204.36	\$ -			\$ 4,067,246.86
2033		\$ -	\$ 222,141.49	\$ -			\$ 222,141.49
2034			\$ -	\$ -			\$ -
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

**INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	361	408	376	351	402	459	382	404	22
Masters Degrees	143	138	127	170	144	174	136	163	27
Doctoral Degrees	0	0	0	0	0	0	-	-	-
TOTAL OVERALL DEGREES CONFERRED	504	546	503	521	546	633	518	567	49

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	66	112	86	85	136	164	88	128	40
TOTAL OVERALL DEGREES CONFERRED	66	112	86	85	136	164	88	128	40

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE IV (PMS IV)
STUDENT PERSISTENCE INCENTIVE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
STUDENT PERSISTENCE INCENTIVE PFF METRIC FOR FY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Campuses									
Successfully Completed 15 Credit Hours									
Successfully Completed 30 Credit Hours									
Successfully Completed 45 Credit Hours									
4 year Institutions									
Successfully Completed 30 Credit Hours	405	440	497	504	648	732	447	628	181
Successfully Completed 60 Credit Hours	464	540	570	570	623	704	525	632	108
OVERALL STUDENTS PERSISTING	869	980	1,067	1,074	1,271	1,436	972	1,260	288

Notes:

- Assumes undergraduate , degree-seeking, resident students only, no reciprocity
- Resident status is based on FY being reported (e.g., for reporting FY06, the student must have been an Indiana resident during 05-06)
- Based on fiscal year (summer A, fall, spring, summer B)

**INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	445	515	501	406	475	498	487	460	(27)
Number of Students Receiving a Degree in 4 years	38	48	28	33	30	38	38	34	(4)
On-Time Graduation Rate	8.5%	9.3%	5.6%	8.1%	6.3%	7.6%	7.8%	7.3%	-0.5%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY NORTHWEST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 84,388	\$ 76,851	\$ 82,285	\$ 89,146	\$ 87,416	\$ 80,709	\$ 81,175	\$ 85,757	\$ 4,582

Indiana University
South Bend

INDIANA UNIVERSITY SOUTH BEND
2013-15 OPERATING APPROPRIATION REQUEST

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IU SOUTH BEND

The submitted change in operating and fee replacement appropriations for the South Bend campus in the 2013-15 biennium is \$164 thousand. This submission consists of allocations of performance funding and fee replacement. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, and student persistence incentive.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values are shown in the table below.

INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 21,772,918	\$ 21,756,890	\$ 21,756,890	\$ 21,756,890	\$ (1,305,413)	\$ 20,451,477	\$ 20,451,477	\$ (1,522,982)	\$ 20,233,908	\$ 20,233,908		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 228,653			\$ 266,762		
- At-Risk Student Degree Completion							\$ 295,342			\$ 344,566		
- High Impact Degree Completion							\$ -			\$ -		
- Student Persistence Incentive							\$ 452,625			\$ 528,063		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ -			\$ -		
- Institution Defined Productivity Metric							\$ -			\$ -		
TOTAL OPERATING BUDGET SUBMISSION	\$ 21,772,918	\$ 21,756,890	\$ 21,756,890	\$ 21,756,890	\$ (1,305,413)	\$ 20,451,477	\$ 21,428,097	\$ (1,522,982)	\$ 20,233,908	\$ 21,373,299	-1.5%	-0.3%
B. Debt Service (3)	\$ 5,047,427	\$ 4,197,505	\$ 4,263,860	\$ 4,092,616			\$ 4,227,071			\$ 4,811,436	-0.9%	13.8%
C. Line Items (4)												
- General Fund												
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 26,820,345	\$ 25,954,395	\$ 26,020,750	\$ 25,849,506	\$ (1,305,413)	\$ 20,451,477	\$ 25,655,168	\$ (1,522,982)	\$ 20,233,908	\$ 26,184,735	-1.4%	2.1%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 26,820,345	\$ 25,954,395	\$ 26,020,750	\$ 25,849,506	\$ (1,305,413)	\$ 20,451,477	\$ 25,655,168	\$ (1,522,982)	\$ 20,233,908	\$ 26,184,735	-1.4%	2.1%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	8,330	8,342	8,899	9,797	9,914	9,536	9,535	9,535	9,535	2.3%	0.0%	0.0%
a. Indiana Resident	7,880	7,893	8,450	9,283	9,392	9,064	9,063	9,063	9,063	2.4%	0.0%	0.0%
b. Non-Resident	450	449	449	514	522	472	472	472	472	0.8%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	1,756	1,727	1,492	1,397	1,098	933	934	969	969	-10.0%	3.7%	0.0%
a. Indiana Resident	1,554	1,558	1,334	1,244	948	805	805	840	840	-10.4%	4.3%	0.0%
b. Non-Resident	202	169	158	153	150	128	129	129	129	-7.2%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	0	0	0	0	0	0	0	0	0			
a. Indiana Resident	0	0	0	0	0	0	0	0	0			
b. Non-Resident	0	0	0	0	0	0	0	0	0			
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	10,086	10,069	10,391	11,194	11,012	10,469	10,469	10,504	10,504	0.6%	0.3%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	4,454.6	4,479.2	4,807.0	5,379.6	5,536.7	5,343.4	5,343.0	5,343.0	5,343.0	3.1%	0.0%	0.0%
a. Indiana Resident	4,207.7	4,227.7	4,536.4	5,073.6	5,232.7	5,044.4	5,044.0	5,044.0	5,044.0	3.1%	0.0%	0.0%
b. Non-Resident	246.9	251.5	270.6	306.0	304.0	298.9	299.0	299.0	299.0	3.2%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	657.6	664.2	599.9	586.6	490.0	418.5	419.0	434.0	434.0	-7.2%	3.6%	0.0%
a. Indiana Resident	559.8	565.5	506.2	490.3	405.9	344.8	345.0	360.0	360.0	-7.8%	4.3%	0.0%
b. Non-Resident	97.8	98.7	93.7	96.3	84.1	73.7	74.0	74.0	74.0	-4.5%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
a. Indiana Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
b. Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	5,112.2	5,143.4	5,406.9	5,966.2	6,026.6	5,761.9	5,762.0	5,777.0	5,777.0	2.0%	0.3%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	558	679	856	1,052	1,273	1,559	1,559	1,559	1,559	18.7%	0.0%	0.0%
2. High School FTE	100.3	126.9	155.1	188.0	240.1	283.9	284.0	284.0	284.0	18.9%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	794,258.50	794,258.46	777,698.61	723,878.74	-	-	-	-	-
Student Fee Bonds Series J	1,019,068.00	1,017,980.03	1,017,854.89	1,017,994.87	1,017,994.86	1,017,994.87	1,017,994.87	1,017,994.86	-
Student Fee Bonds Series K	723,864.16	724,353.20							
Student Fee Bonds Series N	1,072,109.47	1,072,625.64	1,071,407.50	1,073,816.27	1,071,521.06	938,935.87	-	-	-
Student Fee Bonds Series P	314,694.24	315,231.52	314,936.60	314,965.80	315,120.56	314,835.86	314,907.40	315,301.60	966,432.40
Student Fee Bonds Series R	181,223.17	310,028.35	1,037,289.47	1,027,987.75	1,026,788.58	186,111.85	185,561.27	1,030,934.64	1,030,557.53
Student Fee Bonds Series S			94,601.74	95,931.26	94,131.26	92,331.26	95,181.26	92,931.26	96,037.51
Student Fee Bonds Series T-1			-	-	1,070,609.31	946,050.00	946,000.00	947,050.00	948,250.00
Student Fee Bonds Series T-2 *			-	-	451,261.36	578,128.44	578,128.44	578,128.44	578,128.44
Student Fee Bonds Series U			-	-	-	123,117.24	954,842.75	244,729.72	243,829.72
South Bend Student Union Bldg Bonds, Series 1979	276,975.00	276,795.00	265,625.00						
Total Existing Debt Service for Fee Replacement Projects	\$ 4,382,192.54	\$ 4,511,272.20	\$ 4,579,413.81	\$ 4,254,574.69	\$ 5,047,426.99	\$ 4,197,505.39	\$ 4,092,615.99	\$ 4,227,070.52	\$ 3,863,235.60
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUSB Regional Campus Projects									948,200.84
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 948,200.84
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 4,382,192.54	\$ 4,511,272.20	\$ 4,579,413.81	\$ 4,254,574.69	\$ 5,047,426.99	\$ 4,197,505.39	\$ 4,092,615.99	\$ 4,227,070.52	\$ 4,811,436.44

INDIANA UNIVERSITY SOUTH BEND, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Consolidated Revenue Bonds, Series 2008A	-	259,198.79	818,522.50	903,522.50	954,272.50	1,022,272.50	1,096,522.50	1,136,522.50	1,138,772.50
Facility Revenue Bonds, 1994A	289,309.00	289,864.50	288,860.00	288,925.00	288,120.00	-	-	-	-
Facility Revenue Bonds, 2004	64,837.50	64,837.50	64,837.50	64,837.50	64,837.50	342,356.25	342,000.00	340,856.25	343,793.75
Tax-Exempt Commercial Paper, 2007		366,450.08							
Total Existing Debt Service for Other Funded Projects	\$ 354,146.50	\$ 980,350.87	\$ 1,172,220.00	\$ 1,257,285.00	\$ 1,307,230.00	\$ 1,364,628.75	\$ 1,438,522.50	\$ 1,477,378.75	\$ 1,482,566.25
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
IUSB Energy Savings Project							\$126,666.67	\$1,023,495.93	\$1,023,495.93
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 126,666.67	\$ 1,023,495.93	\$ 1,023,495.93
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ 354,146.50	\$ 980,350.87	\$ 1,172,220.00	\$ 1,257,285.00	\$ 1,307,230.00	\$ 1,364,628.75	\$ 1,565,189.17	\$ 2,500,874.68	\$ 2,506,062.18
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 4,736,339.04	\$ 5,491,623.07	\$ 5,751,633.81	\$ 5,511,859.69	\$ 6,354,656.99	\$ 5,562,134.14	\$ 5,657,805.16	\$ 6,727,945.20	\$ 7,317,498.62

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT**

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 5,047,426.99		\$ -	\$ 1,307,230.00	\$ -		\$ 6,354,656.99
2012	\$ 4,197,505.39		\$ -	\$ 1,364,628.75	\$ -		\$ 5,562,134.14
2013	\$ 4,092,615.99		\$ -	\$ 1,438,522.50	\$ 126,666.67		\$ 5,657,805.16
2014	\$ 4,227,070.52		\$ -	\$ 1,477,378.75	\$ 1,023,495.93		\$ 6,727,945.20
2015	\$ 3,863,235.60		\$ 948,200.84	\$ 1,482,566.25	\$ 1,023,495.93		\$ 7,317,498.62
2016	\$ 3,860,053.36		\$ 948,200.84	\$ 1,140,022.50	\$ 1,023,495.93		\$ 6,971,772.63
2017	\$ 3,853,045.46		\$ 948,200.84	\$ 1,138,272.50	\$ 1,023,495.93		\$ 6,963,014.73
2018	\$ 3,276,061.13		\$ 948,200.84	\$ 1,137,772.50	\$ 1,023,495.93		\$ 6,385,530.40
2019	\$ 4,134,486.76		\$ 948,200.84	\$ 1,136,272.50	\$ 1,023,495.93		\$ 7,242,456.03
2020	\$ 3,771,796.17		\$ 948,200.84	\$ 1,138,772.50	\$ 1,023,495.93		\$ 6,882,265.44
2021	\$ 3,772,875.64		\$ 948,200.84	\$ 1,140,022.50	\$ 1,023,495.93		\$ 6,884,594.91
2022	\$ 1,659,888.34		\$ 948,200.84	\$ 1,140,522.50	\$ 1,023,495.93		\$ 4,772,107.61
2023	\$ 1,663,451.91		\$ 948,200.84	\$ 1,139,722.50	\$ 1,023,495.93		\$ 4,774,871.18
2024	\$ 1,663,903.90		\$ 948,200.84	\$ 1,137,582.50			\$ 3,749,687.24
2025	\$ 1,661,194.38		\$ 948,200.84	\$ 1,139,062.50			\$ 3,748,457.72
2026	\$ 1,663,416.14		\$ 948,200.84	\$ 1,139,200.00			\$ 3,750,816.98
2027	\$ 1,660,779.44		\$ 948,200.84	\$ 1,138,700.00			\$ 3,747,680.28
2028	\$ 1,568,005.08		\$ 948,200.84	\$ 1,139,900.00			\$ 3,656,105.92
2029	\$ 1,565,118.35		\$ 948,200.84	\$ 1,139,750.00			\$ 3,653,069.19
2030	\$ 1,569,813.29		\$ 948,200.84	\$ 1,139,750.00			\$ 3,657,764.13
2031	\$ 43,000.00		\$ 948,200.84	\$ 1,138,000.00			\$ 2,129,200.84
2032	\$ 41,000.00		\$ 948,200.84	\$ 1,139,500.00			\$ 2,128,700.84
2033			\$ 948,200.84	\$ 1,139,000.00			\$ 2,087,200.84
2034			\$ 948,200.84	\$ 1,136,500.00			\$ 2,084,700.84
2035				\$ 1,137,000.00			\$ 1,137,000.00
2036				\$ 1,140,250.00			\$ 1,140,250.00
2037				\$ 1,141,000.00			\$ 1,141,000.00
2038				\$ 1,139,250.00			\$ 1,139,250.00

INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNium

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 38,731,441.12			\$ 18,060,000.00			\$ 56,791,441.12
2012	\$ 36,562,562.35			\$ 17,560,000.00			\$ 54,122,562.35
2013	\$ 34,602,884.41			\$ 16,960,000.00	\$ 8,000,000.00		\$ 59,562,884.41
2014	\$ 32,468,272.55			\$ 16,290,000.00	\$ 7,356,504.07		\$ 56,114,776.62
2015	\$ 29,899,270.84		\$ 11,077,661.20	\$ 15,580,000.00	\$ 6,682,442.09		\$ 63,239,374.13
2016	\$ 27,206,183.21		\$ 10,462,276.15	\$ 15,185,000.00	\$ 5,976,362.16		\$ 58,829,821.52
2017	\$ 24,398,842.53		\$ 10,115,656.19	\$ 14,775,000.00	\$ 5,236,743.44		\$ 54,526,242.16
2018	\$ 22,063,727.23		\$ 9,749,105.59	\$ 14,345,000.00	\$ 4,461,992.82		\$ 50,619,825.64
2019	\$ 18,751,213.10		\$ 9,361,478.32	\$ 13,895,000.00	\$ 3,650,441.56		\$ 45,658,132.98
2020	\$ 15,662,410.40		\$ 8,951,562.49	\$ 13,420,000.00	\$ 2,800,341.60		\$ 40,834,314.49
2021	\$ 12,435,000.00		\$ 8,518,076.50	\$ 12,920,000.00	\$ 1,909,861.90		\$ 35,782,938.40
2022	\$ 11,230,000.00		\$ 8,059,665.06	\$ 12,400,000.00	\$ 977,084.42		\$ 32,666,749.48
2023	\$ 9,980,000.00		\$ 7,574,894.96	\$ 11,860,000.00	\$ -		\$ 29,414,894.96
2024	\$ 8,685,000.00		\$ 7,062,250.59	\$ 11,300,000.00			\$ 27,047,250.59
2025	\$ 7,345,000.00		\$ 6,520,129.16	\$ 10,715,000.00			\$ 24,580,129.16
2026	\$ 5,950,000.00		\$ 5,946,835.75	\$ 10,105,000.00			\$ 22,001,835.75
2027	\$ 4,500,000.00		\$ 5,340,577.97	\$ 9,465,000.00			\$ 19,305,577.97
2028	\$ 3,085,000.00		\$ 4,699,460.36	\$ 8,795,000.00			\$ 16,579,460.36
2029	\$ 1,615,000.00		\$ 4,021,478.50	\$ 8,095,000.00			\$ 13,731,478.50
2030	\$ 80,000.00		\$ 3,304,512.67	\$ 7,360,000.00			\$ 10,744,512.67
2031	\$ 40,000.00		\$ 2,546,321.31	\$ 6,590,000.00			\$ 9,176,321.31
2032	\$ -		\$ 1,744,533.95	\$ 5,780,000.00			\$ 7,524,533.95
2033			\$ 896,643.82	\$ 4,930,000.00			\$ 5,826,643.82
2034			\$ -	\$ 4,040,000.00			\$ 4,040,000.00
2035				\$ 3,105,000.00			\$ 3,105,000.00
2036				\$ 2,120,000.00			\$ 2,120,000.00
2037				\$ 1,085,000.00			\$ 1,085,000.00
2038				\$ -			\$ -

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	660	493	511	629	554	569	555	584	29
Masters Degrees	234	194	201	152	176	179	210	169	(41)
Doctoral Degrees	0	0	0	0	0	0	-	-	-
TOTAL OVERALL DEGREES CONFERRED	894	687	712	781	730	748	764	753	(11)

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	184	117	132	187	201	206	144	198	54
TOTAL OVERALL DEGREES CONFERRED	184	117	132	187	201	206	144	198	54

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE IV (PMS IV)
STUDENT PERSISTENCE INCENTIVE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
STUDENT PERSISTENCE INCENTIVE PFF METRIC FOR FY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Campuses									
Successfully Completed 15 Credit Hours									
Successfully Completed 30 Credit Hours									
Successfully Completed 45 Credit Hours									
4 year Institutions									
Successfully Completed 30 Credit Hours	480	568	718	742	801	876	589	806	218
Successfully Completed 60 Credit Hours	520	587	604	683	789	800	570	757	187
OVERALL STUDENTS PERSISTING	1,000	1,155	1,322	1,425	1,590	1,676	1,159	1,564	405

Notes:

- Assumes undergraduate , degree-seeking, resident students only, no reciprocity
- Resident status is based on FY being reported (e.g., for reporting FY06, the student must have been an Indiana resident during 05-06)
- Based on fiscal year (summer A, fall, spring, summer B)

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	570	634	599	713	673	761	601	716	115
Number of Students Receiving a Degree in 4 years	34	40	27	33	29	41	34	34	1
On-Time Graduation Rate	6.0%	6.3%	4.5%	4.6%	4.3%	5.4%	5.6%	4.8%	-0.8%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY SOUTH BEND
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 60,292	\$ 82,932	\$ 79,910	\$ 67,390	\$ 84,017	\$ 84,255	\$ 74,378	\$ 78,554	\$ 4,176

Indiana University
Southeast

INDIANA UNIVERSITY SOUTHEAST
2013-15 OPERATING APPROPRIATION REQUEST

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IU SOUTHEAST

The submitted change in operating and fee replacement appropriations for the Southeast campus in the 2013-15 biennium is \$1.1 million. This submission consists of allocations of performance funding and fee replacement. The performance funding components of the submission are described in the following sections and include at-risk student degree completion, student persistence incentive, and on-time graduation rate.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *Student persistence incentive* affects all non-research campuses and funds the change in resident undergraduate headcount. This incentive measures progress point accumulation using the values are shown in the table below.
- *On-time graduation rate* provides funding for the change in the graduation rate achieved in four years by resident, undergraduate, first time, full time students. Increases in the three year average are valued as shown in the table below.

Performance Funding Metric Values and Amounts Submitted

	At-Risk Degree Completion		Student Persistence Incentive		On-Time Graduation Rate	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
30 Credit Hours Completed			\$ 765	\$ 893		
60 Credit Hours Completed			\$ 1,530	\$ 1,785		
Bachelor's Degree	\$ 5,503	\$ 6,420			\$ 22,921	\$ 26,741

	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Amount Submitted	\$ 172,436	\$ 201,175	\$ 239,190	\$ 279,055	\$ 122,246	\$ 142,621

Total Performance Funding Submitted 2013-14: \$ 533,872

Total Performance Funding Submitted 2014-15: \$ 622,851

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued; 2) anticipated debt service for projects authorized by prior General Assembly Action; and 3) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$1.8 million.

INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 19,846,717	\$ 18,976,859	\$ 18,976,859	\$ 18,976,859	\$ (1,138,612)	\$ 17,838,247	\$ 17,838,247	\$ (1,328,380)	\$ 17,648,479	\$ 17,648,479		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ -			\$ -		
- At-Risk Student Degree Completion							\$ 172,436			\$ 201,175		
- High Impact Degree Completion							\$ -			\$ -		
- Student Persistence Incentive							\$ 239,190			\$ 279,055		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ 122,246			\$ 142,621		
- Institution Defined Productivity Metric							\$ -			\$ -		
TOTAL OPERATING BUDGET SUBMISSION	\$ 19,846,717	\$ 18,976,859	\$ 18,976,859	\$ 18,976,859	\$ (1,138,612)	\$ 17,838,247	\$ 18,372,119	\$ (1,328,380)	\$ 17,648,479	\$ 18,271,330	-3.2%	-0.5%
B. Debt Service (3)	\$ 3,916,728	\$ 3,012,122	\$ 3,052,964	\$ 2,968,073			\$ 4,848,357			\$ 4,835,357	58.8%	-0.3%
C. Line Items (4)												
- General Fund												
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 23,763,445	\$ 21,988,981	\$ 22,029,823	\$ 21,944,932	\$ (1,138,612)	\$ 17,838,247	\$ 23,220,476	\$ (1,328,380)	\$ 17,648,479	\$ 23,106,687	5.4%	-0.5%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 23,763,445	\$ 21,988,981	\$ 22,029,823	\$ 21,944,932	\$ (1,138,612)	\$ 17,838,247	\$ 23,220,476	\$ (1,328,380)	\$ 17,648,479	\$ 23,106,687	5.4%	-0.5%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	6,986	6,919	7,250	7,647	8,095	7,712	7,806	7,856	7,856	1.9%	0.6%	0.0%
a. Indiana Resident	5,315	5,150	5,331	5,468	5,758	5,539	5,540	5,540	5,540	0.7%	0.0%	0.0%
b. Non-Resident	82	66	91	104	115	80	86	86	86	0.8%	0.0%	0.0%
d. Reciprocity Non-Resident	1,589	1,703	1,828	2,075	2,222	2,093	2,180	2,230	2,230	5.4%	2.3%	0.0%
2. Graduate	1,430	1,459	1,546	1,465	1,292	1,242	1,253	1,253	1,253	-2.2%	0.0%	0.0%
a. Indiana Resident	820	814	815	707	594	554	565	565	565	-6.0%	0.0%	0.0%
b. Non-Resident	17	7	20	16	12	10	10	10	10	-8.5%	0.0%	0.0%
d. Reciprocity Non-Resident	593	638	711	742	686	678	678	678	678	2.3%	0.0%	0.0%
3. Professional	0	0	0	0	0	0	0	0	0			
a. Indiana Resident	0	0	0	0	0	0	0	0	0			
b. Non-Resident	0	0	0	0	0	0	0	0	0			
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	8,416	8,378	8,796	9,112	9,387	8,954	9,059	9,109	9,109	1.2%	0.6%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	4,106.1	4,080.6	4,287.4	4,715.5	4,968.0	4,896.0	4,954.0	4,985.0	4,985.0	3.2%	0.6%	0.0%
a. Indiana Resident	3,141.2	3,077.9	3,204.4	3,400.0	3,558.0	3,544.5	3,545.0	3,545.0	3,545.0	2.0%	0.0%	0.0%
b. Non-Resident	36.6	36.3	46.5	60.2	56.2	48.5	52.0	52.0	52.0	6.0%	0.0%	0.0%
d. Reciprocity Non-Resident	928.3	966.4	1,036.5	1,255.3	1,353.8	1,303.0	1,357.0	1,388.0	1,388.0	6.5%	2.3%	0.0%
2. Graduate	497.7	503.5	551.0	537.6	468.4	485.3	489.0	489.0	489.0	-0.3%	0.0%	0.0%
a. Indiana Resident	275.0	258.6	268.3	239.4	203.5	203.1	207.0	207.0	207.0	-4.6%	0.0%	0.0%
b. Non-Resident	4.2	1.9	7.0	6.3	4.3	4.0	4.0	4.0	4.0	-0.8%	0.0%	0.0%
d. Reciprocity Non-Resident	218.5	243.0	275.7	291.9	260.6	278.2	278.0	278.0	278.0	4.1%	0.0%	0.0%
3. Professional	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
a. Indiana Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
b. Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	4,603.8	4,584.1	4,838.5	5,253.2	5,436.3	5,381.3	5,443.0	5,474.0	5,474.0	2.8%	0.6%	0.0%
C. BREAKOUT OF HIGH SCHOOL ENROLLMENT												
1. High School Headcount	50	99	93	79	178	220	220	220	220	28.0%	0.0%	0.0%
2. High School FTE	6.8	21.3	16.2	14.9	28.2	36.0	36.0	36.0	36.0	32.0%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	932,390.98	932,390.84	912,950.62	849,771.12	-	-	-	-	-
Student Fee Bonds Series J	352,041.67	351,665.83	351,622.60	351,670.96	351,670.95	351,670.95	351,670.95	351,670.96	-
Student Fee Bonds Series K	769,105.66	769,625.28							
Student Fee Bonds Series M	430,425.00	436,100.00	434,650.00	441,825.00	-	-	-	-	-
Student Fee Bonds Series O	1,832,407.51	1,828,949.13	1,831,829.16	1,832,455.84	1,830,829.16	1,517,912.15	1,185,611.14	1,186,470.22	48,740.40
Student Fee Bonds Series P	223,896.33	224,278.59	224,068.76	224,089.54	224,199.65	223,997.09	224,047.99	224,328.46	687,590.18
Student Fee Bonds Series R	180,785.40	307,964.48	1,085,275.10	1,075,283.88	1,510,028.52	614,121.57	614,358.06	614,186.06	69,438.86
Student Fee Bonds Series U			-	-	-	304,419.94	592,384.76	592,384.76	1,685,566.78
Southeast Student Union Bldg Bonds, Series 1979	175,112.50	175,542.50	175,312.50						
Total Existing Debt Service for Fee Replacement Projects	\$ 4,896,165.05	\$ 5,026,516.65	\$ 5,015,708.74	\$ 4,775,096.34	\$ 3,916,728.28	\$ 3,012,121.70	\$ 2,968,072.90	\$ 2,969,040.46	\$ 2,491,336.22
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
IUS Education Technology								1,879,316.97	1,879,316.97
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,879,316.97	\$ 1,879,316.97
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUS Regional Campus Projects									464,703.83
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 464,703.83
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 4,896,165.05	\$ 5,026,516.65	\$ 5,015,708.74	\$ 4,775,096.34	\$ 3,916,728.28	\$ 3,012,121.70	\$ 2,968,072.90	\$ 4,848,357.43	\$ 4,835,357.02

INDIANA UNIVERSITY SOUTHEAST, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Consolidated Revenue Bonds, Series 2008A	-	291,727.58	921,245.00	1,011,245.00	1,091,745.00	1,157,995.00	1,170,495.00	1,286,745.00	1,286,495.00
Consolidated Revenue Bonds, Series 2009A	-	-	-	69,368.54	67,925.00	66,175.00	69,425.00	67,825.00	65,625.00
Consolidated Revenue Bonds, Series 2012A	-	-	-	-	-	57,540.00	164,400.00	249,400.00	247,700.00
SE Qualified Energy Savings Note 2008	-	-	232,115.02	232,115.02	232,115.02	232,115.02	232,115.02	232,115.02	232,115.02
Tax-Exempt Commercial Paper, 2007		379,022.14							
Total Existing Debt Service for Other Funded Projects	\$ -	\$ 670,749.72	\$ 1,153,360.02	\$ 1,312,728.56	\$ 1,391,785.02	\$ 1,513,825.02	\$ 1,636,435.02	\$ 1,836,085.02	\$ 1,831,935.02
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ -	\$ 670,749.72	\$ 1,153,360.02	\$ 1,312,728.56	\$ 1,391,785.02	\$ 1,513,825.02	\$ 1,636,435.02	\$ 1,836,085.02	\$ 1,831,935.02
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 4,896,165.05	\$ 5,697,266.37	\$ 6,169,068.76	\$ 6,087,824.90	\$ 5,308,513.30	\$ 4,525,946.72	\$ 4,604,507.92	\$ 6,684,442.45	\$ 6,667,292.04

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

**INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM**

**BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT**

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 3,916,728.28	\$ -	\$ -	\$ 1,391,785.02			\$ 5,308,513.30
2012	\$ 3,012,121.70	\$ -	\$ -	\$ 1,513,825.02			\$ 4,525,946.72
2013	\$ 2,968,072.90	\$ -	\$ -	\$ 1,636,435.02			\$ 4,604,507.92
2014	\$ 2,969,040.46	\$ 1,879,316.97	\$ -	\$ 1,836,085.02			\$ 6,684,442.45
2015	\$ 2,491,336.22	\$ 1,879,316.97	\$ 464,703.83	\$ 1,831,935.02			\$ 6,667,292.04
2016	\$ 2,493,450.42	\$ 1,879,316.97	\$ 464,703.83	\$ 1,836,985.02			\$ 6,674,456.24
2017	\$ 2,491,919.70	\$ 1,879,316.97	\$ 464,703.83	\$ 1,832,260.02			\$ 6,668,200.52
2018	\$ 2,827,622.95	\$ 1,879,316.97	\$ 464,703.83	\$ 1,829,960.02			\$ 7,001,603.77
2019	\$ 3,383,383.35	\$ 1,879,316.97	\$ 464,703.83	\$ 1,601,595.00			\$ 7,328,999.15
2020	\$ 2,407,689.49	\$ 1,879,316.97	\$ 464,703.83	\$ 1,598,595.00			\$ 6,350,305.29
2021	\$ 2,411,339.28	\$ 1,879,316.97	\$ 464,703.83	\$ 1,598,970.00			\$ 6,354,330.08
2022	\$ 1,689,180.43	\$ 1,879,316.97	\$ 464,703.83	\$ 1,603,742.50			\$ 5,636,943.73
2023	\$ 1,702,750.42	\$ 1,879,316.97	\$ 464,703.83	\$ 1,601,442.50			\$ 5,648,213.72
2024		\$ 1,879,316.97	\$ 464,703.83	\$ 1,602,282.50			\$ 3,946,303.30
2025		\$ 1,879,316.97	\$ 464,703.83	\$ 1,530,950.00			\$ 3,874,970.80
2026		\$ 1,879,316.97	\$ 464,703.83	\$ 1,531,400.00			\$ 3,875,420.80
2027		\$ 1,879,316.97	\$ 464,703.83	\$ 1,530,150.00			\$ 3,874,170.80
2028		\$ 1,879,316.97	\$ 464,703.83	\$ 1,525,500.00			\$ 3,869,520.80
2029		\$ 1,879,316.97	\$ 464,703.83	\$ 1,534,250.00			\$ 3,878,270.80
2030		\$ 1,879,316.97	\$ 464,703.83	\$ 1,531,750.00			\$ 3,875,770.80
2031		\$ 1,879,316.97	\$ 464,703.83	\$ 1,532,000.00			\$ 3,876,020.80
2032		\$ 1,879,316.97	\$ 464,703.83	\$ 1,534,750.00			\$ 3,878,770.80
2033		\$ 1,879,316.97	\$ 464,703.83	\$ 1,534,750.00			\$ 3,878,770.80
2034			\$ 464,703.83	\$ 1,532,000.00			\$ 1,996,703.83
2035				\$ 1,531,500.00			\$ 1,531,500.00
2036				\$ 1,533,000.00			\$ 1,533,000.00
2037				\$ 1,531,250.00			\$ 1,531,250.00
2038				\$ 1,286,250.00			\$ 1,286,250.00

INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION

SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 23,890,405.09			\$ 20,940,078.87			\$ 44,830,483.96
2012	\$ 21,619,758.43			\$ 23,927,127.06			\$ 45,546,885.49
2013	\$ 19,885,857.47			\$ 23,431,468.29			\$ 43,317,325.76
2014	\$ 18,074,538.40	\$ 21,385,683.03		\$ 22,712,759.14			\$ 62,172,980.57
2015	\$ 16,416,131.41	\$ 20,736,042.83	\$ 5,417,661.20	\$ 21,965,640.87			\$ 64,535,476.31
2016	\$ 14,670,301.22	\$ 20,049,048.31	\$ 5,127,457.86	\$ 21,179,738.76			\$ 61,026,546.15
2017	\$ 12,836,319.77	\$ 19,322,551.62	\$ 4,957,582.86	\$ 20,364,661.40			\$ 57,481,115.65
2018	\$ 10,563,708.44	\$ 18,554,281.36	\$ 4,777,940.04	\$ 19,515,000.00			\$ 53,410,929.84
2019	\$ 7,604,359.96	\$ 17,741,835.57	\$ 4,587,967.75	\$ 18,855,000.00			\$ 48,789,163.28
2020	\$ 5,493,961.67	\$ 16,882,674.14	\$ 4,387,072.07	\$ 18,165,000.00			\$ 44,928,707.88
2021	\$ 3,271,594.46	\$ 15,974,110.93	\$ 4,174,624.88	\$ 17,440,000.00			\$ 40,860,330.27
2022	\$ 1,675,935.45	\$ 15,013,305.33	\$ 3,949,961.97	\$ 16,680,000.00			\$ 37,319,202.75
2023	\$ -	\$ 13,997,253.41	\$ 3,712,380.95	\$ 15,890,000.00			\$ 33,599,634.36
2024		\$ 12,922,778.51	\$ 3,461,139.03	\$ 15,065,000.00			\$ 31,448,917.54
2025		\$ 11,786,521.30	\$ 3,195,450.69	\$ 14,275,000.00			\$ 29,256,971.99
2026		\$ 10,584,929.30	\$ 2,914,485.27	\$ 13,450,000.00			\$ 26,949,414.57
2027		\$ 9,314,245.76	\$ 2,617,364.34	\$ 12,585,000.00			\$ 24,516,610.10
2028		\$ 7,970,497.92	\$ 2,303,158.95	\$ 11,685,000.00			\$ 21,958,656.87
2029		\$ 6,549,484.57	\$ 1,970,886.76	\$ 10,735,000.00			\$ 19,255,371.33
2030		\$ 5,046,762.96	\$ 1,619,508.91	\$ 9,740,000.00			\$ 16,406,271.87
2031		\$ 3,457,634.86	\$ 1,247,926.84	\$ 8,695,000.00			\$ 13,400,561.70
2032		\$ 1,777,131.89	\$ 854,978.80	\$ 7,595,000.00			\$ 10,227,110.69
2033		\$ -	\$ 439,436.25	\$ 6,440,000.00			\$ 6,879,436.25
2034			\$ -	\$ 5,230,000.00			\$ 5,230,000.00
2035				\$ 3,960,000.00			\$ 3,960,000.00
2036				\$ 2,625,000.00			\$ 2,625,000.00
2037				\$ 1,225,000.00			\$ 1,225,000.00
2038				\$ -			\$ -

**INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	462	491	477	475	440	480	477	465	(12)
Masters Degrees	127	92	125	114	99	106	115	106	(8)
Doctoral Degrees	0	0	0	0	0	0	-	-	-
TOTAL OVERALL DEGREES CONFERRED	589	583	602	589	539	586	591	571	(20)

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	89	90	92	92	104	169	90	122	31
TOTAL OVERALL DEGREES CONFERRED	89	90	92	92	104	169	90	122	31

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE IV (PMS IV)
STUDENT PERSISTENCE INCENTIVE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
STUDENT PERSISTENCE INCENTIVE PFF METRIC FOR FY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Campuses									
Successfully Completed 15 Credit Hours									
Successfully Completed 30 Credit Hours									
Successfully Completed 45 Credit Hours									
4 year Institutions									
Successfully Completed 30 Credit Hours	384	379	459	465	532	507	407	501	94
Successfully Completed 60 Credit Hours	516	518	506	573	627	668	513	623	109
OVERALL STUDENTS PERSISTING	900	897	965	1,038	1,159	1,175	921	1,124	203

Notes:

- Assumes undergraduate , degree-seeking, resident students only, no reciprocity
- Resident status is based on FY being reported (e.g., for reporting FY06, the student must have been an Indiana resident during 05-06)
- Based on fiscal year (summer A, fall, spring, summer B)

INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM

PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	581	576	626	568	628	642	594	613	18
Number of Students Receiving a Degree in 4 years	47	49	58	50	59	61	51	57	5
On-Time Graduation Rate	8.1%	8.5%	9.3%	8.8%	9.4%	9.5%	8.6%	9.2%	0.6%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY SOUTHEAST
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 78,776	\$ 76,290	\$ 79,663	\$ 81,854	\$ 96,995	\$ 92,898	\$ 78,243	\$ 90,582	\$ 12,339

Indiana University-Purdue University
Indianapolis

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 OPERATING APPROPRIATION REQUEST

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IUPUI

The submitted change in operating and fee replacement appropriations for the IUPUI campus in the 2013-15 biennium is \$9.8 million, \$8.5 million in the General Academic component, and \$1.3 million in the Health Division. This submission consists of allocations of performance funding, fee replacement and special state appropriations. In accordance with the state's research support funding, schedules summarizing research expenditures are included in the special state appropriations section of this document. The performance funding components of the submission are described in the following sections and include overall degree completion, at-risk student degree completion, high impact degree completion, on-time graduation rate, and institution defined productivity. The Health Division combines the IU School of Medicine and the IU School of Dentistry for this submission and is not participating in the performance funding pool.

The institutional narrative discusses accomplishments and initiatives of Indiana University. These are shared across all campuses. In addition, specific campus achievements are highlighted throughout that section.

Components of submitted increases in campus operating appropriations

In accordance with the instructions of the Indiana Commission for Higher Education (ICHE) and State Budget Agency (SBA), the submission does not include funding for ongoing operational increases, and instead focuses on budget performance data. Base adjustments are calculated according to performance in areas specified by ICHE that address changes in activity levels. The various adjustments address progress toward state goals for the outcomes of higher education.

The performance funding metrics provide funding for changes in each measure over a three-year period rolling average (2006 through 2011). Funding is calculated by comparing the average of 2009 through 2011 to 2006 through 2008.

- *Overall degree completion* acknowledges increases in the number of degrees completed by resident students. Increases in the three year average are valued as shown in the table below.
- *At-risk degree completion* provides funding for the change in degrees conferred on at-risk resident students. Pell grant eligibility is used to identify at-risk students. Increases in the three year average are valued as shown in the table below.
- *High impact degree completion* High impact degrees are identified as specific degree types that are granted in Science, Technology, Engineering and Math (STEM) fields as defined by national standards set by Complete College America (CCA). Increases in the three year average are valued as shown in the table below.

- *On-time graduation rate* provides funding for the change in the graduation rate achieved in four years by resident, undergraduate, first time, full time students. Increases in the three year average are valued as shown in the table below.
- *The institution defined productivity metric* developed by Indiana University compares funding provided by Indiana taxpayers and Hoosier families per in-state bachelor’s degree. The measure focuses on reducing the cost of attendance for students and uses a significance factor developed by ICHE to calculate the performance funding adjustment as shown in the table below.

**Performance Funding Metric Values and Amounts Submitted
General Academic**

	Overall Degree Completion		At-Risk Degree Completion		High Impact Degree Completion		On-Time Graduation Rate		Institution Defined Productivity	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Bachelor's Degree	\$ 7,795	\$ 9,094	\$ 5,503	\$ 6,420	\$ 19,491	\$ 22,740	\$ 22,921	\$ 26,741		
Master's Degree	\$ 3,898	\$ 4,547			\$ 14,033	\$ 16,372				
Doctoral Degree	\$ 1,949	\$ 2,274			\$ 6,822	\$ 7,959				
Amount Submitted	\$ 3,156,975	\$ 3,683,138	\$ 1,403,334	\$ 1,637,223	\$ 870,866	\$ 1,016,011	\$ 2,070,548	\$ 2,415,640	\$ 337,889	\$ 394,203

Total Performance Funding Submitted 2013-14: \$ 7,839,612

Total Performance Funding Submitted 2014-15: \$ 9,146,214

Fee replacement appropriation

Changes in the total amount of fee replacement requested result from 1) scheduled debt service payments on bonds already issued, and 2) anticipated debt service for projects included in the 2013-15 Capital Appropriation Request. The change requested for fee replacement appropriation for bonded debt in 2013-15 is \$5.7 million for General Academic and \$1.3 million for the Health Division.

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- HEALTH DIVISION
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 111,438,387	\$ 105,714,222	\$ 105,714,222	\$ 105,714,222		\$ 105,714,222	\$ 105,714,222		\$ 105,714,222	\$ 105,714,222		
Performance Formula Funding (2)												
- Overall Degree Completion												
- At-Risk Student Degree Completion												
- High Impact Degree Completion												
- Student Persistence Incentive												
- Remediation Success Incentive												
- On-time Graduation Rate Metric												
- Institution Defined Productivity Metric												
TOTAL OPERATING BUDGET SUBMISSION	\$ 111,438,387	\$ 105,714,222	\$ 105,714,222	\$ 105,714,222	\$ -	\$ 105,714,222	\$ 105,714,222	\$ -	\$ 105,714,222	\$ 105,714,222	0.0%	0.0%
B. Debt Service (3)	\$ 2,907,287	\$ 2,778,025	\$ 3,519,571	\$ 3,390,957			\$ 3,410,261			\$ 4,818,694	-3.1%	41.3%
C. Line Items (4)												
- General Fund	\$ 2,847,529	\$ 3,524,230	\$ 3,524,230	\$ 3,524,230			\$ 3,555,684			\$ 3,555,684	0.9%	0.0%
- Dedicated Funds	\$ 524,230											
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 117,717,433	\$ 112,016,477	\$ 112,758,023	\$ 112,629,409	\$ -	\$ 105,714,222	\$ 112,680,167	\$ -	\$ 105,714,222	\$ 114,088,600	-0.1%	1.2%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 117,193,203	\$ 112,016,477	\$ 112,758,023	\$ 112,629,409	\$ -	\$ 105,714,222	\$ 112,680,167	\$ -	\$ 105,714,222	\$ 114,088,600	-0.1%	1.2%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM

SUMMARY BUDGET SUBMISSION SCHEDULE I
GENERAL AND DEDICATED FUNDS STATE SUPPORT SUBMISSION SUMMARY
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF OPERATING, DEBT SERVICE, LINE ITEMS AND REPAIR AND REHABILITATION FUNDING FOR 2013-15

	Actual 2010-11	Actual 2011-12	Approp 2012-13 (a)	Estimated 2012-13 (b)	2014 Budget Adjustment (c)	2014 Base Budget (d)	Submission 2013-14	2015 Budget Adjustment (e)	2015 Base Budget (f)	Submission 2014-15	% Change 2013 v 2014	% Change 2014 v 2015
A. Operating Budget Submission												
Operating Budget Base (1)	\$ 82,969,675	\$ 90,103,644	\$ 90,103,644	\$ 90,103,644	\$ (5,406,219)	\$ 84,697,425	\$ 84,697,425	\$ (6,307,255)	\$ 83,796,389	\$ 83,796,389		
Performance Formula Funding (2)												
- Overall Degree Completion							\$ 3,156,975			\$ 3,683,138		
- At-Risk Student Degree Completion							\$ 1,403,334			\$ 1,637,223		
- High Impact Degree Completion							\$ 870,866			\$ 1,016,011		
- Student Persistence Incentive							\$ -			\$ -		
- Remediation Success Incentive							\$ -			\$ -		
- On-time Graduation Rate Metric							\$ 2,070,548			\$ 2,415,640		
- Institution Defined Productivity Metric							\$ 337,889			\$ 394,203		
TOTAL OPERATING BUDGET SUBMISSION	\$ 82,969,675	\$ 90,103,644	\$ 90,103,644	\$ 90,103,644	\$ (5,406,219)	\$ 84,697,425	\$ 92,537,037	\$ (6,307,255)	\$ 83,796,389	\$ 92,942,604	2.7%	0.4%
B. Debt Service (3)	\$ 14,009,774	\$ 12,701,718	\$ 15,772,053	\$ 15,195,706			\$ 15,187,461			\$ 21,459,862	-3.7%	41.3%
C. Line Items (4)												
- General Fund	\$ 56,543	\$ 48,062	\$ 48,062	\$ 48,062			\$ 48,062			\$ 48,062	0.0%	0.0%
- Dedicated Funds												
- Other Funds												
D. Repair and Rehabilitation (General Fund) (5)												
- Building	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
- Infrastructure	\$ -	\$ -	\$ -	\$ -			See note 5.			See note 5.		
TOTAL BUDGET SUBMISSION (ALL FUNDS)	\$ 97,035,992	\$ 102,853,424	\$ 105,923,759	\$ 105,347,412	\$ (5,406,219)	\$ 84,697,425	\$ 107,772,560	\$ (6,307,255)	\$ 83,796,389	\$ 114,450,528	1.7%	6.2%
TOTAL BUDGET SUBMISSION (STATE GENERAL FUND O	\$ 97,035,992	\$ 102,853,424	\$ 105,923,759	\$ 105,347,412	\$ (5,406,219)	\$ 84,697,425	\$ 107,772,560	\$ (6,307,255)	\$ 83,796,389	\$ 114,450,528	1.7%	6.2%

Notes:

- (1) For FY 2011 through 2013 include actual operating distribution to institution/campus
- (2) For Budget Submission FY 2014 and 2015 include amounts from weighting allocation (provided by CHE)
- (3) Include amount of state funded debt service from schedule CRS I
- (4) Includes amounts from BRS XI schedules. Separate by funding source. If more than one line item, include total for all line items in this section, do not list out each line
- (5) Total 2013-15 university-wide R&R formula amount for Indiana University from CRS I is \$45,825,192 with \$42,218,131 for facilities and \$3,607,061 for infrastructure.

- (a) Figures should reflect appropriation amount for FY13
- (b) Figures should reflect estimated expenditures for FY13
- (c) Multiply FY 13 Operating Appropriation by 6% (do not calculate for Debt Service, Line Items or R&R)
- (d) Subtract 2014 Base Adjustment Amount from FY 13 Operating Appropriation (Operating Only)
- (e) Multiply FY 13 Operating Appropriation by 7% (do not calculate for Debt Service, Line Items or R&R)
- (f) Subtract 2015 Base Adjustment Amount FY 13 Operating Appropriation (Operating Only)

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- HEALTH DIVISION
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	1,368	1,388	1,361	1,398	1,492	1,726	1,795	1,844	1,844	4.6%	2.7%	0.0%
a. Indiana Resident	1,303	1,301	1,274	1,326	1,414	1,622	1,683	1,723	1,723	4.4%	2.4%	0.0%
b. Non-Resident	65	87	87	72	78	104	112	121	121	9.5%	8.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	551	546	566	601	642	692	698	699	699	4.0%	0.1%	0.0%
a. Indiana Resident	356	355	360	364	415	470	476	476	476	5.0%	0.0%	0.0%
b. Non-Resident	195	191	206	237	227	222	222	223	223	2.2%	0.5%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	1,541	1,559	1,596	1,649	1,688	1,715	1,715	1,718	1,718	1.8%	0.2%	0.0%
a. Indiana Resident	1,317	1,305	1,328	1,370	1,394	1,392	1,419	1,419	1,419	1.3%	0.0%	0.0%
b. Non-Resident	224	254	268	279	294	296	296	299	299	4.8%	1.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	3,460	3,493	3,523	3,648	3,822	4,106	4,208	4,261	4,261	3.3%	1.3%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	995.7	1,015.2	1,012.7	1,059.8	1,119.7	1,285.4	1,337.0	1,374.0	1,374.0	5.0%	2.8%	0.0%
a. Indiana Resident	948.5	954.3	946.7	1,004.0	1,056.9	1,205.9	1,251.0	1,281.0	1,281.0	4.7%	2.4%	0.0%
b. Non-Resident	47.2	60.9	66.0	55.9	62.8	79.6	86.0	93.0	93.0	10.5%	8.1%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	414.3	401.2	414.0	432.0	487.2	502.6	507.0	508.0	508.0	3.4%	0.2%	0.0%
a. Indiana Resident	241.7	245.4	228.9	240.0	298.0	318.7	323.0	323.0	323.0	5.0%	0.0%	0.0%
b. Non-Resident	172.6	155.8	185.1	192.0	189.2	183.9	184.0	185.0	185.0	1.1%	0.5%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	2,797.8	2,834.4	2,927.7	3,045.8	3,075.2	3,091.8	3,141.0	3,146.0	3,146.0	1.9%	0.2%	0.0%
a. Indiana Resident	2,365.8	2,351.9	2,414.2	2,510.1	2,532.9	2,540.6	2,590.0	2,590.0	2,590.0	1.5%	0.0%	0.0%
b. Non-Resident	432.0	482.5	513.5	535.7	542.3	551.2	551.0	556.0	556.0	4.1%	0.9%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	4,207.8	4,250.7	4,354.4	4,537.7	4,682.1	4,879.8	4,985.0	5,028.0	5,028.0	2.9%	0.9%	0.0%
C. BREAKOUT OF DUAL CREDIT ENROLLMENT												
1. High School Headcount	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a			
2. High School FTE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a			

Note:
- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE VIII (BRS VIII)
STUDENT ENROLLMENT DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF STUDENT ENROLLMENT BY DEGREE TYPE AND RESIDENCY (FTE AND HEADCOUNT)

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	EST 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. ANNUAL STUDENT HEADCOUNT												
1. Undergraduate	27,049	26,872	27,066	27,597	27,428	26,777	26,776	26,776	26,776	-0.2%	0.0%	0.0%
a. Indiana Resident	26,075	25,790	25,863	26,304	26,168	25,476	25,475	25,475	25,475	-0.4%	0.0%	0.0%
b. Non-Resident	974	1,082	1,203	1,293	1,260	1,301	1,301	1,301	1,301	4.9%	0.0%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
2. Graduate	8,416	8,527	8,743	8,046	7,125	6,700	6,756	6,848	6,848	-3.6%	1.4%	0.0%
a. Indiana Resident	6,346	6,432	6,410	6,258	5,857	5,420	5,475	5,525	5,525	-2.4%	0.9%	0.0%
b. Non-Resident	2,070	2,095	2,333	1,788	1,268	1,280	1,281	1,323	1,323	-7.7%	3.3%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
3. Professional	1,156	1,166	1,220	1,195	1,125	1,183	1,183	1,189	1,189	0.4%	0.5%	0.0%
a. Indiana Resident	927	891	898	915	935	1,012	1,012	1,015	1,015	1.5%	0.3%	0.0%
b. Non-Resident	229	275	322	280	190	171	171	174	174	-4.8%	1.8%	0.0%
d. Reciprocity Non-Resident	0	0	0	0	0	0	0	0	0			
TOTAL STUDENT HEADCOUNT	36,621	36,565	37,029	36,838	35,678	34,660	34,715	34,813	34,813	-0.9%	0.3%	0.0%
B. ANNUAL FULL-TIME EQUIVALENT (FTE) STUDENTS												
1. Undergraduate	15,977.5	16,256.9	16,852.8	17,597.3	17,818.6	17,608.3	17,608.0	17,608.0	17,608.0	1.6%	0.0%	0.0%
a. Indiana Resident	15,502.3	15,671.1	16,096.4	16,781.1	16,990.2	16,732.5	16,732.0	16,732.0	16,732.0	1.3%	0.0%	0.0%
b. Non-Resident	475.1	585.8	756.4	816.2	828.4	875.8	876.0	876.0	876.0	10.7%	0.0%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
2. Graduate	3,813.1	3,975.7	4,160.7	3,645.3	3,541.9	3,405.2	3,433.0	3,480.0	3,480.0	-1.7%	1.4%	0.0%
a. Indiana Resident	2,842.1	2,969.1	3,008.3	2,953.7	2,907.6	2,737.4	2,765.0	2,790.0	2,790.0	-0.5%	0.9%	0.0%
b. Non-Resident	971.0	1,006.7	1,152.4	691.5	634.3	667.7	668.0	690.0	690.0	-6.0%	3.3%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
3. Professional	1,228.3	1,239.4	1,266.4	1,243.0	1,201.7	1,298.2	1,298.0	1,304.0	1,304.0	0.9%	0.5%	0.0%
a. Indiana Resident	1,002.7	993.3	995.4	1,019.6	1,024.5	1,126.1	1,126.0	1,129.0	1,129.0	2.0%	0.3%	0.0%
b. Non-Resident	225.7	246.0	271.0	223.4	177.2	172.1	172.0	175.0	175.0	-4.4%	1.7%	0.0%
d. Reciprocity Non-Resident	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
TOTAL STUDENT FTE	21,018.9	21,472.0	22,279.9	22,485.5	22,562.2	22,311.7	22,339.0	22,392.0	22,392.0	1.0%	0.2%	0.0%
C. BREAKOUT OF DUAL CREDIT ENROLLMENT												
1. High School Headcount	95	136	190	296	220	160	160	160	160	9.1%	0.0%	0.0%
2. High School FTE	55.2	91.3	134.4	333.1	286.3	204.6	205.0	205.0	205.0	24.4%	0.0%	0.0%

Note:

- Dual credit is based on successfully completed hours with data as of 6/25/2012

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - A (BRS X - A)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS - 2007-2015

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
A. Projects Eligible for Fee Replacement									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series H	6,565,108.03	6,565,108.39	6,428,228.01	5,983,368.69	-	-	-	-	-
Student Fee Bonds Series J	1,859,051.88	1,861,742.37	2,273,114.03	-	-	-	-	-	-
Student Fee Bonds Series K	3,118,065.91	3,119,281.89							
Student Fee Bonds Series M	1,534,950.00	1,531,487.50	1,535,862.50	1,530,975.00	-	-	-	-	-
Student Fee Bonds Series O	4,157,375.01	4,154,316.63	4,157,146.66	4,151,548.34	4,157,271.66	5,892,410.90	6,104,916.14	6,102,975.22	4,413,552.90
Student Fee Bonds Series P	1,161,512.74	2,290,770.80	2,291,382.27	2,287,740.03	2,292,261.23	2,173,722.94	2,061,674.48	2,060,004.42	4,463,779.16
Student Fee Bonds Series Q	-	2,554,211.26	2,554,111.26	2,554,811.26	2,553,711.26	2,550,811.26	2,551,011.26	2,552,361.26	2,551,311.26
Student Fee Bonds Series R	679,606.00	1,915,383.35	5,056,325.30	6,867,826.60	6,468,797.12	2,851,060.63	2,853,392.63	2,853,287.54	936,030.05
Student Fee Bonds Series S			820,438.55	817,293.76	821,893.76	820,793.76	816,968.76	817,443.76	820,987.51
Student Fee Bonds Series T-1			-	-	438,533.47	388,950.00	385,750.00	388,900.00	388,000.00
Student Fee Bonds Series T-2 *			-	-	184,592.74	236,488.92	236,488.92	236,488.92	236,488.92
Student Fee Bonds Series U			-	-	-	565,504.30	3,576,460.76	3,586,260.76	5,207,408.57
Total Existing Debt Service for Fee Replacement Projects	\$ 19,075,669.57	\$ 23,992,302.19	\$ 25,116,608.58	\$ 24,193,563.68	\$ 16,917,061.24	\$ 15,479,742.71	\$ 18,586,662.95	\$ 18,597,721.88	\$ 19,017,558.37
2. New Debt Service Awaiting Issuance for Approved Fee Replacement Projects (1)									
a. Project (List each project)									
Total Debt Service for Approved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3. New Debt Service for Unapproved Fee Replacement Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Requested Fee Replacement Projects (2)									
a. Project (List each project)									
IUPUI Rotary Building Laboratory Expansion									2,135,587.47
IUPUI Science and Engineering Laboratory Building - Phase II									1,879,316.97
IUPUI VanNuys Medical Science Lab Renovation - Phase IV									1,879,316.97
IUPUI Emerson Hall									820,065.59
IUPUI Taylor Hall Renovation - Phase II									546,710.39
Total New Debt Service for Requested Fee Replacement Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,260,997.39
TOTAL DEBT SERVICE FOR FEE REPLACEMENT PROJECTS	\$ 19,075,669.57	\$ 23,992,302.19	\$ 25,116,608.58	\$ 24,193,563.68	\$ 16,917,061.24	\$ 15,479,742.71	\$ 18,586,662.95	\$ 18,597,721.88	\$ 26,278,555.76

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS, BRS X-A CONTINUED

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJ 2012-13	PROJ 2013-14	PROJ 2014-15
B. Projects without Fee Replacement (3)									
1. Existing Debt Service (Please list Series)									
Student Fee Bonds Series P	688,950.00								
Student Fee Bonds Series Q	943,922.46								
Student Fee Bonds Series R	718,966.71	705,688.76	1,032,313.76	1,030,188.76	1,032,188.76	1,033,188.76	1,033,188.76	1,032,188.76	1,030,188.76
Student Fee Bonds Series S			1,307,604.17	1,309,475.00	1,310,875.00	1,311,475.00	1,308,700.00	1,310,025.00	1,310,125.00
Student Fee Bonds Series U						773,824.17			
Consolidated Revenue Bonds, Series 2008A	-	1,158,023.87	5,906,917.50	5,899,417.50	5,906,667.50	5,902,667.50	5,902,667.50	5,896,167.50	5,903,167.50
Consolidated Revenue Bonds, Series 2009A	-	-	-	297,477.49	294,981.26	295,231.26	294,981.26	296,381.26	294,006.26
Consolidated Revenue Bonds, Series 2010A	-	-	-	-	575,428.89	579,600.00	584,150.00	582,750.00	-
Consolidated Revenue Bonds, Series 2010B *	-	-	-	-	356,812.72	352,891.70	352,891.70	352,891.70	932,891.70
Consolidated Revenue Bonds, Series 2011A	-	-	-	-	-	1,264,324.50	1,268,120.00	1,265,120.00	1,266,920.00
Consolidated Revenue Bonds, Series 2012A	-	-	-	-	-	639,275.00	2,336,500.00	2,346,300.00	2,355,700.00
Student Residence System 2004A	1,245,650.63	899,463.14							
Student Residence System 2004B	1,238,440.00	1,275,715.00	1,311,640.00	1,350,202.50	1,390,040.00	1,009,945.00	634,450.00	677,850.00	722,625.00
Facility Revenue Bonds, 1994A	1,996,850.79	1,990,770.50	2,334,360.00	2,333,720.00	2,335,830.00	-	-	-	-
Facility Revenue Bonds, 2000	835,614.24	932,188.66							
Facility Revenue Bonds, 2004	1,712,737.50	1,595,637.50	1,520,362.50	1,180,612.50	1,185,887.50	3,115,943.75	2,925,593.75	2,994,368.75	2,463,000.00
Certificates of Participation 2003	844,062.50	848,037.50	845,475.00	846,102.50	849,762.50	425,628.75	-	-	-
Certificates of Participation, Series 2012A	-	-	-	-	-	335,682.22	761,700.00	760,150.00	753,400.00
Tax-Exempt Commercial Paper, 2005	1,978,917.36	1,405,245.12							
Tax-Exempt Commercial Paper, 2007		433,809.00							
Total Existing Debt Service for Other Funded Projects	\$ 12,204,112.19	\$ 11,244,579.05	\$ 14,258,672.93	\$ 14,247,196.25	\$ 15,238,474.13	\$ 17,039,677.61	\$ 17,402,942.97	\$ 17,514,192.97	\$ 17,032,024.22
2. New Debt Service Awaiting Issuance for Approved Projects (1)									
a. Project (List each project)									
IUPUI Energy Savings Project-Phase I							\$137,750.00	\$1,113,051.82	\$1,113,051.82
Total Debt Service for Approved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 137,750.00	\$ 1,113,051.82	\$ 1,113,051.82
3. New Debt Service for Unapproved Other Funded Projects (4)									
a. Project (List each project)									
Total New Debt Service for Unapproved Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. New Debt Service for Other Funded Requested Projects									
a. Project (List each project)									
IUPUI Data Network Infrastructure Upgrades									854,234.99
IUPUI Ball Gardens Renovation									410,032.79
IUPUI School of Dentistry - Phase I									2,562,704.96
Total New Debt Service for Requested Other Funded Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,826,972.74
TOTAL DEBT SERVICE FOR Other Funded PROJECTS	\$ 12,204,112.19	\$ 11,244,579.05	\$ 14,258,672.93	\$ 14,247,196.25	\$ 15,238,474.13	\$ 17,039,677.61	\$ 17,540,692.97	\$ 18,627,244.79	\$ 21,972,048.78
TOTAL DEBT SERVICE FOR ALL CAPITAL PROJECTS	\$ 31,279,781.76	\$ 35,236,881.24	\$ 39,375,281.51	\$ 38,440,759.93	\$ 32,155,535.37	\$ 32,519,420.32	\$ 36,127,355.92	\$ 37,224,966.67	\$ 48,250,604.54

Notes:

- (1) For those projects previous by CHE, SBC and SBA that do not have funding in 2011-13, and debt service is not included in existing debt service figures (A-1).
(2) Figures must match 2013-15 Capital Project Request Schedule for requested capital projects
(3) Figure should include all other debt service not related to fee replacement (auxiliary, revenue, short term notes, etc)
(4) Include only projects pending approval by CHE, SBC or SBA that are not funded in 2011-13 and have been previously authorized by the General Assembly

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 BIENNIUMBRS X-A Supplement
Allocation of Debt Service on Projects Eligible for Fee Replacement

	<u>Allocation Basis: Projected FTE Enrollment</u>	<u>2013-14 Allocation</u>	<u>2014-15 Allocation</u>
Health Division	5,028	\$ 3,410,261	\$ 4,818,694
General Academic	22,392	15,187,461	21,459,862
Total	27,420	\$ 18,597,722	\$ 26,278,556

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - B (BRS X - B)
DEBT SERVICE ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF DEBT SERVICE FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Debt Service			Other Debt Service			Total Debt Service
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 16,917,061.24		\$ -	\$ 15,238,474.13	\$ -	\$ -	\$ 32,155,535.37
2012	\$ 15,479,742.71		\$ -	\$ 17,039,677.61	\$ -	\$ -	\$ 32,519,420.32
2013	\$ 18,586,662.95		\$ -	\$ 17,402,942.97	\$ 137,750.00	\$ -	\$ 36,127,355.92
2014	\$ 18,597,721.88		\$ -	\$ 17,514,192.97	\$ 1,113,051.82	\$ -	\$ 37,224,966.67
2015	\$ 19,017,558.37		\$ 7,260,997.39	\$ 17,032,024.22	\$ 1,113,051.82	\$ 3,826,972.74	\$ 48,250,604.54
2016	\$ 19,005,687.03		\$ 7,260,997.39	\$ 15,566,669.88	\$ 1,113,051.82	\$ 3,826,972.74	\$ 46,773,378.86
2017	\$ 18,988,775.13		\$ 7,260,997.39	\$ 15,548,463.70	\$ 1,113,051.82	\$ 3,826,972.74	\$ 46,738,260.78
2018	\$ 19,641,886.14		\$ 7,260,997.39	\$ 15,477,897.88	\$ 1,113,051.82	\$ 3,826,972.74	\$ 47,320,805.97
2019	\$ 17,102,957.93		\$ 7,260,997.39	\$ 15,427,581.22	\$ 1,113,051.82	\$ 3,826,972.74	\$ 44,731,561.10
2020	\$ 14,569,103.55		\$ 7,260,997.39	\$ 15,042,415.08	\$ 1,113,051.82	\$ 3,826,972.74	\$ 41,812,540.58
2021	\$ 14,572,245.24		\$ 7,260,997.39	\$ 14,458,352.43	\$ 1,113,051.82	\$ 3,826,972.74	\$ 41,231,619.62
2022	\$ 10,822,703.06		\$ 7,260,997.39	\$ 14,441,379.60	\$ 1,113,051.82	\$ 3,826,972.74	\$ 37,465,104.61
2023	\$ 10,879,628.73		\$ 7,260,997.39	\$ 14,010,648.68	\$ 1,113,051.82	\$ 3,826,972.74	\$ 37,091,299.36
2024	\$ 8,345,835.24		\$ 7,260,997.39	\$ 13,672,488.57		\$ 3,826,972.74	\$ 33,106,293.94
2025	\$ 8,339,284.95		\$ 7,260,997.39	\$ 12,507,138.68		\$ 3,826,972.74	\$ 31,934,393.76
2026	\$ 8,337,833.10		\$ 7,260,997.39	\$ 12,518,110.86		\$ 3,826,972.74	\$ 31,943,914.09
2027	\$ 8,340,184.23		\$ 7,260,997.39	\$ 12,515,697.79		\$ 3,826,972.74	\$ 31,943,852.15
2028	\$ 3,076,928.61		\$ 7,260,997.39	\$ 12,521,119.49		\$ 3,826,972.74	\$ 26,686,018.23
2029	\$ 3,073,495.31		\$ 7,260,997.39	\$ 10,673,561.68		\$ 3,826,972.74	\$ 24,835,027.12
2030	\$ 3,074,039.62		\$ 7,260,997.39	\$ 9,238,208.10		\$ 3,826,972.74	\$ 23,400,217.85
2031	\$ 2,446,000.00		\$ 7,260,997.39	\$ 5,548,312.50		\$ 3,826,972.74	\$ 19,082,282.63
2032	\$ 2,444,625.00		\$ 7,260,997.39	\$ 5,545,287.50		\$ 3,826,972.74	\$ 19,077,882.63
2033	\$ -		\$ 7,260,997.39	\$ 3,372,050.00		\$ 3,826,972.74	\$ 14,460,020.13
2034			\$ 7,260,997.39	\$ -		\$ 3,826,972.74	\$ 11,087,970.13
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE X - C (BRS X - C)
OUTSTANDING DEBT ON ALL CAPITAL PROJECTS
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF OUTSTANDING DEBT FOR ALL CAPITAL PROJECTS THROUGH RETIREMENT OF DEBT

	Fee Replacement Outstanding Debt			Other Outstanding Debt			Total Outstanding Debt
	Existing	Planned	New	Existing	Planned	New	
2011	\$ 146,705,191.61			\$ 179,535,000.00			\$ 326,240,191.61
2012	\$ 168,547,016.03			\$ 184,460,000.00			\$ 353,007,016.03
2013	\$ 157,880,784.42			\$ 175,175,000.00	\$ 8,700,000.00		\$ 341,755,784.42
2014	\$ 146,690,480.46			\$ 165,365,000.00	\$ 8,000,198.18		\$ 320,055,678.64
2015	\$ 134,506,970.52		\$ 82,626,502.60	\$ 155,610,000.00	\$ 7,267,155.77	\$ 43,549,027.25	\$ 423,559,656.14
2016	\$ 121,704,715.85		\$ 80,116,529.10	\$ 146,985,000.00	\$ 6,499,293.85	\$ 42,226,123.57	\$ 397,531,662.37
2017	\$ 108,256,246.16		\$ 77,462,232.12	\$ 138,045,000.00	\$ 5,694,958.49	\$ 40,827,152.93	\$ 370,285,589.70
2018	\$ 93,437,564.05		\$ 74,655,313.07	\$ 128,845,000.00	\$ 4,852,417.20	\$ 39,347,741.48	\$ 341,138,035.80
2019	\$ 80,459,122.88		\$ 71,686,996.17	\$ 119,270,000.00	\$ 3,969,855.19	\$ 37,783,263.86	\$ 313,169,238.10
2020	\$ 69,427,778.79		\$ 68,548,001.05	\$ 109,650,000.00	\$ 3,045,371.49	\$ 36,128,828.79	\$ 286,799,980.12
2021	\$ 57,836,887.14		\$ 65,228,513.71	\$ 100,170,000.00	\$ 2,076,974.82	\$ 34,379,263.70	\$ 259,691,639.37
2022	\$ 49,510,494.47		\$ 61,718,155.85	\$ 90,305,000.00	\$ 1,062,579.30	\$ 32,529,098.61	\$ 235,125,328.23
2023	\$ 40,755,000.00		\$ 58,005,952.41	\$ 80,450,000.00	\$ -	\$ 30,572,549.04	\$ 209,783,501.45
2024	\$ 34,205,000.00		\$ 54,080,297.28	\$ 70,500,000.00		\$ 28,503,497.86	\$ 187,288,795.14
2025	\$ 27,345,000.00		\$ 49,928,916.97	\$ 61,265,000.00		\$ 26,315,476.24	\$ 164,854,393.21
2026	\$ 20,150,000.00		\$ 45,538,832.30	\$ 51,605,000.00		\$ 24,001,643.37	\$ 141,295,475.67
2027	\$ 12,600,000.00		\$ 40,896,317.75	\$ 41,480,000.00		\$ 21,554,765.12	\$ 116,531,082.87
2028	\$ 10,075,000.00		\$ 35,986,858.62	\$ 30,880,000.00		\$ 18,967,191.37	\$ 95,909,049.99
2029	\$ 7,430,000.00		\$ 30,795,105.59	\$ 21,635,000.00		\$ 16,230,832.13	\$ 76,090,937.72
2030	\$ 4,655,000.00		\$ 25,304,826.77	\$ 13,385,000.00		\$ 13,337,132.22	\$ 56,681,958.99
2031	\$ 2,385,000.00		\$ 19,498,856.91	\$ 8,435,000.00		\$ 10,277,044.58	\$ 40,595,901.49
2032	\$ -		\$ 13,359,043.78	\$ 3,245,000.00		\$ 7,041,001.90	\$ 23,645,045.68
2033	\$ -		\$ 6,866,191.39	\$ -		\$ 3,618,886.76	\$ 10,485,078.15
2034		\$ -		\$ -		\$ -	\$ -
2035				\$ -			\$ -
2036				\$ -			\$ -
2037				\$ -			\$ -
2038				\$ -			\$ -

**INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE I (PMS I)
OVERALL DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
OVERALL DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									
Bachelor Degrees	2,532	2,534	2,590	2,821	2,841	3,065	2,552	2,909	357
Masters Degrees	1,010	1,096	1,229	1,150	1,217	1,256	1,112	1,208	96
Doctoral Degrees	249	273	274	272	273	243	265	263	(3)
TOTAL OVERALL DEGREES CONFERRED	3,791	3,903	4,093	4,243	4,331	4,564	3,929	4,379	450

- Notes:
- For four-year institutions, only Bachelor, Master's, and Doctoral degrees conferred are counted
 - Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
 - Includes all degrees conferred as reported on SIS file for a given reporting year (B, M, D for 4-year institutions other than VU; Cert, Associate, and Bachelor for VU; and Cert and Associate for ITTCI)

**INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE II (PMS II)
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
AT-RISK STUDENT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
1 Year Certificates									-
Associate Degrees									-
Bachelor Degrees	553	517	576	648	767	996	549	804	255
TOTAL OVERALL DEGREES CONFERRED	553	517	576	648	767	996	549	804	255

Notes:

- For four-year institutions, only Bachelor degrees conferred are counted
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment
- "At-risk" is defined as Pell recipient at time of degree conferral
- Includes all degrees conferred to Pell recipients as reported on SIS file for a given reporting year (Bachelor for 4-year institutions other than VU; Cert, Assoc, and Bachelor for VU; and Cert and Assoc for ITTCI)

**INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE III (PMS III)
HIGH IMPACT DEGREE COMPLETION PFF METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
HIGH IMPACT DEGREE COMPLETION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Bachelor Degrees	514	472	495	503	520	569	494	531	37
Masters Degrees	163	181	201	163	188	226	182	192	11
Doctoral Degrees	2	-	-	-	-	-	1	-	(1)
TOTAL OVERALL DEGREES CONFERRED	679	653	696	666	708	795	676	723	47

Notes:

- CHE provided a list of eligible degree programs to include
- Assumes resident students only, no reciprocity. Residency status is based on residency at the time of degree conferment.
- Only applies to IUB, PUWL, BSU and IUPUI General Academic
- Includes all degrees conferred in identified STEM areas as reported on SIS file for a given reporting year (Bachelor, Master's, Doctoral)

**INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VI (PMS VI)
ON-TIME GRADUATION RATE METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION
ON-TIME GRADUATION PFF METRIC FOR AY 2006-2011**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
2 Year Institutions (Associates Only)									
Number of Students Entering First Time, Full Time (1)									
Number of Students Receiving a Degree in 2 years									
On-Time Graduation Rate									
4 year Institutions (Bachelor Only)									
Number of Students Entering First Time, Full Time (1)	1,891	2,005	1,962	2,108	2,231	2,415	1,953	2,251	299
Number of Students Receiving a Degree in 4 years	183	205	212	217	294	360	200	290	90
On-Time Graduation Rate	9.7%	10.2%	10.8%	10.3%	13.2%	14.9%	10.2%	12.9%	2.7%

Notes:

(1) Should be the cohort entering in the fall 2 or 4 years prior to graduation. Example, 2005-06 should be the cohort of 2004-05 for 2 year and 2002-2003 for 4 year.

- Assumes undergraduate resident students only, no reciprocity
- Residency status is based on residency at time of cohort entry
- Applies to Associate and Bachelor degrees only
- Degree seeking students, no exclusions, fall enrollment for cohorts only

**INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS
2013-15 BIENNIUM**

**PERFORMANCE METRIC SCHEDULE VII (PMS VII)
INSTITUTION DEFINED PRODUCTIVITY METRIC
INDIANA PUBLIC POSTSECONDARY EDUCATION**

Funding Provided by State Taxpayers and Hoosier Families Per In-State Bachelor's Degree

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2006-08 3 Year Avg	2009-11 3 Year Avg	Change in 3 Year Avg
Funding Per In-State Bachelor's Degree	\$ 92,256	\$ 93,516	\$ 92,982	\$ 86,305	\$ 87,722	\$ 83,045	\$ 92,918	\$ 85,691	\$ (7,227)

Special State Appropriations

INDIANA UNIVERSITY
2013-15 SPECIAL STATE APPROPRIATION REQUEST

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INDIANA UNIVERSITY
2013-15 OPERATING APPROPRIATION REQUEST

Summary of Proposed Requests

	2012-13	2013-14			2014-15		
Research Support Expenditures Schedules BRS IX							
Abilene Network Operations	\$ 707,707	\$ 42,462	6.0%	\$ 750,169	\$ -	0.0%	\$ 750,169
Indiana Institute for Disability and Community	\$ 2,105,824	\$ 126,349	6.0%	\$ 2,232,173	\$ -	0.0%	\$ 2,232,173
Geological Survey	\$ 2,636,907	\$ 158,214	6.0%	\$ 2,795,121	\$ -	0.0%	\$ 2,795,121
Indiana Advisory Commission on Intergovernmental Relations	\$ 48,062	\$ -	0.0%	\$ 48,062	\$ -	0.0%	\$ 48,062
Medical Education Centers Expansion	\$ 3,000,000	\$ -	0.0%	\$ 3,000,000	\$ -	0.0%	\$ 3,000,000
IU Spinal Cord/Head Injury Research Center	\$ 524,230	\$ 31,454	6.0%	\$ 555,684	\$ -	0.0%	\$ 555,684
I-Light Network	\$ 1,471,833	\$ -	0.0%	\$ 1,471,833	\$ -	0.0%	\$ 1,471,833
GigaPOP Operations	\$ 656,158	\$ 39,369	6.0%	\$ 695,527	\$ -	0.0%	\$ 695,527
Optometry Education Fund	\$ 1,500	\$ 46,746	3116.4%	\$ 48,246	\$ (46,746)	-96.9%	\$ 1,500
TOTALS	\$ 11,152,221	\$ 444,594	4.0%	\$ 11,596,815	\$ (46,746)	-0.4%	\$ 11,550,069
IHETS (External Agency)	\$ 491,438	\$ (56,169)	-11.4%	\$ 435,269	\$ -	0.0%	\$ 435,269

Recognizing the importance that research plays in creating new knowledge, new products, and medical treatments, the state began to provide research funding support to public research campuses in FY 2003. Since that time, IU has increased its extramural sponsored program spending from \$323 million in FY 2003 to \$454 million in FY 2012. The state research support funds are critical to helping IU finance the research enterprise, including administrative costs, research equipment and facilities, and the prestigious Indiana Clinical and Translational Sciences Institute, which is discussed in the institutional narrative portion of this submission.

The Importance of IU Research

Indiana University's expenditure of nearly one-half billion dollars in research funds during FY 2012 is testimony to IU's national stature as a major research institution, internationally renowned faculty, modern research facilities, and prominence in life sciences research and information technology.

Why is university research important to the state of Indiana? Virtually every state in the nation is engaged in a competitive battle for development of jobs in high technology fields such as the life sciences and information technology. Most states have recognized that research universities can be an essential catalyst behind economic development. Indeed, economic development studies indicate that technology-based economies are accelerated by research universities that are actively engaged with the private sector. University research is critical because it creates intellectual property – new knowledge and technology – that frequently spawns new companies that commercialize new products and services. In addition, research universities attract and produce the type of human capital that is essential for growth of high technology companies.

IU is heavily engaged in both basic scientific and translational research. Basic scientific research leads to new scientific discoveries that increase knowledge, which becomes the building blocks for additional discoveries. Translational research involves using scientific discoveries to produce new products and services that improve the lives of Hoosiers. For example, through IU's major engagement in the life sciences, translational research often produces new medical treatments and therapies that improve the health of Hoosiers.

Not only do research awards support cutting-edge research in numerous disciplines, they support a substantial number of jobs at the university, including faculty, research assistants, and other support personnel. An excellent example is how IU's prominence in computer network operations has led to growth in research contract awards and job creation. IU's engagement in network operations was accelerated by the state's initial investment of \$1.2 million in FY 1998, which helped IU secure the contract to manage Internet2 operations. This initial investment has been leveraged over the years to generate substantially more revenue and to create high paying jobs. Today, IU manages over 20 national and international network projects, generating over \$14 million in annual contract revenue and employing approximately 95 staff – much like a high technology start-up company.

Additionally, IU has created a new center focused on research, testing, protocol development and education. The center, named the *"Indiana Center for Network Translational Research and Education"* (InCNTRE), has emerged as the national leader in next generation network development. In its first year of operation the center has won over \$2.5 million in grant awards and has hired 11 fulltime staff and 9 students.

Commercialization and Economic Development from Research

To ensure that research discoveries with commercialization potential are pursued, the Indiana University Research and Technology Corporation (IURTC) works closely with IU research faculty to achieve this goal. Specifically, the IURTC manages IU's intellectual property portfolio, works to bring innovative research discoveries with commercial potential to the marketplace, and helps faculty and researchers legally protect their discoveries. In addition, IURTC assists with licensing discoveries to other companies, assists faculty with starting a business by conducting strategic business planning and attracting investors. Finally, IURTC manages the Innovation Center in Indianapolis, a business incubation facility equipped with wet and dry labs to facilitate the growth and development of new start-up ventures and the commercialization of IU developed research and technology.

Often key to the success of new business start-ups is working capital to finance initial start-up activity. Often, such early stage investment capital is difficult for new businesses to attract and so IU recently established the Innovate Indiana Fund. Capitalized with a \$10 million investment funded from university and private donor sources, this fund enables IU to play a significant role in bridging this critical financing gap by offering a vital new source for funding for Indiana University entrepreneurs, ensuring that new technology and life science companies are not only established in the state, but are able to thrive here as well.

IURTC has enjoyed tremendous success in commercializing IU faculty-generated intellectual property as demonstrated by the following statistics:

- Since 1997, IU research has filed nearly 1,800 invention disclosures, been awarded 355 patents, and involved in 41 startup companies.
- During FY 2010-11, IURTC enjoyed the following successes:
 - Recorded \$11 million in licensing revenue
 - Filed 302 total US and international patents
 - Received 28 issued patents
 - Executed 39 new licensing agreements

Importance of State Research Support

While a small amount in comparison to total extramural funding, the state support is critical to Indiana University. First, research grants, especially from the federal government, require strict adherence to standards for conduct of research as well as require substantial reporting. Administrative cost reimbursement awarded with research grants generally does not fully cover these costs. Second, grant funding often requires matching institutional funds. Third, winning research funds requires investments in the latest facilities, equipment, technology as well as renowned faculty, involving substantial costs to the university above the level of regular operating appropriations provided by the state. Due to these factors, the School of Medicine estimates that it must subsidize its research activity at a rate of approximately 25%.

For all of these reasons, continued research support funding is critical for Indiana University.

INDIANA UNIVERSITY BLOOMINGTON
2013-15 BIENNIUM

**BUDGET REPORT SCHEDULE IX (BRS IX)
RESEARCH INSTITUTION EXPENDITURE DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION**

SUMMARY OF RESEARCH-RELATED EXPENDITURES FOR RESEARCH FOCUSED CAMPUSES

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJECTED 2012-13	PROJECTED 2013-14	PROJECTED 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. Total Externally Funded Research Costs (1)												
1. Federal Appropriations, Grants and Contracts (2)	\$43,582,310	\$48,026,262	\$47,601,767	\$49,820,245	\$48,906,182	\$49,453,399	\$ 50,000,000	\$ 51,000,000	\$ 52,000,000	2.3%	2.0%	2.0%
2. Industrial Grants and Contracts	\$ 2,626,274	\$ 3,220,055	\$ 2,999,437	\$ 2,653,445	\$ 3,598,268	\$ 3,735,968	\$ 3,800,000	\$ 4,000,000	\$ 4,000,000	6.4%	5.3%	0.0%
3. Private Foundations/Other (3)	\$22,763,606	\$16,903,392	\$18,227,157	\$19,425,191	\$21,116,038	\$21,256,670	\$ 21,000,000	\$ 21,000,000	\$ 21,000,000	-1.3%	0.0%	0.0%
4. Institution Foundations/Endowments												
TOTAL RESEARCH-RELATED EXPENDITURES	\$68,972,190	\$68,149,709	\$68,828,361	\$71,898,881	\$73,620,488	\$74,446,037	\$ 74,800,000	\$ 76,000,000	\$ 77,000,000	1.4%	1.6%	1.3%

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- HEALTH DIVISION
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE IX (BRS IX)
RESEARCH INSTITUTION EXPENDITURE DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF RESEARCH-RELATED EXPENDITURES FOR RESEARCH FOCUSED CAMPUSES

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJECTED 2012-13	PROJECTED 2013-14	PROJECTED 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. Total Externally Funded Research Costs (1)												
1. Federal Appropriations, Grants and Contracts (2)	\$ 77,924,844	\$ 83,603,979	\$ 89,398,377	\$ 84,493,518	\$ 83,618,615	\$ 84,997,095	\$ 85,500,000	\$ 87,400,000	\$ 89,350,000	1.6%	2.2%	2.2%
2. Industrial Grants and Contracts	\$ 3,171,522	\$ 2,201,065	\$ 2,209,441	\$ 2,028,636	\$ 1,868,101	\$ 2,371,205	\$ 3,005,000	\$ 3,005,000	\$ 3,005,000	-0.9%	0.0%	0.0%
3. Private Foundations/Other (3)	\$ 33,860,465	\$ 34,447,116	\$ 30,808,890	\$ 28,476,050	\$ 31,324,494	\$ 35,181,149	\$ 35,150,000	\$ 35,150,000	\$ 35,150,000	0.6%	0.0%	0.0%
4. Institution Foundations/Endowments												
TOTAL RESEARCH-RELATED EXPENDITURES	\$ 114,956,831	\$ 120,252,160	\$ 122,416,708	\$ 114,998,204	\$ 116,811,210	\$ 122,549,449	\$ 123,655,000	\$ 125,555,000	\$ 127,505,000	1.2%	1.5%	1.6%

IU Special State Appropriations

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INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS -- GENERAL ACADEMIC
2013-15 BIENNIUM

BUDGET REPORT SCHEDULE IX (BRS IX)
RESEARCH INSTITUTION EXPENDITURE DATA
INDIANA PUBLIC POSTSECONDARY EDUCATION
SUMMARY OF RESEARCH-RELATED EXPENDITURES FOR RESEARCH FOCUSED CAMPUSES

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	PROJECTED 2012-13	PROJECTED 2013-14	PROJECTED 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
A. Total Externally Funded Research Costs (1)												
1. Federal Appropriations, Grants and Contracts (2)	\$ 8,455,284	\$10,580,327	\$11,116,190	\$12,881,228	\$13,556,388	\$11,359,580	\$ 11,000,000	\$ 10,000,000	\$ 10,000,000	4.5%	-9.1%	0.0%
2. Industrial Grants and Contracts	\$ 1,408,553	\$ 1,030,661	\$ 1,351,164	\$ 1,161,952	\$ 1,457,223	\$ 1,162,125	\$ 1,000,000	\$ 900,000	\$ 900,000	-5.5%	-10.0%	0.0%
3. Private Foundations/Other (3)	\$ 4,490,127	\$ 5,753,613	\$ 7,245,956	\$ 5,531,770	\$ 3,559,274	\$ 4,065,639	\$ 4,000,000	\$ 4,000,000	\$ 4,000,000	-1.9%	0.0%	0.0%
4. Institution Foundations/Endowments												
TOTAL RESEARCH-RELATED EXPENDITURES	\$14,353,964	\$17,364,601	\$19,713,310	\$19,574,950	\$18,572,885	\$16,587,344	\$ 16,000,000	\$ 14,900,000	\$ 14,900,000	1.8%	-6.9%	0.0%

JUSTIFICATION OF BUDGET REQUEST **Internet2 (Abilene) and the Global Network Operations Center** 2013-2015

IU is the home of the Internet2 (Abilene) Network Operations Center (NOC)

In August of 1998, Indiana University was chosen as the home for the Abilene network operations center. The 7x24x365 operations center provides comprehensive network management services and plays a critical role in the deployment of the advanced networking initiatives. Recently Internet2 changed the name of the Abilene Network to the “Internet2 Network” to more clearly identify its new 100gb backbone which was recently deployed by our operations center staff. See <http://globalnoc.iu.edu/> for more information

Impact of the Operations Center

The State recognizes the importance of supporting the development of the new generation of high-speed Internet technologies that provide promise of major impacts in such diverse areas as distance and lifelong learning, healthcare and geographically distributed design and planning. The Abilene NOC Indiana University has been able to support these missions and leverage state finding and expertise gained to support additional national and international networks and in the process add more than 15 jobs in the past two years. In addition an undergraduate student intern program has been created to develop the next generation of network engineers. To date IU has hired 2 of these students and other graduates of the programs are working in the commercial sector.

The Operations Center is also working with the National Science Foundation and their Global Environment for Network Innovations (GENI) project to study how to manage and control future internet protocols. Additionally, a new center focused on research, testing, protocol development and education has emerged as the national leader in next generation network development. In its first year of operation the center has won over \$2.5 million in grant awards and has hired 3 fulltime staff and 9 students. See <http://incntre.iu.edu/> for more information.

Global Networks

Being the NOC for Abilene has enabled IU to develop the reputation and expertise in managing high performance networks and led to the establishment of the Global Research Network Operations Center (GRNOC). The GRNOC has been awarded contracts to support following Global Networks: See <http://internationalnetworking.iu.edu/> for more information.

TransPAC and America Connects to Europe (ACE): A \$9.5 million award from the National Science Foundation to provide international networking support.

Man-Lan: An optical exchange point located in New York allows international networks to terminate optical connections and connect to Networks in the US

AMPATH: This network supports the R&E institutions in South and Central America, the Caribbean and Mexico.

Future engagements

Federal departments such as NOAA, the Department of Defense, Regional Optical Networks and international network owners are expressing interest in our services. By slightly increasing the size of

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - ABILENE NETWORK OPERATIONS CENTER

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
SUMMARY OF BUDGET REQUEST												
Salary and Wages	\$ 561,713	\$ 466,712	\$ 535,988	\$ 440,667	\$ 289,501	\$ 209,901	\$ 11,656	\$ 11,889	\$ 12,127	-47.6%	2.0%	2.0%
Fringe Benefits	\$ 179,575	\$ 155,745	\$ 183,873	\$ 141,265	\$ 85,140	\$ 73,905	\$ 5,052	\$ 5,153	\$ 5,256	-44.9%	2.0%	2.0%
Other Personnel Services												
Total Personnel Services	\$ 741,288	\$ 622,457	\$ 719,861	\$ 581,932	\$ 374,641	\$ 283,806	\$ 16,708	\$ 17,042	\$ 17,383	-46.9%	2.0%	2.0%
Services Other than Personnel												
Services by Contract	\$ 5,013	\$ 37,743			\$ 288,535	\$ 376,365	\$ 661,576	\$ 678,127	\$ 682,786	125.6%	2.5%	0.7%
Materials and Supplies	\$ 13,665	\$ 67,485	\$ 111,484	\$ 68,251	\$ 154,828	\$ 28,884	\$ 28,598	\$ 40,000	\$ 35,000	13.1%	39.9%	-12.5%
Equipment	\$ 13,154	\$ 56,386		\$ 118,896								
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.												
In-State Travel	\$ 6,138	\$ 6,261	\$ 2,432	\$ 12,547	\$ 10,401	\$ 173	\$ 825	\$ 5,000	\$ 5,000	-28.4%	506.1%	0.0%
Out-of-State Travel	\$ 38,244	\$ 51,695	\$ 24,838	\$ 50,970	\$ 22,944	\$ 8,845		\$ 10,000	\$ 10,000			0.0%
Total Other Operating	\$ 76,214	\$ 219,570	\$ 138,754	\$ 250,664	\$ 476,708	\$ 414,267	\$ 690,999	\$ 733,127	\$ 732,786	44.4%	6.1%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 817,502	\$ 842,027	\$ 858,615	\$ 832,596	\$ 851,349	\$ 698,073	\$ 707,707	\$ 750,169	\$ 750,169	-2.4%	6.0%	0.0%
LINE ITEM FUNDING												
General Fund (1)	\$ 817,502	\$ 842,027	\$ 858,615	\$ 832,596	\$ 832,596	\$ 707,707	\$ 707,707	\$ 750,169	\$ 750,169	-2.4%	6.0%	0.0%
Dedicated Funds												
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 817,502	\$ 842,027	\$ 858,615	\$ 832,596	\$ 832,596	\$ 707,707	\$ 707,707	\$ 750,169	\$ 750,169	-2.4%	6.0%	0.0%

THE WORK OF THE INSTITUTE AND ITS VALUE TO INDIANA AND INDIANA UNIVERSITY

The Mission of the Indiana Institute on Disability and Community is to work with communities to welcome, value, and support the contributions of people of all ages and abilities through research, education, and service.

Indiana communities, like states and communities nationwide, are faced with continued, unprecedented uncertainty and economic shifts. Schools and communities are being called upon, even required, to do better, and to do better with less. People with disabilities, of all ages, are a part of these communities, yet the costs associated with students and adults with disabilities have just recently come to public attention and concern.

As a result, schools and communities are seeking to “do better:” better at educating all students and doing so at less cost; better at increasing the employment rate of people with disabilities; better at finding new ways to fund outcomes and not simply pay for services of unknown outcomes; and better at increasing the meaningful community participation of people with disabilities. It is the work of the Institute to engage in the research, education, and service that promotes these kinds of improvements.

More specifically, these are the kinds of services being asked of the Indiana Institute on Disability and Community:

- Preschools and kindergartens are asking how to deliver effective early education in order that all children are ready for their school years.
- Schools are asking how to develop methods of universal design in teaching that works for every child, including children with disabilities.
- Schools are asking how to develop methods for teaching and including children with behavior support needs and autism.
- High schools are asking how to ensure that all young people transition from high school to post-secondary education or employment.
- Schools are asking how to train teachers to be the brightest and the best, fluent in the best technologies and instructional methods known.
- Schools and communities are asking how to use technological advances to eliminate barriers to learning and employment.
- Employers are asking how to include people with disabilities in their work force.
- Non-profit agencies are asking how to train staff to deliver the best known intervention and supports to individuals.
- Architects and general contractors are asking how to build homes that work for everyone, including people that are aging or who have disabilities.
- Non-profit agencies are asking how to develop management strategies for delivering outcomes for quality of life beyond simply providing hours of service.
- Government agencies are asking how to create leadership with modern management skills and up to date rehabilitation knowledge.
- Policy makers are asking for creative methods of funding for outcomes beyond funding for services.
- Policy makers are asking for research from other states and countries on creative and effective policy for cost effective community structures.

- Policy makers are asking for outcome data systems for tracking and improving quality of life outcomes.

Providing research, education, and service to these constituents in Indiana is the work of the Indiana Institute on Disability and Community. As Indiana's University Center for Excellence in Research, Education, and Service (as designated by the U.S. Department of Health and Human Services), it is a primary, and often the only, source of this work. Our training and technical assistance activities touch thousands of Hoosiers. In 2011-2012, we conducted more than 845 training events involving more than 39,300 people. We provided nearly 8,000 hours of training and technical assistance to schools, community agencies, and government agencies. Our scholarly and knowledge translation publications record show our research in these areas. Our pre-service and in-service education and coursework, and graduate student mentoring show our education role in Indiana and at Indiana University. We generated more than 1,450 student credit hours in teaching graduate and undergraduate courses. Our participation in policy work committees and implementation leaders with government and state leaders in education and community services show our service.

The Indiana Institute on Disability and Community is designed for "research to practice" with ideas that improve knowledge, policy and practice. Our knowledge development and practical application and dissemination of human service ideas define our mission and our work.

We specifically ask for funding in order to:

- ❖ Improve on our aging technology needs;
- ❖ Resume updating our library and dissemination functions;
- ❖ Restore our Collaborative Work Lab;
- ❖ Respond to the increasing requests for assistance from families and practitioners related to autism;
- ❖ Re-establish former training and technical assistance functions related to early childhood and disability; and
- ❖ Respond to the new needs of schools related to special education and educational reform.

Appropriation request: \$2,232,173

**BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - INDIANA INSTITUTE ON DISABILITY AND COMMUNITY**

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
<u>SUMMARY OF BUDGET REQUEST</u>												
Salary and Wages	\$ 3,277,047	\$ 3,192,160	\$ 1,541,693	\$ 1,644,879	\$ 1,400,247	\$ 1,620,772	\$ 1,788,817	\$ 1,431,522	\$ 1,474,469	-9.6%	-20.0%	3.0%
Fringe Benefits	\$ 1,059,438	\$ 1,066,785	\$ 579,963	\$ 631,097	\$ 555,327	\$ 611,188	\$ 759,943	\$ 618,366	\$ 636,916	-5.4%	-18.6%	3.0%
Other Personnel Services												
Total Personnel Services	\$ 4,336,485	\$ 4,258,945	\$ 2,121,656	\$ 2,275,976	\$ 1,955,574	\$ 2,231,960	\$ 2,548,760	\$ 2,049,888	\$ 2,111,385	-8.5%	-19.6%	3.0%
Services Other than Personnel												
Services by Contract	\$ 200,000	\$ 549,580										
Materials and Supplies	\$ 1,738,049	\$ 1,925,694	\$ 357,714	\$ 106,210	\$ 413,771	\$ 324,655	\$ 85,356	\$ 133,673	\$ 70,718	-39.5%	56.6%	-47.1%
Equipment												
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.			\$ 6,607									
In-State Travel	\$ 144,408	\$ 143,457	\$ 49,414	\$ 61,457	\$ 39,360	\$ 64,980	\$ 28,000	\$ 25,145	\$ 25,899	-23.9%	-10.2%	3.0%
Out-of-State Travel	\$ 68,526	\$ 62,104		\$ 33,797	\$ 20,615	\$ 46,422	\$ 30,000	\$ 23,467	\$ 24,171	-12.9%	-21.8%	3.0%
Total Other Operating	\$ 2,150,983	\$ 2,680,835	\$ 413,735	\$ 201,464	\$ 473,746	\$ 436,057	\$ 143,356	\$ 182,285	\$ 120,788	-36.3%	27.2%	-33.7%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 6,487,468	\$ 6,939,780	\$ 2,535,391	\$ 2,477,440	\$ 2,429,320	\$ 2,668,017	\$ 2,692,116	\$ 2,232,173	\$ 2,232,173	-13.6%	-17.1%	0.0%
<u>LINE ITEM FUNDING</u>												
General Fund (1)	\$ 2,432,526	\$ 2,505,502	\$ 2,554,860	\$ 2,477,440	\$ 2,477,440	\$ 2,105,824	\$ 2,105,824	\$ 2,232,173	\$ 2,232,173	-2.4%	6.0%	0.0%
Dedicated Funds	\$ 2,920,711	\$ 3,388,289										
Federal Funds	\$ 1,134,231	\$ 1,045,989										
TOTAL FUNDING FOR LINE ITEM	\$ 6,487,468	\$ 6,939,780	\$ 2,554,860	\$ 2,477,440	\$ 2,477,440	\$ 2,105,824	\$ 2,105,824	\$ 2,232,173	\$ 2,232,173	-17.1%	6.0%	0.0%

Origins and Purpose of the Program: The mission of the Indiana Geological Survey (IGS), as established in state statute, is to provide geologic information and counsel contributing to the wise stewardship and economic development of the energy, mineral, and ground-water resources of Indiana, and to the health, safety, and welfare of its citizens. This mission is carried out through directed research; cooperative studies with other universities and government agencies; the publication of maps, reports, and databases; public service and education, including the advising and mentoring of students; and the collection and archiving of geologic data and materials for continued and future reference.

Population Served, including historic and projected changes: Through the work of the IGS, all 6.5 million of Indiana's citizens are served directly or indirectly, whether, for example, through the orderly development of the mineral and energy resources of Indiana, by providing answers to questions related to environmental conditions, or through its various educational programs reaching all age groups of Hoosiers. Business and governmental agencies are provided geologic information often vital to their operations. These groups include land and minerals owners; coal, petroleum, aggregate and building-stone industries; clay brick manufacturers; and various Indiana governmental agencies, including Natural Resources, Environmental Management, Transportation, Board of Health, State Chemist, and Homeland Security. The concerns of the general public are addressed on a request basis and are handled personally, in writing or orally, with reference to available maps and reports.

Outreach efforts of the IGS staff include assisting with the Indiana University's undergraduate and graduate instruction and graduate advising, IU Mini University program, Indiana Master Naturalist program, and various events that occur throughout the year, such as Hoosier Association of Science Teachers, Science Olympiad, Indiana GIS Conference, Earth Day Indiana, and Earth Science Week. As one measure of the success of IGS outreach, the average annual number of visitors to the IGS Website now totals nearly 310,000, where these individuals download approximately one million page views of information.

Program Goals for the 2013-15 Biennium: Plans include continuing many ongoing programs of directed research and education. Among them, the following projects display the depth and variety of activities of the Indiana Geological Survey scientists and staff:

- Participation in a nationwide inventory of geothermal resources to assess its potential statewide that could lead to enhanced development of this natural, renewable energy resource.
- Pursue federally-funded research into ways to geologically sequester carbon dioxide through participation in several region-wide consortia.
- Development and maintenance of the Indiana Geographic Information Council's *IndianaMap*. *IndianaMap* is one of the nation's leading Web-based geographic information systems, providing an atlas of varied maps and databases. It consists of over 260 layers of information ranging from energy and mineral resources to land use, infrastructure, history, environment, biology, geology, and natural hazards.
- Continued outreach in the form of K-12 and undergraduate classroom presentations, continuing education programs, short courses, and public lectures.
- Dissemination of geological data through onsite visits to records and searchable Web-accessed databases.

Indiana Geological Survey Quality Improvement Request

Request: Annual base budget increase to fund professional positions to provide more public access to the IGS's data and information by continuing to collect, support, enhance, and transform the Survey's digital

data and *IndianaMap* Website. Immediate beneficiaries of this expanded service will be decision makers, businesses, government agencies, and the public.

Appropriation request: \$2,795,121

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - INDIANA GEOLOGICAL SURVEY

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
SUMMARY OF BUDGET REQUEST												
Salary and Wages	\$ 1,862,838	\$ 1,971,604	\$ 2,071,465	\$ 1,945,902	\$ 2,033,162	\$ 1,811,631	\$ 1,791,107	\$1,916,249	\$1,916,249	-0.7%	7.0%	0.0%
Fringe Benefits	\$ 648,617	\$ 710,005	\$ 778,487	\$ 794,805	\$ 773,113	\$ 710,657	\$ 762,327	\$795,399	\$795,399	2.7%	4.3%	0.0%
Other Personnel Services												
Total Personnel Services	\$ 2,511,455	\$ 2,681,609	\$ 2,849,952	\$ 2,740,707	\$ 2,806,275	\$ 2,522,288	\$ 2,553,434	\$ 2,711,648	\$ 2,711,648	0.3%	6.2%	0.0%
Services Other than Personnel												
Services by Contract												
Materials and Supplies	\$ 452,521	\$ 380,109	\$ 229,613	\$ 293,412	\$ 209,130	\$ 157,698	\$ 41,003	\$41,003	\$41,003	-33.0%	0.0%	0.0%
Equipment	\$ 19,083	\$ 20,841	\$ 69,538	\$ 24,356	\$ 23,808	\$ 44,539	\$ 10,000	\$10,000	\$10,000	-10.2%	0.0%	0.0%
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.				\$ 2,591								
In-State Travel	\$ 18,533	\$ 11,888	\$ 7,721	\$ 9,499	\$ 2,210	\$ 2,234	\$ 2,500	\$2,500	\$2,500	-28.4%	0.0%	0.0%
Out-of-State Travel	\$ 44,410	\$ 42,935	\$ 42,364	\$ 31,679	\$ 26,694	\$ 25,833	\$ 29,970	\$29,970	\$29,970	-6.3%	0.0%	0.0%
Total Other Operating	\$ 534,547	\$ 455,773	\$ 349,236	\$ 361,537	\$ 261,842	\$ 230,304	\$ 83,473	\$ 83,473	\$ 83,473	-26.6%	0.0%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 3,046,002	\$ 3,137,382	\$ 3,199,188	\$ 3,102,244	\$ 3,068,117	\$ 2,752,592	\$ 2,636,907	\$ 2,795,121	\$ 2,795,121	-2.4%	6.0%	0.0%
LINE ITEM FUNDING												
General Fund (1)	\$ 3,046,002	\$ 3,137,382	\$ 3,199,188	\$ 3,102,244	\$ 3,102,244	\$ 2,636,907	\$ 2,636,907	\$ 2,795,121	\$ 2,795,121	-2.4%	6.0%	0.0%
Dedicated Funds												
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 3,046,002	\$ 3,137,382	\$ 3,199,188	\$ 3,102,244	\$ 3,102,244	\$ 2,636,907	\$ 2,636,907	\$ 2,795,121	\$ 2,795,121	-2.4%	6.0%	0.0%

The Indiana Advisory Commission on Intergovernmental Relations (IACIR) was established by the General Assembly to provide a forum for discussion and planning in light of the increasing demands being made on state and local governments. IC 4-23-24.2-12 names the Indiana University Center for Urban Policy and the Environment (Center) to staff and administer the Commission. The Center, as part of the IU Public Policy Institute and the School of Public and Environmental Affairs, brings to the IACIR a strong reputation for merging policy analysis research with the experience of practitioners to develop pragmatic solutions for state and local governments in Indiana.

Since its inception in 1995, the IACIR has undertaken numerous efforts to improve intergovernmental decision-making and to provide an ongoing forum for discussion and resolution of intergovernmental problems and concerns. The commission's work has included a periodic survey of local governments and series of studies and public forums on several important issues facing Indiana's local governments and citizens, including: annexation, the implementation of the new property tax assessment and appeals procedures, the efficacy of local economic development tools, and estimates of needed investments in water and wastewater infrastructure. Current projects include the 2012 survey of local governments, study of 911/e-911 local government responsibilities (2012 SEA 345), exploration of structural options for the provision of public health insurance, and fiscal benchmarking.

As in its first seventeen years, the IACIR is poised to provide research as well as a discussion forum for complex issues affecting state and local government. The IACIR anticipates several initiatives during the upcoming biennium (2013-15), including:

- Conducting the biennial survey of local governments
- Continuing work on issues surrounding local government fiscal and organizational reforms, including fiscal benchmarking for local governments
- Providing a forum for discussion of current intergovernmental and local government issues

The commission and its staff remain available to complete work assigned by the Indiana General Assembly and/or the Legislative Council. In years past, the commission completed an extensive study on annexation requested by the Legislative Council. More recently, the commission has been assigned to study local government responsibilities for 911/e-911 services as mentioned above. Additional appropriations may be needed if the nature or volume of assignments exceeds the commission's current appropriation.

Appropriations request: \$48,062

**BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION**

SUMMARY OF LINE ITEM APPROPRIATION REQUEST - INDIANA ADVISORY COMMITTEE ON INTERGOVERNMENTAL RELATIONS

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
<u>SUMMARY OF BUDGET REQUEST</u>												
Salary and Wages	\$ 27,019	\$ 37,642	\$ 41,401	\$ 31,508	\$ 23,815	\$ 23,836	\$ 30,827	31,462	31,462	2.2%	2.1%	0.0%
Fringe Benefits	\$ 9,197	\$ 16,728	\$ 16,909	\$ 16,757	\$ 9,673	\$ 10,027	\$ 12,042	13,636	13,636	4.6%	13.2%	0.0%
Other Personnel Services												
Total Personnel Services	\$ 36,216	\$ 54,370	\$ 58,310	\$ 48,265	\$ 33,488	\$ 33,863	\$ 42,869	\$ 45,098	\$ 45,098	2.9%	5.2%	0.0%
Services Other than Personnel												
Services by Contract												
Materials and Supplies	\$ 17,159	\$ 2,360		\$ 7,067	\$ 3,668	\$ 4,164	\$ 4,464	2,464	2,464	-20.1%	-44.8%	0.0%
Equipment												
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.						\$ -						
In-State Travel	\$ 1,887	\$ 454	\$ 2,283	\$ 1,211	\$ 370	\$ 2,691	\$ 729	500	500	-14.7%	-31.4%	0.0%
Out-of-State Travel												
Total Other Operating	\$ 19,046	\$ 2,814	\$ 2,283	\$ 8,278	\$ 4,038	\$ 6,855	\$ 5,193	\$ 2,964	\$ 2,964	-19.5%	-42.9%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 55,262	\$ 57,184	\$ 60,593	\$ 56,543	\$ 37,526	\$ 40,718	\$ 48,062	\$ 48,062	\$ 48,062	-2.3%	0.0%	0.0%
<u>LINE ITEM FUNDING</u>												
General Fund (1)	\$ 55,518	\$ 57,184	\$ 58,310	\$ 56,543	\$ 56,543	\$ 48,062	\$ 48,062	48,062	48,062	-2.4%	0.0%	0.0%
Dedicated Funds												
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 55,518	\$ 57,184	\$ 58,310	\$ 56,543	\$ 56,543	\$ 48,062	\$ 48,062	\$ 48,062	\$ 48,062	-2.4%	0.0%	0.0%

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Overview: To directly address projected physician workforce shortages, the Indiana University School of Medicine implemented a plan to expand its medical student enrollment by 30 percent, from 280 per entering class to 364 per class by 2016. The 2012 entering class will be 335 students. At full implementation, total enrollment in the School of Medicine would reach 1,456 medical students. All additional medical students have, and will continue to receive their first two years of medical school education at the regional Centers for Medical Education. Six of the regional centers have also begun clinical instruction (3rd and 4th years of medical school) to help accommodate the increased number of medical students.

The IUSM Expansion Plan: Prior to the expansion, medical students completed their first two years assigned to either Indianapolis or to one of the eight regional Centers for Medical Education. All students returned to the Indianapolis campus for the third and fourth years of medical school to complete their required clinical experiences.

The School revisited the original plan for expansion and revised it to reduce costs and to phase in the expansion over a longer period. After a year of not adding any additional students to the entering class, the revised plan permitted expansion to continue in the face of a lower state funding commitment.

With the entering class of 2012, each of the regional medical centers will have increased its class size. Efforts to expand our network of sites to provide required clinical clerkships for our students have led to hospitals and practice sites located near the following campuses to participate in teaching our students: Indiana University - Purdue University at Fort Wayne; Indiana University Northwest; Indiana University (Bloomington); Purdue University (West Lafayette); University of Notre Dame; and Indiana State University.

At Terre Haute, half of the students matriculate into the Rural Medical Education Track and complete their clinical experiences at local/regional hospitals including critical access hospitals. In 2011, Terre Haute students were also provided with the opportunity to do their clinical clerkships at Reid Hospital in Richmond. At all of the campuses, community-based physicians have been recruited as volunteer faculty to teach in clinical settings.

Expansion Budget: In FY 2010-11, the state provided \$1 million dollars in support of school expansion. Given the continued uncertainty for future state funding, the School of Medicine Dean's Office requested that each regional medical center spend expansion dollars cautiously until the school was able to gain additional information on the state's economic outlook as well as future commitments for expansion of the medical school. In 2011-12, the state made a commitment to provide \$3 million dollars to the medical school. This action enabled the School of Medicine to provide the base funding required to move forward with plans to establish necessary educational infrastructure to ultimately increase the medical student class from 284 to 364 over the next several years and to fully implement clinical learning opportunities across all of the regional Centers for Medical Education.

**JUSTIFICATION OF BUDGET REQUEST
2013 – 2015**

**INDIANA UNIVERSITY MEDICAL
EDUCATION CENTER EXPANSION**

	<u>FY 2013</u>	<u>FY 2014</u>	<u>FY 2015</u>	<u>FY 2016</u>	<u>FY 2017</u>	<u>FY 2018</u>	<u>FY 2019</u>	<u>FY 2020</u>	<u>FY 2021</u>
Revenue:									
Exp Tuition	\$ 5,204	\$ 6,056	\$ 6,672	\$ 7,505	\$ 8,225	\$ 8,669	\$ 8,669	\$ 8,669	\$ 8,669
State	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Other	\$ 273	\$ 199	\$ 95	\$ 203	\$ 135	\$ 123	\$ 244	\$ 366	\$ 488
Total Revenue	\$ 8,204	\$ 9,056	\$ 9,672	\$ 10,505	\$ 11,225	\$ 11,669	\$ 11,669	\$ 11,669	\$ 11,669
Expenses:									
Schoolwide	\$ 3,476	\$ 3,864	\$ 4,164	\$ 4,533	\$ 4,856	\$ 5,172	\$ 5,294	\$ 5,416	\$ 5,538
1st & 2nd Year	\$ 1,166	\$ 1,347	\$ 1,539	\$ 1,696	\$ 1,831	\$ 1,896	\$ 1,896	\$ 1,896	\$ 1,896
3rd & 4th Year	\$ 3,836	\$ 4,044	\$ 4,064	\$ 4,479	\$ 4,672	\$ 4,722	\$ 4,722	\$ 4,722	\$ 4,722
Total Expenses	\$ 8,478	\$ 9,255	\$ 9,767	\$ 10,708	\$ 11,360	\$ 11,791	\$ 11,913	\$ 12,035	\$ 12,157
(Numbers are in Thousands Dollars)									

(Expansion Budget as of July 2012)

Appropriations Request: \$3,000,000

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - Medical Education Centers Expansion

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
<u>SUMMARY OF BUDGET REQUEST</u>												
Salary and Wages					\$ 157,933	\$ 251,742	\$ 851,568	\$ 877,115	\$ 903,428		3.0%	3.0%
Fringe Benefits					\$ 64,965	\$ 93,717	\$ 331,888	\$ 341,845	\$ 352,100		3.0%	3.0%
Other Personnel Services												
Total Personnel Services	\$ -	\$ -	\$ -	\$ -	\$ 222,898	\$ 345,459	\$ 1,183,456	\$ 1,218,960	\$ 1,255,528		3.0%	3.0%
Services Other than Personnel						\$ 657,496						
Services by Contract					\$ 1,226	\$ 363,848	\$ 1,667,544	\$ 1,638,820	\$ 1,609,235		-1.7%	-1.8%
Materials and Supplies					\$ 56,814	\$ 176,693	\$ 149,000	\$ 142,220	\$ 135,237		-4.6%	-4.9%
Equipment					\$ 7,139	\$ 27,450						
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.												
In-State Travel					\$ 491	\$ 33,501						
Out-of-State Travel						\$ 918						
Total Other Operating	\$ -	\$ -	\$ -	\$ -	\$ 65,670	\$ 1,259,906	\$ 1,816,544	\$ 1,781,040	\$ 1,744,472		-2.0%	-2.1%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ -	\$ -	\$ -	\$ -	\$ 288,568	\$ 1,605,365	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000		0.0%	0.0%
<u>LINE ITEM FUNDING</u>												
General Fund (1)					\$ 1,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000		0.0%	0.0%
Dedicated Funds												
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000		0.0%	0.0%

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Leadership Changes - In the past year, the IU School of Medicine has recruited **Nicholas Barbaro, M.D.** to the position of Chair of the Department of Neurological Surgery, to replace the retired Paul Nelson, M.D. in that capacity. Dr. Barbaro was most recently Vice-Chair of Neurosurgery at the University of California at San Francisco (UCSF) School of Medicine and brings an outstanding reputation for clinical and administrative accomplishment as well as an impressive personal research portfolio. Dr. Barbaro has also been appointed as the inaugural Medical Director of the Indiana University Neuroscience Center, a groundbreaking collaborative clinical and research center which houses faculty from the Departments of Neurology, Neurological Surgery, Psychiatry, Otolaryngology, and Physical Medicine & Rehabilitation.

Indiana University Spinal Cord and Brain Injury Research Group - Gerry S. Oxford, Ph.D. Executive Director of the Stark Neurosciences Research Institute (SNRI), has coordinated the rapid and successful establishment of a new basic research group in spinal cord and brain injury. This began with the recruitment of Xiao-Ming Xu, M.D., Ph.D. from the University of Louisville School of Medicine in 2007 as the Mari Hulman George Research Chair of Neurological Surgery. Dr. Xu's charge was to establish and grow a basic science research group within the SNRI to foster basic and translational research in spinal cord injury, traumatic brain injury and stroke. Two additional extramurally funded investigators (Drs. Chen and Jin) were recruited to supplement Dr. Xu's strong research program. Additionally, a number of existing researchers have been engaged in collaborative research in spinal cord and brain injury. The group now numbers 16 investigators plus several postdoctoral fellows and graduate students, currently has \$3.9 million in annual extramural funding from the NIH and has published 53 peer-reviewed manuscripts in 2011-2012. The state support has played a critical role in allowing Dr. Xu to be recruited and continues to provide critical support for core facilities and personnel associated with this research group.

Clinical Program Update - Scott Shapiro, M.D. was the principal investigator of the state-funded pilot human trial of the Oscillating Field Stimulator in complete spinal cord injury in collaboration with Dr. Richard Borgens of Purdue. The trial was successful, published and the technology bought by Cyberkinetics Inc. of Foxborough, MA. A Humanitarian device designation was sought and given by the FDA. The fund will support a Phase II case controlled study of acute human complete spinal cord injury. This team has systematically studied polyethylene glycol (PEG) in various animal models of spinal cord injury and the intellectual property was purchased by Medtronic Inc. The fund will support a Phase I dose escalation study of PEG in severe human spinal cord injury and he has also begun a Phase 1 trial of PEG for head injury.

Maintenance of Operations - State support for ongoing activities of the center are vital. Higher education in general and medical schools in particular must address a highly competitive market for talented faculty and the cost of unfunded mandates. These factors must then be considered within the context of the rate of inflation in determining an appropriate maintenance increase for the base budget.

Program Goals for the Next Biennium - Basic and Translational Science: Maintenance of critical core facilities utilized by all investigators in the center. Current cores include a Surgical Core for developing and implementing animal models of traumatic nervous system injury and a Behavioral Core which provides assessments of motor and sensory function to gauge the extent of functional recovery following experimental therapies for various CNS injuries. Support will include technical personnel for these cores, supplies, and salary support for investigators directing these cores.

We plan to expand these cores with the addition of an In Vivo Electrophysiology Core and a research grade Histology Core. These new cores will provide support for ongoing detailed assessment of neurological activity recovery and accelerate the assessment of the extent of brain injury and recovery from autopsy specimens. Quality Improvement funding is requested to implement these two additional cores as reflected in the attached budget request.

Clinical Research Program: Dr. Barbaro has recently appointed Dr. Richard (Ben) Rodgers, Assistant Professor of Neurological Surgery, to head a new clinical research initiative that seeks to gather functional, neurochemical,

imaging, and genomic data from all neurotrauma patients seen by the Goodman-Campbell neurosurgical practice of IU Health. This initiative will provide both data and coordinated access to same to clinical researchers throughout Indiana and, in particular, the IU Health network of hospitals. Research involving this emerging dataset will be coordinated with the basic science group to focus on the most promising avenues for therapeutic discovery in human neurotrauma.

Increase the number of IU School of Medicine students and resident trainees involved in research on brain and spinal cord injury: The Department of Neurological Surgery was recently given permission to increase the number of residents in the program based on the strong clinical and educational environment provided in the IU Health system. In addition, a relatively large number of IU School of Medicine students enter the field of neurosurgery each year. All of these trainees are encouraged to work in laboratories related to their chosen field. Drs. Barbaro (Chair), Shapiro (Residency Program Director) and Xu have continued to encourage these young individuals to participate in the ongoing research within ISCBIRG. This is in addition to the large number of graduate students and post-doctoral fellows already involved in that program. This will lead to an increased number of clinicians and clinician-scientists involved in treatment and research in spinal cord and brain injury.

Appropriation request: \$555,684

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - SPINAL CORD AND HEAD INJURY RESEARCH

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
SUMMARY OF BUDGET REQUEST												
Salary and Wages	\$ 244,727	\$ 182,474	\$ 151,950	\$ 290,102	\$ 283,096	\$ 287,420	\$ 364,579	\$ 320,467	\$ 320,467	6.9%	-12.1%	0.0%
Fringe Benefits	\$ 83,651	\$ 77,353	\$ 55,039	\$ 113,061	\$ 120,011	\$ 117,288	\$ 155,466	\$ 137,801	\$ 137,801	10.9%	-11.4%	0.0%
Other Personnel Services	\$ 33,485	\$ 39,500										
Total Personnel Services	\$ 361,863	\$ 299,327	\$ 206,989	\$ 403,163	\$ 403,107	\$ 404,708	\$ 520,045	\$ 458,268	\$ 458,268	6.2%	-11.9%	0.0%
Services Other than Personnel	\$ 42,894											
Services by Contract	\$ 12,000											
Materials and Supplies	\$ 45,614	\$ 87,025	\$ 276,694	\$ 15,568	\$ 64,978	\$ 49,682	\$ 3,685	\$ 56,816	\$ 56,816	-34.3%	1441.8%	0.0%
Equipment		\$ 36,470	\$ 40,928	\$ 77,787	\$ 324,045	\$ 23,961		\$ 40,000	\$ 40,000			0.0%
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.			\$ 15,000	\$ 27,712	\$ 59,917	\$ 38,373						
In-State Travel	\$ 3,643				\$ -	\$ 2,062	\$ 500	\$ 600	\$ 600	-28.2%	20.0%	0.0%
Out-of-State Travel	\$ 5,316		\$ 1,001		\$ 165							
Total Other Operating	\$ 109,467	\$ 123,495	\$ 333,623	\$ 121,067	\$ 449,105	\$ 114,078	\$ 4,185	\$ 97,416	\$ 97,416	-42.0%	2227.7%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 471,330	\$ 422,822	\$ 540,612	\$ 524,230	\$ 852,212	\$ 518,786	\$ 524,230	\$ 555,684	\$ 555,684	1.8%	6.0%	0.0%
LINE ITEM FUNDING												
General Fund (1)	\$ 514,726	\$ 530,168	\$ 540,612			\$ 524,230	\$ 524,230	\$ 555,684	\$ 555,684	0.3%	6.0%	0.0%
Dedicated Funds				\$ 524,230	\$ 524,230							
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 514,726	\$ 530,168	\$ 540,612	\$ 524,230	\$ 524,230	\$ 524,230	\$ 524,230	\$ 555,684	\$ 555,684	0.3%	6.0%	0.0%

The I-Light network connects university and college sites in Indiana to a private shared network infra- structure and is a unique collaboration in Indiana between colleges and universities, state government, and private sector broadband providers. I-Light has enabled a statewide community forum by connecting colleges and universities directly to I-Light at 1 Gigabit speeds with the ability to provide even larger, on-demand wavelengths, and very high capacity connectivity between research and learning communities.

The state initially built the I-Light fiber network to connect its primary research universities--Indiana University Bloomington, Purdue University West Lafayette, and the joint campus in Indianapolis. Since that time, the network has proven its value in helping to grow research and education funding through high performance computing, competitive research grant success in Life Sciences and Engineering, connections to Internet2, National Lambda Rail, and favorable economics with the Indiana GigaPOP for the state to efficiently pool network traffic.

Currently 46 of Indiana's colleges and universities are connected directly to the I-Light network, representing over 100 connections. Every university and college has access to I-Light resources via commercial connectivity. Sixteen additional Ivy Tech sites were connected last year via funding provided by the BTOP federal stimulus program, 6 additional Ivy Tech sites would be connected before the grant expires in January 2013.

In June of 2008, the state commissioned the I-Light expansion that completed an optical DWDM network backbone with 19 access points across the state to enable connections to all other colleges and universities. Indiana University along with Purdue University was assigned responsibility for the build out, operation, and management of the network. The I-Light expansion used competitive bidding for each segment, which yielded contracts with 12 telecommunications providers to create a 1,000-mile redundant backbone for the state. The highly sustainable I-Light backbone currently supports 10 Gigabit connections and can easily be upgraded to 100 Gigabit capacities. Campuses are connected to the backbone at 1 Gigabit with the ability to grow to larger capacity connections as their need expands. The final goal is to have all higher education sites connected directly to the I-Light backbone.

Network management for I-Light is provided by the Global Research Network Operations Center (GRNOC) at Indiana University, a premier provider of highly responsive network coordination, engineering, monitoring and installation services that support the advancement of Research and Education networking. The GRNOC has become an unrivaled provider of 24x7x365 expert support for the most advanced research networks in the country.

I-Light has the capacity to support multiple communities on the same backbone providing for greater financial efficiencies in the State. Existing backbone fiber leases are set up in 20-year IRUs and reserve funding is being set aside to allow these leases to be renewed when they expire.

Existing commercial networks in the state are simply inadequate to serve remote areas of the state. Even in locations where network capacity exists, it is generally too expensive to be used by the higher education community. The business model for commercial networks is one that charges the customer for the peak amount of capacity needed for a given month. The more capacity an organization might need, the higher the tier of service they purchase, and the higher price they pay. In the higher

education environment, the use of cyberinfrastructure requires massive amounts of managed information, and often this peak demand is only needed for a few hours, or a day, not an entire month. For this reason, the commercial model does not fit the needs of the research and education communities. With dedicated optical networks we can provide the massive capacity needed without charging for the peak amounts of traffic carried.

Appropriation request: \$1,471,833

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - INDIANA I-LIGHT

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
SUMMARY OF BUDGET REQUEST												
Salary and Wages				\$ 580,022	\$ 359,595	\$ 354,599						
Fringe Benefits				\$ 227,339	\$ 140,464	\$ 138,444						
Other Personnel Services												
Total Personnel Services				\$ 807,361	\$ 500,059	\$ 493,043		\$ -				
Services Other than Personnel												
Services by Contract					\$ 574,823	\$ 418,683	\$ 1,268,659	\$ 1,268,659	\$ 1,268,659		0.0%	0.0%
Materials and Supplies				\$ 572,537	\$ 125,856	\$ 607,485	\$ 198,174	\$ 198,174	\$ 198,174		0.0%	0.0%
Equipment				\$ 79,690		\$ 190,000						
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.												
In-State Travel				\$ 12,245	\$ 3,222	\$ 7,856	\$ 5,000	\$ 5,000	\$ 5,000		0.0%	0.0%
Out-of-State Travel												
Total Other Operating				\$ 664,472	\$ 703,901	\$ 1,224,024	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833		0.0%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM				\$ 1,471,833	\$ 1,203,960	\$ 1,717,067	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833		0.0%	0.0%
LINE ITEM FUNDING												
General Fund (1)											0.0%	0.0%
Dedicated Funds				\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833			
Federal Funds												
TOTAL FUNDING FOR LINE ITEM				\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833	\$ 1,471,833		0.0%	0.0%

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Impact of the Indiana GigaPOP

The Indiana GigaPOP plays a key and expanding role in Indiana's Higher Education connectivity and relationship to the developing national cyberinfrastructure. The GigaPOP has become one of a very few premier network interface points in the nation. The GigaPOP services not only IU and Purdue, but also the rest of the State R&E community through the connectivity of I-Light. The GigaPOP is the single service provider for the State's higher education sector to Internet2, National Lambda Rail, NOAA, the National Science Foundation's GENI network and other advanced US-based and international research networks.

The GigaPOP's relationships with similar regional organizations have enabled Indiana's K-20 community to take advantage of tremendous reductions in rates for internet connectivity, which in turn have allowed a dramatic increase in connectivity. The GigaPOP is truly a state wide resource, providing location-neutral pricing for all services.

By exploiting cost savings the GigaPOP continues to expand services and build redundancy while reducing rates to many of its end users. In 2012 the GigaPOP will increase connectivity to the commodity Internet by utilizing a new 10 GB connection to a low cost commercial internet provider. In addition a new 100gb connection between Indianapolis and Chicago will provide a tremendous resource for researchers at every institution in the state. Named Monon100, this connection is the first in the country to connect a state education network to the national research backbone.

With the recent upgrade and expansion of the network to Chicago and the connection at 100gb to Internet2, universities and colleges in Indiana will play an increasingly important role in providing resources to the advanced research network access to all the state universities and colleges.

The GigaPOP also provides engineering consulting services to its members at no additional charge. Subject matter experts working for the GigaPOP consult with universities in Indiana to improve their access to high performance resources locally and nationally. The "end-to end" performance problems that plague many researchers, even at large universities can be overwhelming at smaller schools. As networking becomes more complex and at the same time more critical to every part of university activities, the Gigapop plans to add additional technical staff to better assist educational institutions in Indiana.

Appropriation request: \$ 695,527

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - INDIANA GIGAPOP

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
SUMMARY OF BUDGET REQUEST												
Salary and Wages	\$ 168,269	\$ 159,723	\$ 180,878	\$ 163,329	\$ 331	\$ 266				-100.0%		
Fringe Benefits	\$ 64,564	\$ 63,157	\$ 72,841	\$ 65,400	\$ 24	\$ 19				-100.0%		
Other Personnel Services												
Total Personnel Services	\$ 232,833	\$ 222,880	\$ 253,719	\$ 228,729	\$ 355	\$ 285				-100.0%		
Services Other than Personnel												
Services by Contract		\$ 19,204			\$ 639,948	\$ 664,871	\$ 285,484	\$ 310,527	\$ 310,527		8.8%	0.0%
Materials and Supplies	\$ 389,415	\$ 497,601	\$ 515,008	\$ 464,855	\$ 27,268	\$ 27,263	\$ 370,674	\$ 380,000	\$ 380,000	-0.8%	2.5%	0.0%
Equipment	\$ 86,027	\$ 3,559										
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.												
In-State Travel	\$ 751	\$ 976	\$ 835	\$ 172	\$ 106							
Out-of-State Travel	\$ 18,612	\$ 5,247	\$ 2,389		\$ 3,481	\$ 20,129		\$ 5,000	\$ 5,000	-100.0%		0.0%
Total Other Operating	\$ 494,805	\$ 526,587	\$ 518,232	\$ 465,027	\$ 670,803	\$ 712,263	\$ 656,158	\$ 695,527	\$ 695,527	4.8%	6.0%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 727,638	\$ 749,467	\$ 771,951	\$ 693,756	\$ 671,158	\$ 712,548	\$ 656,158	\$ 695,527	\$ 695,527	-1.7%	6.0%	0.0%
LINE ITEM FUNDING												
General Fund (1)	\$ 727,638	\$ 749,467	\$ 771,951									
Dedicated Funds				\$ 693,756	\$ 656,158	\$ 656,158	\$ 656,158	\$ 695,527	\$ 695,527		6.0%	0.0%
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 727,638	\$ 749,467	\$ 771,951	\$ 693,756	\$ 656,158	\$ 656,158	\$ 656,158	\$ 695,527	\$ 695,527	-1.7%	6.0%	0.0%

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**JUSTIFICATION OF BUDGET REQUEST
2013-2015**

**Optometry Board
Education Fund**

The Acts of 1951 added \$17.00 to the annual optometry registration renewal fee, to be collected by the Optometry Board and deposited in an optometry school account of the State general fund. All such fees deposited by April 1 each year are to be paid to Indiana University by July 1 and are to be used for "the advancement of optometrical research and the maintenance and support of the department in which the science of optometry is taught at the University." An appropriation sufficient to pay this amount is authorized by law. This budget is merely to set the amount of these appropriations.

Registration fees are collected biennially. 2014-15 will be the "off" year in which little is collected. The estimate of \$1,500 is high to cover safely the expected collections for that fiscal year.

Maintenance of the base is a key factor in the institution's ongoing delivery of high-quality services. Higher education in general must address a highly competitive market for talented faculty and the cost of unfunded mandates. These factors must then be considered within the context of the rate of inflation in determining an appropriate maintenance increase for the base budget. Our request follows the instructions of the Commission for Higher Education and the State Budget Agency and therefore makes no specific request; it assumes that adequate price inflation funding will be recommended by the Commission and funded by the General Assembly.

Appropriations request: \$48,246 in 2013-14, \$1,500 in 2014-15

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - OPTOMETRY BOARD EDUCATION FUND

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
<u>SUMMARY OF BUDGET REQUEST</u>												
Salary and Wages												
Fringe Benefits												
Other Personnel Services												
Total Personnel Services												
Services Other than Personnel												
Services by Contract												
Materials and Supplies								\$ 48,246	\$ 1,500			
Equipment			\$ 1,500	\$ 29,000								
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.	\$ 1,500	\$ 29,000										
In-State Travel					\$ 1,000	\$ 7,160	\$ 1,500					
Out-of-State Travel												
Total Other Operating	\$ 1,500	\$ 29,000	\$ 1,500	\$ 29,000	\$ 1,000	\$ 7,160	\$ 1,500	\$ 48,246	\$ 1,500	100%	3116%	-97%
TOTAL OPERATING BUDGET FOR LINE ITEM	\$ 1,500	\$ 29,000	\$ 1,500	\$ 29,000	\$ 1,000	\$ 7,160	\$ 1,500	\$ 48,246	\$ 1,500	100%	3116%	-97%
<u>LINE ITEM FUNDING</u>												
General Fund (1)	\$ 1,500	\$ 29,000	\$ 1,500	\$ 29,000	\$ -	\$ 48,246	\$ 1,500	\$ 48,246	\$ 1,500	100%	3116%	-97%
Dedicated Funds												
Federal Funds												
TOTAL FUNDING FOR LINE ITEM	\$ 1,500	\$ 29,000	\$ 1,500	\$ 29,000	\$ -	\$ 48,246	\$ 1,500	\$ 48,246	\$ 1,500	100%	3116%	-97%

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This budget request would support the ongoing video streaming set up, production, storage services, requested room equipment upgrades, IHETS services to the legislators in the House of Representatives, Senate, the State Supreme Court, and the Office of the Governor, in support of educational/civic access and engagement to Hoosiers statewide.

Last session, IHETS upgraded its streaming servers and the equipment located at the government center to support streaming to mobile devices (such as iPads and Android tablets). This technology detects the end users' bandwidth availability and sends them a video stream that is appropriate to their connection, delivering a smooth stream without choppiness or jitter. Additionally, IHETS' programmers created a web interface that is viewable, and that will play video on almost any device. This project continues to evolve and will require additional minor software changes.

This appropriation will allow IHETS operationally to continue to provide uninterrupted video streaming and video on-demand service, which include: offering public access via scalable streaming content distribution to the House and Senate Chambers, committee meetings, oral arguments (courts), and defined special events such as the Governor's State-of-the-State address; access and support for various technologies such as video conferencing infrastructure and support to facilitate access and reduce costs; upgrade of equipment for video streaming; media storage; upgrades and technology refreshes; proactive monitoring of the video streaming infrastructure; connection reporting and monitoring; and anytime availability of IHETS staff for troubleshooting and assistance in helping advance the services and access provided.

IHETS continues to work closely with each of the government entities specified in its appropriation, and Legislative Services Agency (LSA) to identify current and future needs. Projects under consideration that this appropriation would support are:

- Upgrade cabling in the State House to support High Definition (HD) video streaming
- Upgrade cameras in committee rooms and chambers to HD
- Integrate video conferencing in the video stream for remote testimony Through IHETS' services, the State of Indiana has provided tens of thousands of Hoosiers with direct access to state government, making available more than 360 hours of live streaming video of government proceedings and 4,500 archived proceedings via video on-demand. Most notably, IHETS supported over 6,000 concurrent connections from citizens all over the State of Indiana during the Right to Work debate last session.

Appropriations request: \$435,269

BUDGET REPORT SCHEDULE XI (BRS XI -A)
 LINE ITEM APPROPRIATION REQUEST (ALL FUNDS)
 INDIANA PUBLIC POSTSECONDARY EDUCATION
 SUMMARY OF LINE ITEM APPROPRIATION REQUEST - IHETS

IU Special State Appropriations

	ACTUAL 2006-07	ACTUAL 2007-08	ACTUAL 2008-09	ACTUAL 2009-10	ACTUAL 2010-11	ACTUAL 2011-12	BUDGET 2012-13	PROP 2013-14	PROP 2014-15	2007-13 CAGR	% Change 2013 v 2014	% Change 2014 v 2015
<u>SUMMARY OF BUDGET REQUEST</u>												
Salary and Wages					\$ 231,379	\$ 350,480	\$ 250,663	\$ 129,241	\$ 129,241		-48.4%	0.0%
Fringe Benefits					\$ 66,935	\$ 112,601	\$ 106,117	\$ 56,039	\$ 56,039		-47.2%	0.0%
Other Personnel Services												
Total Personnel Services					\$ 298,314	\$ 463,081	\$ 356,780	\$ 185,280	\$ 185,280		-48.1%	0.0%
Services Other than Personnel												
Services by Contract												
Materials and Supplies					\$ 178,775	\$ 242,655	\$ 127,018	\$ 45,741	\$ 45,741		-64.0%	0.0%
Equipment								\$ 204,249	\$ 204,249			0.0%
Land and Structures												
Grants, Subsidies, Refunds, Awards, Etc.												
In-State Travel					\$ 1,132	\$ 1,178	\$ 7,640					
Out-of-State Travel												
Total Other Operating					\$ 179,907	\$ 243,833	\$ 134,658	\$ 249,990	\$ 249,990		85.6%	0.0%
TOTAL OPERATING BUDGET FOR LINE ITEM					\$ 478,221	\$ 706,914	\$ 491,438	\$ 435,269	\$ 435,269		-11.4%	0.0%
<u>LINE ITEM FUNDING</u>												
General Fund (1)												
Dedicated Funds					\$ 501,751	\$ 491,438	\$ 491,438	\$ 435,269	\$ 435,269		-11.4%	0.0%
Federal Funds												
TOTAL FUNDING FOR LINE ITEM					\$ 501,751	\$ 491,438	\$ 491,438	\$ 435,269	\$ 435,269		-11.4%	0.0%

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