

## MINUTES

### UNIVERSITY OF SOUTHERN INDIANA BOARD OF TRUSTEES

November 5, 2020

The University of Southern Indiana Board of Trustees met on Thursday, November 5, 2020, virtually via Zoom Video Communications. Present were Chair Kenneth L. Sendelweck '76 and Trustees Josi M. Barscz '22; W. Harold Calloway; John M. Dunn; Daniel M. Fuquay; Christine H. Keck; Jeffrey L. Knight; Ronald D. Romain '73 and Christina M. Ryan. Also in attendance were President Ronald S. Rochon; Provost Mohammed Khayum; Vice President for Finance and Administration Steven J. Bridges '89 M'95; Vice President for Marketing and Communications Kindra L. Strupp; Vice President for Development David A. Bower; Vice President for Student Affairs Khalilah T. Doss; Chief Government and Legal Affairs Officer Aaron C. Trump; Faculty Senate Chair Rex M. Strange '92; and Student Government Association President Kelsey L. McCullough '21.

Chair Sendelweck called the meeting to order at 10:30 a.m.

#### SECTION I – GENERAL AND ACADEMIC MATTERS

##### A. APPROVAL OF MINUTES OF SEPTEMBER 3, 2020, MEETING

On a motion by Mr. Dunn, seconded by Mr. Knight, the minutes of the September 3, 2020, meeting of the Board of Trustees were approved.

##### B. ESTABLISHMENT OF NEXT MEETING DATE, TIME, LOCATION

Mr. Sendelweck called on Vice President Strupp, who reported the next meeting of the Board of Trustees is scheduled for Thursday, January 14, 2021, with location or modality to be determined.

##### C. REPORT OF THE JOINT ACADEMIC AFFAIRS AND ENROLLMENT MANAGEMENT AND FINANCE/AUDIT COMMITTEE

Chair Sendelweck called on Trustees Keck and Romain for a report on the joint committee meeting. Ms. Keck requested a waiving of the report since the full Board was present at the joint meeting.

The request to waive the report unanimously was approved.

##### D. PRESIDENT'S REPORT

Chair Sendelweck called on President Rochon for his report. Dr. Rochon began by reporting the USI Executive Team recently provided newly appointed Indiana Commission for Higher Education (ICHE) member, Pepper Mulherin, with a virtual orientation session. This gave Ms. Mulherin an opportunity to better understand USI's offerings and the initiatives that were discussed during the budget presentation to the Commission in early September. Ms. Mulherin was very appreciative of the opportunity to reconnect as an Alumna and expressed her eagerness to help in the advancement of USI through her ICHE work.

On October 29, former U.S. Secretary of Defense Leon Panetta spoke on "Challenges of Leadership in Democracy" as part of the inaugural "We Stand Together" speaker series. This collaborative initiative of the New President's Academy is working to stand together to call out and eradicate discrimination and racism. Presidents and Chancellors from 15 diverse colleges and universities across the nation joined to provide this event to their greater campus communities. Secretary Panetta provided students with his insight on how to become leaders and engage in serving our nation.

President Rochon reported on the updated spring schedule. Since March, safety has been the guiding principle behind USI's decision making and the safety measures put in place this Fall Semester have served USI well. USI is committed to an approach that continues to put safety at the forefront and is following that methodology to start the Spring 2021 semester. When USI employees return to work on January 4, all those

who can perform their duties remotely will do so through January 11. This will help reduce campus density to the lowest levels possible as employees return to campus from Winter Recess. On January 11, USI will begin to transition back to the work arrangements like those in place now. While USI students will return to classes on January 19 as previously communicated, they will do so in an online capacity with a few exceptions for labs, practicums, clinicals and other areas that require in-person attendance. Classes will return to their previously scheduled modalities on February 8. Students will be notified prior to Thanksgiving break if they are registered for a class that requires them to be back for in-person instructional activities on January 19. As always, this plan is subject to change as we continue to monitor the pandemic and the guidance of health and government officials. USI is proud of the work we have done up to this point, but we must stay vigilant to ensure that we continue to keep our campus community safe.

On Wednesday, November 18, USI will present its 2021-2023 Biennial Budget request to the State Budget Agency in Indianapolis at 10 a.m. Eastern time. This time slot immediately follows the Commission for Higher Education's presentation and recommendations to the committee which kicks-off the day. The remaining State institutions also will present to the State Budget Agency that day.

President Rochon thanked the Trustees for participating in the Carnegie Dartlet workshops on October 28 and 29. This important work will help define who we are, further our strategic planning efforts and shape USI's communications for years to come. Trustees' voice, along with those of students, staff, alumni, and community members will be critical in forming these conclusions.

Dr. Rochon called on Provost Khayum to provide an update on the Strategic Planning process. Dr. Khayum began by providing a recap of what was presented at the September Board of Trustees meeting. Since then USI has incorporated feedback from the campus community regarding objectives and strategies that would lead to the achievement of four goals. The objectives for each goal that USI believes will keep us grounded in our implementation efforts, were reviewed. Foremost in our thinking is the ability to monitor progress, to regularly report on the progress being made, and to be able to make needed adjustments in a timely manner. The objectives for Goal 1 highlight the importance of retention and progression as key elements of a successful college experience. In addition, USI plans to ensure that we keep our focus on key aspects of its mission with regard to diversity and the changing landscape of the higher education market. USI also knows that student success is integrally related to relevant and impactful co-curricular experiences. Dr. Khayum highlighted the different avenues for continued engagement with individuals and organizations in the region and USI's focus on measuring the types of impact it's making with its engagement. For Goal 3 USI is setting some ambitious targets. Feedback from the campus community highlighted a strong interest and desire for USI to enhance its visibility and reputation and these objectives will help keep this at the forefront of efforts. Goal 4 provides objectives that are integral to day to day operations. Each of these objectives will play a critical role in how well USI navigates the challenges facing the University and higher education in general through a focus on enrollment, fundraising, operational improvements and efficiency and alignment with metrics in the performance funding formula. He concluded by providing an overview of where USI goes from here to complete the formulation stage of the strategic plan. Each objective will have associated strategies, details about action steps, identification of who will be responsible and resources needed, as well as the timeframe for accomplishing the action steps.

President Rochon called on Vice President Strupp for a Marketing and Communications update. Vice President Strupp began by updating the Trustees on the Fall Commencement Ceremonies. With safety at the forefront of thinking, especially as flu season is also upon us, a decision was reached and announced on October 1, 2020, that the Fall 2020 Commencement Ceremonies will take place as a virtual celebration on Saturday, December 12. That is one week earlier than originally planned and coincides with the revised academic calendar and the end of the semester. While this is not the outcome USI had hoped for, as celebrating our graduates' achievements in person is a biannual highlight, the alternative of filling the Screaming Eagles Arena, even with a reduced capacity, would not be the safe and responsible thing to do. Once live at 11 a.m. on December 12, the virtual ceremony will be available to graduates and their families on demand for viewing at a time convenient to them.

All 2020 graduates are invited to participate in this virtual event. With Spring, Summer and Fall graduates, that amounts to 2,441 total graduates in the Class of 2020. Of that, 710 are eligible this Fall. USI asked students to create a profile with our partner, Marching Order, who has conducted virtual ceremonies for universities around the nation. Four student reflection speakers were identified by their college and are recording their speeches to be shared with all graduates for the virtual ceremony. Dr. Rochon also will be recording a message for the

graduates. Although far from a perfect solution, it will be a Commencement Ceremony that recognizes each USI graduate and can be safely shared with family and friends, whether they reside locally or states away. Safety restrictions related to COVID-19 may limit the overall seating capacity in the Screaming Eagles Arena for some time to come, so it will not be possible to allow Class of 2020 graduates to walk in future ceremonies. USI looks forward to celebrating its Class of 2020 during the virtual ceremony on Saturday, December 12.

Ms. Strupp reported as USI continues its third strategic planning process, prepares for the next iteration of marketing communications and considers maximizing the use of grant funding related to the adult learner, it has created a custom program to engage the campus community and conduct necessary research and reputational assessment. Through repurposed marketing dollars and grant funding, the University has retained Carnegie Dartlet, a leading national reputation and strategy firm specializing in crowd-sourced and consensus-driven processes to achieve authentic results. USI is conducting a research project focused on promoting communication clarity and alignment for the institution. This project began in September and will take several months to complete, ultimately culminating in a new reputation strategy and communication platform for the institution.

Ms. Strupp outlined the three-part research strategy. The project will culminate with an extensive reveal presentation of findings, recommendations and new marketing campaign concepts to align with the personality of the University and narrative that is discovered through this work. USI plans to complete this work in late January and provide an update to the Trustees at the next meeting.

President Rochon called on Vice President Bower for an update from the Presidential Task Force. Mr. Bower began by noting today's COVID Dashboard shows USI has a total of 37 individuals who have tested positive for the coronavirus, 32 students and five employees. Since March there have been a total of 392 individuals who tested positive, 361 students and 31 employees. The University Health Center has tested 154 persons since August – 16 were positive and 138 were negative.

The University Health Center has given 1,226 flu vaccines since September.

Vice President Bower summarized the content of the communication initiatives that will be sent through video messaging, social media, and town hall meetings to continue to promote safety and provide clear expectations for the end of fall and beginning of spring semesters. He concluded his report noting all the task force members continue to work tirelessly to ensure the health and safety of our campus and each one is owed a debt of gratitude.

President Rochon called on Khalilah Doss, vice president for Student Affairs, for a report. Dr. Doss began by stating Student Affairs continues its programming, just in different ways this semester. There are plans to provide programming to continue engagement over the holidays for those students who remain on campus. USI is also reminding students of available resources to support them during this difficult semester.

Dr. Doss introduced Dr. Jennifer Hammat, dean of students, to provide an overview on the student contact tracing process. She noted over 1,400 students have been contact traced since August 14. If those students' close contacts are included, the number increases to over 2,000. Additionally:

- 361 students have tested positive (104 on-campus and 257 off-campus);
- 900+ have been placed in quarantine or isolation (268 on-campus, 600 off-campus);
- hundreds of meals packaged and delivered to residential students by Sodexo; and
- thousands of assignments have been remotely accommodated by kind and caring faculty members, department chairs, and college deans who are to be commended for their help.

Students can self-report for a variety of reasons and most commonly:

1. They have symptoms
2. A faculty member has advised a student to fill out the form (usually based on an email communication they received from the student about feeling ill – or symptomatic)
3. A friend has reached out to them to let them know they are positive or are awaiting their results
4. They have been identified as a close contact of a student who tested positive

Once the Dean of Students Office (DOSO) receives the self-report form, the case is assigned to one of the 35 plus contact tracers. All of the members of the division of Student Affairs have undergone Johns Hopkins Contact Tracing training, as well as Tina McCalment, a staff member outside our division, and Dr. Sarah Stevens, director of the Honors Program and Living, Learning Communities.

Once contact tracing is completed, the DOSO is notified. Crystal Willoughby has sent out over 1,800 faculty notices regarding student quarantines and isolations. David Alexander and Colin Boggs from Information Technology developed a Banner generated email for DOSO to expedite this process.

Dr. Hammat explained that a contact trace can take anywhere from 40 minutes to 7 hours to complete. The amount of time needed depends on the number of close contacts a student has, if they are in a student organization and met with that group during their exposure period, if they work on campus, and if they live on campus. It also depends on how quickly the student self-reports and if they attended classes within the past 24 hours.

Students in quarantine and isolation can checkout laptops and mobile hotspots to help with remote education while they are unable to attend class lectures. Housing and Residence Life continues to support and enforce the no guest policy to help thwart the spread of the virus in the residential community. It has been hard on the students and the staff, but USI is convinced this policy is why our reporting numbers on campus have been so low. Several whole or partial student organizations have been placed into quarantine, and several also have placed themselves into quarantine when a member has self-identified as having exposed other members of the group.

President Rochon called on Dr. Rex Strange, chair of Faculty Senate, for a report. Dr. Strange reported that USI is finishing its 11th consecutive week of in-person instruction. This is considered a success by the faculty and most attribute that success to all the safety protocols in place and compliance by the campus community of those recommendations. USI's campus remains open in spite of the pandemic, allowing faculty to continue to deliver on USI's mission to provide high quality education in southwest Indiana. Dr. Strange acknowledged the faculty and student body for their efforts in maintaining a safe work environment for all. He also acknowledged the work of the Dean of Students Office in keeping faculty informed through the contact tracing process of students in need of academic accommodations because of exposure or illness. He reported on the additional workloads for faculty from the need to adapt to classroom capacity limits due to COVID-19. Dr. Strange concluded stating that Senate has begun discussion around the economic state of our nation from the pandemic and what that means for the future financial viability of USI.

President Rochon called on Student Government Association (SGA) President Kelsey McCullough for a report. SGA has been promoting voter registration this semester through yard signs, flyers, and social media campaigns to help students learn how to register and vote. The current number of people who voted in the United States is the highest it has been in the past 60 years. The AVP for External Relations, Anna Ardelean, worked diligently all year to ensure that students were registered and had a plan to vote.

During the week of October 19, SGA hosted its annual Alcohol Awareness Week. This national event is promoted on college campuses to teach students about the dangers of binge drinking. SGA partnered with the Vanderburgh County Sheriff's Office and USI Public Safety to host weeklong activities and experiences through this event.

Ms. McCullough reported that SGA recently made changes to its executive board. The General Assembly voted unanimously to replace the Court Clerk position with a Communications Director. The responsibilities that were under the court clerk position have been transferred to SGA's Chief of Staff. The Communications Director will be responsible for SGA's social media accounts and will also handle all outside communications.

In conclusion, Ms. McCullough thanked the administration, faculty, staff, and Dean of Students Office for their collaborative efforts to keep the campus open and safe during the Fall Semester.

## **E. APPROVAL OF CANDIDATES FOR DEGREES**

Mr. Sendelweck called on Provost Khayum, who recommended approval of the candidates for degrees listed in Exhibit I-A.

On a motion by Mr. Knight, seconded by Ms. Ryan, the award of degrees presented in Exhibit I-A, subject to the completion of all requirements, were approved.

## **SECTION II – FINANCIAL MATTERS**

### **A. APPROVAL OF ANNUAL OPERATING BUDGET**

Mr. Sendelweck called on Vice President Bridges for a report. Mr. Bridges began by reminding the Trustees that at the May 28, 2020, Special Meeting of the Board, the Trustees approved an interim budget for the University through December 31, 2020. The interim budget used the 2019-2020 budget as the base, with a plan to adjust as data related to the state appropriation and the fall 2020 enrollment became known. As part of the request for approval in May, President Rochon implemented several immediate strategies to assist with the budget including: a review process for all hiring; a request that all University departments reduce supply and expense spending; and a moratorium of all unnecessary travel. Mr. Bridges directed the Trustees Exhibit II-A which provided the adjustments and recommendations for the second half of the fiscal year budget. He noted the current shortfall of \$6,754,673 compared to last year's base budget. This number includes a projected decline for Spring 2021 Semester, however, the remaining variables for Summer 2020 and Fall 2020 enrollments are known.

Mr. Bridges reminded the Trustees that a summary worksheet is provided each year as part of the budget approval process. The spreadsheet has been used to model potential scenarios for state funding and enrollment reductions and to discuss possible budget solutions. He reported USI's current financial position fell somewhere between the most optimistic position and the medium optimistic position as opposed to the worst-case scenario.

Mr. Bridges reviewed the summary in Exhibit II-A. He noted the adjustments lead to a balanced budget for the remainder of the 2020-2021 year. Moving forward USI will feel the impact of this fall semester for four years as the smaller freshman class works its way through the pipeline from freshman to senior. USI is hopeful that the State of Indiana will return the reserve holdback of \$3.4 million, however, we will need a plan to prepare the institution to remain strong and vibrant by working together across the University. In response to that need, President Rochon will be appointing a committee composed of faculty, staff, and administrators to thoroughly review the budget and process. As part of this exercise, a desired outcome will be to have the funding necessary to resume salary increases. This will have to come from a combination of expense reductions and revenue increases where possible. USI will have to make adjustments to be responsive to the changing higher education model. Mr. Bridges concluded his report stating the Board will be updated on this initiative as this larger plan for continued success progresses.

On a motion by Mr. Dunn, seconded by Ms. Barszcz, the annual operating budget in Exhibit II-A was approved.

### **B. ANNUAL REPORT OF STUDENT FINANCIAL ASSISTANCE**

Mr. Sendelweck called on Provost Khayum, who introduced Director of Student Financial Assistance Mary Harper for a summary of the report in Exhibit II-B. Ms. Harper began by reporting the Student Financial Assistance office served 12,629 enrolled and prospective students in 2019-2020. She noted 7,521 or 71 percent of enrolled students received some type of aid. The Student Financial Assistance office awarded aid totaling just over \$80.3 million, which is a decrease of over \$2.3 million from the prior year. She shared information about the sources of aid, including federal, state, institutional, USI Foundation, private and USI Varsity Club.

Ms. Harper reported on the updates to Federal aid programs including the Higher Education Emergency Relief Funds to assist needy students impacted by COVID-19. Following guidance from the Department of Education, eligible students were identified and encouraged to apply for the funds through an application process. Ultimately, 4,862 students who attended spring and summer terms of 2019 and fall 2020 term, received emergency awards. The maximum individual award was \$1,500.

Ms. Harper compared the national average undergraduate debt of the class of 2020, which was \$29,076 to USI students' average debt of \$20,334. She shared default rates for 2015, 2016, and 2017, and noted the USI student default rate is well below both state and national rates.

### **C. REPORT ON INSURANCE RENEWALS**

Mr. Sendelweck called on Vice President Bridges, who introduced Executive Director of Human Resources Andrew Lenhardt for a presentation on the 2021 insurance renewal. Mr. Lenhardt reviewed the goals of the renewal, which were to achieve low to moderate health-cost increases and continue to adapt to expected changes due to healthcare reform; review and optimize medical plan design for improved future cost control while maintaining employee choice and competitive benefits; to utilize a quote process to obtain competitive and cost-effective vision coverage; and to initiate a competitive search for a new carrier with a record of providing quality service to retirees 65 years of age and older.

Mr. Lenhardt reviewed the trends of the population with medical coverage noting the number of retirees insured through USI continues to grow due to baby boomer retirements. He reviewed the employee participation by medical plan. Of the 962 benefit eligible employees, 128 waive medical coverage through USI.

Mr. Lenhardt summarized the outcome of medical renewal noting there were no plan design changes for active employees, with the exception of a new HSA annual limit. The HSA annual limit will increase to \$3,600 for individual coverage and \$7,200 for family coverage due to IRS requirements. As a result of ongoing efforts to control health care costs and a switch to a new prescription drug plan provider, CVS Caremark in 2019, the 2021 premiums for Anthem Blue Core-PPO and Anthem CDHP with Health Savings Account (HSA) for active employees will increase approximately 1.5 percent. This increase equates to approximately \$1 to \$6 per month for active employees. Effective January 1, 2021, retirees 65 years of age or older will be automatically enrolled into a UnitedHealthcare custom Group Medicare Advantage (PPO) plan designed exclusively for USI. The Group Medicare Advantage (PPO) plan is a Medicare Advantage plan that delivers all the benefits of Original Medicare (Parts A and B), includes prescription drug coverage (Part D) and offers additional benefits and features. As a result, 354 out of 367 members 65 years of age or older will see their monthly premiums decrease. The impact for the 13 members that will experience an increase ranges from \$3 to \$6 per month.

Mr. Lenhardt concluded his report explaining the status of the other plans offered to USI employees. Due to a proposed rate increase of 8.6 percent, a change of vision carrier to EyeMed through Paramount from VSP was made. EyeMed will provide an expanded network of providers and similar benefits, while premiums will see a decrease. The dental plan, with vendor HRI (now Paramount Dental), will be in year three with a rate guarantee of a three-year agreement. The Basic Life, Voluntary Life, Short-Term Disability and Long-Term Disability insurance plans were renegotiated with The Standard. Premiums will vary based on age and coverage elected. The University offers several voluntary benefits through Aflac including Critical Illness, Accident and Hospital Indemnity. These lines of coverage will see no premium increase in 2021.

### **D. UPDATE ON CURRENT CONSTRUCTION PROJECTS**

Mr. Sendelweck called on Vice President Bridges, who introduced Director of Facility Operations and Planning, Jim Wolfe and asked for a report on current construction projects and projects in design. Exhibit II-C is a summary of the cost and funding sources for each project.

### **SECTION III - PERSONNEL MATTERS**

#### **A. REPORT ON FACULTY AND ADMINISTRATIVE RETIREMENTS**

Mr. Sendelweck called on Provost Khayum, who reviewed the following faculty and administrative retirements.

Senior Applications Administrator Larry Back, in accordance with the revised retirement policy will retire effective July 1, 2021, after 27 years of service, including leave with pay for the period of January 1, 2021, through June 30, 2021.

Instructor in English Leisa A. Belleau, in accordance with the revised retirement policy, will retire effective July 1, 2021, after 21 years of service, including leave with pay for the period of January 1, 2021, through June 30, 2021.

Instructor in Teacher Education Teresa L. Branson, in accordance with the regular retirement policy, will retire effective May 10, 2021, after 10 years of service.

Director of Recreation, Fitness, and Wellness, and Instructor of Exercise Science and Kinesiology David F. Enzler, in accordance with the revised retirement policy, will retire effective July 1, 2021, after 20 years of service, including leave with pay for the period of January 1, 2021, through June 30, 2021.

Senior AV Systems Administrator Connie R. Keeling, in accordance with the revised retirement policy will retire effective July 1, 2022, after 21 years of service, including leave with pay for the period of January 1, 2022, through June 30, 2022.

Principal of Southern Indiana Japanese School Keietsu Nishimura, in accordance with the revised retirement policy, will retire effective July 1, 2021, after 24.5 years of service, including leave with pay for the period of January 1, 2021, through June 30, 2021.

Instructor in Marketing Virginia Weiler, in accordance with regular retirement policy, will retire effective December 19, 2020, after 15 years of service.

#### **B. APPROVAL OF EMERITUS STATUS**

Mr. Sendelweck called on Provost Khayum, who recommended approval of emeritus titles. On a motion by Mr. Knight, seconded by Mr. Romain, the following titles were approved.

Senior Applications Administrator Emeritus Larry Back

Instructor Emerita in English Leisa A. Belleau

Instructor Emerita in Teacher Education Teresa L. Branson

Director Emeritus of Recreation, Fitness, and Wellness David F. Enzler

Senior AV Systems Administrator Emeritus Connie R. Keeling

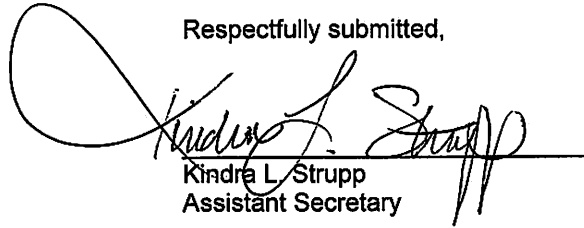
Principal Emeritus of Southern Indiana Japanese School Keietsu Nishimura

Men's Varsity Basketball Coach Emeritus Rodney J. Watson

Instructor Emerita in Marketing Virginia Weiler

There being no further business, the meeting was adjourned at 11:52 a.m.

Respectfully submitted,



Kindra L. Strupp  
Assistant Secretary



**CANDIDATES FOR DEGREES  
UNIVERSITY OF SOUTHERN INDIANA  
December 12, 2020**

**MASTER OF ARTS IN  
COMMUNICATION**

Caleb M. Fendrich  
Shannon M. Hoehn  
Mary E. Reese

**MASTER OF ARTS IN  
SECOND LANGUAGE  
ACQUISITION, POLICY AND  
CULTURE**

Lorena A. Baquerizo Gellibert  
Rachel E. Beard  
Elle N. Floyd  
Jordan C. Wright

**MASTER OF BUSINESS  
ADMINISTRATION**

Ryan T. Abbott  
Erin A. Akins  
Mohamed I. Alhali  
Lynda A. Amama  
Savannah L. Anderson  
Rabia Ari  
Pascal J. Arnes  
Clinton D. Barger  
Kaitlynn M. Batts  
Grant C. Beaman  
Hunter Beauchamp  
Allison N. Belcher  
Brad Bickett  
Santosh V. Binwade  
Trupti S. Binwade  
Nathan L. Boerner  
Lisa G. Boltz  
Caitlyn J. Bradley  
Jessica Bradley  
Sarah M. Brian  
Jason D. Brown  
Marianne C. Brown  
Justin L. Buchanan  
Leah Carter  
Steve Center  
Mary Champion  
Peter K. Champion  
Wingyan Chan  
Corey J. Chapman  
Michael A. Cicero  
Kyle Cochran  
Bradley A. Conrad  
Brandon M. Cooper  
Jon A. Cox  
Brandon Curry  
Shaunn R. Dauenhauer  
Shelby Davis III  
Jessica L. Deckard  
Zacharea I. Doleh  
Naomi R. Donaldson  
Deann A. D'Onofrio  
Aron P. Dymovic  
Emily E. Eickhoff  
Carrie Eldridge

Kevin Elmore  
Cameron Evans  
Michael R. Fischer  
Kyler H. Floyd  
Zachary J. Frederick  
William E. Fredette  
Karri Gates  
Morganne N. Geiser  
William C. George  
Melissa Geyer  
Darren Gibson  
Kiara L. Gibson  
Nikolai Gogol  
Hannah N. Gonder  
Jane T. Gonzales  
Praveen B. Gowdar  
Matthew L. Green  
Jamie L. Gribbins  
Joshua A. Gunselman  
Mark Hardy  
Susan D. Hayes  
Cheryl R. Hook  
Shanna S. Hughes  
Sarah E. Jackson  
Kacey Johnson  
Hart A. Jones  
Makenzie L. Jones  
Shanae N. Jones  
Ryan N. Kaczmarek  
Kristina A. Kaffenberger  
Arshdeep S. Kahlon  
Jordan P. Kalaitisides  
Andrew J. Kamplain  
Lea R. Karnezis  
Christopher A. Kelly  
Steve R. Kelly  
Sevil A. Khalilova  
Casey F. Kick  
Melissa Klinge  
Cody J. La Bean  
Amy Lillich  
Bret P. Lillich  
Craig A. Linderman  
Tara L. Lively  
Anne M. Lopez  
Christina M. Lutes  
Trico J. Lutkins  
Jared Lynch  
Logan P. Mann  
Peyton O. Mann  
Brannon K. Martin  
Zachary R. Marvel  
Vikas Maurya  
Diane S. McBride  
Morgan J. McCombs-Jones  
Trevor McGill  
Katrina M. McGrath  
Marcus D. McNeal  
Kevin M. McWilliams  
Megan S. Miller  
Feroz A. Mohammed  
Vanessa Moline Thompson

Gabrielle D. Moreton  
Raymond C. Morris  
Luke A. Mowry  
Alexandra R. Muhlbach  
Tendo S. Nalyaali  
Sumit Narang  
Erika L. ORourke  
Mitchell A. Palmer  
Ryan A. Palmer  
Michelle Paoletti  
William E. Pappano  
Emily L. Patton  
Joseph Paul  
Shontay Porter  
Andrew Potts Schmidt  
Daniel Radulescu  
Cari Randel  
Angela R. Ratcliff  
James T. Read Jr  
Russell D. Recknor  
Brett Reichart  
Elizabeth N. Reis  
Logan C. Robinson  
Anthony J. Ross  
Simona L. Santabarbara  
Mara E. Schmitt  
Madison Schneid  
Jesse E. Schneider  
Daniel Schnur  
Jessica L. Schramm  
Andrew Sears  
Muhammad Amjad Seyal  
Muhammad U. Seyal  
Hayden C. Sharp  
Michael T. Shepherd  
Jessica A. Simpson  
Rob Sinclair  
Joseph R. Sipes  
Meghan L. Skaggs  
Ranithri K. Slayton  
Brittany L. Small  
Mark T. Smith  
Brad M. Sneed  
Emily P. Sommers  
Alex C. Springer  
Matthew R. St. Ledger  
John M. Stahl  
Brianna Stakelin  
Austin N. Steffen  
Brandon J. Stevenson  
Bryce J. Stevenson  
Sarah E. Thomas  
Jennifer M. Thomason  
Jalen M. Townsend  
Vinh Q. Tran  
Casey F. Trela  
Kenneth A. Turner  
Jared A. Unseld  
Garrick Utley  
Jennifer Valentine  
Kenneth F. Varble  
Tim Wagstrom

Kristin Walden  
Anna Wamack  
Brandy Washler  
Michael A. Williams  
Jessica D. Wilson  
Wenyi S. Zhuang

**MASTER OF HEALTH  
ADMINISTRATION**

Linda S. Fox

**MASTER OF PUBLIC  
ADMINISTRATION**

Tyler A. Stock  
Juan C. Maysen Roca

**MASTER OF SCIENCE IN  
EDUCATION**

Jennifer L. Dill  
Angela Yarrell

**MASTER OF SCIENCE IN  
INDUSTRIAL MANAGEMENT**

Angelo J. Vissas

**MASTER OF SCIENCE IN  
NURSING**

Shelby L. England

**MASTER OF SCIENCE IN  
SPORT MANAGEMENT**

Laura A. Bruno  
Kenneth F. Hansen  
Deshaun A. Johnson  
Thomas K. Katzman  
Jalen T. Madison

**ROMAIN COLLEGE OF  
BUSINESS  
POST-BACCALAUREATE  
CERTIFICATE**

Brandon M. Johns  
Nina Mathies

**ROMAIN COLLEGE OF  
BUSINESS  
BACHELOR OF ARTS**

Shahad F. Almashaabi  
Mariana D. Arboleda  
Emily Bacon  
Logan R. Goldman  
Jacob M. Griffin  
Jenna Jochum  
Dana C. Jones  
Erin C. Kinsel  
Madison N. Koester  
Justin K. O'Neal  
Joseph W. Roan  
Sidney L. Schneider  
Vanessa Seaman  
Joseph Settersten  
Madison M. Tanner

**ROMAIN COLLEGE OF  
BUSINESS  
BACHELOR OF SCIENCE**

Olivia Adler  
Brian T. Alexander  
Evan J. Allen  
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## CURRENT OPERATING BUDGET SUMMARY

	<u>Approved Budget 2019-2020</u>	<u>Budget Change</u>	<u>Proposed Budget 2020-2021</u>
<b>INCOME</b>			
State Appropriation - Operating	47,504,564	705,585	48,210,149
7% Operating Appropriation Reduction	<u>0</u>	<u>(3,374,710)</u>	<u>(3,374,710)</u>
Net State Appropriation - Operating	47,504,564	(2,669,125)	44,835,439
State Appropriation - Line Items	236,153	0	236,153
7% Line Item Appropriation Reduction	<u>0</u>	<u>(16,531)</u>	<u>(16,531)</u>
Net State Appropriation - Line Items	236,153	(16,531)	219,622
State Appropriation - Fee Replacement	11,022,633	4,034,895	15,057,528
Student Fees	54,662,129	(9,046,545)	45,615,584
Other Income	7,312,628	203,841	7,516,469
Fund Balance	<u>0</u>	<u>738,792</u>	<u>738,792</u>
<b>TOTAL</b>	120,738,107	(6,754,673)	113,983,434
<b>MAJOR EXPENSE CLASSIFICATION</b>			
Personal Services	82,188,476	(97,561)	82,090,915
2020-21 Budget Reduction	<u>0</u>	<u>(4,524,688)</u>	<u>(4,524,688)</u>
Net Personal Services	82,188,476	(4,622,249)	77,566,227
Supplies and Expense	34,227,729	(683,661)	33,544,068
2020-21 Budget Reduction	<u>0</u>	<u>(1,447,745)</u>	<u>(1,447,745)</u>
Net Supplies and Expense	34,227,729	(2,131,406)	32,096,323
Repairs and Maintenance	2,215,966	4,150	2,220,116
Capital Outlay	<u>2,105,936</u>	<u>(5,168)</u>	<u>2,100,768</u>
<b>TOTAL</b>	120,738,107	(6,754,673)	113,983,434
<b>FUNCTIONAL EXPENDITURE CLASSIFICATION</b>			
Instruction	58,261,705	(743,097)	57,518,608
2020-21 Budget Reduction	<u>0</u>	<u>(3,837,440)</u>	<u>(3,837,440)</u>
Net Instruction	58,261,705	(4,580,537)	53,681,168
Academic Support	6,199,853	28,625	6,228,478
2020-21 Budget Reduction	<u>0</u>	<u>(214,016)</u>	<u>(214,016)</u>
Net Academic Support	6,199,853	(185,391)	6,014,462
Student Services	9,754,686	77,005	9,831,691
2020-21 Budget Reduction	<u>0</u>	<u>(481,141)</u>	<u>(481,141)</u>
Net Student Services	9,754,686	(404,136)	9,350,550
Operation and Maintenance of Plant	15,991,478	14,962	16,006,440
2020-21 Budget Reduction	<u>0</u>	<u>(722,597)</u>	<u>(722,597)</u>
Net Operation and Maintenance of Plant	15,991,478	(707,635)	15,283,843
Administration and General	17,644,642	148,884	17,793,526
2020-21 Budget Reduction	<u>0</u>	<u>(717,239)</u>	<u>(717,239)</u>
Net Administration and General	17,644,642	(568,355)	17,076,287
Institutional Student Aid	<u>12,885,743</u>	<u>(308,619)</u>	<u>12,577,124</u>
<b>TOTAL</b>	120,738,107	(6,754,673)	113,983,434

	<u>Approved Budget 2019-2020</u>	<u>Budget Change</u>	<u>Proposed Budget 2020-2021</u>
<b>FUNCTION BY MAJOR EXPENSE CLASSIFICATION</b>			
<b>INSTRUCTION</b>			
Personal Services	51,774,561	(272,121)	51,502,440
2020-21 Budget Reduction	<u>0</u>	<u>(2,841,315)</u>	<u>(2,841,315)</u>
Net Personal Services	51,774,561	(3,113,436)	48,661,125
Supplies and Expense	5,319,218	(455,608)	4,863,610
2020-21 Budget Reduction	<u>0</u>	<u>(996,125)</u>	<u>(996,125)</u>
Net Supplies and Expense	5,319,218	(1,451,733)	3,867,485
Repairs and Maintenance	519,876	(10,200)	509,676
Capital Outlay	<u>648,050</u>	<u>(5,168)</u>	<u>642,882</u>
<b>TOTAL INSTRUCTION</b>	58,261,705	(4,580,537)	53,681,168
<b>ACADEMIC SUPPORT</b>			
Personal Services	3,244,680	14,758	3,259,438
2020-21 Budget Reduction	<u>0</u>	<u>(179,366)</u>	<u>(179,366)</u>
Net Personal Services	3,244,680	(164,608)	3,080,072
Supplies and Expense	1,633,862	567	1,634,429
2020-21 Budget Reduction	<u>0</u>	<u>(34,650)</u>	<u>(34,650)</u>
Net Supplies and Expense	1,633,862	(34,083)	1,599,779
Repairs and Maintenance	406,682	13,300	419,982
Capital Outlay	<u>914,629</u>	<u>0</u>	<u>914,629</u>
<b>TOTAL ACADEMIC SUPPORT</b>	6,199,853	(185,391)	6,014,462
<b>STUDENT SERVICES</b>			
Personal Services	8,275,286	116,209	8,391,495
2020-21 Budget Reduction	<u>0</u>	<u>(347,941)</u>	<u>(347,941)</u>
Net Personal Services	8,275,286	(231,732)	8,043,554
Supplies and Expense	1,377,942	(39,904)	1,338,038
2020-21 Budget Reduction	<u>0</u>	<u>(133,200)</u>	<u>(133,200)</u>
Net Supplies and Expense	1,377,942	(173,104)	1,204,838
Repairs and Maintenance	73,213	700	73,913
Capital Outlay	<u>28,245</u>	<u>0</u>	<u>28,245</u>
<b>TOTAL STUDENT SERVICES</b>	9,754,686	(404,136)	9,350,550
<b>OPERATION AND MAINTENANCE OF PLANT</b>			
Personal Services	6,333,052	14,827	6,347,879
2020-21 Budget Reduction	<u>0</u>	<u>(679,487)</u>	<u>(679,487)</u>
Net Personal Services	6,333,052	(664,660)	5,668,392
Supplies and Expense	8,208,715	135	8,208,850
2020-21 Budget Reduction	<u>0</u>	<u>(43,110)</u>	<u>(43,110)</u>
Net Supplies and Expense	8,208,715	(42,975)	8,165,740
Repairs and Maintenance	1,059,286	0	1,059,286
Capital Outlay	<u>390,425</u>	<u>0</u>	<u>390,425</u>
<b>TOTAL OPERATION AND MAINTENANCE OF PLANT</b>	15,991,478	(707,635)	15,283,843

	<u>Approved Budget 2019-2020</u>	<u>Budget Change</u>	<u>Proposed Budget 2020-2021</u>
<b>ADMINISTRATION AND GENERAL</b>			
Personal Services	12,560,897	28,766	12,589,663
2020-21 Budget Reduction	0	(476,579)	(476,579)
Net Personal Services	12,560,897	(447,813)	12,113,084
Supplies and Expense	4,802,249	119,768	4,922,017
2020-21 Budget Reduction	0	(240,660)	(240,660)
Net Supplies and Expense	4,802,249	(120,892)	4,681,357
Repairs and Maintenance	156,909	350	157,259
Capital Outlay	124,587	0	124,587
<b>TOTAL ADMINISTRATION AND GENERAL</b>	17,644,642	(568,355)	17,076,287
<b>INSTITUTIONAL STUDENT AID</b>			
Supplies and Expense	12,885,743	(308,619)	12,577,124
<b>TOTAL INSTITUTIONAL STUDENT AID</b>	12,885,743	(308,619)	12,577,124
<b>TOTAL BUDGET</b>	120,738,107	(6,754,673)	113,983,434



**2019-2020 Student Financial Aid Programs Final Report  
University of Southern Indiana  
November 5, 2020**

**Executive Summary**

The final report of student financial aid activity in 2019-2020 contains summary and program-specific data of all student aid programs administered by Student Financial Assistance. Key indicators contained in the 2019-2020 report are:

**Service Profiles**

Student Financial Assistance served 12,629 prospective and returning students of which 11,291 filed a Free Application for Federal Student Aid (FAFSA) for need-based assistance. Financial assistance was packaged for 11,057 students, each of whom received an award letter detailing federal, state, USI Foundation and USI Institutional awards. Student Financial Assistance disbursed assistance to 7,801 enrolled students resulting in 19,084 awards totaling just under \$80.4 million. This is a significant decrease in revenue from prior year, primarily due to decreases in the Federal Pell Grant program and Direct Loan programs, the Frank O'Bannon Indiana Higher Education Award and the 21<sup>st</sup> Century Scholars programs.

		<b>Percent of</b>
		<b>Change</b>
<b>Trends in Funding by Source (compared to 2018-2019)</b>		
• Federal student aid: decreased	\$2,233,951	-4.7%
• State of Indiana aid: decreased	902,452	-8.4%
• University student aid: increased	935,213	5.8%
• USI Foundation student aid: increased	89,503	3.9%
• USI Varsity Club funding: no change	0	0.0%
• Corporate/private funding decreased	231,423	-3.8%

<b>Trends in Funding by Type (compared to 2018-2019)</b>		
• Gift aid: grants/scholarships decreased	\$ 736,533	-1.7%
• Self-help: loans decreased	1,549,450	-3.9%
• Self-help: on-campus employment decreased	57,126	-18.2%

		<b>Percent of</b>
		<b>Revenue</b>
<b>Distribution of Aid by Source</b>		
• Federal aid	\$46,103,320	56.1%
• State of Indiana	9,809,660	12.2%
• USI aid	17,079,555	21.3%
• USI Foundation	2,369,467	3.0%
• USI Varsity Club	190,000	0.2%
• Private sources	5,814,785	7.2%

<b>Distribution of Aid by Type</b>		
• Gift aid: grants/scholarships	\$41,839,357	52.1%
• Self-help: loans	38,271,117	47.6%
• Self-help: on-campus employment	256,314	0.3%

**2019-2020 Student Financial Aid Programs  
University of Southern Indiana  
November 5, 2020**

**Final Report**

**Introduction**

This report contains both summary and program-specific information for all student financial assistance programs administered by the University. Data used in compiling this report was obtained from the University's administrative system on October 06, 2020. The Student Financial Assistance office assists students in obtaining the types of financial aid included in this report.

**Narrative: Need Based Applications**

Returning and prospective students submitted 11,291 Free Applications for Federal Student Aid (FAFSA) for need-based assistance. Of this number, 6,987 (62%) enrolled during 2019-2020, with 6,802 of these students receiving assistance from one of the sources below. Total FAFSA applications decreased 3.3 percent over 2018-2019 award year.

The Student Financial Assistance office administered 19,084 awards for a total of just under \$80.4 million in student financial assistance. The distribution of awards by funding source is provided in the chart below.

<i>Source</i>	<i>Awards</i>	<i>Subtotals</i>	<i>% of Total Dollars</i>	<i>Prior Year Distribution</i>
Federal Government	7,506	\$46,301,441	56.1	57.2
State of Indiana	2,474	9,809,660	12.2	13.0
USI	5,130	17,079,555	21.3	19.5
USI Foundation	1,611	2,369,467	3.0	2.8
USI Varsity Club	60	190,000	0.2	0.2
Private Sources	2,303	5,814,785	7.2	7.3
<b>Totals</b>	<b>19,084</b>	<b>\$80,366,787</b>	<b>100</b>	<b>100</b>

Student financial assistance categorized by aid type: grants/scholarships; loans; and employment. In 2019-2020, spending was distributed as follows:

<i>Categories</i>	<i># of Awards</i>	<i>Award Totals</i>	<i>% of Total Dollars</i>	<i>Prior Year Distribution</i>
Grants / Scholarships	13,605	\$41,839,357	51.1	51.5
Loans	5,265	38,271,116	47.6	48.1
Employment	214	256,314	0.3	0.4
<b>Totals</b>	<b>19,084</b>	<b>\$80,366,787</b>	<b>100</b>	<b>100</b>

### Federal Pell Grant Program

The Federal Pell Grant Program is the cornerstone of aid packages for exceptionally needy students. The number of Pell Grant recipients in the 19/20 award year decreased 9.5 percent following a 2.5 percent decrease in the 2018-2019 award year. Total Pell Grant dollars in the 19/20 award year decreased 8.0 percent following a .04 percent decrease in the prior year. The substantial decrease in 2019-2020 Pell Grant funds is due mostly to a decline in enrollment. Other factors may include the Department of Education requiring students and parents to use federal tax returns dating back two years as opposed to prior year returns.

### State Funds

Total Indiana funding declined 8.4 percent for the 2019-2020 award year, following a 0.1 percent decrease in 2018-2019. The sharp decline in revenue is due to substantial decreases in both The Frank O'Bannon Indiana Higher Education Award as well as the 21<sup>st</sup> Century Scholars program. Indiana Higher Education Awards, similar to the Federal Pell Grant program, evaluates a student's eligibility based on the student's Federal Expected Family Contribution which is an index calculated largely based on family income, household size and the number of students attending college at least half-time.

The 21<sup>st</sup> Century Scholars Program, is a need-based program whereby eligibility is determined primarily by income and the student's eligibility for the Free Lunch Program when they are in middle school. These students must also meet income eligibility once they begin attending college as well, therefore, if the family's financial situation has improved, they may no longer be eligible for the program.

Changes in funding levels, summarized by source below:

<i>Source</i>	<i>2016-2017</i>	<i>2017-2018</i>	<i>2018-2019</i>	<i>2019-2020</i>
Federal Government	+1.8	+4.4	-1.3	-4.7
State of Indiana	+0.5	+20.4	-0.1	-8.4
USI	+33.2	+14.8	+17.5	+5.8
USI Foundation	+16.6	+3.2	-2.2	+3.9
USI Varsity Club	0.0	0.0	0.0	0.0
Private Sources	-1.0	+7.3	+5.5	-3.8
<i>Aggregate Change</i>	+5.8%	+8.1	+2.5	-2.8

### Federal Direct Loan Program

Aggregate borrowing for Direct Student Loan recipients among the Class of 2020 baccalaureate graduates averaged \$20,334. Among 2020 masters' and doctoral degree recipients, aggregate borrowing averaged \$31,025, including both graduate and undergraduate borrowing. These figures are based on borrowing while enrolled at USI.

There are on-going efforts nationally, in Indiana and here at USI to reduce the 3-year Cohort Default Rates (CDR). As can be seen in the chart below, our efforts continue to keep USI's 3-year CDR to significantly less than the national and state averages and lower than the average for 4-year public institutions.

A 3-year summary of Federal FY Cohort Default Rates appears below:

<i>Fiscal Year</i>	USI	Indiana	<i>National</i>	4-Year Public
2015	6.6%	14.2%	10.8%	7.1%
2016	5.0%	14.2%	10.1%	6.8%
2017	5.0%	9.6%	9.7%	7.1%

### **Student Financial Assistance Mission**

As part of the Enrollment Services Division, team members in the Student Financial Assistance Office are committed to supporting the University's goals of enrolling and graduating a highly talented and diverse student body.

Our student-focused team works to help students and their families seek, obtain, and make the best use of all resources available to help finance the costs of attending the University of Southern Indiana. We aim to provide efficient and effective access to programs and services through personalized attention and the use of state-of-the-art technology.

In partnership with internal, federal, state, and other organizations, team members coordinate the administration of all student financial assistance awarded to ensure equity and consistency in the delivery of funds to students. We are dedicated to providing for the proper stewardship of all University, government, and private funds utilized by our students to finance their education.

We aspire to minimize the procedural barriers that sometimes frustrate financial aid applicants and diligently work to ensure our students learn to handle their financial affairs in a responsible manner. The Student Financial Assistance team provides student advocacy on issues relevant to student success.

**Summary  
Construction Projects**

**November 5, 2020**

**Projects Under Construction**

**Physical Activities Center (PAC) Phase II**

**Project Cost** **\$ 38,500,000**

Funding Source: Legislative Appropriation - 2017

**Projects In Design**

**Health Professions Renovation/Addition**

**Project Cost** **\$ 30,000,000**

Funding Source: Legislative Appropriation - 2019

**Wellness Center**

**Project Costs** **\$ 11,000,000**

Funding Source: Legislative Appropriation - 2019

**HVAC Infrastructure Improvements**

**Project Cost** **\$ 3,700,000**

Funding Source: Legislative Appropriation - 2019

**Exterior Signage Replacement**

**Project Cost** **\$ 500,000**

Funding Source:

Parking Reserves \$ 250,000

Landscape Improvement Reserves \$ 250,000

**Quadrangle Landscape Improvements**

**Project Cost** **\$ 125,000**

Funding Source: Landscape Improvement Reserves