APPENDIX

INFORMATION ON THE COMPONENTS OF STATE/SYSTEM FUNDING FORMULAS



| EXHIBIT A-1 |
|------------------------------|
| INSTRUCTION FUNDING FORMULAS |

| State | Calcula | tion Me | thod | Appr | oach | | Base | | C | Differentiat | ion | Costs | | |
|-----------------------|------------|-----------|------------|----------------|----------|--------|-------|-------|------------|--------------|-------------|-------|----------|--|
| | | | BFPR | All | | Credit | Head | FTES/ | | | Type of | | | |
| | RPBF | PBF | /SR | Inclusive | Itemized | Hours | Count | FTEF | Discipline | Level | Institution | Fixed | Variable | |
| Alabama | х | | | | х | Х | | | x | Х | | | X | |
| Arizona * | | | х | | х | Х | | Х | | Х | | | x | |
| California * | | | х | | Х | Х | | Х | Х | Х | х | х | x | |
| Connecticut | | | х | | х | Х | | Х | Х | Х | х | | х | |
| Florida | х | | х | | х | Х | | Х | х | Х | х | | х | |
| Georgia | | | х | | х | х | | Х | х | Х | | | х | |
| Idaho * | х | | | Х | | Х | | | х | Х | х | | х | |
| Illinois * | | | х | | х | Х | | | х | Х | х | | х | |
| Kansas * | х | | | | х | Х | | | | Х | х | х | х | |
| Kentucky | х | | | | х | Х | | | х | Х | х | | х | |
| Louisiana * | х | | | | х | Х | | | х | Х | х | | х | |
| Maryland | х | | | | х | Х | | | х | Х | х | | x | |
| Minnesota * | х | | | | х | Х | | | х | Х | х | | х | |
| Mississippi | | х | х | | х | Х | | | х | Х | х | | х | |
| Missouri | х | | | | х | Х | | | х | Х | | | х | |
| Montana | х | | х | | х | х | | Х | х | Х | | | х | |
| Nevada | | | х | | х | х | | Х | | Х | | | х | |
| New Mexico | х | | х | | х | Х | | | х | Х | х | | x | |
| North Dakota | х | | х | | х | Х | | | х | Х | х | | x | |
| Ohio * | х | | | | х | Х | | Х | х | Х | х | х | x | |
| Oklahoma * | х | | | | х | х | | Х | х | Х | х | | х | |
| Oregon | | х | х | | х | Х | | | х | Х | х | | x | |
| Pennsylvania * | | | х | | х | Х | | Х | | Х | | х | x | |
| South Carolina | | | х | | х | Х | | Х | х | Х | х | | x | |
| South Dakota * | | | х | | х | Х | | Х | х | Х | | | x | |
| Tennessee | | | х | | Х | х | | Х | х | Х | х | | Х | |
| Texas | х | | | | Х | Х | | | х | Х | х | х | x | |
| Utah * | | | х | | Х | х | | | х | Х | х | | Х | |
| West Virginia * | х | | | | Х | | | Х | | | х | | Х | |
| * indicates more that | an one fur | ctional a | area inclu | uded in this f | ormula. | | | | | | | | | |



| | Calcul | ation M | ethod | | A | pproach Ba | ase | | Diffe | erentiat | ion | Costs | |
|----------------|--------|---------|-------------|------------------|----------|-------------------|--------------------------|---------------|------------|----------|------------------------|-------|----------|
| State | RPBF | PBF | BFPR/ SR | All Inclusive | Itemized | Credited Hours | Sponsored Research \$ | FTES/ FTEF | Discipline | Level | Type of Institution | Fixed | Variable |
| Alabama | | х | | х | | Х | | | х | х | | | Х |
| California * | | | х | | Х | Х | | | х | х | х | х | х |
| Florida * | | | х | | Х | Х | | | х | х | х | | х |
| Georgia * | | | х | | Х | Х | | Х | х | х | | | Х |
| Kansas * | Х | | | | Х | Х | | | | х | х | х | х |
| Kentucky | | х | | х | | | х | | | | | х | х |
| Louisiana | Х | | | | Х | Х | | | х | Х | х | | Х |
| Maryland | | х | | | х | Х | | | х | х | х | | Х |
| Mississippi | Х | | | | Х | | | Х | х | | | | х |
| Montana * | х | | х | | х | х | | Х | х | х | | | х |
| Oklahoma * | Х | | | | х | Х | | Х | х | х | х | | Х |
| Oregon | | х | | х | | | | Х | | | х | | Х |
| Pennsylvania * | | | х | | х | Х | | Х | | х | | х | Х |
| South Carolina | | х | | х | | | х | | | | | | х |
| South Dakota * | | | х | | Х | Х | | Х | х | х | | | х |
| Texas | Х | | | | х | | | Х | | | | | Х |
| West Virginia | Х | | | х | | | | х | | | | | Х |

EXHIBIT A – 2 RESEARCH FORMULAS USED BY STATES/SYSTEMS



| | Calcu | lation M | lethod | Appr | oach | | Base | | Di | fferentiat | ion | C | osts |
|-----------------------|-------------|-------------|-------------|------------------|----------|--------|---------|-------|------------|------------|-------------|-------|----------|
| | | | BFPR/ | All | | Credit | Expend | FTES/ | | | Type of | | |
| State | RPBF | PBF | SR | Inclusive | Itemized | Hours | Mission | FTEF | Discipline | Level | Institution | Fixed | Variable |
| Alabama | | х | | х | | Х | | | х | х | | | х |
| California * | | | х | | Х | Х | | | х | х | х | х | х |
| Florida * | | | х | | х | Х | | | х | х | х | | Х |
| Kansas * | Х | | | | Х | х | | | | Х | x | Х | х |
| Kentucky | x | | | | x | x | | | x | х | x | x | x |
| Maryland | | х | | | х | х | | | x | х | х | | х |
| Mississippi | х | | | х | | | х | | | | х | | х |
| Montana * | Х | | Х | | Х | х | | Х | х | Х | | | х |
| Oklahoma * | x | | | | x | x | | x | x | х | x | | x |
| Pennsylvania * | | | х | | х | Х | | х | | х | | | х |
| South Carolina | | х | | х | | | х | | | | | | х |
| Tennessee | | х | | | Х | х | | х | x | Х | x | х | x |
| * indicates that more | than one fu | unctional a | area includ | ed in this formu | la. | | | | | | | | |

EXHIBIT A – 3 PUBLIC SERVICE FUNDING FORMULAS USED BY STATES/SYSTEMS



| | Calcu | lation M | ethod | Appro | ach | | Base | | Dif | ferentiat | ion | Costs | |
|-----------------------|-------------|------------|-------------|-------------------|--------------|--------|-------|-------|------------|-----------|-------------|-------|----------|
| State | | | BFPR/ | | | Credit | Head | FTES/ | | | Type of | | |
| | RPBF | PBF | SR | All Inclusive | Itemized- | Hours | Count | FTEF | Discipline | Level | Institution | Fixed | Variable |
| Alabama | х | х | | | х | Х | | | х | х | | | Х |
| Arizona * | | | х | | х | Х | | Х | | х | | | Х |
| California * | | | Х | | х | Х | | | х | Х | х | х | Х |
| Connecticut | х | | х | | х | Х | b | х | | b | х | х | Х |
| Florida | х | | х | | х | Х | х | х | х | х | х | | Х |
| Georgia * | | х | | | х | Х | | | х | х | | | Х |
| Kansas * | х | | | | х | Х | | | | х | х | х | Х |
| Kentucky | х | х | | | х | Х | Х | | | х | х | х | Х |
| Louisiana * | х | | | | х | Х | | | х | х | х | | Х |
| Maryland | х | х | | | х | | | | | | х | | Х |
| Minnesota * | х | | | | х | | | х | х | х | х | | Х |
| Mississippi | | х | | | х | Х | | х | х | х | х | | Х |
| Missouri | х | | | | х | Х | | | х | х | | | Х |
| Montana * | х | | | X | | | | | | | | | Х |
| Nevada | х | х | | | х | Х | | х | | х | | х | Х |
| New Mexico | х | х | | | х | Х | | | | b | х | | Х |
| North Dakota | х | | | | х | | | х | | х | | | Х |
| Ohio | х | | | | х | Х | | х | х | х | х | х | Х |
| Oklahoma * | х | | | | х | Х | | х | х | х | х | | Х |
| Oregon | х | х | | | х | Х | b | х | х | b | х | х | Х |
| Pennsylvania * | х | | | | х | Х | | х | | | | х | Х |
| South Carolina | | х | | | х | Х | | | х | х | | | Х |
| South Dakota * | | | х | | Х | Х | | х | Х | х | | | х |
| Tennessee | х | х | | | Х | | | х | | | х | | Х |
| Texas | х | | | | Х | Х | | | | х | | х | Х |
| Utah * | х | | х | | Х | Х | | | х | х | х | | Х |
| West Virginia * | х | | | | Х | | | х | | | х | | Х |
| * indicates that more | than one fu | nctional a | rea include | d in this formula | l. | | • | • | | | | | |
| b indicates the state | uses the As | sociation | of College | Research Librar | ies formula. | | | | | | | | |

EXHIBIT A – 4 ACADEMIC SUPPORT FORMULAS USED BY STATES/SYSTEMS



| EXHIBIT A – 5 |
|--|
| STUDENT SERVICES FORMULAS USED BY STATES/SYSTEMS |

| | Calcula | Calculation Method | | | oach | | Base | | Di | fferentia | tion | Costs | |
|----------------------------|---------------|--------------------|----------------|------------|----------|--------|-------|----------|------------|-----------|--------------|-------|----------|
| | | | BFPR/ | All | | Credit | Head | FTES/ | | | Type of | | |
| State | RPBF | PBF | SR | Inclusive | Itemized | Hours | Count | FTEF | Discipline | Level | Institutions | Fixed | Variable |
| Alabama | х | | | | Х | | Х | | | | | Х | Х |
| Arizona * | | | х | | Х | х | | х | | х | | | х |
| Florida | Х | | | | Х | | Х | Х | | Х | х | | Х |
| Georgia * | | Х | | | Х | х | | | х | х | | | Х |
| Kansas * | х | | | | Х | х | | | | х | х | х | х |
| Kentucky | Х | | | | Х | | Х | | | | х | х | Х |
| Louisiana * | х | | | | Х | х | | | х | х | х | | Х |
| Maryland | Х | | | Х | | | | | | | | | Х |
| Minnesota * | х | | | | Х | | | х | х | х | х | | х |
| Mississippi | х | | | | Х | х | | Х | | | | х | Х |
| Missouri | х | | | | Х | х | | | х | х | | | Х |
| Montana * | х | | х | | Х | х | | х | х | х | | | х |
| Nevada | | | х | | Х | | Х | х | | | х | х | Х |
| New Mexico | | | х | | Х | | Х | | | | | х | Х |
| North Dakota * | х | | | | Х | | Х | | | х | | х | х |
| Ohio * | Х | | | | Х | Х | | Х | х | Х | | х | Х |
| Oklahoma * | х | | | | Х | х | | Х | х | х | х | | Х |
| Oregon | х | | | | Х | | Х | | | | | х | Х |
| Pennsylvania * | х | | | | Х | х | | Х | | | | х | Х |
| South Carolina | х | | | | Х | х | Х | | | | | х | Х |
| South Dakota * | | | х | | Х | х | | х | х | х | | | Х |
| Tennessee | х | | | | Х | х | х | х | Х | | х | | Х |
| Texas | х | | | | Х | | Х | | | | | Х | Х |
| Utah * | | | х | | Х | Х | | | Х | х | х | | Х |
| West Virginia * | х | | | | х | | | х | | | х | | х |
| * indicates that more thar | n one functio | onal area inc | cluded in this | s formula. | | | | <u> </u> | <u> </u> | | <u> </u> | | |



| | Calculation Method | | | Approach | | | Ba | ase | | Dif | ferentia | tion | C | osts |
|-----------------|---------------------------|-----|-------------|------------------|----------|-----------------|----|-------|---------------|------------|----------|-------------------------|-------|----------|
| State | RPBF | PBF | BFPR/ SR | All Inclusive | Itemized | Credit Hours | | Other | FTES/ FTEF | Discipline | Level | Type of Institutions | Fixed | Variable |
| Alabama | | х | | Х | | х | | | | x | х | | | х |
| Arizona * | | | х | | х | х | | | Х | | х | | | х |
| California * | | | х | | х | х | | | Х | х | х | x | | х |
| Florida | | х | | | х | х | | | | | | | х | х |
| Georgia * | | х | | х | | х | | | | х | х | | | х |
| Kansas * | х | | | | х | х | | | | | х | х | х | х |
| Kentucky | | х | | | Х | х | х | | | х | х | х | Х | х |
| Louisiana * | х | | | | х | х | | | | х | х | х | | х |
| Maryland | х | | | | х | | | х | | | | | | х |
| Minnesota * | х | | | | х | | | | Х | х | х | x | | х |
| Mississippi | | х | | | х | х | | | | х | х | x | | х |
| Missouri | х | | | | х | х | | | | х | х | | | х |
| Montana * | х | | | Х | | | | | | | | | | х |
| Nevada | | х | | Х | | | | х | | | | | х | х |
| New Mexico | | х | х | | х | | | х | | | | | х | х |
| North Dakota * | х | | | х | | | Х | | | | | | х | Х |
| Ohio * | х | | | | Х | Х | | | Х | | х | x | х | Х |
| Oklahoma * | х | | | | х | х | | | Х | х | х | x | | х |
| Oregon | х | х | | | Х | | х | | | | | | х | Х |
| Pennsylvania * | х | | | | Х | Х | | | Х | | | | х | Х |
| South Carolina | | х | | х | | х | | | Х | x | х | | х | Х |
| South Dakota * | | | х | | Х | Х | | | Х | x | х | | | Х |
| Tenessee | х | х | | х | | | | | Х | | | | х | Х |
| Texas | х | | | | Х | | х | х | | | | | х | Х |
| Utah * | | | х | | х | х | | | | x | х | x | | х |
| West Virginia * | х | | | | х | | | | х | | | x | | х |

EXHIBIT A – 6 INSTITUTIONAL SUPPORT FORMULAS USED BY STATES/SYSTEMS

of America

| EXHIBIT A – 7 |
|--|
| OPERATION AND MAINTENANCE OF PLANT FORMULAS USED BY THE STATES/SYSTEMS |

| State | | | | A | pproach | | | Ba | se | | Different | iation | Costs | |
|-------------------------|------------------|--------------|-------------|---------------|----------|------|---------|-------|--------|-------|-----------|--------|-------|----------|
| | | | BFPR/ | All | | NSF/ | Replace | | Credit | FTES/ | Type of | | | |
| | RPBF | PBF | SR | Inclusive | Itemized | GSF | Cost | Acres | Hours | FTEF | Building | Level | Fixed | Variable |
| Alabama | х | | | | х | х | | | | | х | х | | х |
| Arizona * | | | х | | Х | | | | х | х | | х | | х |
| California * | | | Х | | Х | Х | | | Х | | | Х | х | х |
| Connecticut | х | х | х | | х | х | Х | | | | х | | х | х |
| Florida | Х | | | | Х | х | | | | | Х | | | х |
| Georgia | х | | | | х | х | | | | | | | | х |
| Kansas | х | | х | | х | х | | | | | | | | х |
| Kentucky | Х | Х | | | Х | х | | | | | Х | | | х |
| Louisiana * | х | | | | х | х | | | | | | | | х |
| Maryland | х | х | | | х | х | Х | | | | | | | х |
| Minnesota * | х | | | | х | | | | | х | | х | | х |
| Mississippi | х | | | | х | х | | | | | х | | | х |
| Missouri | х | | | | х | х | | | | | Х | х | | х |
| Nevada | | Х | х | | Х | х | Х | х | | | | | | х |
| New Mexico | | | х | | Х | х | | | | | Х | | | х |
| North Dakota | х | | | | х | | Х | х | | х | | х | | x |
| Ohio | х | | | | Х | х | | | | х | Х | х | х | х |
| Oklahoma * | х | | | | х | х | | | | х | | х | | х |
| Oregon | х | х | х | | х | х | | х | | | Х | | | x |
| Pennsylvania | х | | | | Х | х | Х | | | | | х | х | х |
| South Carolina | х | | х | | х | х | Х | х | | х | Х | | | х |
| South Dakota * | | | х | | Х | | | | | Х | | | | х |
| Tenessee | х | | | | Х | х | | | х | | Х | | | х |
| Texas | Х | | х | | х | х | Х | х | | х | Х | | х | Х |
| Utah * | | | х | | х | х | | | | | | | | Х |
| West Virginia * | х | | | | х | | | | | х | | Х | | х |
| * indicates that more t | l than one fu | nctional are | ea included | in this formu | la. | | | | | | | | | |



EXHIBIT A – 8 SCHOLARSHIPS AND FELLOWSHIPS FUNDING FORMULAS USED BY STATES/SYSTEMS

| | Calcu | ulation M | ethod | Approach | | | Base | | Diff | erentiati | on | Costs | |
|-----------------------|---------------|-------------|-------------|------------------|----------|-----------------|---------------|--------------------|------------|-----------|------------------------|-------|----------|
| State | RPBF | PBF | BFPR/ SR | All Inclusive | Itemized | Credit Hours | Head Count | Tuition Revenue | Discipline | Level | Type of Institution | Fixed | Variable |
| Kentucky | | х | | х | | | | х | | | | | х |
| Maryland | | х | | х | | | | х | | | | | х |
| Mississippi | | х | | х | | | | х | | | | | х |
| Montana | | х | | Х | | | | х | | | | | Х |
| Oklahoma * | х | | | | х | х | Х | | х | Х | х | | х |
| | • | • | • | | | | | • | | | | | |
| * indicates that more | e than one fi | unctional a | rea include | ed in this form | nula. | | | | | | | | |

