
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Technical Modeling Workgroup Meeting #2 - January 19, 2023 (9am-11am CT)
Meeting Notes

MEETING OBJECTIVES

1. Review work plan and initiate first work streams.
2. Begin to identify data needs and available data, and create a plan for data collection.
3. Discuss options for estimating instructional and student support costs.

Welcome & Agenda Overview

Executive Director Ginger Ostro opened the meeting with general announcements regarding Open Meetings Act, that the meeting will be recorded and instructions for any members of the public who would like to participate in Public Comment. Martha Snyder provided an overview of the agenda.

Action: Approval of minutes from January 5, 2023 Workgroup Meeting

Andrew Rogers made a motion to approve the minutes from the January 5, 2023 workgroup meeting. Commissioner Mahony seconded the motion. All workgroup members were in favor.

Introductions

Martha Snyder started a round of introductions and asked each workgroup member to introduce themselves and share their affiliation.

Review of Work Plan

Will Carroll shared a chart with the Topic Teams, as follows:

- Student Centered-Access: Sandy Cavi and Michael Moss
- Academic Supports: Robin Steans and Kim Tran
- Non-Academic Supports: Mike Abrahamson and Andrew Rogers
- Core Instructional Program Costs: Dan Mahony and Jeanette Malafa
- Research, Public Service & Artistry: Beth Ingram and Simón Weffer
- Equitable Student Share: Corey Bradford and Ralph Martire

Expectations were outlined for the Topic Teams to understand, including the following questions/answers:

- Is the expectation to meet between workgroup meetings? Yes. There is necessary work between workgroup meetings to advance from conceptual framework to technical modeling and formula recommendations.
- Will HCM facilitate meetings? No. HCM will not formally facilitate team meetings but will help provide advice on data sources, framing questions and other resources relevant to the topic.
- What is the deliverable for each Topic Team? The deliverable is to provide recommendations to the full group on the data points necessary for calculation of the (assigned) component to be incorporated into the full adequacy calculation (or resources evaluation).
- Will the full workgroup weigh in to recommendations of each Topic Team? Yes. The Topic Teams will present on research, findings and recommendations for feedback and input from the full workgroup.
- Will the workgroup still respond to iterations of strawman and technical conceptualizations? Yes. Iterations of the strawman and technical conceptualizations will be informed by the work of the Topic Teams (with input from the workgroup and

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sign-off from the Commission). As the various components of the model get built out, we will review, evaluate and adjust as appropriate. HCM and IBHE will also support the development of the full model and formula recommendations.

Will Carroll walked through the work plan, as outlined, and the timeline for when each area will be discussed (at which meetings). As outlined, the workgroup meetings will go through the end of April 2023 with additional meetings scheduled as needed. Workgroup members raised the following “additional ideas” and important pieces to remember: transparency, accountability, reconciliation of data points and approaches.

Approaches to Defining Adequacy Levels and Estimating Costs

Instruction and Student Services: Key Questions

- What is the benchmark for this component? What is the desired outcome?
- How many/what level of resources are required to achieve the benchmark/outcome?
- What do those resources cost?
- What adjustments need to be made for student, program, and institutional variation?

A conceptual model was shared on screen with the workgroup members:
[Service] x [Cost of the Service] x [Service/Student Ratio] x [Adjustments]

There was a concern that a formula could grow very complex. Complexity and Transparency are linked and very important. The formula cannot become so complex that people don't understand it. Overall, this is a three-step process: develop adequacy target, identify available resources, identify the gap in resources to allocate future state investment.

Ralph Martire walked through examples and basic weighting of the EBF model to get to the adequacy target and how the process may be similar to this workgroup's work. Jeannette Malafa also provided historical context around the K12 models and formula. Any formula created will not be perfect when first implemented and will need adjustment as time goes on. In the EBF formula, there are 34 base elements.

Has research been looked into around the appropriate number of students per class (class size) in order to figure out adequate instructors and staffing. Unfortunately, there is not as robust data on these factors in higher education.

Instruction and Student Services: Data Sources and Approaches

Approaches for Measuring Adequacy: Strategies for answering key questions (not mutually exclusive):

- Assess what IL schools do currently, then what additions they would need to provide the service adequately and equitably
- Identify the desired outcome and map costs to that
- Use a comparable exemplar to benchmark costs
- Build a budget from the ground up
- Evaluate on a line-item basis versus bucketing services together (see example above re: admissions officer versus ORE)

Potential Data Sources for Adequacy

- High-performing institutions/program components in Illinois
 - Pros: comparable content, data, financial structures, ease of “translation”
 - Cons: limited number, limited range of funding and performance levels, challenges maintaining objectivity, reflects historical funding patterns
- High-performing institutions/programs out of state

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- Pros: wide range of performance and funding levels, sources for new ideas, easier to be objective
- Cons: different contents, financial structures, data classifications, hard to connect funding to specific outcomes
- Academic research
 - Pros: potential for more rigorous connections between funding and outcomes, credibility with key stakeholders
 - Cons: limited number of use cases in context of overall funding levels

Potential Data Sources - Reports and Data

- Illinois: IBHE, ISAC, ISBE, Institutional data
- US/Federal: IPEDS, NPSAS, National Student Clearinghouse, College Scorecard, NSF/NCSSES, OPE
- Associations: SCUP, NACUBO, AAU, APLU, AASCU, CUPA, AAUP, MHEC, SREB
- Other States: Texas, California
- Other relation projects: Oklahoma SU Salary Survey, Delaware Study, Delta Cost Project
- International: OECD, UNESCO
- Research/Best Practices: IES What Works Clearinghouse, Washington State Institute for Public Policy

Mike Abrahamson shared that it's important to not let the data limitations limit the work to be done in this space. Jeanette Malafa pointed out that the public university environment is very different from K-12, despite the similarities.

Martha Snyder walked through the areas for each element (description, rationale, evidence-based practices/examples and potential measures to calculate costs): Student-Centered Access, Student-Centered Pathways: Academic Supports, Student-Centered Pathways: Non-Academic Supports, Academic/Instructional Core Costs and offered time for the Topic Teams and workgroup members to offer initial thoughts or questions for each element.

The workgroup members offered suggestions, data sources and conversation around the component areas. Workgroup members would schedule time between meetings to work and talk through their components. HCM Strategists team members could join meetings/calls, if available, or workgroup members are welcome to send notes/thoughts following these work sessions.

Cross-Cutting Considerations

- Variation for students, programs, institutions
- Grad versus undergrad
- Central services included in the component, or in O&M?
- Cost-of-living differences versus ability to pay higher salaries due to more revenue
- Future adequacy
- What else?

Simón Weffer asked that "professional" be added to the "grad versus undergrad" bullet.

Public Comment

There were no members of the public requesting to make public comment.

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Preview of Work on Research and Equitable Student Share

Simón Weffer and Beth Ingram shared that they would meet following the workgroup meeting. Similarly, Corey Bradford and Ralph Martire have not yet met but plan to for further discussion.

Plan for Subsequent Meetings

February 2nd Meeting

- Instruction and Student Services components report out on recommendations, questions, data needs
- Discuss student, program, and institutional variation of instruction and Student Services components
- Updates on Research, Public Service & Artistry and Equitable Student Share

Student, Program and Institutional Variation: Key Questions

- What is the relative difference in spending necessary to achieve similar outcomes (enrollment, persistence, completion) for students from various backgrounds?
- Should there be a weight for high concentrations of higher-cost students as well as a per-student weight?
- How do we establish appropriate weights if a research base isn't available?
- Do different types of institutions (size, concentration of populations) require more spending to offer comparable services and supports?
- How to account for system offices?
- What extra costs may be associated with different degree levels/program areas?
- What approach to incorporating degree levels/graduate education best allows for equity to be addressed within the context of advanced degree opportunities?

Adjournment

The next workgroup meeting was scheduled for Thursday, February 2, 2023 (9am-11am CT). The workgroup would reflect on whether the meetings need to be extended by an additional 30 minutes for a total of 2.5 hours.

Workgroup Members in attendance

Mike Abrahamson, designee for Lisa Castillo-Richmond
Kim Tran, designee for Zaldwaynaka Scott
Sandy Cavi, designee for Terri Kinzy
Robin Steans
Ralph Martire
Simón Weffer
Corey Bradford, designee for Cheryl Green
Beth Ingram, designee for Lisa Freeman
Dan Mahony
Michael Moss, designee for Javier Reyes
Jeanette Malafa, designee for Guiyou Huang
Andrew Rogers

Support Team Members in attendance

Ginger Ostro
Jaimee Ray
Martha Snyder
Jimmy Clarke

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Will Carroll
Nate Johnson
Katie Lynne Morton
Brenae Smith