
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Meeting #4

Welcome to the August 25, 2022 meeting of the Adequacy Workgroup. The meeting will begin at 9:00 a.m. This meeting will be recorded.

Members of the general public will remain muted throughout the meeting and will have the opportunity to comment during the public comment period. To make a comment, please leave your name and the organization you represent in the Q&A section by 11:05 a.m. We will call on you during the public comment period and ask that you keep your remarks to under three minutes.

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Welcome & Agenda Overview

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- 9:00 am Welcome & Agenda Overview
 - 9:10 am Action: Approval of minutes from August 4, 2022 Workgroup Meeting
 - 9:15 am Introductions & Team Building Activity
 - 9:30 am Recap of Discussions
 - 9:35 am Effective Practices for Student-Centered Adequacy Components
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| 10:00 am | Discussion on Considerations for Student-Centered Components |
| 10:30 am | Prep for September Commission Meeting |
| 11:20 am | Break |
| 11:35 am | Public Comment |
| 11:40 am | Prep for Meeting #5 |
| 12:00 pm | Next Steps and Adjournment |
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Action: Approval of minutes from
August 4, 2022 Workgroup
Meeting

Introductions & Team Building Exercise

Mike Abrahamson	Partnership for College Completion
Andreas Cangellaris	University of Illinois Urbana-Champaign
Robin Steans	Advance Illinois
Ralph Martire	Center for Tax and Budget Accountability
Simón Weffer	Northern Illinois University
Cheryl Green	Governors State University
Lisa Freeman	Northern Illinois University
Cherita Ellens	Women Employed
Respicio Vazquez	Elgin Community College
Sheila Caldwell	Southern Illinois University

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Workgroup Overview

Workgroup Overview

Three workgroups: 1) Adequacy, 2) Resources and 3) Technical Modeling

Role and Purpose: Inform the analytical, data and technical modeling of the Commission's work. The workgroups will comprise a subset of Commission members or other assigned representatives. Workgroups do not make decisions but provide added, focused capacity to the Commission to elevate and understand options for addressing funding components and considerations.

Representatives: Selected by co-chairs; ~ 10 members for each workgroup; Will reflect groups and organizations on Commission with regional, mission and other attributes represented.

- Adequacy: Conceptual, Policy and Analytical skills
- Resource: Conceptual, Analytical skills
- Technical Modeling: Policy, Data Analytics and Modeling skills

Workgroup Charge

Adequacy Workgroup: The adequacy workgroup will focus on evaluating and understanding various issues and concepts of adequacy in postsecondary finance. The workgroup will support the Commission's work in identifying the components that comprise an adequate and equitable finance structure for universities in context of the legislative charge and definitional concepts developed by the Commission.

The outcome of this review will be to analyze the components of adequacy and institutional "adequacy profiles" that help inform the cost of achieving adequacy for each institution.

Workgroup Activities

Adequacy Workgroup

- Determine which components should be included to measure university adequacy costs
- Develop cost estimates for adequacy components

University Adequacy Cost

Resource Workgroup

- Understand types of revenues available to universities
- Determine which revenues should be included in an institutions revenue mix
- Create understanding of state share of revenue in context of other revenue

University Revenue Mix

Technical Modeling Workgroup

- Analyze work of adequacy and resources to understand gaps across institutions between adequacy and revenue mix
- Model options for closing gaps between adequacy and revenue and progress toward goals

Distribution Model for State Resources

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Effective Practices for Student-
Centered Adequacy Components

Effective Practices for Student-Centered Adequacy Components

- What does the research tell us about effective practices, supports and interventions that foster student access, retention and success?
- Are there differential benefits across different student groups?
- What are the gaps in the field's knowledge?
- What are considerations the technical workgroup should consider as it begins its work of measuring and incorporating these aspects?

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Adequacy Workgroup Report

Summary of Discussions

- Research on PS Funding/Implications for Adequate PS Funding
- Framework Components of Adequacy
- Analytical Considerations for Instructional, Academic and Student Support Components
- Next Steps

Adequacy & Resources: How the Workgroups Interrelate

Each institution will have an Adequacy Target, built from the components of what it costs for students to succeed and will vary based on student need. The Adequacy Workgroup is developing these components.

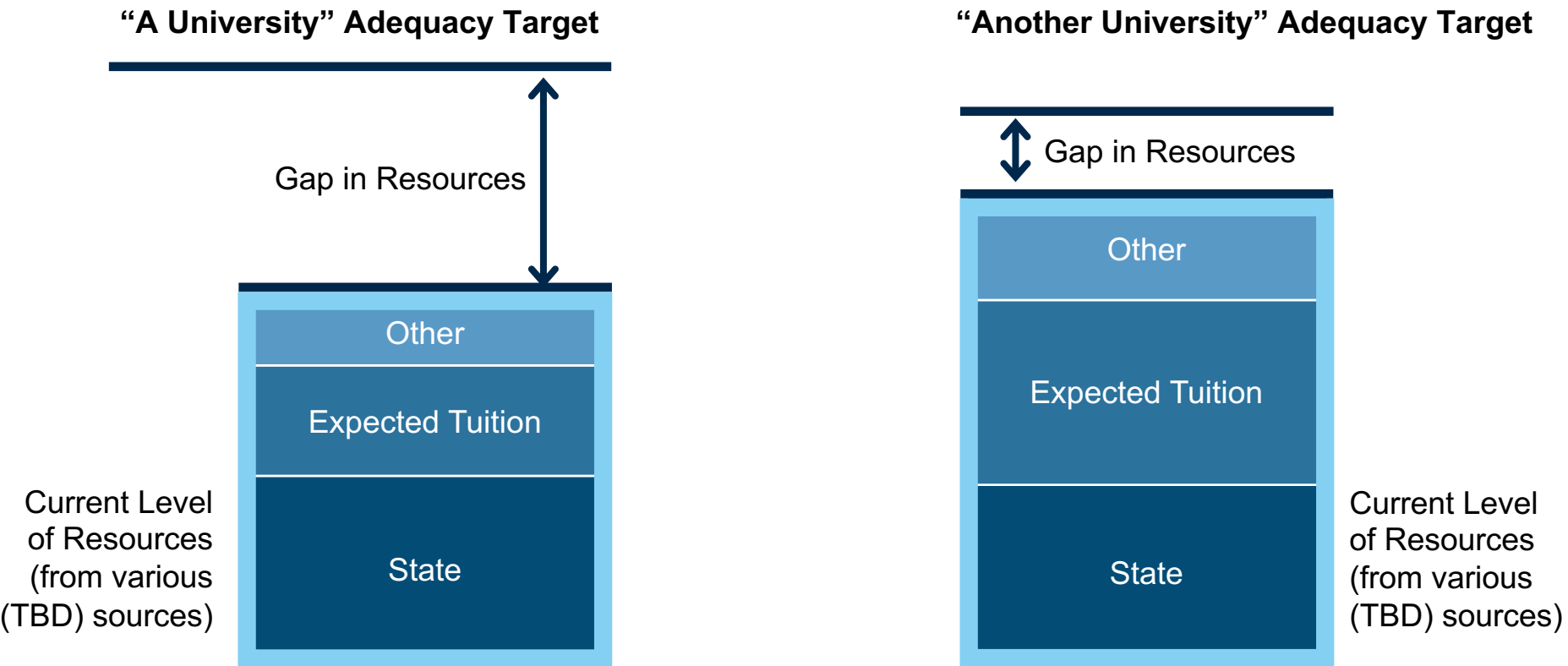
“A University” Adequacy Target

Instruction and Student Services
<i>Student-centered access components</i>
<i>Academic supports</i>
<i>Non-academic supports</i>
<i>Core instructional program costs</i>
Research & Public Service Mission
<i>Unfunded and inseparable from instructional adequacy/equity</i>
<i>Externally or separately funded</i>
Operations and Maintenance

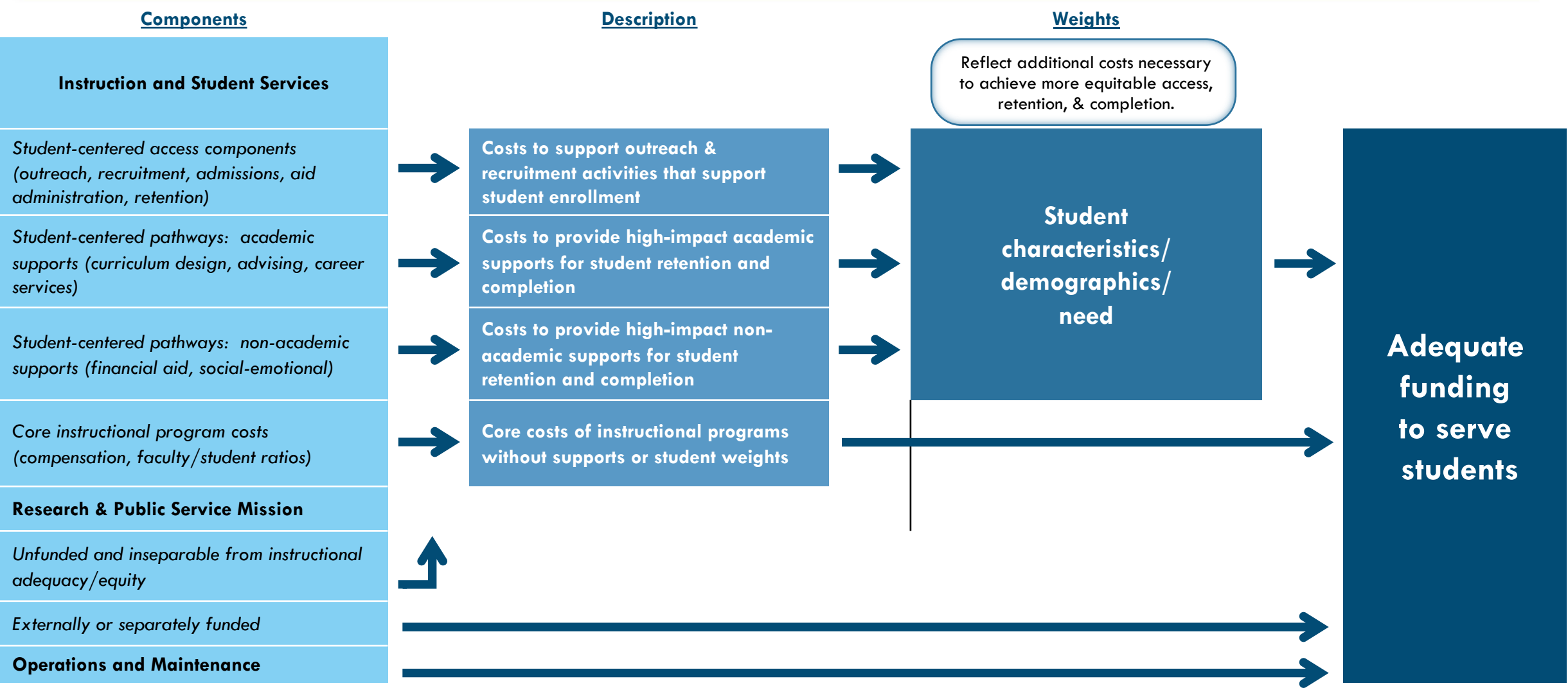
Adequacy & Resources: How the Workgroups Interrelate

Each institution will have an Adequacy Target, built from the components of what it costs for students to succeed and will vary based on student need. The Adequacy Workgroup is developing these components.

Each institution has Resources available to it. The Resources Workgroup is determining which types of resources should be counted to determining how close an institution is to adequacy.



Potential Model for Developing Adequacy Definition



Student-Centered Access Components

Description	Rationale	Evidence-Based Practices (examples)	Potential Measures to Calculate Costs	Considerations
Costs to support outreach, recruitment and enrollment of students	Outreach, recruitment and enrollment activities have costs for all students and will be higher to achieve more equitable access for underserved populations.	<ul style="list-style-type: none"> Financial aid/FAFSA application support Targeted information to low-income, BIPOC students from those who have gone (mentorship) Admission application support Financial Literacy 	<ul style="list-style-type: none"> Student services expenditures Admissions office expenses Other identifiable direct outreach/marketing expenses Financial aid admin expenses attributable to incoming undergraduates <p>Student-Level Finance Measures</p> <ul style="list-style-type: none"> Cost of individual student access strategies 	<ul style="list-style-type: none"> Other sectors have a role in college access, particularly when it comes to equity Some available data reflect existing costs/status quo, not necessarily what it takes to support retention and completion overall/f or different students; not what it takes to achieve goals for more and more equitable retention/completion

Student-Centered Pathways: Academic Supports

Description	Rationale	Evidence-Based Practices (examples)	Potential Measures to Calculate Costs	Considerations
Costs to provide high-impact academic supports for student retention and completion	Academic supports enhance retention and completion with investment needed to ameliorate historical disadvantages and inequities	<ul style="list-style-type: none">• First-Year Seminars and Experiences• Summer Bridge• Learning Communities• Undergraduate research• Career connections• Internships/ap prenticeships• CUNY ASAP components (tutoring, early registration, block scheduling, transportation support)	<ul style="list-style-type: none">• Total instructional expenditures• Total academic support expenditures• Specific academic support expenditures: libraries, technology• Cost studies from research/evaluation in other locations <p>Student-Level Finance Measures</p> <ul style="list-style-type: none">• Cost of individual student pathways: Costing out the pathway of student services used by students to support retention and completion.	<ul style="list-style-type: none">• If/how to incorporate post-bachelor's degrees and related academic support costs• Understanding different costs/levels of supports needed for different students• Some available data reflect existing costs/status quo, not necessarily what it takes to support retention and completion overall/for different students; not what it takes to achieve goals for more and more equitable retention/completion

Student-Centered Pathways: Non-Academic Supports

Description	Rationale	Evidence-Based Practices (examples)	Potential PS Measures to Calculate Costs	Considerations
Costs to provide high-impact supports for student retention and completion	Non-academic supports that enhance retention and completion with investment needed to ameliorate historical disadvantages and inequities	<ul style="list-style-type: none"> • Single Stop • Financial Aid; Emergency Aid • Social Emotional/Counseling/ Mental Health Support • Housing, childcare, transportation • CUNY ASAP components (financial, personal supports) 	<ul style="list-style-type: none"> • Total student services expenditures • Financial aid • Specific student services expenditures: advising, career services, health <p>Student-Level Finance Measures</p> <ul style="list-style-type: none"> • Cost of individual student pathways: Costing out the pathway of students services used by students to support retention and completion. 	<ul style="list-style-type: none"> • If/how to incorporate/consider post bachelor's degrees and related academic support costs • Understanding different costs/levels of supports needed for different students • Available data reflect existing costs/status quo, not necessarily what it takes to support retention and completion overall/for different students; not what it takes to achieve goals for more and more equitable retention/completion • Cost analysis available for ASAP

Adjustments for Student Needs

Description	Rationale	Potential Measures to Calculate Costs	Considerations
Factor(s) based on student characteristics applied to base costs for access, academic supports, and non-academic supports	To reflect additional costs to close equity gaps and to fund state priorities to achieve better outcomes for target populations	<ul style="list-style-type: none">• Low-income• Race/ethnicity• First generation• Academic preparation level• K-12 district resources (e.g. EBF Tier)• Age (Working Adult)• Employment history	<ul style="list-style-type: none">• Should adjustments be derived empirically or agreed upon based on state priorities• Same factors for all cost categories or different factors

Academic / Instructional Core Costs

Description	Rationale	Potential PS Measures to Calculate Costs	Considerations
Core cost of undergraduate instructional programs	To define a baseline cost factor for serving students without any additional supports	<ul style="list-style-type: none">• Competitive compensation factors• Discipline / major differentials• Faculty / student ratios	<ul style="list-style-type: none">• How to establish appropriate ratios• How to define competitive compensation• Accounting for graduate education / research / public service

Next Steps

- Incorporate Commission feedback into Student-Centered Component considerations
- Review other components of adequacy
 - Mission (research and services)
 - Operations + Maintenance*[Report to Commission in December]*
- Finalize recommendations and considerations for technical workgroup

Appendix:

Summary of Research on PS Adequacy

Summary of Research for PS Funding Adequacy

- Clear connection between state funding and student outcomes
- Reduced state investment leads to increased tuition and/or decreased expenditures
 - Access to alternative revenue (tuition increases, out-of-state enrollment, other) not equal across institutions
 - Clear implications for equity and affordability
- Inequitable and Unequal
 - Students of color over-represented at less-resourced institutions/those with fewer alternative revenue sources
 - Institutions serving higher numbers of students of color and low-income students more reliant on state funding

Summary of Research for PS Funding Adequacy

- Existing PS funding models are not based on what it costs to produce an outcome
 - various allocation methods;
 - costs often measures of expenditures, not empirically derived
- But, research shows costs to achieve an outcome vary for different groups of students
 - Academically less prepared
 - Lower income
 - First generation
 - Adults/students not previously successful

These factors can be compounding/concentrated and, therefore, linked to race/ethnicity.

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Summary of Research for PS Funding Adequacy

- Funding matters, but what is invested in matters too
 - Some investments, strategies and practices are more effective than others at supporting and serving students
 - Non-academic supports that enhance retention and completion can help ameliorate historical disadvantages and inequities
 - Academic supports that enhance retention and completion are needed to ameliorate historical disadvantages and inequities
- Costs of different pathways vary, this includes costs across programs and disciplines

Research Implications for PS Funding Adequacy

Implication 1: Funding should be adjusted to reflect the costs needed to successfully support students and the increased level of support needed for some students.

Implication 2: Funding should be grounded in strategies, programs and supports that have evidence of supporting student success

Research Implications for PS Funding Adequacy

Implication 3: Funding should reflect variable costs of different programs of study/disciplines (*in a way that also reflects student equity in access to these areas of study*)

Implication 4: Allocation of state funding should consider other resources available to institutions and how those affect institutions ability to serve the students it enrolls (*aligned to efforts of resources workgroup*)

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Break

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Public Comment

Facilitated by Katie Lynne Morton, HCM Strategists

Instructions for Members of the Public:

Please wait for your name to be called. Public comments will be limited to three (3) minutes per person.

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Next Steps and Adjournment

Next Meeting: September 22, 2022
