
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Adequacy Workgroup Meeting #1 - June 16, 2022 (9am-12pm CT)
Meeting Notes

MEETING OBJECTIVES

1. Review Commission input to identify common themes and topics for the workgroup to address.
2. Discuss the research provided (readings # 1+2; 3+4 optional) and matrix of state and K12 (EBF) presentations to build toward common understanding of adequacy in university context.
3. Identify potential high-level categories of adequacy to guide workgroups future work.

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.

Workgroup Overview (Objectives, Meeting Calendar)

Martha Snyder provided an overview of the Adequacy Workgroup. It was noted that the Resource Workgroup is working in parallel and that there will be a total of three Workgroups over the time of the Commission's work.

The Adequacy, Resources and Technical Workgroups (workgroups) for the Illinois Commission on Equitable University Finance (Commission) will inform the analytical, data and technical modeling of the Commission's work. The workgroups are composed of a subset of Commission members or other assigned representatives. The workgroups, supported by IBHE and HCM, will expand the capacity of the Commission's work between full Commission meetings, providing opportunities to dig deeper around concepts and considerations advanced by the Commission.

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. Directed by the Commission, this effort may include evaluating various components of adequacy such as:

- Student-Centered Adequacy Components
- Program/degree type components
- Cost-based components
- Mission-Centered Components.

Representatives were selected by the co-chairs with ~10 members for each workgroup. Membership will reflect groups and organizations on the Commission with regional, mission and other attributes represented.

- Adequacy: Conceptual, Policy and Analytical skills
- Resource: Conceptual, Analytical skills

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

- Technical Modeling: Policy, Data Analytics and Modeling skills

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.

The Commission's definition of "adequate funding" was shared as a reminder: The amount of funding necessary to equitably support all students to enroll and complete a degree without placing undue financial burden on students/families and for each university to carry out its mission. The cost of adequacy will vary across institutions based on the different needs of students being served, different degree types offered and the different mission components across institutions. Achieving adequacy requires directing new state investments to institutions with the greatest gap after accounting for other revenue sources.

Team Building Activity

Chief of Staff Ja'Neane Minor used Zoom Whiteboard to facilitate a Team Building/Ice Breaker activity for the group. Workgroup members were asked to respond to the question "What is your favorite song and what feeling it evokes when you hear it?" on the Zoom Whiteboard. Once all workgroup members answered the question, the group was asked to guess which answer belonged to which workgroup member.

Commission input (Jamboard): Considerations for Adequacy

Chief of Staff Ja'Neane Minor facilitated a session with the workgroup members to help breakdown the components/elements of adequacy that should be included in developing an adequate funding structure for universities. The Jamboard that was created by the full Commission during the May meeting was brought forward for the workgroup to breakdown into categories. Commissioner Simón Weffer suggested categories to break down the sticky notes into "Student" and "Institutions." Workgroup members virtually collaborated to divide up the sticky notes on the screen into categories by theme. During the activity, Commissioner Ralph Martire shared thoughts from a memo he wrote. The memo written by Commissioner Martire would be shared with the workgroup following the meeting. The workgroup members collaborated to break down the sticky notes into the following themes/categories: Students, Institutions, Financial, Research Questions and Other.

Research and State Approaches to Adequacy in PS, Lessons from K12, Adequacy Components for Discussion

Martha Snyder took a moment to reflect with the workgroup on what Commissioner Martire started to lay out and put it into the context of this work. The commission is working towards ultimately figuring out the "math" of what is adequate funding for universities and What this means for both the level of state investment and how those state investments are allocated to different institutions in the context of other, non-state resources available at each institution, with priority for state investment to those furthest from their "adequacy level." The first step in that is to understand what elements or components comprise university adequacy? And what does that then look like for each institution. The sorting exercise that the workgroup completed was an initial step in that direction. As well as the discussion on the research initially shared with you, and what can be learned from the

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

states we heard from as well as the K12 EBF formula. From here, the workgroup would dig deeper into each of these elements to define, measure and prioritize.

Martha Snyder walked through the state matrix that was shared with the workgroup members. The matrix encompasses information from all of the states that the Commission heard from (Oregon, Tennessee, Colorado, Louisiana), as well as the EBF K12 information and additional information from the California Community Colleges. The matrix is broken down by component areas. Commissioner Steans shared that it would be helpful to include a section of what kind of impacts (critical changes) each state/system has seen over time. Commissioner Martire asked whether the matrix could be shared in a non-spreadsheet format. The workgroup members did not raise any questions regarding the information shared in the matrix.

Martha Snyder discussed the resources (articles, reports) that were provided to the workgroup members. Workgroup members were invited to add resources to the list.

The workgroup members were asked to share observations and reflections on the first two readings listed in the resources:

1. Cummings K., Laderman, S., Lee, J., Tandberg, D. and Weeden, D. (2020). Investigating the Impacts of State Higher Education Appropriations and Financial Aid. State Higher Education Executive Officers.

[https://sheeo.org/wp-](https://sheeo.org/wp-content/uploads/2021/05/SHEEO_ImpactAppropationsFinancialAid.pdf)

[content/uploads/2021/05/SHEEO_ImpactAppropationsFinancialAid.pdf](https://sheeo.org/wp-content/uploads/2021/05/SHEEO_ImpactAppropationsFinancialAid.pdf)

This resource provided an extensive summary of research findings on appropriations and aid. Appropriations changes affect tuition rates (affordability) and expenditures (effectiveness, student success).

2. Prescott, B., Koch, Z., Jones, D. (2021) Considering a Standard Approach to Determining Institutional Funding Adequacy. NCHEMS.

<https://nchems.org/wp-content/uploads/210331-Institutional-Adequacy-Paper-FINAL.pdf>

This resources proposed a way of looking at appropriations in the context of institutional spending, which categorizes spending into: foundational, maintenance, scale, scope, innovation/performance/equity, research/public service, and other. The state responsibility differs within each category. There was a key breakdown/taxonomy on pages 9-10; which is probably most useful as a concept than for the specific findings and data analysis.

Both Commissioners Steans and Martire commented on the lack of adequacy in the formulas presented. Commissioner Martire also commented on the lack of stability in the various formulas shared. Due to the lack of stability and adequacy, the formulas could lead to unintended consequences that may not be positive and could reduce the amount of academic offerings to students and a loss of degree availability. Nate Johnson shared that the graph from the NCHEMS report can be helpful. The framework was helpful in setting up a potential state analysis and outlining where to put different kinds of funding/research concerns. The framework outlined foundational resources, resources related to scope of mission, innovation, performance, research, public service and other. The critical functions and roles of the categories resonated with Commissioner Steans. The “adequacy number” will have to be strong enough to have traction and withstand a considerable amount of “tire kicking.”

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Commissioner Ellens shared that the research seems to be institutional-centered, rather than student-centered. How does the workgroup need to look at the research differently? What is the balance between centering students and centering institutions? When the needs of students are centered, areas such as student services are looked at more closely. What is the appetite of the workgroup and what does it really mean to be student centered? Commissioner Steans shared that there is likely a need to have both student-centered and institutional-centered aspects of adequacy. Regarding the need for a baseline, Mike Abrahamson shared about the cost-minimizing output level which may mean reinvestment at certain institutions before per-student levels of funding can be looked into. Commissioner Martire shared that in his opinion there is a two-part process needed: a basic starting point opens up to adjustments at a later time.

Commissioner Weffer reflected on the matrix and historical resources in that there is a charge to look into the historical inequities. How do we make this notion of adequacy bulletproof? How much time should be spent sharing how important adequacy is and sharing the understanding that this will make Illinois unique? Adequacy needs to really be at the forefront of what is produced.

Commissioner Caldwell asked whether a model can be proposed that shows institutions receiving adequate funding and the impact on the students as a result. What would it look like to request a certain amount of funding to move institutions up to an adequate level?

Nate Johnson shared high level information from the SHEEO report, including the fact that two scenarios can harm students: inadequate state support can cause an increase in tuition, or if tuition is held constant then total spending goes down.

Commissioner Martire shared that if funding is reduced on a year to year basis, the EBF model works in a way to make sure that the cuts have the least impact on students. This information was also included in the memo to be shared with the workgroup.

The workgroup members did not have any further resources to share at the time.

Prep for Meeting #2: Identifying Student Supports

The Jamboard was shared on screen again for the workgroup members to review. The workgroup would start to dig into the student-centered aspects of adequacy during the second meeting. What does the research say around supporting students? What are successful interventions and supports for students? How can we start to understand what those are (and what the costs are)?

Commissioner Martire suggested looking at the EBF formula and dollar amount per student as a proxy for implementing the supports needed for countering the obstacles to see if a similar percentage or dollar amount should be used at the higher education level.

Commissioner Caldwell agreed with Commissioner Martire. She also asked what it would look like to incentivize based on high-impact practices. Structures need to be in place to ensure success on the back end for students. What does the research say around the high-impact practices and how does it get built into the cost, capacity and expectations for providing?

In addition to evidence-based practices, Mike Abrahamson shared that affordability needs to be looked at further (students who have been historically priced out in the past).

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Commissioner Weffer shared a personal story about helping his daughter look for an institution and addressing the mindset of “go to the school that will leave you with the least debt.” How much money goes directly to students versus what money goes indirectly to students? Factoring in the cost is very important.

Break

The workgroup took a ten minute break before reconvening for public comment.

Public Comment

There were no members of the public that requested to make public comment.

Additional Prep for Meeting #2: Identifying Student Supports

Additional resources (readings) would be shared with the workgroup members and members were asked to volunteer to read a resource or two and “report out” to the group at the July meeting.

Workgroup members were asked about whether sending a short survey to each of the public institutions to gather information around critical interventions, supports, etc. that help equitably serve their students would be helpful input. HCM would create a draft survey with specific narrow/targeted parameters for the workgroup to respond to before sending. There was discussion regarding sending the survey to Provost, Student Affairs. IBHE offered to help manage making sure the survey is sent to the appropriate individuals.

Next Steps and Adjournment

Time and space was provided for any reflections from workgroup members or designees who did not have the chance to speak earlier in the meeting.

The workgroup members were asked whether there was a desire to meet in person or continue to meet virtually. The workgroup decided to continue meeting virtually. The workgroup members were also asked to affirm that they see themselves as an “advisory” committee in order to be able to meet virtually. All affirmed, there were no disagreements. The second meeting was scheduled for July 14, 2022 (9am-12pm CT). The second meeting would allow time to dig into the student-centered aspects of adequacy.

Workgroup Members in attendance

Mike Abrahamson, designee for Lisa Castillo-Richmond
Bill Bernhard, designee for Andreas Cangellaris
Robin Steans
Ralph Martire
Simón Weffer
Dr. Marlon Cummings, designee for Cheryl Green
Katie Davison, designee for Lisa Freeman
Cherita Ellens
Respicio Vazquez
Sheila Caldwell

Support Team Members in attendance

Ginger Ostro
Ja’Neane Minor
Jaimee Ray

ILLINOIS COMMISSION ON
EQUITABLE PUBLIC UNIVERSITY FUNDING

Martha Snyder
Jimmy Clarke
Nate Johnson
Katie Lynne Morton