
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Meeting #3

Welcome to the April 22, 2022 meeting of the Commission on Equitable Public University Funding. The meeting will begin at 12:00 p.m. This meeting will be recorded. Closed Captioning can be accessed by clicking on the speech bubble in the lower left corner.

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, the organization you represent, and the topic you would like to address in the Q&A section by 2:20 p.m. The Q&A function is in the corner of the screen. We will call on you during the public comment period and ask that you keep your remarks to under three minutes. For members joining by phone, we will direct you to use *3 to raise your hand when the comment period begins.

If you have technical difficulties during the meeting, please contact David Antonacci at antonacci@ibhe.org or via text to 217-720-5269

ILLINOIS COMMISSION ON
EQUITABLE PUBLIC UNIVERSITY FUNDING

Welcome & Agenda Overview

Ginger Ostro, Executive Director, IBHE

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Approval of minutes from February 2022 Commission Meeting

Ginger Ostro, Executive Director, IBHE

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Commission Reflection: Charge, Objectives, Meeting Arc

Senate Majority Leader Kimberly Lightford, Co-Chair

Deputy Governor Martin Torres, Co-Chair

IBHE Board Chair John Atkinson, Co-Chair

A Thriving Illinois



A thriving Illinois has an inclusive economy and broad prosperity with equitable paths to opportunity for all, especially those facing the greatest barriers.



Strategies for a Thriving Illinois



Close the equity gaps for students who have been left behind.



Build a stronger financial future for individuals and institutions.



Increase talent and innovation to drive economic growth.

Principles for a public higher education funding system that is equitable, stable, and adequate



SUSTAINABILITY

Build a stronger financial future for individuals and institutions.

Provide equitable funding so that students can receive the best educational experience and succeed

Support a thriving postsecondary system that enriches the state and its residents

Fund institutions sufficiently to achieve student, institutional, and state goals

Ensure affordability for all students

Recognize institutional uniqueness

Provide predictability, stability, and limited volatility

Principles, continued



Build a stronger financial future for individuals and institutions.

Include a “hold-harmless” provision

Support accountability

Support a collaborative higher education system

Encourage partnerships outside higher education

Legislative Charge

By July 1, 2023, evaluate the existing funding methods and recommending specific, data-driven criteria and approaches to ADEQUATELY, EQUITABLY, and STABLY fund our public universities.

The recommendations must fulfill the principles established in the strategic plan. The recommendations will also be informed by the findings and recommendations established by the Chicago State University Equity Working Group.

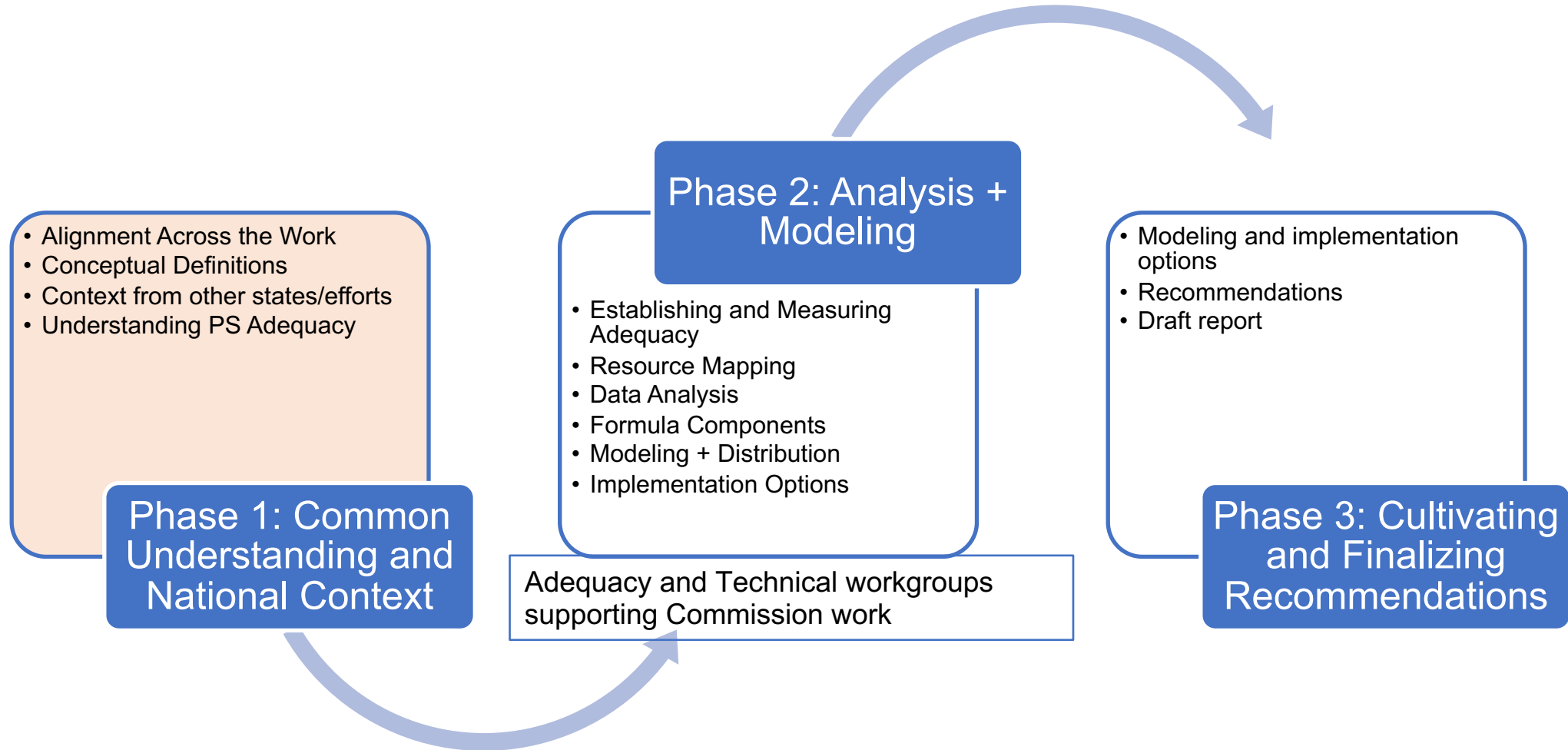
Recommendations must be equity-centered and consider 13 areas. A few of those areas include:

- Remediating inequities that have led to disparities in access, affordability, and completion for underrepresented students
- Providing incentives to enroll underrepresented students
- Allowing ongoing monitoring and continuous improvement in funding models, with transparency and accountability
- Funding for institutions that serve underrepresented students, including graduate and professional students
- Supporting individual institution missions, including research and health care
- Holding all universities harmless to their current funding level

Goals + Scope

- Create a shared understanding of how Illinois' public universities are funded and the alignment of these approaches to critical state goals and objectives.
- Cultivate information from other state approaches for financing postsecondary education that promotes equitable access and success.
- Consider how to address the various functions of a university and account for different institutional missions.
- Develop recommendations for an adequate, equitable and stable formula centered around increasing access and success for underrepresented and historically underserved student populations while reflecting the varied missions of Illinois' public universities.

Workplan Summary



Workplan Phase I:

Common Understanding + National Context

Meeting 1: Alignment Across the Work

- Legislative Charge
- A Thriving Illinois
- Chicago State University Equity
- Principles for an Equitable, Adequate and Stable Funding Model

Meeting 2: Conceptual Definitions, Context from States and Sectors

- Definition survey and review
- K12 EBF Funding Model
- Oregon's Equity Lens and University Funding Model

Meeting 3: Conceptual Definitions, Context from Other States

- Definition survey 2 review and discussion
- Louisiana's Master Plan and Aligned Funding Model
- Colorado's Funding Model
- National Context

Meeting 4: Context from Other States, Adequacy

- Tennessee: Mission Components
- Concepts/ considerations for PS Adequacy
- Working Session: Reflections, Components, Adequacy WG Charge



Workplan Phase 2: Analysis and Modeling

Meeting 5: Establishing + Measuring Adequacy

Options for incorporating student-centered adequacy components

Other components to include adequacy

Elevate student voice

Meeting 6: Establishing + Measuring Adequacy

- Student-Centered Adequacy Components
- Options/Considerations for Mission and Program/Degree Variation
- Putting it all together: components of adequacy for IL universities

Meeting 7: Resource Mapping Data Analysis

- Institutional adequacy profiles
- Resource Mapping
- Gap analysis
- Formula components (data analysis)

Meeting 8: Technical Modeling + Implementation

- Modeling Distribution options
- Implementation scenarios (across various projected spending levels)

Adequacy
Workgroup
Meetings

Adequacy
Workgroup
Meetings

Adequacy
Workgroup
Meetings

Technical
Modeling
Workgroup
Meetings

Technical
Modeling
Workgroup
Meetings

Workplan Phase 3: Cultivating and Finalizing Recommendations

Meeting 8 (overlap w/phase 2): Technical Modeling + Implementation

- Review modeling and implementation options
- Initial recommendations

Technical
Modeling
Workgroup
Meetings

Meeting 9: Recommendations + Report Draft

- Recommendations and options

Technical
Modeling
Workgroup
Meetings

Workgroup Overview

Two proposed workgroups: 1) Adequacy and 2) 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
- Technical Modeling: Policy, Data Analytics and Modeling skills

Timing: Selection before May Meeting; Adequacy will start following May meeting

Workgroup Overview

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 as well as consideration for the varying scope of resources across institutions to consider as a factor for investing new state resources.

Technical Modeling Workgroup: The technical workgroup will build upon the conceptual framework established by the Commission (informed by the adequacy workgroup) and begin identifying metrics/data, modeling distribution mechanisms and various funding scenarios/implementation options based on spending considerations. The workgroup's analysis will incorporate the varying levels of resources (revenue streams) across institutions, as outlined by the Commission.

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Survey Review

Representative Carol Ammons, Co-Chair

Survey Background: Purpose + Overview

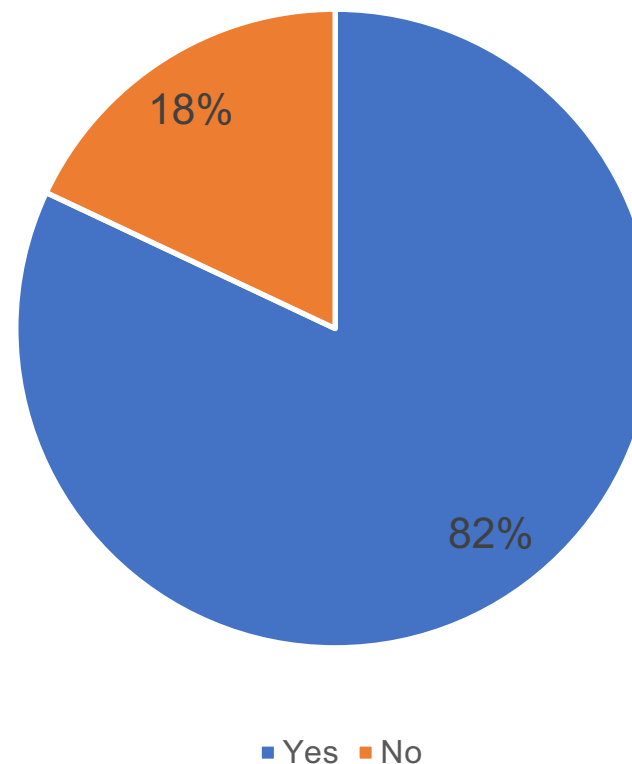
- Establish common understanding of key terms and concepts of Equitable funding, Adequate funding, Stable funding
- Forward looking: orient the work, analysis and recommendations of the Commission
- Revised to reflect conversation and input at the February 2022 meeting

Survey Response: Summary

- 67% response rate: 22 out of 33 Commission member
- Overall high level of agreement with the revised definitions.
- Some comments included recommended revisions but overall, comments primarily elevated areas related to analysis, modeling and implementation of the terms that will need to be explored throughout the Commission's work.
- Comments on considering each of the three concepts in a connected way that elevated some differing perspectives – particularly around implementation.

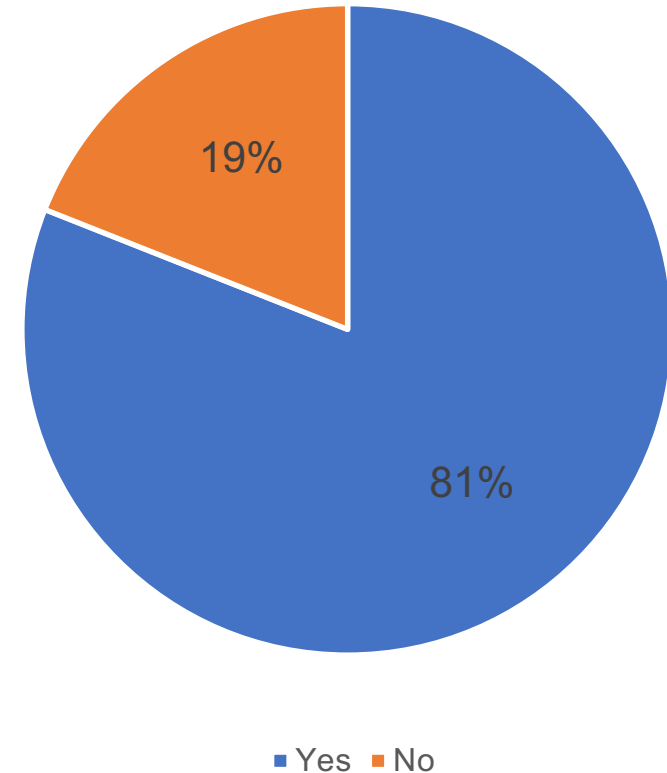
Equitable Funding

An equitable funding model recognizes the varying levels of financial resources available to each institution, accounts for differences in students' ability to pay and factors in the different levels of support needed for students from varying backgrounds to be successful, particularly those underserved by higher education including but not limited to, Black, Latinx, low-income, rural, and working adult student groups. An equitable funding model recognizes that to achieve equity requires that institutions both receive and use dollars in a way that recognizes these differences.



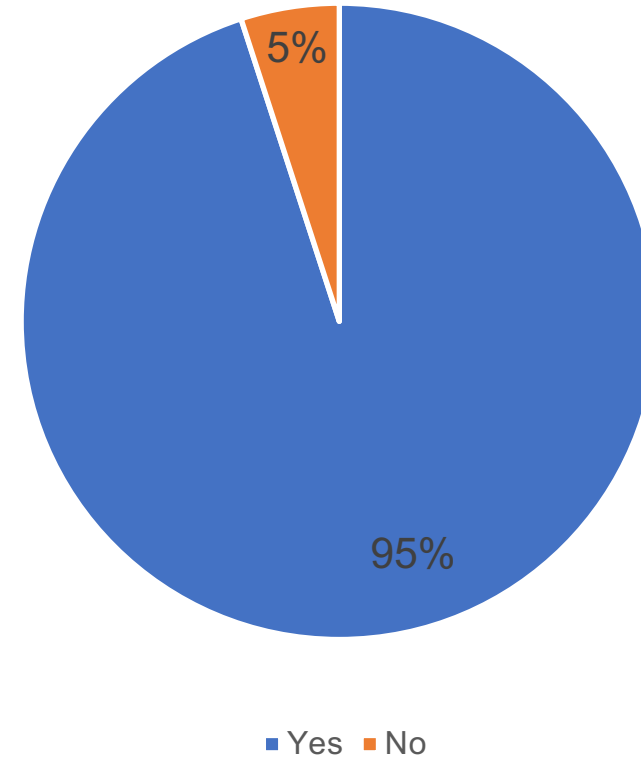
Adequate Funding

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 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.



Stable Funding

State funding is predictable year-over-year, avoiding volatility and inequitable or arbitrary cuts, while making progress toward achieving adequate and equitable funding for all institutions.



Survey: Considerations

Considerations for analysis + modeling discussions

- Inclusion of additional student groups/characteristics (Native American students, First Generation, EBF Tier of student's school district);
- Concentration of at-risk student (both enrollment and graduation)
- Costs + Components of student-centered adequacy
- Including/reflecting institutional mission
- Accounting for program/degree cost variations
- Scope of institutional resource types factored in
- Gaps between adequacy and resources across institutions
- Modeling various state funding level scenarios

Survey: Considerations

Considerations for implementation discussions

- Level of state funding necessary and prioritizing investments
- Balancing across equitable, adequate and stable: Options to make progress on adequate and equitable while maintaining institutional stability

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State Example: Louisiana

Commissioner Kim Hunter Reed
Louisiana Board of Regents

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State Example: Colorado

Kaycee Gerhart
Director of Government Affairs, MSU Denver

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Reflections and Discussion

Facilitated by
Senate Majority Leader Kimberly Lightford, Co-Chair
and IBHE Board Chair John Atkinson, Co-Chair

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Public Comment

Facilitated by Toya Barnes-Teamer, 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. People participating by phone should dial *3 to raise their hand, we will call on you to provide comment.

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Next Steps, Closing Announcements and Adjournment

Deputy Governor Martin Torres, Co-Chair

Next Meeting: May 25, 2022
