
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Illinois Commission on Equitable Public University Funding

February 27, 2024: 9:00am-12:00pm CT

Meeting #15 Notes

Welcome & Introductions

Executive Director Ginger Ostro opened the meeting with a welcome and shared general announcements that the meeting was being conducted via videoconference pursuant to rules adopted by the Commission at the May 30, 2023 meeting. Notice of the meeting was posted in accordance with Open Meetings Act.

Action: Approval of minutes from February 15, 2024 Commission Meeting

Katie Lynne Morton called the roll to approve the minutes from the February 15, 2024 meeting. Co-Chair Pranav Kothari motioned to approve the minutes. Co-Chair Leader Kimberly Lightford seconded. The roll was called and twenty-four commissioners approved, one commissioner abstained.

Action: Approval of minutes from February 22, 2024 Technical Modeling Workgroup Meeting

Katie Lynne Morton called the roll to approve the minutes from the February 22, 2024 meeting of the Technical Modeling Workgroup. Commissioner Ralph Martire motioned to approve the minutes. Commissioner Dan Mahony seconded. The roll was called and seven workgroup members approved.

Executive Director Ostro reviewed the agenda.

Process & Timeline

The Co-Chairs shared what the Commission has achieved in its time together. Co-Chair Leader Lightford shared that the commission has done a fabulous job in achieving the goals that were set forth. Even the difficult task of ironing out some complications in the process of how business is done and creating a blueprint for the General Assembly, one that's based on data evidence. The conversation continues through the legislative process, and the goal here was not to solve every issue, but noting the areas of disagreements for the General Assembly is important and it's a helpful finding. Each institution has a unique funding level based on its students needs, mission and mix of programs.

What the Commission has Achieved

- The Commission has fulfilled its difficult charge.
- The Commission has created a blueprint for the General Assembly, one based in data, evidence, and your expertise and perspectives.
- The conversation continues through the legislative process.
- The goal was not to solve every issue; noting the areas of disagreement for the General Assembly is an important finding as well.

Finalizing the Report & Next Steps

Early this week: Incorporate comments from Commissioners

- The report has been updated and reflects feedback received.
- All comments will be posted on the Commission's website.

Friday, March 1: Submit and post the report

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

- Commissioners will receive an advance copy.

General Assembly next steps

A thank you was shared to all Commissioners who submitted comments. Comments have been reviewed with the Co-Chairs, the report is being updated based on the comments and feedback submitted, as the remaining issues are being worked through. All the comments that were submitted would be posted on the website as was indicated previously. On Friday (March 1, 2024), the report in final form would be submitted to the General Assembly and posted on the IBHE website, as the legislation calls for. The Commissioners would also have a copy in advance of it being formally submitted and posted.

Model Output

Funding Formula Review: Major Design Features

- Each institution has a unique funding level based on its students' needs, mission, and mix of programs.
- Encourages greater access and success for historically underrepresented students.
- Every institution gets a funding increase when new dollars are invested.
- Institutions have flexibility to invest in ways that best serve their students.
- Incentivizes institutions to reduce reliance on student tuition with increased state investment.

Funding Formula Review: Key Takeaways

- Provides a path to equity-centered adequate funding
- Built on best practices and research on what it costs to serve students equitably, especially those from low-income families, students of color, from rural communities, and working adults
- Includes \$800 million to equitably serve all students
- Calls for an increase of \$1.4 billion in state funding, through targeted annual investments
- Distributes new funding through an equity allocation
- Seeks to reduce burden on students, targeting tuition share to 40% overall
- Calls for transparency and increasing accountability as institutions get closer to adequate funding

Will Carroll walked through the model framework and summary of the output that the Commission developed.

Public Comment

Katie Lynne Morton reminded members of the public that they have up to three minutes to provide public comment.

- Sonianne Lozada, Community Engagement Manager at the Partnership for College Completion. Ms. Lozada read a public comment statement on behalf of one of the students (Delante Cooper) from the Student Advisory Committee. "As the Commission on Equitable Public University Funding continues to prepare to release its recommendations for an adequate, equitable and stable public higher education funding formula to the state of Illinois we urge you to continue advocating for the students of Illinois. Equitable access to funding in the state higher education system will not only increase access for our students, especially our Black, Latinx and low-income students but also provide a pathway. When students don't have to worry about funding their higher education, they can focus on what's important to them,

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

their studies. Mental health, extracurricular activities, and quality of life on campus. As the Commission considers how the Scottish affirmative action decision could impact the development of an equitable funding formula in Illinois, we want to remind you of your commitment to equity which includes funding that offers the best educational experience for our students, success and completion. It has been my experience that equitable funding makes sure that all members of society, regardless of their race or economic level, have access to equal resources and opportunities. It promotes fairness and equality by addressing unfair historical issues and leveling the playing field for marginalized communities. As such, equitable funding guarantees social mobility, strengthens communities and contributes to a more all-encompassing society where anyone can thrive. A student and equity center funding formula is crucial in ending inequitable investment and this investment that impacts access and degree attainment. We ask that you consider this when determining how the commission will proceed with its equitable funding. Sincerely, Delante Cooper.”

- Jennifer Delaney, professor of higher education finance at the University of California, Berkeley. Ms. Delaney shared that having come to the end of the funding commission meetings, Ms. Delaney thanked everyone for the time and effort that was expended throughout this process. She expressed her concern by the formula that will be put forward on March 1, 2024. She appreciated the strong commitment of the group to a funding model based on equity, but shared that it is not clear that the model as proposed will produce a more equitable higher education system. Importantly, it is not clear that the formula will yield more affordable higher education options for students and families. Fundamentally, it seems to be impossible to end up with a more equitable system if it is not more affordable. Ms. Delaney shared that she continues to believe that the underlying conceptual framework for the funding formula is flawed. Importantly, the approach ignores the stability of state funding for higher education. There is nothing in the formula that will make state appropriations for higher education more predictable than the status quo. She also believes that this formula for institutional appropriations is setting up a “zero-sum game” not only with the K-12 funding formula but also with state funding for MAP grants. With its strong focus on undergraduate enrollment, the formula overlooks profoundly important elements in the ways in which education functions at the postsecondary level. These important synergies are inherent to quality education such as the importance of peer effects, the overlapping nature of graduate education with undergraduate instruction, and the ways in which research enhances undergraduate teaching and learning. Other essential elements of university missions such as public service, research, the arts, and the preservation of knowledge are not well-served by the formula as presented. Ms. Delaney shared that she was worried that the funding formula is upending the social contract between the state and higher education institutions in a manner that will undermine the full scope of institutional missions. She shared her profound concern by the number of incredibly important issues upon which this group was not able reach consensus. These are not minor issues that are unresolved, but rather point to fundamental weaknesses within the formula. Ms. Delaney shared that it is profoundly important that the full funding commission, the legislature, and the public know that consensus was not reached on these issues. She shared that she hopes that the path forward will allow for time and space to develop a less complicated formula that will fulfill the important aspirations and values held by this commission, especially those related to equity.

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Closing Reflections and Remarks

The Co-Chairs offered time and space for closing reflections and remarks from the Commissioners.

The Commissioners raised the following reflections and remarks:

- This has been a very difficult process, but one that has been long overdue for Illinois. As a university president, we've focused on really improving access and success for our students. The one thing that makes this objective and vision and mission difficult is a lack of stable funding for our institution. Until the current governor, little to no real funding and really little to no attention was paid to the issues of equity, or black and brown and low-income students in this state. For years, the state sat on data. That showed that students who were in rural communities, students who are low income, students who are black and brown have difficulty accessing our higher education systems. Until *Thriving Illinois* there was no direct connection between the work we needed to do and the work that we were doing. Appreciation was shared for the fact that Executive Director Ginger Ostro and her work has refocused the state through *Thriving Illinois* and others and really looking at how we improve outcomes for our students using public dollars and in our public institutions. The product of our work is not perfect. But it is good work, it is solid work, and it will give this state and our legislature clear direction on where we should go and support our public institutions. Part of the process as we move forward should be some subject matter hearings when we look at some of the finer details on percentages and to make sure that we have aligned those percentages. Overall, I applaud the work of the presidents who have come forward and those who are not presidents but are advocates for higher education and putting their thoughts and energy into this work. Thanks were shared with everyone for their attention to the work.
- This is an incredibly complex undertaking and there was no way that we were going to have this conversation and end up having resolved every last issue to everybody's satisfaction. That was impossible. That said, this is an incredibly important place that we've gotten to that will allow us to have the conversations we need to have as a state on an issue that is absolutely essential that we address. Period full stop. Thanks were shared for the General Assembly for challenging the state to have this conversation in the first place. It's incredible the degree of energy, time, and commitment that every member of this commission and particularly those in the technical working group have given this over two years. The ongoing participation has been nothing short of incredible. A huge thank you was shared for the people who made the time to have the conversations that we really have needed to have. Thanks were shared for the Board of Higher Education and HCM.
- Thanks and gratitude was shared for being part of the process to represent both faculty and the Latinx community on both this group, the advocacy group and the technical working group. Hope for what can be achieved was shared and hope as a parent of a student that's currently at one of our fine public institutions with three more in the pipeline. Encouragement was shared for all to advocate for higher education so that we can get there as quickly so that we can get there as quickly so that we can get there as quickly so that we can get there as quickly so that maybe by the time their fifth grader gets to college.
- Thanks were shared to Leader Lightford, Representative Ammons, Martin Torres and the Governor's Office. There couldn't have been a process like this without strong support from the executive in the legislative branches and we've had strong support and we've had great input. Disagreement was shared for the public comment: I don't think this is a flawed approach, I think the fundamental formula that we've come up

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

on is sound, I think it's evidence-based, I think it is designed to address historic inequity by race by income by ethnicity. The creation of this work makes Illinois a real leader in the nation. That has all changed with this Governor and the recent General Assembly. Illinois is now a leader. And this formula will be a leader and a model for the nation. It's not perfect, it will need to be tweaked. But, the folks on this Commission had the presence of mind to put in place a process to improve the formula over. That is good lawmaking. That is good legislation. That is thoughtful. That is approaching public policy the right way. That is allowing evidence to rule the day.

- 2020 was a very challenging and a very difficult time for all of us involved in promoting educational opportunities for our students. But the fact that it was challenging did not mean that the work could not be done and should not be done. Civil rights was challenging, it was difficult, it was not easy. It was full of resistance and conflict. And fear, but it was the right thing to do. Women's rights was full of conflict and fear and difficulty, but it was the right thing to do. School desegregation that happened in 1954 over 70 years ago was full of conflict and fear, confusion and resistance, but it was the right thing to do. The Commission's work on equitable public funding for the state of Illinois is the right thing to do. And it is time for us to do it. I am proud to be working for the state of Illinois that we are even tackling this issue. Many states are not. I applaud everyone on this commission for staying the course. And believing that there is a path towards equity. And our unresolved issue shall not deter us from reaching the ability to move forward for equitable public funding in the state of Illinois. Kudos were given to IBHE for leading the way with *Thriving Illinois*.
- This is historic work. There is no singular flawless solution. All the work that's brought us here today and all of the work ahead of us, but I do think and want to recognize that today is an important milestone for some phenomenal progress. Thanks were shared for the incredible leadership of our co-chairs, the leadership of Executive Director Ostro and the support of the team from HCM and all of the Commissioners. It's clear that this is really the unfinished business and the connection between our education system and our workforce. It is deeply connected to the health of our state economy. It touches on college affordability and ensuring our institutions are accessible to our students and that they have the resources to serve them all well. This has not been the case. And we cannot avoid talking about that and we have talked about that a lot. This is the very first time that Illinois will consider our students the very first time we will center students in the way that we fund our public universities in a systemic way. That is everybody. We need a well funded, consistently excellent higher education system across our entire public system through early childhood through from early childhood through our community colleges and our public universities, we need a well-funded need-based aid program that also helps us with the College of affordability piece and we can now build upon the incredible work that we have done on this commission to take this across the finish line.
- Thanks was shared for everyone who participated in this process on behalf of the IBHE board. I'm overwhelmed by the commitment of the group, how often folks have been able to dive in on calls, questions, clarifications, trying to work through some very thorny issues. Getting to a place where we collectively said here's the things that we think are going to that that makes sense for us as a group and that have come out of this commission and hear the things that we are hoping the General Assembly can help us figure out, takes a lot of hard work. I appreciate the continued commitment to this process. Special kudos to the HCM team for making it through

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

this process. Will, in particular, thanks for your time and attention and to the Co-chairs who have been here from the start of the process. Thank you for your continued commitment to this work and Ginger for all of your work on this as well.

- Thank you all to Ginger and the team at HCM. What we've done is nothing compared to what this challenge was so just wanted to recognize that and thank people. I also recognize the journey ahead is long. So when you look at the numbers, we're talking about a decade, 15 years, 20 years to get to advocacy. For FY 25 it's looking like the state budget is going to be tight. We need to recognize that and recognize there's a lot of work ahead to get there and we're going to have to stay the course in order to get to the level that we're trying to do to close that adequacy gap. We need to keep in mind the trade off between state appropriations and MAP grants. Even once we get to adequacy, there's still a significant equitable student share that has to be paid by students and for low-income students, Pell and MAP. We need to keep in mind that we need to continue to fund MAP in order to support our low-income students. Flaws in the formula can be addressed going forward.
- It's been a long journey to get to this point but we all should be very proud that you've met the legislative charge that was charged to this Commission. You've done an excellent job doing the landscape analysis. You've done an excellent job in the technical working group and the adequacy working group going through really difficult questions - really complex things that frankly no other state has done to position Illinois to be a national leader and provide a more equitable framework. That is a really big deal. So to have an alternative framework that now positions the general assembly to way through these difficult issues and propel this work forward is an achievement. I would not worry about there being unresolved issues because I think that's the way there is with every taskforce, right? We're in a great position to usher the conversation forward because we have people who care fundamentally about equity. There's no question that Leader Lightford and Representative Ammons are censored on equity and making sure that the state does its best for students. It's okay not to have everything figured out because that's what we expect the General Assembly to do.
- This has been an extraordinary experience. The work of the adequacy and technical work groups when we started this took a considerable amount of time to even get to a funding formula that can be put in place. All of these groups that have given up so much time to do this work, we could not be at this moment without you. HCM has been tremendous in consulting us and guiding us and giving us best practices from around the country. I have been on a lot of commissions and taskforces. IBHE is the best. This takes a lot of time and people. On behalf of the students of Illinois, I don't want the universities to forget that we are working toward a sustainable model. The journey ahead is long for us. Let me remind us that the journey ahead has been long, certainly for African Americans. It has only been 70 years since desegregation. Public education is arguably the best and most impactful way to create equal opportunity for children, their families, and the community to succeed. If our communities are not succeeding, it's because we have not provided the greatest access to public education. This commission's objective coming out of House Bill 2170 was to do exactly that. Unfortunately, communities of color are too often outside of the education refrain. We intend to have an equitable educational system because our community depends on it. Our communities are suffering as a result of disinvestment for decades and we intend to fix that. So our vision of educational reform and innovation starts with what we have done in trying to understand the current landscape. Our goal is to develop a system that 10 years from now is observably different than what it currently is. Thank you to all of the taskforce

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

members, IBHE, HCM, the university systems who are represented here, colleagues and lawmakers who are represented here and certainly our advocacy groups, we are indebted and Illinois will be indebted to you all forever for this work.

Co-Chair Leader Lightford reminded the Commission of the upcoming important dates before closing out the meeting.

Commission Members in attendance

Senate Majority Leader Kimberly Lightford, Co-Chair
Deputy Governor for Education Martin Torres, Co-Chair
Representative Carol Ammons, Co-Chair
Pranav Kothari, Co-Chair
Representative Dan Swanson
Senator Mike Halpin
Senator Terri Bryant
Representative Katie Stuart
Sheila Caldwell
John Coleman
Lisa Castillo-Richmond
Dr. Wendi Wills El-Amin
Cherita Ellens
Lisa Freeman
Dr. Katrina Bell-Jordan
Matt Bierman
Cheryl Green
Warren Richards
Guiyou Huang
Ani Yazedjian, designee for Aondover Tarhule
Dan Mahony
Ralph Martire
Brandon Schwab
Dr. Karen Colley
Zaldwaynaka "Z" Scott
Robin Steans
Respicio Vazquez
Simón Weffer
Eric Zarnikow

Commission Members not in attendance

Senator Dale Fowler
Representative Mike Marron
Brandon Kyle
Jack Wuest

Support Team Members in attendance

Ginger Ostro
David Antonacci

ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Martha Snyder
Will Carroll
Nate Johnson
Katie Lynne Morton
Brenae Smith