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# ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

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## Meeting #7

Welcome to the April 13, 2023 meeting of the Technical Modeling 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 10:15 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  |
| 9:05 am | Action: Approval of Minutes from March 30, 2023<br>Workgroup Meeting |
| 9:10 am | Overview of Workgroup  |
| 9:15 am | Mission Team Report Out  |
| 9:40 am | Equity and other Adjustments to Instruction and Student<br>Support   |

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|          |   |
|----------|---|
| 10:20 am | Equitable Student Share Topic Team Report |
| 10:45 am | Public Comment                            |
| 10:55 am | Plan for Subsequent Meetings              |
| 11:00 am | Next Steps & Adjournment                  |

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Action: Approval of minutes from  
March 30, 2023 Workgroup  
Meeting

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## Introductions

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# Technical Modeling Workgroup Membership

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| Name            | Title   | Organization                             |
|-----------------|---|--|
| Corey Bradford  | VP for Admin & Finance                                  | Governors State University               |
| Dan Mahony      | President   | Southern Illinois University             |
| Michael Moss    | Associate Vice Chancellor                               | University of Illinois Chicago           |
| Mike Abrahamson | Senior Manager of Research and Policy                   | Partnership for College Completion       |
| Beth Ingram     | Executive Vice President and Provost                    | Northern Illinois University             |
| Ralph Martire   | Executive Director                                      | Center for Tax and Budget Accountability |
| Robin Steans    | President   | Advance Illinois                         |
| Simón Weffer    | Associate Professor                                     | Northern Illinois University             |
| Sandy Cavi      | Associate Vice President for Budgeting and Planning     | Illinois State University                |
| Kim Tran        | Chief of Staff  | Chicago State University                 |
| Andrew Rogers   | Director, Financial Analysis and State Budget Reporting | Northern Illinois University             |
| Jeanette Malafa | Director, Government Relations                          | Western Illinois University              |

# Conceptual Model: Similar to K-12 EBF

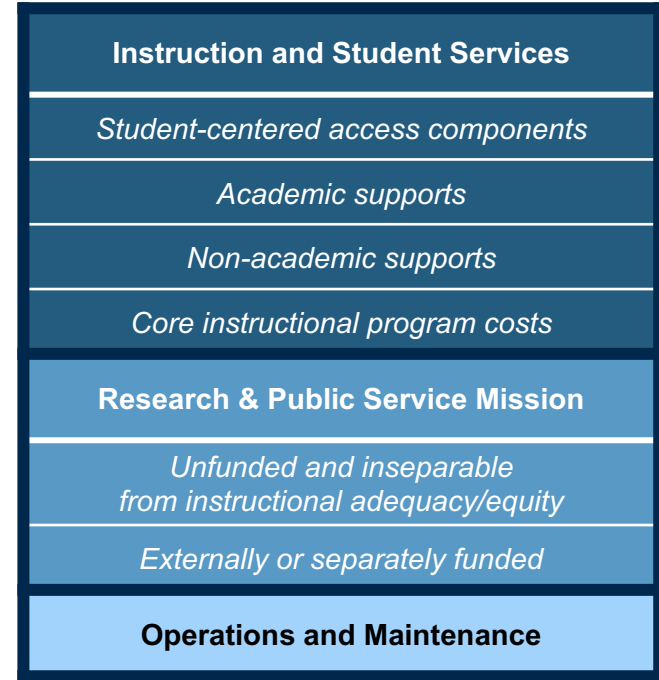
## Start with an Equity-Centered Adequacy Target

Each institution will have an Adequacy Target, primarily built from student-centered components of what it costs for students to succeed.

**Equity adjustments** will be made based on variable student need to reflect the priority of increasing more equitable access and success for historically underserved student populations.

Adequacy will also consider research, service, and artistry missions. Cost for facilities operations and maintenance included, as well.

### “University A” Adequacy Target





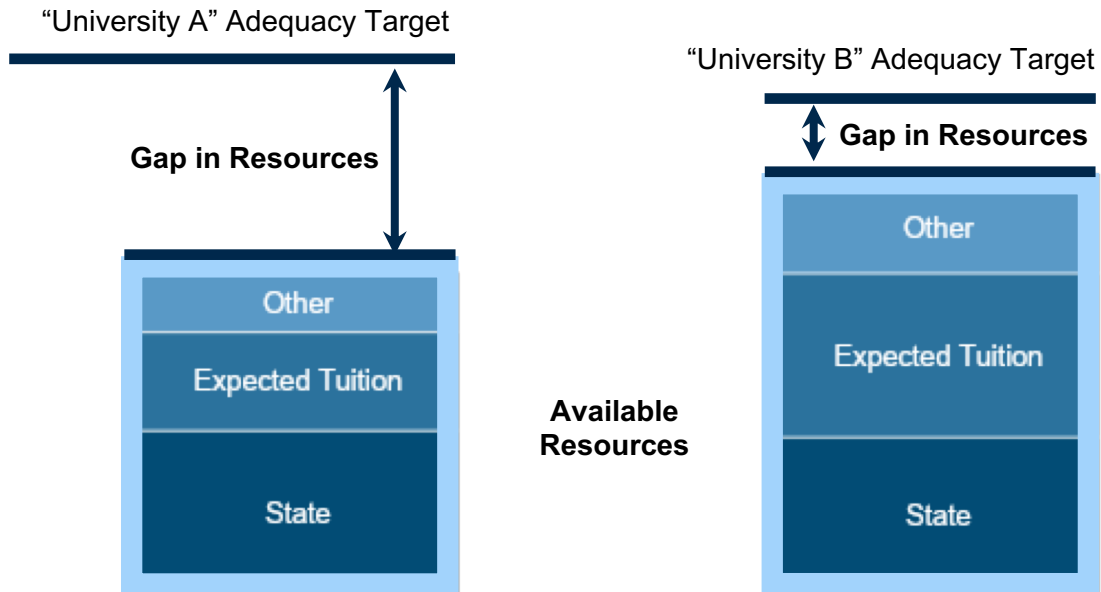
# Conceptual Model

## Identify Available Resources

Include existing state funding as base, account for “expected tuition,” and other resources, like endowment. “Expected tuition” rather than actual tuition helps address more equitable affordability.

## State Funds Fill in Gap in Resources

Model to be developed, but goal to prioritize distribution of **new** state investments to institutions with the greatest gap between equity-centered adequacy target and current available resources (state, expected tuition and other)



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## Mission Topic Team Report

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Equity and Other Adjustments to  
Instruction and Student Share

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# Key Topics for Today

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## Equity Adjustments: Tiers of Support

- Data availability
  - Grad vs Undergrad
  - Transfer students
- Revisiting the tiers based on national research

# Academic & Non-Academic Support Tiers

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| Tier      | Student                 |
|-----------|-------------------------|
| Intensive | High + Other            |
| High      | Black/African-American  |
|           | American Indian         |
|           | Tier 1 EBF              |
|           | Developmental Education |
|           | Medium + Other          |
| Medium    | Adult Learner           |
|           | Pell Recipient          |
|           | Latinx                  |
|           | 2 or more races         |
| Low       | EBF Tier 2 school       |
|           | Rural?                  |

## Equity Adjustments: Data Constraints

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|                    |   |
|--------------------|---|
| Graduate Students  | Characteristics of Pell, EBF Tier, and Developmental Education are not collected or applicable. Rural and age may not be as relevant. |
| EBF Tiers          | Only collected for freshman, but IBHE could start tracking this into later years.   |
| Transfer Students  | No EBF Tier data for transfer students.   |
| First-gen students | No data right now, but IBHE will collect it from schools starting next year.  |
| Student parents    | Only institution-level data currently, but IBHE will collect at the student level next year.  |

# Equity Adjustments: Tiers of Support

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## 1) Grad vs Undergrad

- Should the equity adjustment apply to grad students also? At the same tiers/amounts?
- Grads may not work with Pell, EBF Tier, Adult, Dev Ed, Rural

## 2) Transfer Students

- Given good outcomes, the Initial thought was that transfer students would not need an equity adjustment. Should we reconsider that given the inability to track their EBF Tier and Dev Ed status?

## 3) Revisiting the tiers based on national research

- Students with disabilities, Rural, Adult, First-Gen, Student Parents

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## Equitable Student Share

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## Public Comment

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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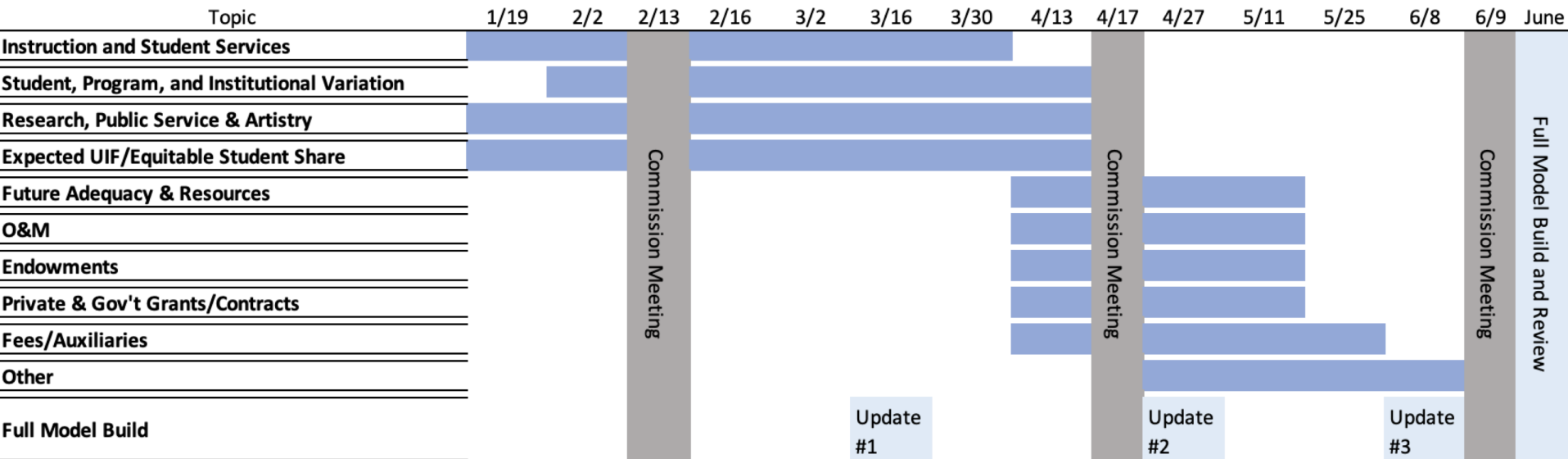
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## Next Steps

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# Work Plan



# Next Steps

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- Commission Meeting - Monday, April 17th
  - Topics: Equity adjustments for Instruction and Student Supports components; possible approach to benchmarking adjustment; initial thoughts on Mission
  - Presenters: Dan Mahony, Robin Steans, Simón Weffer
- Next Technical Workgroup Meeting
  - High-Cost program adjustments for Core Instructional Costs
  - Access tiers
  - Kick-off work on O&M and other resources

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## Adjournment

Next Workgroup Meeting: April 27, 2023

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## Appendix: Adjusting for Equity

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# Best Practice Interventions

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- In this approach, we identify research-based interventions specific to each adequacy component that improve outcomes and equity for target populations
  - Student Centered Access
  - Academic & Non-Academic Supports
  - Core Instruction Costs

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|   |                |                |                |
|---|----------------|----------------|----------------|
| <b>Tiers of Academic &amp; Non-Academic Support<br/>“Packages” and Cost/Student for Equity Adjustment</b> |                |                |                |
| <b>Intensive</b>  | <b>High</b>    | <b>Medium</b>  | <b>Low</b>     |
| <b>\$8,000</b>  | <b>\$6,000</b> | <b>\$4,000</b> | <b>\$2,000</b> |

Package costs based on best-practice interventions – the most effective had higher costs around \$5,000 per student, but interviews indicated that some students required more services than what the average cost implies.



# Academic & Non-Academic Support Tiers

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Recommended approach to identifying which students would be eligible for the equity add-on associated with each “package”:

- Base the level of service needed on the current outcomes gap in IL, creating tiers based on natural breaks in the data
- Students with multiple characteristics would be placed into the tier above the tier of their highest characteristic

| Student Characteristic | Retention Rate           |               | Possible Tier |
|------------------------|--------------------------|---------------|---------------|
|                        | Median Institutional Gap | Statewide Gap |               |
| American Indian*/White | N/A                      | -22.1%        | High          |
| African-American/White | -11.9%                   | -20.3%        | High          |
| Tier 1 EBF/Tier 4 EBF  | -11.0%                   | -14.8%        | High          |
| Dev Ed/No Dev Ed       | -10.3%                   | -17.2%        | High          |
| Age 25+*^/Under 25     | N/A                      | -12.5%        | Medium        |
| Pell/Non-Pell          | -7.3%                    | -10.4%        | Medium        |
| Latinx/White           | -6.5%                    | -8.9%         | Medium        |
| 2 or More Races*/White | N/A                      | -7.6%         | Medium        |
| Tier 2 EBF/Tier 4 EBF  | 0.6%                     | -5.4%         | Low           |
| Rural/Urban            | 2.6%                     | -2.1%         | Low or N/A?   |

\* There are too few students of this type at each institution to calculate a median university gap

^ There are only 39 first-time, full-time students age 25+

# Academic & Non-Academic Support Tiers

| 6-year Graduation Rate Gaps (National) |      |
|--|------|
| Black/African American Gap             | -20% |
| Pell Gap                               | -16% |
| Hispanic/Latino Gap                    | -9%  |
|  |      |
| Black/African American + Pell Gap      | -26% |
| Hispanic/Latino + Pell Gap             | -14% |
|  |      |
| Age 25+                                | -48% |
| Students with Children                 | -48% |

- National graduation data show similar outcomes and relative gaps among groups of students to IL retention rate data. It also indicates the added impact of multiple characteristics.
- The national data is not limited to first-time, full-time students, so adults and students with children that enroll mostly part-time have much larger gaps

# Academic & Non-Academic Support Adjustments

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## **Discussion Questions:**

- Does a tiered set of services approach make sense?
- Are the number of tiers (4) and costs right?
- Is the approach to identifying which students get which tier of service right?
- What other services or interventions should be included in the equity add-on for these components?

# Student-Centered Access: Equity Adjustments

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- The equity adjustment could match funding to programs that increase the enrollment of traditionally underrepresented students
- Bottom Line has the most rigorous evaluation and impact among those listed here, but there may be others

Best Practices in Enrolling  
Historically Marginalized Students

|                        |                     |
|------------------------|---------------------|
| Upward Bound           | \$4,900 per student |
| Bottom Line            | \$1,000 per student |
| Talent Search          | \$540 per student   |
| College Advising Corps | \$170 per student   |

## Discussion Questions:

- Should we use a tiers approach for this component?
- Are there other practices that should be part of the add-on to the access component?
- Which students should get this add-on in the formula?
- How can we apply the add-on to ensure schools enrolling lots of first-gen, low-income students are adequately funded for their work AND schools with low enrollment are incentivized to increase their outreach and recruitment?

# Core Instructional Costs: Equity Adjustments

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- Most of the adjustments to close equity gaps would be through Academic & Non-Academic Supports
- The Adequacy Work Group included a recommendation to include the costs of recruiting and retaining a more diverse faculty.
- UI-Chicago Underrepresented Faculty Recruitment Programs: **\$667 per student**
- **Discussion Questions:**
  - Are there other programs to use as benchmarks for this adjustment?
  - Are there other equity adjustments to instruction costs that should be made?

# Equity Adjustments

| Adequacy Component                           | Per Student<br>Adjusted Base | Equity Adjustments     |
|--|------------------------------|------------------------|
| Student Centered Access                      | \$1,404                      | \$1,000                |
| Academic Supports                            | \$1,404                      | \$2,000-\$8,000        |
| Non-Academic Supports                        | \$1,313                      |                        |
| Core Instruction Costs                       | \$14,019                     | \$667                  |
| Mission (Research, Public Service, Artistry) | \$1,227                      | TBD                    |
| O&M  | \$3,757                      | TBD                    |
| <b>Total</b>                                 | <b>\$23,124</b>              | <b>\$3,667-\$9,667</b> |

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## Core Instructional Costs Baseline

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# Core Instruction Costs: High-Cost Programs

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- Certain programs and courses have higher costs due to small class sizes, higher faculty salaries, or lab and other resource requirements.
- The per student Core Instruction Cost should account for some of this variation as a way to adjust for the programmatic differences across institutions.
- Without an adjustment for high-cost programs, the formula could undercount the existing Core Instruction Costs at institutions with a large share of high-cost programs.

# Core Instruction Costs: High-Cost Programs

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## **Proposed Approach**

- Calculate a university's Core Instruction Costs adequacy target using two costs: an average for high-cost programs and an average for all other programs.
- Identify the high-cost programs and the premium amount using IL Cost Study data as well as other state examples.

# Baseline Cost per student

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| Adequacy Component                           | Baseline IL Expenditures |
|--|--------------------------|
| Student Centered Access                      | \$1,073                  |
| Academic Supports                            | \$1,073                  |
| Non-Academic Supports                        | \$1,003                  |
| Core Instruction Costs                       | \$10,714                 |
| <i>High-Cost Programs</i>                    | <i>TBD</i>               |
| <i>All Other Programs</i>                    | <i>TBD</i>               |
| Mission (Research, Public Service, Artistry) | \$1,227                  |
| O&M  | \$3,757                  |
| <b>Total</b>                                 | <b>\$18,848</b>          |

# Core Instruction Costs: Example Calculation

| University A                               |       |  |
|--|-------|--|
| Total Enrollment                           | 5,000 |  |
| Student Credit Hours in High-Cost Programs | 24%   |  |
| Student Credit Hours in All Other Programs | 76%   |  |

| Adequacy Component                           | Baseline IL Expenditures | University A Adequacy Target (pre-equity adjustments)               |
|--|--------------------------|---|
| Student Centered Access                      | \$1,073                  | \$5,364,705   |
| Academic Supports                            | \$1,073                  | \$5,364,705   |
| Non-Academic Supports                        | \$1,003                  | \$5,017,384   |
| Core Instruction Costs                       | \$10,714                 |   |
| <i>High-Cost Programs (40% premium)</i>      | \$12,857                 | \$15,428,458 = 24% * 5,000 students * High-Cost Baseline \$         |
| <i>All Other Programs</i>                    | \$8,571                  | \$32,571,188 = 76% * 5,000 students * All Other Program Baseline \$ |
| Mission (Research, Public Service, Artistry) | \$1,227                  | \$6,135,591   |
| O&M  | \$3,757                  | \$18,786,046  |
| <b>Total</b>                                 | <b>\$18,848</b>          | <b>\$88,668,077</b>   |