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# ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

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Technical Modeling Workgroup Meeting #7 - April 13, 2023 (9am-11am CT)  
Meeting Notes - Updated

## **MEETING OBJECTIVES**

1. Review concepts for Mission adequacy calculation
2. Review concepts for Equitable Student Share resource calculations
3. Discuss equity-based adjustments and other adjustments across Instruction and Student Service components

## **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. Jeanette Malafa shared news that she will be retiring and that Ketra Roselieb would be the designee for Commissioner Guiyou Huang effective immediately. Martha Snyder then provided an overview of the agenda.

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

Commissioner Robin Steans made a motion to approve the minutes from the March 30, 2023 workgroup meeting. Andrew Rogers seconded the motion. Nine workgroup members were in favor, one member abstained. Workgroup members were asked to provide an introduction and share their affiliation during the approval of minutes.

## **Overview of Workgroup/Review of Work Plan**

### *Start with an Equity-Centered Adequacy Target*

Martha Snyder walked through the conceptual model, similar to the K-12 EBF was shared on the screen as a reminder. 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. 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.

### *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 distribute new state investments to institutions with the greatest gap between equity-centered adequacy target and current available resources (state, expected tuition and other).

## **Mission Topic Team Report**

Commissioner Simón Weffer shared about the work that he and Beth Ingram have done regarding mission. Will Carroll shared a spreadsheet on the screen for the workgroup to view. The spreadsheet outlines organized research for each of the institutions (expenditures from state appropriations and UIF revenue, total expenditures (\$ thousands, and by headcount), headcount and the carnegie classification for each institution. How do we deal with the hospitals? If thinking about tiers of schools, the carnegie classification isn't great,

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but can give a hand on the research component and thinking about how to increase or decrease the amount of state funding.

Commissioner Weffer shared the FY22 Revenue and Expenditure Report (Appendix D) and talked through some areas such as direct patient care, cooperative extension services, museums and galleries and library services.

Commissioner Steans asked whether averages/standard amounts would be appropriate in this area and what the overall amount was. The overall number was almost \$170 million, without the patient care component. This is what the spending is now, is this enough? Sandy Cavi echoed that average helps the institutions that are not spending a lot on research. Is the \$919 number in the spreadsheet high enough?

Mike Abrahamson asked whether the average would apply to all institutions, no matter what their Carnegie classification is? Yes. Commissioner Mahony flagged that not every institution is a research university, and that each institution has a different mission(s). Some missions are more expensive than others.

Commissioner Ralph Martire asked whether the data allows for isolating purely academic costs as opposed to the actual cost of providing the health services. It doesn't appear that patient care is a large sum. Executive Director Ostro suggested that Michael Moss may have additional information and that IBHE may have additional data to be shared. Commissioner Mahony shared that a good portion of the state appropriation goes towards salaries.

Mike Abrahamson asked where, in prioritization of a model, this would fall. Commissioner Steans asked about accountability and transparency for how dollars are spent.

### **Equity and Other Adjustments to Instruction and Student Share**

#### *Key Topics for Today*

- Equity Adjustments: tiers of support
  - Data availability
    - Grad vs. Undergrad
    - Transfer students
  - Revisiting the tiers based on national research

#### Academic and Non-Academic Support Tiers

Will Carroll reviewed the tiers and the student populations that fall within each tier.

#### Adjustments - Data constraints:

- Graduate students: characteristics of Pell, EBF tier, and development education are not collected or applicable. Rural and age may not be as relevant.
- EBF tiers: only collected for freshman, but IBHE could state 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.

#### Adjustments: Tiers of Support

- Grad vs. Undergrad

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- Should the equity adjustment apply to grade students also? Same tiers/amounts?
  - Grads may not work with Pell, EBF tier, Adult, Dev Ed, Rural
- 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?
- Revisiting the tiers based on national research
  - Students with disabilities, Rural, Adult, First-Gen, Student Parents

Commissioner Martire raised that including a portion of the federal poverty level should be included in the grad vs. undergrad area. This data may not be available at this time, but institutions could collect this data moving forward. Commissioner Mahony shared that this could become difficult based on whose income is being looked at (the graduate student or the family?). Professional schools (medical) are vastly different from graduate. Is it possible to ask graduate students, as part of their application process, whether they were MAP or Pell eligible?

The workgroup took another look at the tiers of academic and non-academic support “packages” of low (\$2,000), medium (\$4,000), high (\$6,000) and intensive (\$8,000).

Mike Abrahamson asked whether there’s any access cost in getting large transfer student populations. Which students would an equity adjustment apply to? Corey Bradform shared that the greatest challenge as GSU is in providing support to the adult student populations.

Kim Tran shared that it’s important to keep in mind when we think about transfer service, it isn’t just going from community college to university; it could be coming from not just one university, but multiple universities before arriving at one of our Illinois, Public universities, and that speaks to a need and an expenditure or cost that institutions should be responsible for which is around degree, mapping and flexibility and coursework. Tran raised his thinking about both the advisement for these students in these spaces, but also flexibility on coursework towards completion, as they may have accrued many more credit hours than the traditional student at this point.

Mike Abrahamson shared the access challenges that some rural students face, in getting to college. Commissioner Steans shared a disparity in outcomes in the research (students with disabilities). Commissioner Mahony noted the overlap between characteristics, for example: rural, first-generation. Where do we need to account for this? Likewise, Kim Tran shared preliminary thoughts: the definition of adult learners is easy to understand (largely defined as 24 or 25 and older). For adult learners, there are different ways to think about the population; for example, how do we bring back adult learners into the space and engage in enrollment patterns? There needs to be specific investments based on this population. Research on student parents overlaps a good portion of what Tran shared regarding adult learners.

### **Equitable Student Share**

Commissioner Ralph Martire gave a high-level summary of the memo that he and Corey Bradford wrote, that was circulated to the workgroup members prior to the meeting. The base amount needs to be determined and agreed upon. Should auxiliary costs (room and board, etc.) be included in this base amount or left out? Commissioner Martire shared his

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opinion that this subsidy should only be for in-state students. Corey Bradford added a few examples of institutions based on the student populations. Statewide, we would like to see the state share greater than 50 percent.

Commissioner Steans asked where MAP and Pell fit into the Equitable Student Share? Students should maximize their MAP and Pell eligibility, and we don't want students to be disincentivized. Commissioner Mahony flagged that the way described is confusing.

Kim Tran raised the point that we need to be careful around Pell grant eligibility and Pell grant recipients. If using Pell as a proxy, we need to think about how to capture this based on the lifetime limit. Sandy Cavi suggested the terminology be changed to "expected resource pool" since part of the "pool" is MAP and Pell. Commissioner Steans raised the need to talk about our overall goals and what the anchor needs to be. There is a need to know the adequacy target for all the universities, what the gap is, how the Commission feels: what percentage of higher education revenue should come from the state?

### **Public Comment**

Members of the public wishing to make public comment were given three minutes:

- Gay Miller, professor of epidemiology and preventative medicine at the UIUC. Ms. Miller shared the importance of research in higher education. Research brings millions of direct dollars to Illinois. In 2021 sponsored research at UIUC brought in 731 million dollars to Illinois. Many higher education institutions across Illinois also bring in millions of direct dollars for research. The return on investment in research in the long run is incalculable. Miller shared a two-page document that highlights examples with links to the research at UIUC. Miller explained that recent research work includes the Covid Shield program. This was a UIUC pandemic research contribution and response that protected the UIUC community. That protection was expanded to protect other Illinois education communities and citizens of Illinois and expanded protection. Across other States and the world, some Illinois notable researchers are Paul Lauter, who won the Nobel Prize for work leading to the MRI; Sally Greenberg's research on the impact of carbon capture on global warming and the environment leading to her serving on a white house council on environmental quality; Mark Dreessen worked as a student programmer at the National Center for supercomputing applications on campus collaborating with Eric Vina to co-author the Web Browser Mosaic giving a User interface for picture viewing and helped make the Internet what we use today. Ms. Miller shared that some new and exciting research will soon start, extending research on the contemporary problems of our day, including preventing viral disease, transmission of advanced imaging to study and diagnose alzheimer's disease and on and on. Research is inextricably intertwined with education. She shared that at the institutions, research inspires faculty and students alike. There are 875 students working at the research park engaging with industries in collaborative research. The mix of funding varies from school to school in deciding higher education, state support. It is critical to incorporate the different needs of both. Ms. Miller noted that the institutions and the students, and the benefit to all of the citizens of Illinois, making funding of higher education, based mainly on quantitative models, without regard to the complicated balance of funding and missions that exist and are different at different schools can easily lead to less than optimal, even undesirable, outcomes. Lastly, she shared that research has a positive impact on all students, including those who are the focus of the current discussions on how to equitably allocate state resources, which is one reason why research needs to be a part of how the State allocates resources to higher education.

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- Jennifer Delaney, member of the IBHE and faculty member at UIUC. Ms. Delaney shared different topics that came out in the discussion today, particularly mission undergraduate versus graduate education equity adjustments transfer the expected share and how universal use of vouchers in higher education. First, on mission, Ms. Delaney shared her agreement with President Mahony that the State would not be well served to follow institutions or research institutions. The State actually benefits from having differentiated institutional missions, and she thought that that should be valued in some way in terms of what the formula is. Historically, the State thought about its role as being as limiting unnecessary duplication across institutions and programs and meeting state purposes. However, within that framework, we want to be sure that institutions are still allowed to be innovative and to change. Ms. Delaney encouraged thinking about a bottom-up approach. One model, previously shared with the workgroup, was the one that's used in Finland. The institutions identified their own missions, considering both the history and their current ambitions. If the workgroup thinks about using mission first to drive, what targets should be set for different institutions and this process may become a bit more clear. There's a clear state purpose in producing research, since in advance, as a human condition enables better lives on the issue of graduate and undergraduate students. Ms. Delaney made the argument that graduate and professional education missions are both important parts of universities, and that that graduate education needs to be more clearly valued in the work that the script is doing it isn't sufficient to include research if it's only considering universities as primarily teaching undergraduates, and thinking about the funding formulas, funding the institutions as a whole, and not just the undergraduate part of institutional missions, I think, would be helpful in moving forward on the topic that was just up on equity adjustments. Ms. Delaney also raised the issue about the pervasive and universal use of vouchers in higher education. Equity adjustments are really important but we need more clarity about the groups that will be targeted. Ms. Delaney recommended using the same groups across the different elements of the formula. She hopes to see more alignment between the equity adjustments and the equity gaps that we have in the State, and ideally to move to a place where we'll be able to set state goals that show how the equity adjustment meets state purposes. She shared that she thinks that will help institutions understand more what to do with the funds, and then how these changes relate specifically to state goals and transfer students. Ms. Delaney mentioned that part of why transfer students don't actually require extra funding right now is because only those strongest students are making it through the transfer process and nationally, Illinois has very low transfer rates. If the state is able to increase transfer, it may be that those students need more supports going forward.

### **Planning for Subsequent Meetings**

HCM walked through the following next steps:

- 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

The workgroup plans to continue to meet bi-weekly until at least June.

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### **Adjournment**

All workgroup members were invited to the April 17, 2023 Commission meeting and encouraged to weigh in and offer comments during the meeting. The next workgroup meeting was scheduled for Thursday, April 27, 2023 (9am-11am CT). Commissioner Steans requested time in the workplan to talk through transparency and accountability.

#### *Workgroup Members in attendance*

Mike Abrahamson, designee for Lisa Castillo-Richmond  
Kim Tran, designee for Zaldwaynaka Scott  
Sandy Cavi, designee for Terri Kinzy  
Robin Steans  
Ralph Martire  
Simón Weffer  
Corey Bradford, designee for Cheryl Green  
Dan Mahony  
Ketra Roselieb, designee for Guiyou Huang  
Andrew Rogers

#### *Support Team Members in attendance*

Ginger Ostro  
Jerry Lazzara  
Martha Snyder  
Jimmy Clarke  
Will Carroll  
Nate Johnson  
Katie Lynne Morton  
Brenae Smith