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ILLINOIS COMMISSION ON  
EQUITABLE PUBLIC UNIVERSITY FUNDING

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## Meeting #16

Welcome to the August 17, 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 10:45 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 August 3, 2023  
Workgroup Meeting
- 9:10 am            Implementation Team Report Out  
-Formula Upkeep  
-Allocation Formula
- 10:10 am            Topic Team Updates  
-Auxiliaries  
-Other Resources
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- 10:30 am      Formula Data: Gaps & Implications
  - 10:55 am      ESS Subsidy Levels
  - 11:15 am      Public Comment
  - 11:25 am      Plan for Subsequent Meetings
  - 11:30 am      Next Steps & Adjournment
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Action: Approval of minutes from  
August 3, 2023 Workgroup  
Meeting

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Implementation Team Report Out:  
Formula Upkeep

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Implementation Team Report Out:  
Allocation Formula

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## Topic Team Updates: Auxiliaries

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## Accountability and Use of Net Price/Cost of Attendance Recommendations

- *Failing to evaluate full cost of attendance*
  - *Risks incentivizing only lowering tuition and fee costs, possibly at the expense of other costs of living and educational expenses, which are essential to a student's success.*
    - *Because institutions often subsidize beyond tuition and fees, which help students from low-income backgrounds enroll and succeed, we want to avoid any formula that would incentivize a university to move institutional aid away from funding full cost of attendance*
  - *We should consider technical but important issues connected to tuition and fees (order of pay, MAP eligibility, etc.)*

**The accountability subgroup should decide how institutions can/should be held accountable for affordability with additional resources allocated towards cost of attendance (or other expenses beyond tuition and mandatory fees).**

## Accountability and Use of Net Price/Cost of Attendance Recommendations

*Recommendation: Institutions should get an additional amount based on the affordability needs of the students they enroll, added on to the equity adjustment.*

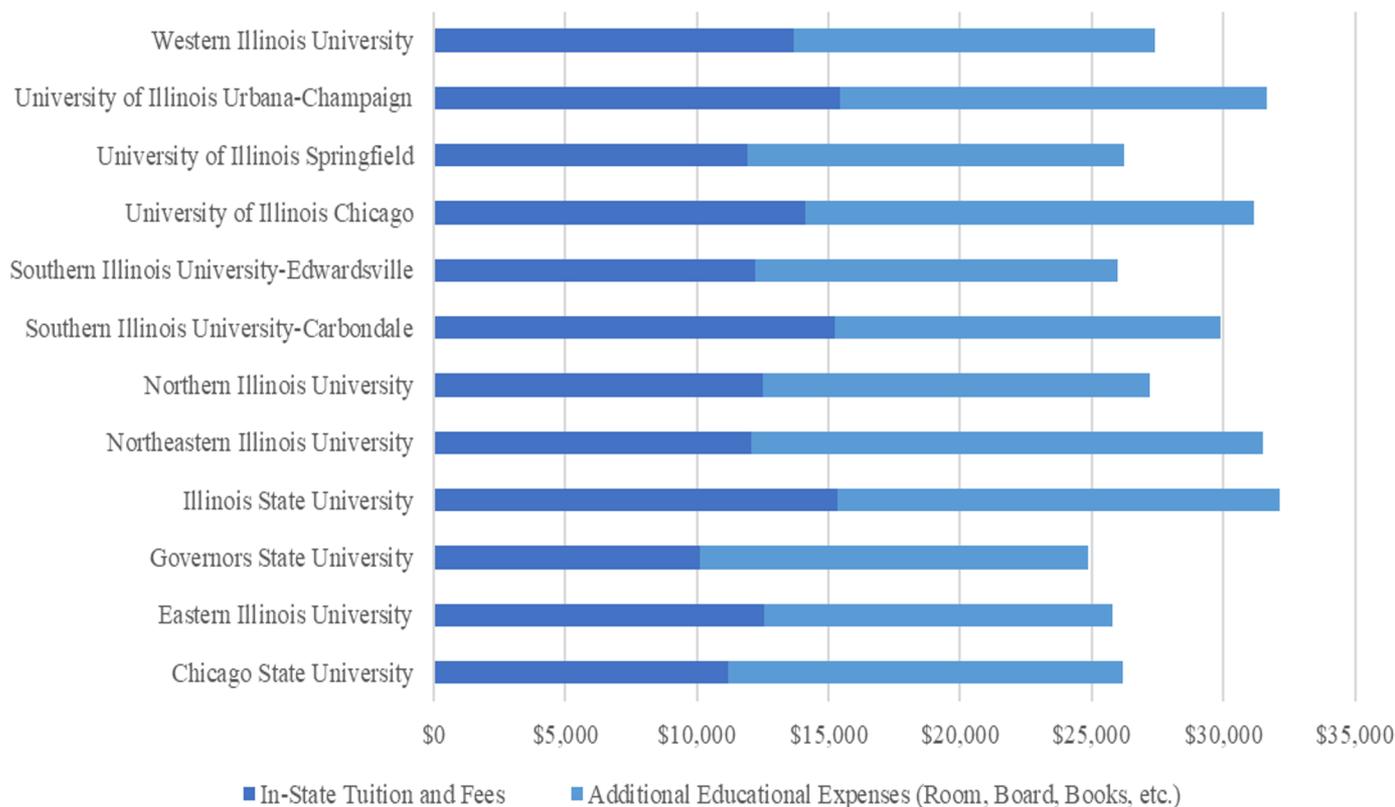
### *Pros:*

- *Concentrates on the same students that the formula identified as priority*
- *Relative to scale of enrollment*
- *Mitigates the need to define and regulate a standardized cost of attendance, net price, institutional aid, etc.*

### *Cons:*

- *Does not fully address the cost of attendance for a particular student, especially with no accountability measures (which need a standard definition of net price)*
- *Current net price data categories (by income) do not match up 1:1 with ESS*

## Total Cost of Attendance (2021-2022)



On average, 54% of a student's cost of attendance can be attributed to expenses beyond tuition and fees (of which the majority is tied to housing and dining costs).

The median expense for each of these institutions is an additional \$14,735 in financial need beyond that of general instruction (tuition and fees).

Average Cost of Attendance is \$28,337

# Application of Cost of Attendance or Net Price

Average Cost of Attendance (2021-2022)	\$28,337
Pell Eligibility (2023-2024)	- \$ 7,400
MAP Eligibility (2023-2024)	- \$ 8,400
<hr/> Total Out of Pocket Costs	

\$28,337  
- \$ 7,400  
- \$ 8,400  

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**\$12,537**

Could be further discounted by institutional aid, other awards and grants, scholarships, etc.

- *Several institutions' tuition and fees are less than the total (\$15,800) full Pell and MAP awards.*
- *Advocate for an extension of the MAP grant criteria to mimic that of Pell that can be applied to additional instructional costs outside of tuition and fees*

# Application of Cost of Attendance or Net Price

## Equitable Student Share - Financial Aid

Share of Students in ESS Categories				
100%	75%	50%	25%	0%
24%	6%	22%	18%	30%

Example: Take students who fall into the 0% category and apply a standard amount (to be determined) to apply towards other cost of attendance expenses (auxiliaries, fees, books, etc.).

	% of students with 0 ESS	Total Enrollment	Additional Cost of Attendance Subsidy	Addition to Equity Adjustment
University A	30%	10,000	\$2,500	\$7,500,000
University B	50%	3,000	\$2,500	\$3,750,000
University C	10%	15,000	\$2,500	\$3,750,000

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Topic Team Updates: Other  
Resources

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Formula Data: Gaps &  
Implications

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# Formula Data Gaps & Implications: Overview

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- Reviewed data to identify data gaps overall and inconsistencies across institutions
  - EBF Tier Data, Race/Ethnicity Data and HS GPA particular focus
- Addressing these data issues will have implications on both adequacy and ESS calculations (increasing full equity-adjusted adequacy target gap and lowering student share)

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## ESS Subsidy Levels

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# ESS Subsidy Level Discussion

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- Current ESS calculations significantly below current actual UIF; will go lower if data gaps are addressed
- Noted need to revisit subsidy levels to be more nuanced (currently using 25% increments as starting point)
- Current ESS linked to base vs. total adequacy target, which lowers total ESS amount

# ESS Subsidy Categories and Levels

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## Potential data to inform ESS Subsidy Categories and Levels

- Race/ethnicity: Disparities in levels of borrowing and default
- EBF Tier: HS zip codes and income levels
- Adults: More likely to have dependents/not have access to other family resources
- Rural: Potential overlap with EBF Tier, HS zip code and/or income
- Low-income: Affordability as barrier to access

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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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# Adjournment

Next Workgroup Meeting: August 31, 2023

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