
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Technical Modeling Workgroup Meeting #3 - February 2, 2023 (9am-11am CT)
Meeting Notes

MEETING OBJECTIVES

1. Discuss findings from Topic Teams on Instruction and Student Services to refine recommendations for calculating adequacy.
2. Discuss strategies for accounting for student, program, and institutional variation to ensure equity when calculating adequacy.

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. Martha Snyder provided an overview of the agenda.

Action: Approval of minutes from January 19, 2023 Workgroup Meeting

Commissioner Martire made a motion to approve the minutes from the January 19, 2023 workgroup meeting. Jeanette Malafa seconded the motion. All workgroup members present were in favor. 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 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. Will also reflect different research, service, and artistry mission. 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 affordability.

State Funds fill in Gap in Resources: model to be developed, but goal to distribute new resources equitably, with more going to institutions furthest from Adequacy Target.

Will Carroll shared a chart with the Topic Teams, as follows:

- Student Centered-Access: Sandy Cavi and Michael Moss
- Academic Supports: Robin Steans and Kim Tran
- Non-Academic Supports: Mike Abrahamson and Andrew Rogers
- Core Instructional Program Costs: Dan Mahony and Jeanette Malafa
- Research, Public Service & Artistry: Beth Ingram and Simón Weffer
- Equitable Student Share: Corey Bradford and Ralph Martire

The work plan timeline was re-shared on screen showing which areas would be targeted during each of the upcoming workgroup meetings. As outlined, the workgroup meetings will go through the end of April 2023 with additional meetings scheduled as needed.

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Instruction and Student Services: Topic Team Report Outs & Discussion

Instruction and Student Services: Key Questions

- What is the benchmark for this component? What is the desired outcome?
- How many/what level of resources are required to achieve the benchmark/outcome?
- What do those resources cost?
- What adjustments need to be made for student, program, and institutional variation?

Student-Centered Access

Michael Moss and Sandy Cavi shared a spreadsheet on the screen, including headcount (2021 but will be refreshed with 2022), new students, transfers and Pell students. The team built sample ratios by pulling in expenses for admissions, financial aid, student services, public relations for each university. For ratios, total headcount makes the most sense. Using the cost and headcount, a cost per headcount ratio was determined for each of the four categories. Sandy Cavi shared that the team found a survey that outlines an example sum (\$500/student) of the cost to recruit new students. A final adequate funding was found by taking equitable baseline funding and any adjustments.

Missing or Vague Data included:

- Offices or programs targeting underserved populations
- Targeted information to low income students
- Mentorship
- Financial Literacy
- Other identifiable Direct Outreach/Marketing Expense
- Student Level Finance Measures
- Individual Student Access Strategies

Additional Data Considerations included:

- Costs cannot be segregated by Academic Level (undergraduate, graduate, professional)
- Costs cannot be segregated by those that benefit underrepresented students

Beth Ingram noted that it looks like the data used was what was being spent, not necessarily what is needed. Should there be an external analysis of what is costs to do something? That's exactly what Moss and Cavi tried to do to find out what the adequate level of funding is. Commissioner Weffer noted there's only a \$38 dollar difference between the lowest and highest cost institutions. Commissioner Martire shared that data sets are likely needed (and will cut across all areas), which universities are well-funded and what they're spending on programs, best practices for programs. We need to be equity-outcome driven in the final adequacy target. Mike Abrahamson shared that the high school tier data could be very interesting to use, rather than Pell data. Commissioner Steans shared that oftentimes last-dollar grants can make a difference in recruiting students.

Michael Moss raised that costs for housing and dining (auxiliaries) operations break even, under state regulations.

Academic Supports

Commissioner Steans and Kim Tran came up with goals and benchmarks to accomplish and what evidence-based practices that universities should be supported to use and how to then

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adjust them based on student characteristics. Steans and Tran walked through their recommendations, including:

- Agree on overarching goals and benchmarks.
- Identify a suite of evidence-based practices and academic support services necessary in supporting students from a variety of backgrounds to meet the aforementioned overarching goal.
- Calculate the base costs for services.
- Identify per student/per credit costs and base program costs.
- Calculate necessary adjustments for targeted student groups, programs, and institutional variation (i.e., economies of scale, typology of student population being served).
- Resources needed to innovate for future state.

Should the graduation rate be at/above the national level? What baseline data is there already? There were a number of benchmark metrics identified that Steans and Tran walked through.

The following questions were raised for the workgroup: There will be necessary overlap between components - how do we separate out appropriately? How do we price out, knowing that some services will be bundled and not all institutions will use every service/bundle? What level of resources are needed to meet the benchmark(s)? What are the components that should be included?

Michael Moss shared that he and Sandy Cavi struggled around the same ideas. Commissioner Martire talked through funding the “typical university” and how to get to a base adequacy amount and then lay out how other universities differ from the “typical university” which shows an adjustment up in the formula based on the populations serving, etc. We need to know what we’re adjusting from in order to get the calculations right.

Non-Academic Supports

Mike Abrahamson and Andrew Rogers shared that they have talked through many of the key questions. The team identified pieces of the framework that are hard to track down, and pieces to consider. The main findings and reflections discussed include the fact that many supports are most effective in tandem. It’s very hard to look for one component and what its effect would be. Student Services (IPEDS expenditures) shows a very wide range, showing many of the enrollment differences. The IBHE data shared is better to use because it’s more granular. In terms of a benchmark, it would be best to revisit after making an adjustment for school size. Completion or Emergency Grants hold a lot of research as to how effective they can be.

Mike Abrahamson asked how does monetary-related supports relate to the student share model of affordability? Another question raised included is there a process to name and identify every area that hits the formula?

Core Instructional Program Costs

Jeanette Malafa shared that there are 45 subject matters in the IBHE cost study. What potential data sources should be included? Malafa suggested either picking a national study or what IBHE has already narrowed down to move forward. There was an access issue with the Delaware study. President Mahoney raised “how complicated do we want this process to be?” Nate Johnson shared a link in the chat to his analysis from other state’s cost studies.

Research, Public Service & Artistry

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Beth Ingram shared that this piece is impacted on different missions at each institution. Individual missions are critical to both institutions and the students across the state. Artistry is another whole category. Simón Weffer shared that their team has struggled with the question of where can this data be found?

Equitable Student Share

Commissioner Martire shared a number of factors such as Pell grant recipients, income, student's K-12 experience (tier), MAP grant recipients, traditionally underrepresented students, student debt. The team spoke about how the formulaic approach to student share should be very simple and easy to explain. At two institutions, the student share is over 75%; three schools' student share was below 50%; the remaining institutions had the student share between 50-75%.

Cross-Cutting Issues

Will Carroll summarized the "issues" that were raised during discussions.

- Model/Ideal student population that definition of "adequacy" is being designed around
- Current spending is what data is available
- Trouble with detail of/within data sources
- What are the right categories for student variation, institution variation (mission, size)?
- When adjusting for student need, should it always be linear?

Public Comment

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

- Jennifer Delaney, member of the IBHE and faculty member at UIUC. Ms. Delaney raised her concern that equity is not present in the components spoken about. Ms. Delaney encouraged the workgroup to make time and space to discuss equity weights and measures. A piecemeal approach falls short for what equity means to the state of Illinois. There needs to be time and space to thoroughly discuss equity measures and weights. The challenge of finding data came up and Ms. Delaney cautioned against looking for data beyond the required reporting. Ms. Delaney shared that the "bundle" is very important, but it's important to flag that many wraparound services can be very expensive.

Planning for Subsequent Meetings

The agenda for the February 13, 2023 Commission meeting was shared with the workgroup members, noting that the majority of the time during this meeting is set aside for a report-out from the Technical Modeling Workgroup. Workgroup members were asked to volunteer to present to the Commission.

February 16, 2023 Meeting

- Instruction and Student Services teams refine their work based on today's discussion, report out on recommendations - including work on student, program and institutional variation to ensure equity.
- Research, Public Service & Artistry and Equitable Student Share report on their initial findings, recommendations, questions.
- Assign topic teams for O&M, Fees, Endowments, and Private & Gov't Grants/Contracts.

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Adjournment

The next workgroup meeting was scheduled for Thursday, February 16, 2023 (9am-11am CT). Workgroup members interested in presenting to the full Commission at the February 13, 2023 meeting were asked to follow up with HCM or IBHE representatives.

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
Beth Ingram, designee for Lisa Freeman
Dan Mahony
Michael Moss, designee for Javier Reyes
Jeanette Malafa, designee for Guiyou Huang
Andrew Rogers

Commission Members in attendance

Danielle Hogue, designee for Leader Lightford

Support Team Members in attendance

Ginger Ostro
Jaimee Ray
Martha Snyder
Jimmy Clarke
Will Carroll
Nate Johnson
Katie Lynne Morton
Brenae Smith