
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Meeting #6

Welcome to the March 30, 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 16, 2023 Workgroup Meeting
9:10 am	Overview of Workgroup
9:15 am	Equity and Other Adjustments to Instruction and Student Share
9:45 am	Equitable Student Share Topic Team Report

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10:20 am	Mission 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 16, 2023 Workgroup
Meeting

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Introductions

Technical Modeling Workgroup Membership

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

Instruction and Student Services
<i>Student-centered access components</i>
<i>Academic supports</i>
<i>Non-academic supports</i>
<i>Core instructional program costs</i>
Research & Public Service Mission
<i>Unfunded and inseparable from instructional adequacy/equity</i>
<i>Externally or separately funded</i>
Operations and Maintenance

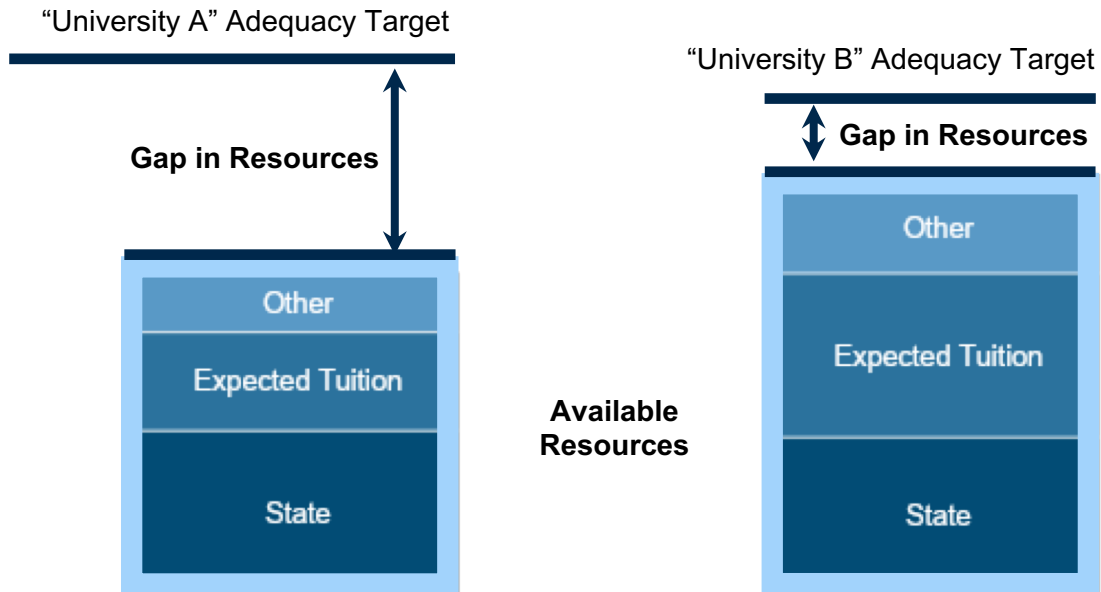
Conceptual Model

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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Equitable Student Share
Topic Team Report

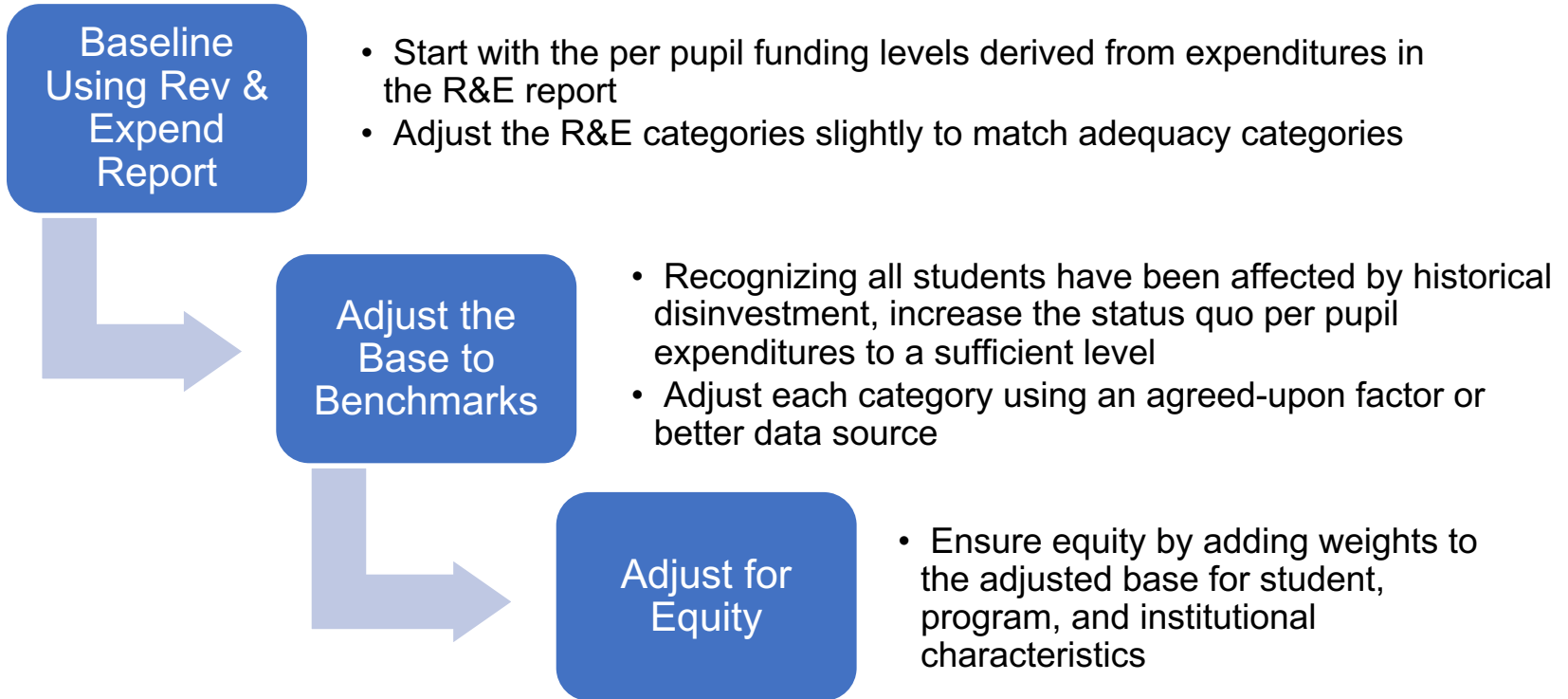
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Equity and Other Adjustments to
Instruction and Student Share

Key Topics for Today

- 1) Equity Adjustments: Tiers of Support
- 2) Core Instructional Costs

Proposed Approach to Calculating Adequacy Targets



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Adjusting for Equity

Best Practice Interventions

- 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

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

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

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 Tiers

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?

- Transfer students have better retention rates than first-time, full-time students, including by subgroup (e.g., Pell transfer students have better retention rates than FTFT Pell students)
- Other populations:
 - Students with children
 - Students with disabilities
- Are there ways we can identify which tier they could be assigned to?

Academic & Non-Academic Support Adjustments

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

- 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

- 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 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
Total	\$23,124	\$3,667-\$9,667

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Core Instructional Costs Baseline

Core Instruction Costs: High-Cost Programs

- 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

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

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
Total	\$18,848

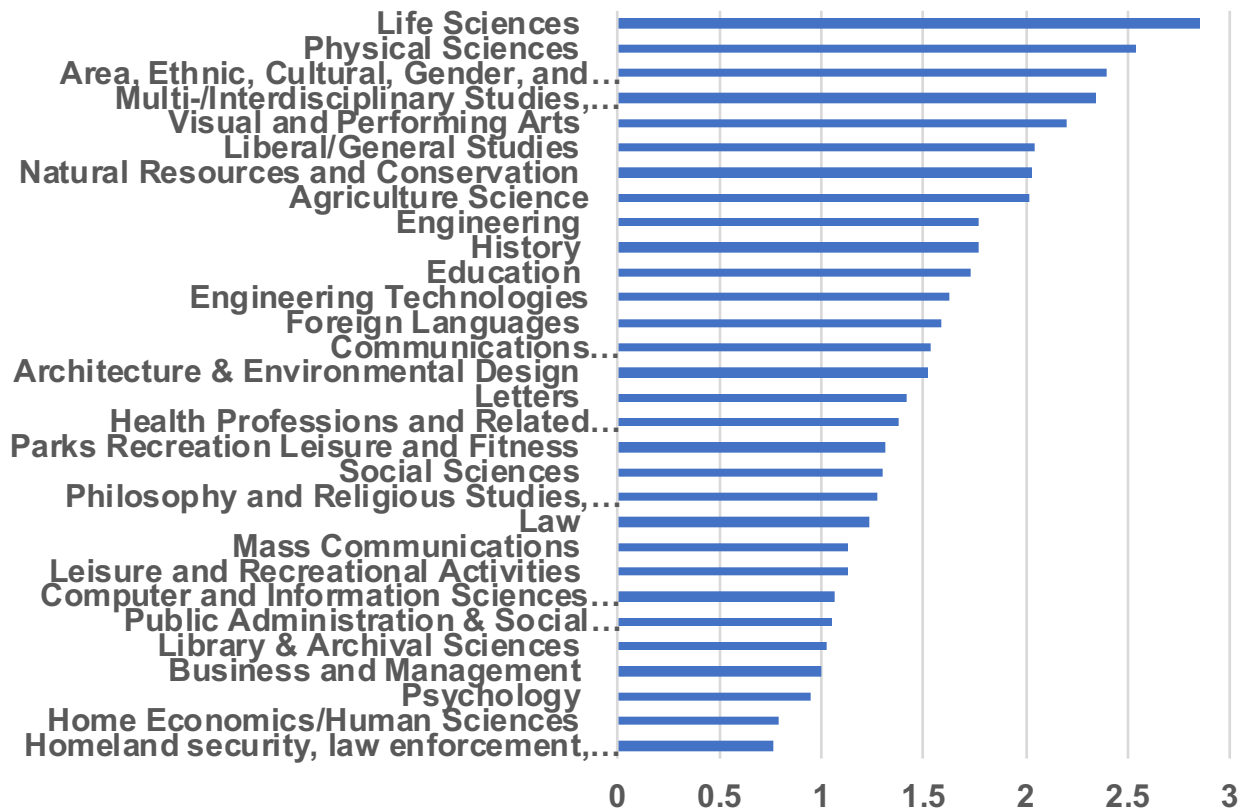
Core Instruction Costs: Example Calculation

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
Total	\$18,848	\$88,668,077

Florida 2019 Cost Study Relative Weights

Upper Undergraduate Weight Relative to Business

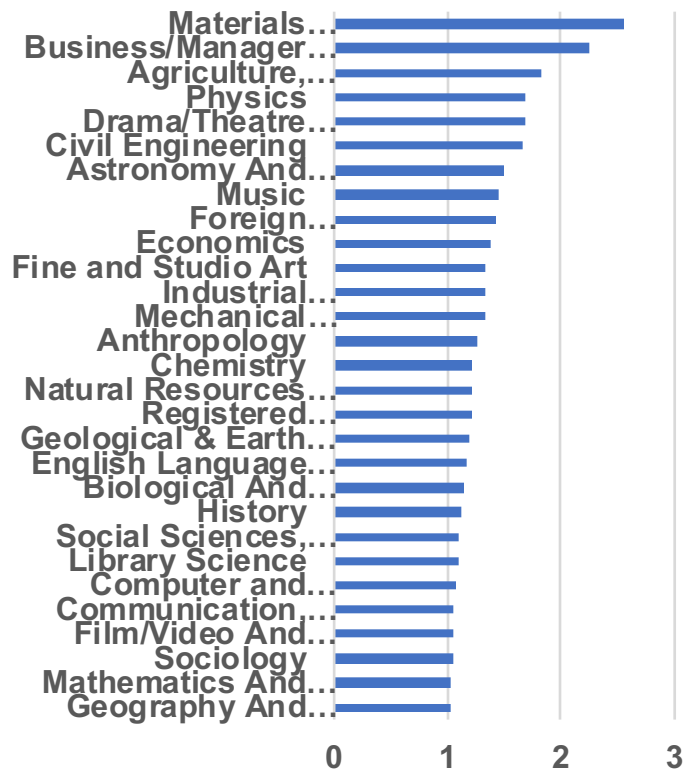


Minnesota State 2020 Cost Study Relative Weights

Upper Undergraduate Weight
Relative to Business

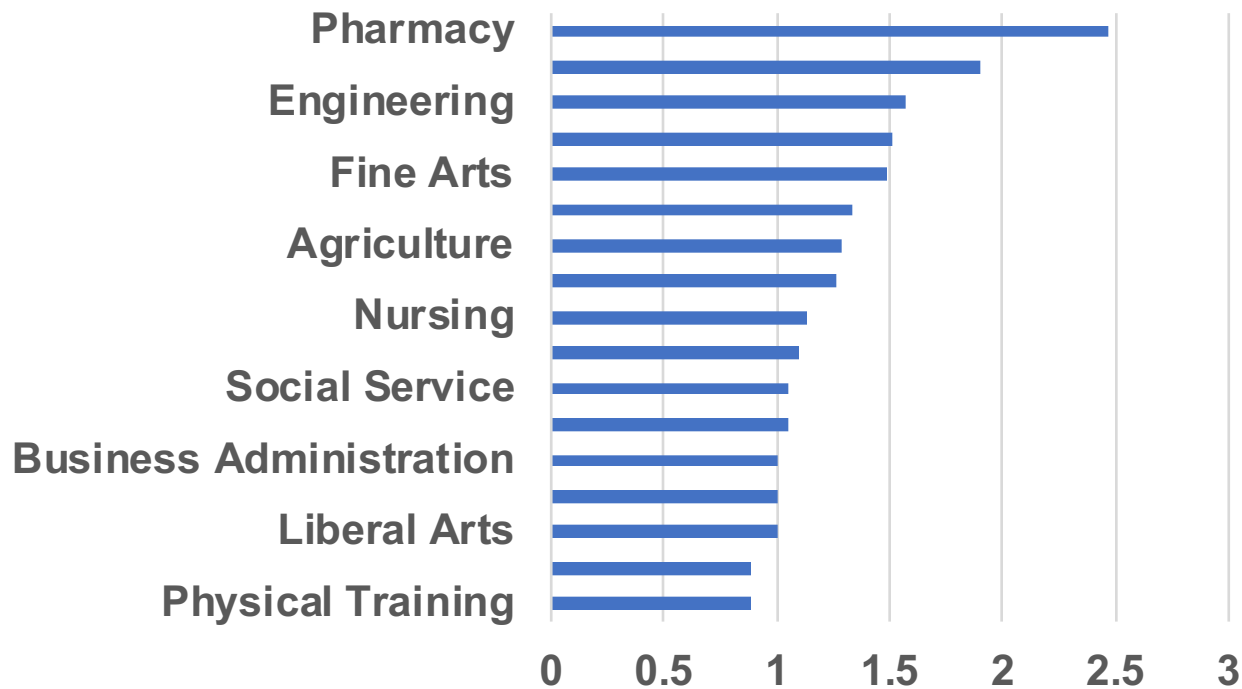


Upper Undergraduate Weight
Relative to Business

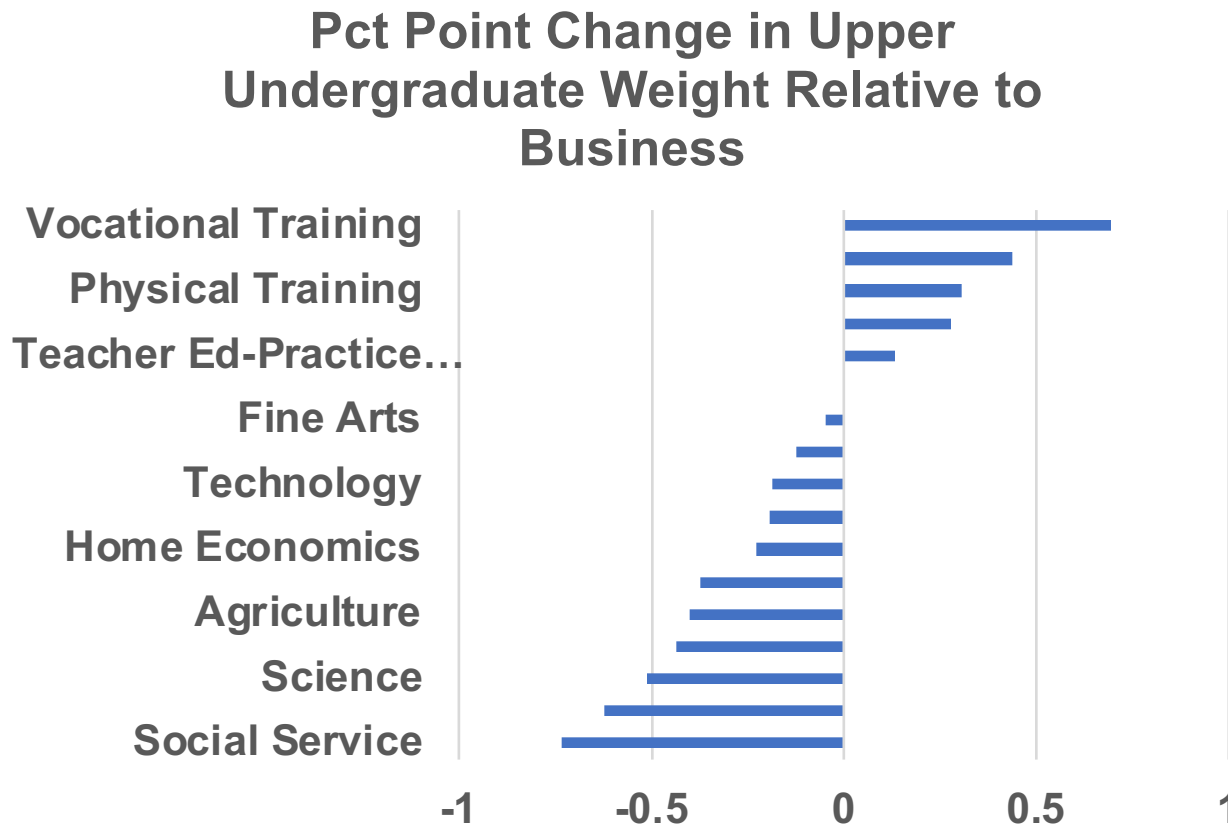


Texas 2022 Cost Study Relative Weights

Upper Undergraduate Weight Relative to Business



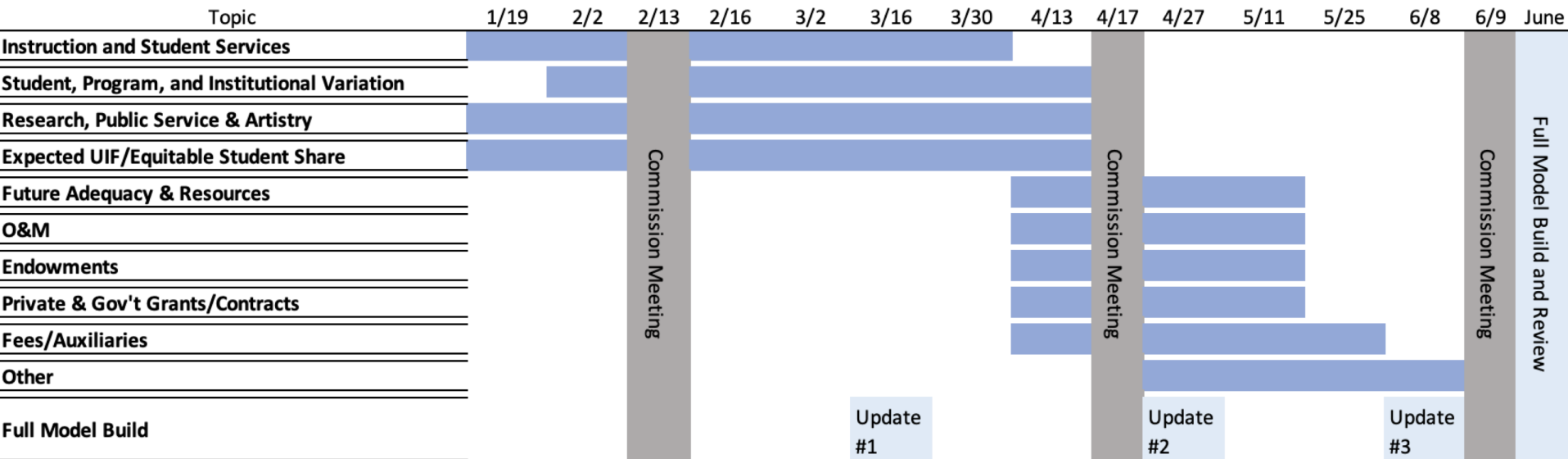
Change in Relative Weights Texas Cost Study 2002-22



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Review of Work Plan

Work Plan



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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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Next Steps

Next Steps

- Next Meeting:
 - Continue discussing Instruction and Student Services - baseline calculations, benchmark adjustments, other necessary adjustments, future of adequacy calculations
 - Please review the deck sent after the 3/16 meeting and come prepared to discuss your recommendations or alternatives to the proposed approaches in that deck
 - Refine ESS and Mission proposals
 - Kick off O&M and other revenue topics

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Adjournment

Next Workgroup Meeting: April 13, 2023
