
ILLINOIS COMMISSION ON EQUITABLE PUBLIC UNIVERSITY FUNDING

Technical Modeling Workgroup Meeting #18 - October 26, 2023 (9am-11:30am CT)
Meeting Notes

MEETING OBJECTIVES

1. Share commission reflections with workgroup
2. Consider the formula framework for alignment with Commission reflections
3. Plan to finalize recommendations

Welcome & Agenda Overview

Executive Director Ginger Ostro opened the meeting with a general welcome and announcements regarding Open Meetings Act 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 August 31, 2023 Workgroup Meeting

Beth Ingram made a motion to approve the minutes from the August 31, 2023 workgroup meeting. Commissioner Dan Mahony seconded the motion. Seven workgroup members were present and in favor. Two workgroup members abstained; one workgroup member did not vote.

October 20, 2023 Commission Meeting Reflections

Martha Snyder shared an overview of the October 2023 Commission meeting: the meeting was anchored around understanding what the current legal landscape is, in the context of the recent affirmative action supreme court decision that was decided in June and to help inform and provide some of that context and understanding the legal landscape. Three panelists joined: Scott Palmer and Zakiya Ellis, both from EducationCounsel, and OiYan Poon from College Admissions Future Co-Laborative.

Scott Palmer provided information around the legal landscape and the potential implications of the affirmative action decision. In terms of various levels of institutional and state policy, Palmer talked about there being levels of gray around the legal landscape and the implications of the Supreme Court decision on a variety of state policies that may include reference or inclusion of race, did reference compelling state interest, did reference compelling state interest, etc. Zakiya Ellis and OiYan Poon both provided a bit more about actions that states can take to advance equity in the context of the Supreme Court Decision.

The group heard reflections from Commissioner members and workgroup members who were able to attend the October 20, 2023 Commission meeting. Reflections presented included:

- ☐ The state is a different actor than an institution. Individual institutions cannot take into account inequities, it is still unclear if a state can.
- ☐ The state has a rational reason to utilize race, based on past and data-proven inequity. Funding is not being taken away from student groups, but rather a student group is getting the resources they need for student success.
- ☐ Conclusion that the Commission has the authority to carry out the task and go down the same path, taking race into account.

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- ❑ Each institution has had the same funding in the same 40-50 years. The argument can be made that funding all the same is not acceptable given the inequities.
- ❑ There is anticipation of being challenged.
- ❑ The workgroup should have kept working while the larger conversation was happening in the Commission meeting.
- ❑ California's past decision did not impact state funding.
- ❑ Under this decision, K-12 and every other OBF state would be vulnerable.
- ❑ There was a request for more clear language on what the charge of the Technical Modeling Workgroup is going forward.
- ❑ More support requested from the Commission to follow the path that the Workgroup was already on. Additional clarity was needed, or more consideration of other options while being conscious of the timeline.

Review of Framework/Model

Martha Snyder provided a grounding for the workgroup before sharing the draft model on screen.

For each part of the formula framework, the workgroup could consider:

- ❑ Does this address the legislative charge and Illinois' strategic plan while accounting for the current legal landscape? Are there ways to improve on that?
- ❑ Are there ways to strengthen the basis for each of the equity adjustments in the formula, such as:
 - Additional data and/or analysis to inform adjustments
 - Refining adjustments using conditional characteristics (e.g., EBF Tier *and* low-income)
- ❑ Including additional student populations

In reviewing the model, keep in mind:

- ❑ The Commission's charge and the principles of IBHE's Strategic Plan
- ❑ Opportunities to strengthen the model in light of the Commission meeting
- ❑ This is still a draft

Commission's Charge and IBHE Strategic Plan

Equitable, Adequate and Stable funding for universities

- ❑ Equity-centered adequacy targets: sets a goal for the state's support of the university sector
- ❑ Full funding of adequacy will phase in over 10-15 years
- ❑ Hold harmless

Opportunities to Strengthen the Model

Are there ways to strengthen the basis for each of the equity adjustments in the formula, such as:

- ❑ Additional data and/or analysis to inform adjustments
- ❑ Including additional student populations
- ❑ Refining adjustments using combined or conditional characteristics (e.g., EBF Tier *and* low-income)

Student Populations to Incorporate into Equity Adjustments

Original list from Adequacy Workgroup included: low-income, race/ethnicity, academic preparation level, K-12 district resources (EBF tier), working adult, rurality.

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Additional populations could include:

- ☐ First-generation: student-level data may be available
- ☐ Students with disabilities: student-level data not available
- ☐ Undocumented students: student-level data not available
- ☐ Students who are parenting: student-level data may be available

Items still to be discussed or finalized include:

- ☐ ESS subsidy levels
- ☐ EBF data imputation
- ☐ Benchmark adjustment
- ☐ Auxiliaries: non-T&F support
- ☐ Size of the Med/Doc premium
- ☐ Update the Med/Doc enrollment shares
- ☐ Other Resources: endowment %
- ☐ Others?

Snyder also reminded the workgroup members the importance of reviewing the draft model from a statewide view (rather than individual institutions). Will Carroll shared the model spreadsheet on screen and walked through each section with the workgroup members.

During the walk through and afterwards, the following questions and discussion topics were raised:

Adequacy Target

- ☐ There is a need to argue that more money means better outcomes (for particular groups), but the model doesn't speak to this point clearly.
 - ☐ There is a need to think about reduced state subsidies and how to make that argument.
- ☐ Adequacy target based on race, income, etc. Are these based on data?
 - ☐ This should be on the list to come up with a data-based argument.
- ☐ There is a need to document what the expected outcomes are to be from the funding.
- ☐ New funding will not all be in one year. The primary focus is to be accurate and provide adequate funding. Legislators should find a way to meet the obligation over time.
- ☐ There is a need to better understand the concentration adjustment.
- ☐ There may be a new/additional topic team needed to work on the narrative/presentation. A strong narrative will be necessary for buy-in come legislature and the public.
- ☐ Consideration needed around the "stability" component. Are the numbers presented in a trajectory that is sustainable?
- ☐ Allocation charge: how to navigate different funding scenarios and ensure stability and planning, not just from the state, but from the institutional perspective?
- ☐ Literature Review: resources were provided from HCM/IBH in the beginning of the Commission that may help make the case for why adequacy and equity in funding actually does matter.
- ☐ There is a need to consider inflation (for example, \$1.3 billion won't go as far in 15 years). The Allocation Formula implementation topic team would discuss this.
- ☐ There is a need to consider "disruptions," such as: severe drop in state funding, flagship increases enrollment significantly, etc.

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Equity Adjustments

- ☐ There was concern raised about including data on undocumented students. There is no student-level data for this area and it cannot be built in anytime soon.
- ☐ Consideration was raised regarding separating black males and black females (access gaps).
- ☐ There is a need to further consider the concentration factor.
- ☐ Considerations of policy interventions for student parents can be expensive, similar to spending on physical childcare infrastructures.
- ☐ Is there a desire to look into not only low-income students, but also if students come from low-income communities or low college-going communities?
 - Other factors, in order to figure out if there are strong correlations? Consider educational history for graduate students, students from rural areas.
- ☐ The question was raised about whether headcount or FTE is more appropriate.
- ☐ Faculty Diversity incentive: if all institutions receive the same amount for same factor; falls under accountability for use of funds; could possibly improve funding for DFI initiative, postdoctoral programs.
- ☐ Was there a final decision on deferred maintenance? It is not in the model, O&M includes an amount for minor remodeling.

Equitable Student Share

- ☐ It may be beneficial to keep the EBF factor in to help make the case for why there are certain adjustments. There is not currently good complete data for which school code or EBF tier, but other school characteristics could be reviewed in addition to EBF tier.

A number of workgroup members noted that they needed time to review and digest before coming back with comments or questions.

Plan for Subsequent Meetings

The spreadsheet(s) shared during the meeting would be shared with the Technical Modeling Workgroup members. HCM requested that the workgroup provide feedback prior to the November 9, 2023 meeting. It was shared that the anticipation is that the Commission will meet three or four times, through February/March 2024, and that the Workgroup will continue to meet bi-weekly through February 2024.

Will Carroll shared that the Implementation Topic Teams (Accountability & Transparency, Allocation Formula, Formula Upkeep, Future Adequacy) should start to meet again.

Public Comment

There were no members of the public wishing to make public comment.

Adjournment

The next workgroup meeting was scheduled for Thursday, November 9, 2023 (9am-11:30am CT).

Workgroup Members in attendance

Mike Abrahamson, designee for Lisa Castillo-Richmond
Kim Tran, designee for Zaldwaynaka Scott
Sandy Cavi, designee for Aondover Tarhule
Robin Steans

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Ralph Martire
Simón Weffer
Corey Bradford, designee for Cheryl Green
Beth Ingram, designee for Lisa Freeman
Dan Mahony
Ketra Roselieb, designee for Guiyou Huang

Support Team Members in attendance

Ginger Ostro
Jaimee Ray
Jerry Lazzara
Emily Chase
Will Carroll
Martha Snyder
Nate Johnson
Katie Lynne Morton
Brenae Smith