



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB B

November 20, 2020

Strategic Plan Affordability Priority

During the October 2020 meeting, the Board approved four strategic priorities and asked the committees to discuss definitions, goals, and strategies around those priorities. The Finance and Facilities Committee was asked to discuss the Board priority of Affordability, which includes the following information:

Definition

Cost of attendance should not be a barrier to accessing or completing a certificate or degree.

Affordability is the ability of a Utah student to cover the cost of attendance at a USHE institution utilizing a combination of financial aid and other resources.

What can the Board do?

- Keep tuition and fees low
- Implement systemwide efficiencies
- Refocus existing, and grow new, financial aid resources
- Leverage statewide resources

Potential Goals

- Develop an expanded standard of affordability by (date).
- Ensure institutional cost of attendance remains within the standard of affordability year over year.

Potential Strategies

- Revise or repeal policies that inhibit unnecessary growth in tuition and fees.
- Develop standardized financial data and definitions including cost of attendance.
- Identify and remove affordability barriers for Utah students.
- Provide equitable financial aid opportunities by prioritizing resources to need-based programs.
- Identify and implement shared services that will have the greatest impact on increasing institutional efficiency.

Additionally, in early 2020 the former Board of Regents created a task force to define affordability ahead of the 2020-2021 tuition-setting process. This definition and the work of the task force could be a starting

point for the committee in discussing affordability as a strategic priority. Materials from the task force are included in the attachments.

Commissioner's Recommendation

This is a discussion item only; no action is required.

Attachments:



UTAH SYSTEM OF
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Utah System of Higher Education Equity Lens Framework

An *equity lens framework* is a tool comprised of shared beliefs, common definitions, and critical questions through which an organization commits to continually evaluating any existing or new strategy, policy, or initiative. The beliefs and definitions ensure the organization begins from a common understanding and sets the groundwork for clear accountability, allowing all efforts to be focused on closing opportunity gaps for marginalized populations. Underlying this framework is how data is collected and synthesized to impact policy and systemic change.

USHE Equity Lens Framework

To guide the Utah Board of Higher Education in their implementation of strategies and initiatives, policymaking, and more, the Board must ask itself the following questions that make up the Equity Lens. These questions will guide state education leaders through the decision-making process to ultimately take action in essential areas.

Equity Lens Questions

- Does the decision being made maintain, sustain, or intervene in existing educational disparities, or does it produce other unintended consequences?
 - What is the impact of this decision on eliminating attainment gaps?
- How have campus and community stakeholders, who may be affected by this potential course of action, been purposefully involved?
- How do you identify and measure the success of a potential policy, initiative, resource allocation, strategy, etc.?
 - Does that success measure properly evaluate the success relative to underrepresented populations?
- How does the policy, initiative, resource allocation, or strategy, etc. advance opportunities for historically underserved students and communities?
- What are the barriers to more equitable outcomes?
 - What resources exist that could be leveraged to challenge these barriers? These might include political, emotional, financial, programmatic, or managerial resources.
- What does the current data tell us about representation among students, staff, and faculty groups?
 - Where do current data collection methodologies fail to measure the extent of underrepresentation?
 - How will the policy, initiative, resource allocation, or strategy impact underrepresented groups?
- How will you modify or enhance your strategies to ensure each learner's and community's individual higher education and career goals are met?

- What is your commitment to, and understanding of, equity, specific to the policy, initiative, resource allocation, or strategy?
 - What resources are you allocating for training that includes stakeholder instruction?
- Does your data infrastructure support forward-thinking measures of representation?
- What data sources will you use to understand the impacts of race, ethnicity, gender, and native language?
 - Does the data include qualitative data gathered from impacted communities?
- What is your decision after looking at this course of action through the Equity Lens?
 - Has your approach or decision changed after looking at this topic through the Equity Lens?
 - What action will be taken, if any?

The Board recognizes the following set of shared beliefs:

We believe that every student has the ability to learn, and that the System has an ethical and moral responsibility to ensure optimal learning and workplace environments exist on USHE campuses for all students, faculty, and staff.

We believe students who are academically underprepared for college are being failed by the educational system. To remedy this reality, the System and its 16 colleges and universities must meet students *where they are* and work to build on and improve each student’s educational outcomes.

We believe that speaking a language other than English is an asset for participating in a growing global economy and workforce. We celebrate those qualities and are committed to culturally-responsive support and academic pathways for students.

We believe we must be inclusive in all facets, including accessibility services, by providing appropriate accommodations through the Americans with Disabilities Act, and celebrating diverse populations, including those with disabilities.

We believe that ending disparities and gaps in college attainment begins in the delivery and quality of college and career readiness programs, initiatives, and policies. These statewide efforts are best coordinated through regional K-16 alliances.

We believe that underrepresented communities have unique and important solutions for improving educational and career outcomes. Our work will only be successful as we sincerely partner with each of Utah’s 16 public colleges and universities and their local communities.

We believe every learner should understand the broad array of college and career pathways available at Utah colleges and universities, the importance of advanced course-taking while still in high school (e.g. Concurrent Enrollment, Advanced Placement, and International Baccalaureate coursework), and other career-focused opportunities such as apprenticeships.

We believe our institutions will provide students with the best educational outcomes when students, faculty, and staff reflect the growing diversity in Utah and across the nation.

We believe each student’s history and culture is a source of pride that we should embrace and celebrate. Our ability as an educational System to meet the needs of an increasingly diverse population is critical to achieving state attainment and other strategic goals.

We believe that all students should graduate from college having better cultural awareness and a greater understanding of why diversity, equity, and inclusion are important values that will help them be better workforce participants, community members, and global citizens.

Finally, we believe in the importance of instruction, processes, policies, goals, and strategies that adapt to the changing global society. An equitable education system requires we provide faculty and staff with the tools and support necessary to meet the needs of each student.

Shared Definitions

The Board recognizes the following definitions of common equity, diversity, and inclusion terms:

1. **Anti-racism:** We define *anti-racism* in accordance with the Alberta Civil Liberties Research Centre:

Anti-racism is the active process of identifying and eliminating racism by changing systems, organizational structures, policies and practices, and attitudes, so that power is redistributed and shared equitably.ⁱ

2. **Attainment Gap:** We define the *attainment gap* as:

The lack of access that underserved groups face, due to systemic barriers, when seeking educational advancement or gainful employment.

This framing shifts the attention from the current emphasis on individuals to more fundamental questions about social, systemic, and structural access. In the State of Utah, students of color are disproportionately impacted by lower rates of enrollment and completion.ⁱⁱ The same is true when socioeconomic status is factored in for rural and urban students.

3. **Culturally Responsive:** We define *culturally responsive* as:

Recognizing the diverse cultural characteristics and knowledge of learners as assets.ⁱⁱⁱ Culturally responsive teaching and advising empower students intellectually, socially, and emotionally by using cultural referents to impart knowledge, skills, and attitudes.^{iv}

4. **Equity:** We define *equity* in line with the Lumina Foundation's Equity Imperative:

Equity is the recognition and analysis of historic, persistent factors that have created an unequal [higher] education system.^v

This includes assessing, identifying, acknowledging, and addressing System policies, and initiatives supporting and/or sustaining inequity and disparities.

5. **Intersectionality:** A term originally coined by law professor Kimberlé Crenshaw;^{vi} we define *intersectionality* consistent with the Oxford English Dictionary:

The interconnected nature of social categorizations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage; a theoretical approach based on such a premise.^{vii}

Students who are underserved based on multiple identities (e.g. race, gender, class, etc.) may face additional discrimination and marginalization.

6. **Privilege:** As defined by dictionary.com:

A right, immunity, or benefit enjoyed by a particular person or a restricted group of people beyond the advantages of most.^{viii}

These special rights, advantages, or immunities may be granted by a state, system, or another authority to a restricted group, either by birth or on a conditional basis.

7. **Race:** As defined by the National Museum of African American History and Culture:

The dictionary's definition of race is incomplete and misses the complexity of impact on lived experiences. It is important to acknowledge race is a social fabrication, created to classify people on the arbitrary basis of skin color and other physical features. Although race has no genetic or scientific basis, the concept of race is important and consequential. Societies use race to establish and justify systems of power, privilege, disenfranchisement, and oppression.^{ix}

Racial or Ethnic groups are generally recognized in society and often by the government. When referring to such groups, we often use the terminology *people of color*, *students of color*, or *communities of color* (or name of the specific racial and/or ethnic group), and *white*. Because race is a social construct, we also understand that racial and ethnic categories differ internationally and that race and ethnicity categories and hierarchies differ globally and internationally. We recognize many local communities come from other international communities. In some societies, ethnic, religious, and caste groups are oppressed and racialized. These dynamics can occur even when the oppressed group is numerically in the majority.

8. **Underserved:** We define *underserved* as:

Any group or individual that has been denied access and/or whom systems have marginalized due to operationalized deficit-based thinking.

Deficit-based thinking is the focus on a community's needs, deficits, or problems rather than its assets, strengths, or opportunities.^x Operationalized systemic barriers can create a disproportional representation of certain groups based on identity characteristics.

Methodology and Context

Developing a USHE Equity Lens Framework

To increase equitable higher education outcomes, the Utah Board of Higher Education created its own equity lens framework, modeled after the Oregon Higher Education Coordinating Commission's Equity Lens,^{xi} which was further developed by USHE Chief Diversity Officers and the Office of the Commissioner of Higher Education. The USHE Equity Lens employs an anti-racist, equity-focused framework with Critical Race Theory^{xii} as a cornerstone.

This lens considers the following emergent, fluid, and intersectional identities as part of the Board's efforts to value the perspective and knowledge that each student brings to higher education learning spaces; this list is neither comprehensive nor exhaustive:

- Age
- Gender identity and expression
- Sexual orientation

- Religious affiliation
- Socioeconomic status
- Citizenship status and country of origin
- Ability/disability
- Veteran status
- First-generation student status
- English language learners
- Geographic location (including rural, urban, sheltered, and unsheltered).

The Equity Lens Framework was developed to achieve educational equity when collecting data, allocating resources, developing policies, engaging stakeholders, and implementing strategic initiatives.

Establishing a Set of Shared Beliefs

The Board recognizes the biases and barriers to accessing higher education that have existed throughout the state’s history that have led to systemic disparities. Higher education in Utah was initially developed to serve a narrow slice of the state’s population, namely white men of privilege, on the ancestral homelands of native peoples.^{xiii} As the state has progressed, education systems have been slow to change from this original framework. To eliminate these disparities, the framework must change.

Equity, as defined within this *new* framework, **re-examines** systemic barriers with an intentional commitment to empowerment and educational justice.

In the newly combined System, made up of all public technical and degree-granting colleges and universities in Utah,^{xiv} the Board has the opportunity to reimagine spaces of higher learning that foster success, create pathways for economic mobility and a high quality of life for students and their communities. It is through this recognition and commitment that the shared beliefs included in the Equity Lens Framework were developed in collaboration with USHE’s Chief Diversity Officers.

Knowledge, Data Collection, & Measuring Progress

Both qualitative and quantitative data are needed for the Board and System to have a holistic view, and understanding of, equity disparities. These data inform how stakeholders are educated about the individuals, groups, communities, and institutions served by Utah’s higher education System.

The questions within the Equity Lens will determine the need for qualitative data to guide the development of new strategies, initiatives, and policies, and to measure progress made.

The Board will work with the USHE Chief Diversity Officers and institutional research departments to develop a practical plan to collect System and institutional demographic and sociocultural data in the following categories:

1. Race and ethnicity
2. Gender identity and expression
3. Sexual orientation
4. Socioeconomic status
5. First-generation status
6. Language proficiency
7. Citizenship and residency status

By collecting this data, we can impact intersectional populations through our strategies, initiatives, and policies. We will incorporate these key metrics into our strategic plan.

Further Reading

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3. Mitchell, Theodore R., Torres, Carlos Alberto. Sociology of Education: Emerging Perspectives. United States: State University of New York Press, 1998.
https://www.google.com/books/edition/_/H1wgFAqo6oMC?hl=en&gbpv=0.
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<http://www.aclrc.com/antiracism-defined>.

ⁱⁱ Utah System of Higher Education. A New Look at Utah's Growing Opportunity Gap, 2020. https://ushe.edu/wp-content/uploads/pdf/reports/issue_brief/2020/2020_Aug_opportunity-gap-IB.pdf.

ⁱⁱⁱ Funds of Knowledge in Higher Education: Honoring Students' Cultural Experiences and Resources as Strengths. United Kingdom: Taylor & Francis, 2017.
https://www.google.com/books/edition/Funds_of_Knowledge_in_Higher_Education/MRIwDwAAQBAJ?hl=en&gbpv=0.

^{iv} AVID. Cultural Relevance and Responsiveness. Accessed November 2020. <https://www.avid.org/cultural-relevance>.

^v Lumina Foundation. Lumina Foundation's Equity Imperative, 2017.
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^{vi} Crenshaw Kimberlé. On Intersectionality: Essential Writings. New York: New Press, 2017.
<https://scholarship.law.columbia.edu/books/255>

^{vii} Perlman, Merrill. "The Origin of the Term 'Intersectionality'." Columbia Journalism Review, 2018.
https://www.cjr.org/language_corner/intersectionality.php.

^{viii} "Privilege." Dictionary.com. Accessed November 2020. <https://www.dictionary.com/browse/privilege>.

^{ix} National Museum of African American History and Culture. Race and Racial Identity, 2020.
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^x The University of Memphis. Comparison Between Asset and Deficit Based Approaches, 2019.
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^{xi} Higher Education Coordinating Commission. Oregon Equity Lens, 2017.
<https://www.oregon.gov/highered/about/Documents/State-Goals/HECC-Equity-Lens-2017-reformat.pdf>.

^{xii} Tara J. Yosso * (2005) Whose culture has capital? A critical race theory discussion of community cultural wealth, Race Ethnicity and Education, 8:1, 69-91, DOI: 10.1080/1361332052000341006.
<https://www.tandfonline.com/doi/abs/10.1080/1361332052000341006>.

^{xiii} Newell, Jackson, and Takeyuki Ueyama. "Higher Education in Utah." Utah History Encyclopedia. Accessed November 2020. https://www.uen.org/utah_history_encyclopedia/e/EDUCATION_HIGHER.shtml.

^{xiv} Utah System of Higher Education. The New Utah System of Higher Education, 2020. https://ushe.edu/wp-content/uploads/pdf/reports/issue_brief/2020/2020_New_Combined_System.pdf.



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MEMORANDUM

October 30, 2020

Equity, Diversity, and Inclusion Workgroup Charter Draft

Statement of Purpose

The Equity, Diversity & Inclusion Workgroup is a standing workgroup to the Utah Board of Higher Education. Its purpose is to foster collaboration and coordination among the Board and System leadership and to cultivate and integrate equity, diversity, and inclusion awareness, cooperation transparency, and progress throughout the Utah System of Higher Education. The workgroup will coordinate and report on each of the Board's standing committee's progress toward statewide goals and align ongoing efforts to advance equitable systemic change.

The workgroup embraces a culture of anti-racism, inclusiveness, and is committed to equitable access and opportunity for all students, faculty, and staff. Equity, diversity, and inclusion enrich our higher education community.

Membership/ Administrative Support

Members of the workgroup will be drawn from Utah Board of Higher Education members, USHE Chief Diversity Officers, and USHE students, faculty, and staff. The terms of service shall be reviewed annually. The chairs of the workgroup will be comprised of two standing Board chairs and USHE's Equity & Advocacy Officer.

Authority

The EDI Workgroup has no expressed or implied power or authority.

Responsibilities

The EDI Workgroup will focus on the following areas and outcomes:

- Inventory, transparency, accountability, and communication across standing Board committees and System equity, diversity and inclusion efforts
- Board and System leadership awareness and understanding of equity, diversity, and inclusion topics through Board and System connection to key community stakeholders
 - Partnerships must include the collaborative intent to build pipelines and successful programs by wisely stewarding, collaborating, sharing, and leveraging state resources

- Collaborative coordination with USHE’s Chief Diversity Officers to shift and influence culture and build a sense of belonging across schools and access points
 - Including work on their collective equity, diversity, and inclusion priorities
- Collection of pertinent data essential to meeting the purpose of the workgroup, including System student program enrollment and completion data disaggregated by race, ethnicity, gender, and socio-economic status, System staff and faculty representation, and institutional cultural assessment data and perceptions
- Regular review of and recommendations for relevant training for Board and System leadership on anti-racist, equity, diversity, and inclusion practices
- Recommendations for appropriate outcomes and alignment with the Board strategic plan
- Suggestions for pertinent System policies and procedures (e.g. hiring recruitment practices, campus safety, etc.)
- Recommendations for community outreach strategies that focus on building positive, dual-capacity relationships between the community and underrepresented student populations
- Service to Board and System staff as a consultative resource
- Communication of successes and progress

Meetings

The workgroup is intended to be permanent or will exist until such time that this charter is revised or revoked. Meetings will be held quarterly.

Reporting

The EDI Workgroup will regularly report to the Utah Board of Higher Education.

Commissioner’s Recommendations

This is an information item only; no action is required.



1

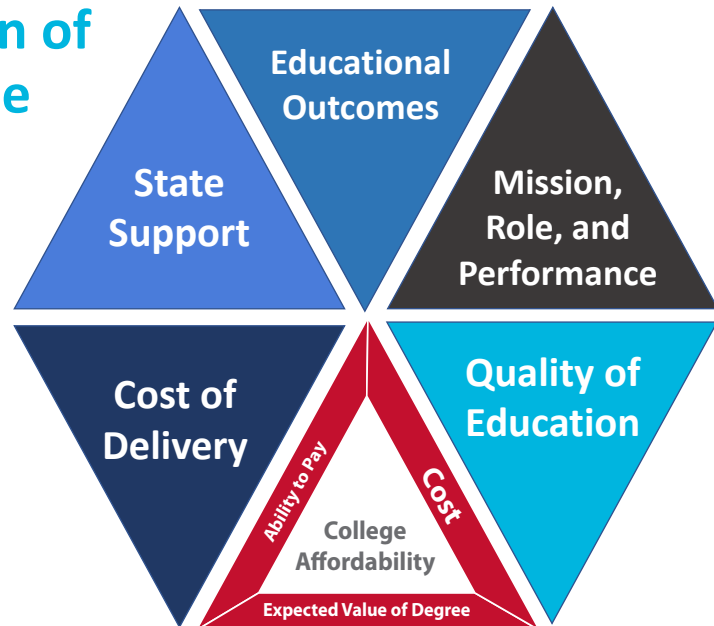
What is Affordability?

- Question asked of the Task Force
- A very INDIVIDUAL answer
- Lumina Rule of Ten
- Kem C. Gardner Institute Work

A diagram in the shape of a triangle. The three sides of the triangle are red and contain white text. The left side is labeled "Ability to Pay", the right side is labeled "Cost", and the bottom side is labeled "Expected Value of Degree". In the center of the triangle, the words "College Affordability" are written in bold black text.

2

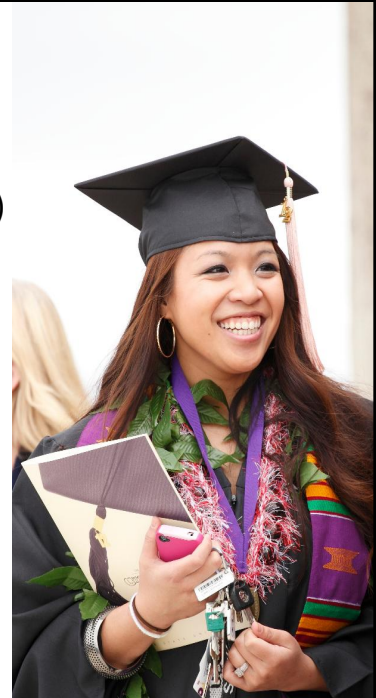
Broader Question of Educational Value



3

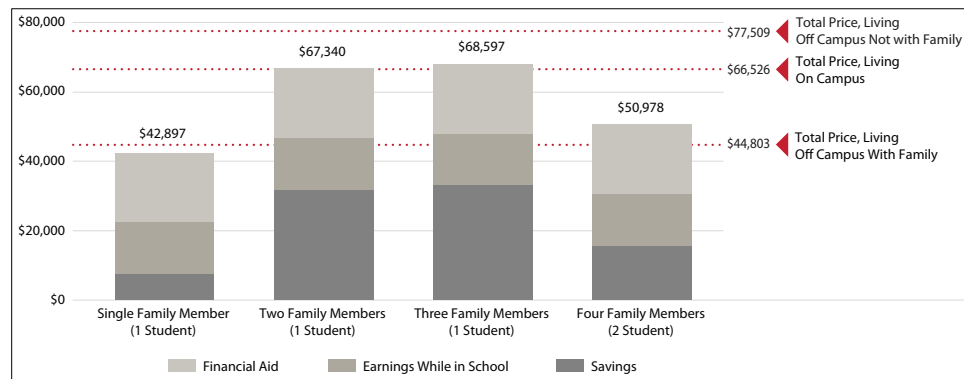
Lumina Foundation Rule of 10

- Alternative to Federal Estimated Family Contribution (EFC)
- Students should pay no more for college than:
 - Saving **10%** of discretionary income for **10** years
 - Discretionary income = income at 200% of Poverty
 - Household of 1: Poverty = \$12,490; 200% = \$24,980
 - Household of 2: Poverty = \$16,910; 200% = \$33,820
 - Household of 4: Poverty = \$25,750; 200% = \$51,500
 - Household of 6: Poverty = \$34,590; 200% = \$69,180
 - Working **10** hours per week
 - Available financial aid (federal, state, institution)



4

Gardner Unmet Need Calculation – Rule of 10



5

Definition of Affordability

Affordability is the ability of a *traditional full-time* Utah student from a family of four to cover the cost of attendance at a USHE institution while living at home with financial aid, reasonable family savings, and the student contributing ten hours of weekly work earnings, without incurring student debt

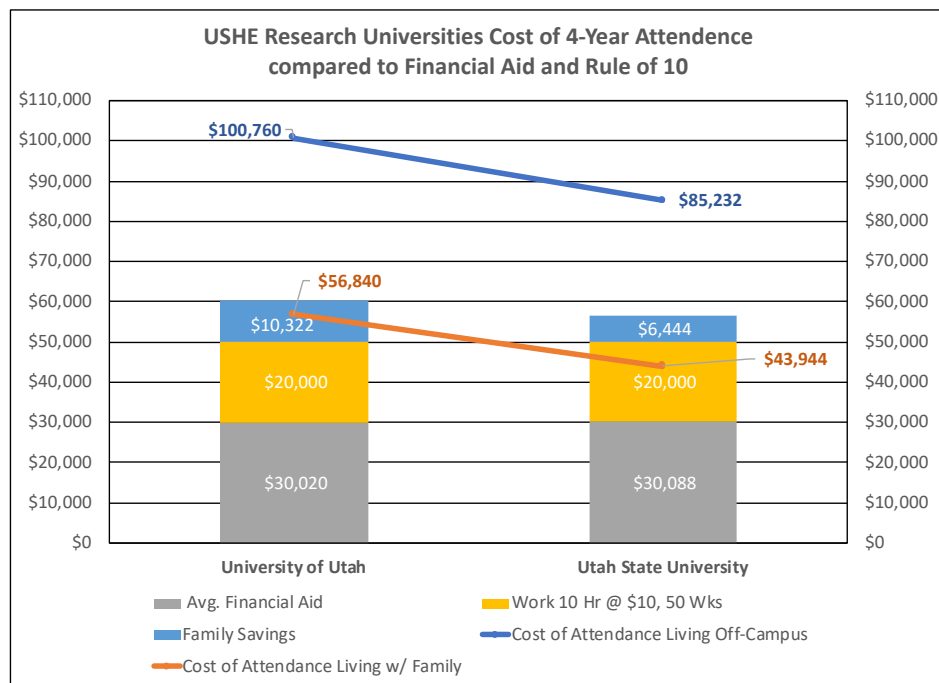
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Affordability Model Factors

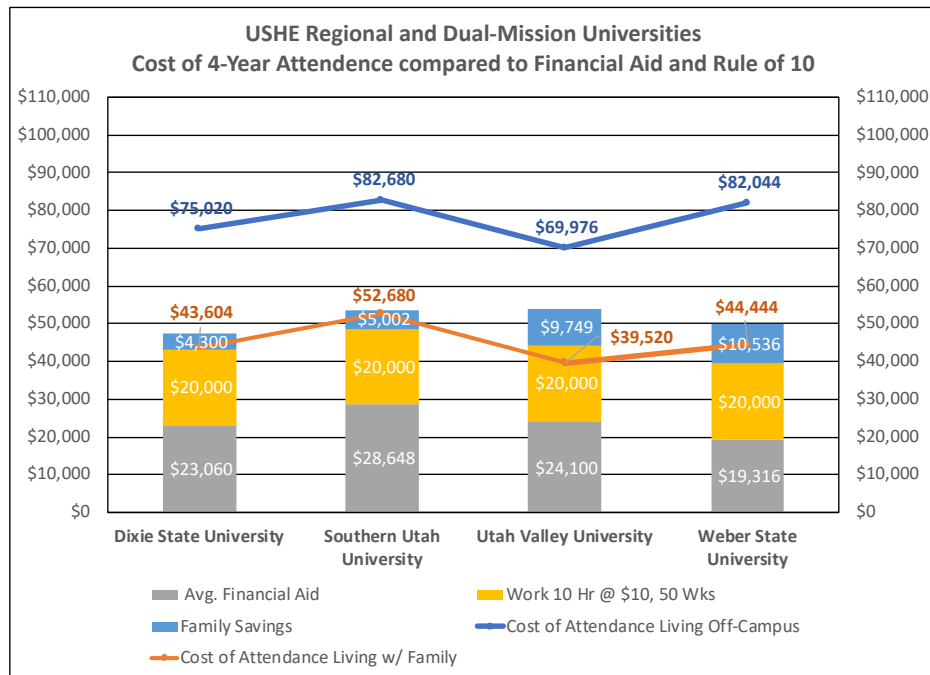
- Based on Gardner Report and Lumina Rule of 10
- Cost of attendance
 - Tuition and fees, books, supplies, transportation
 - Living with family or off-campus
- Ability to pay
 - Student aid (federal, state, institution)
 - Family savings or contribution
 - Family circumstances, income level, and size
 - Work contribution
- Other factors
 - Non-traditional, part-time, or head of household
 - Traditional 4-year timeframe versus 6+ years
 - Concurrent Enrollment and transfer credit



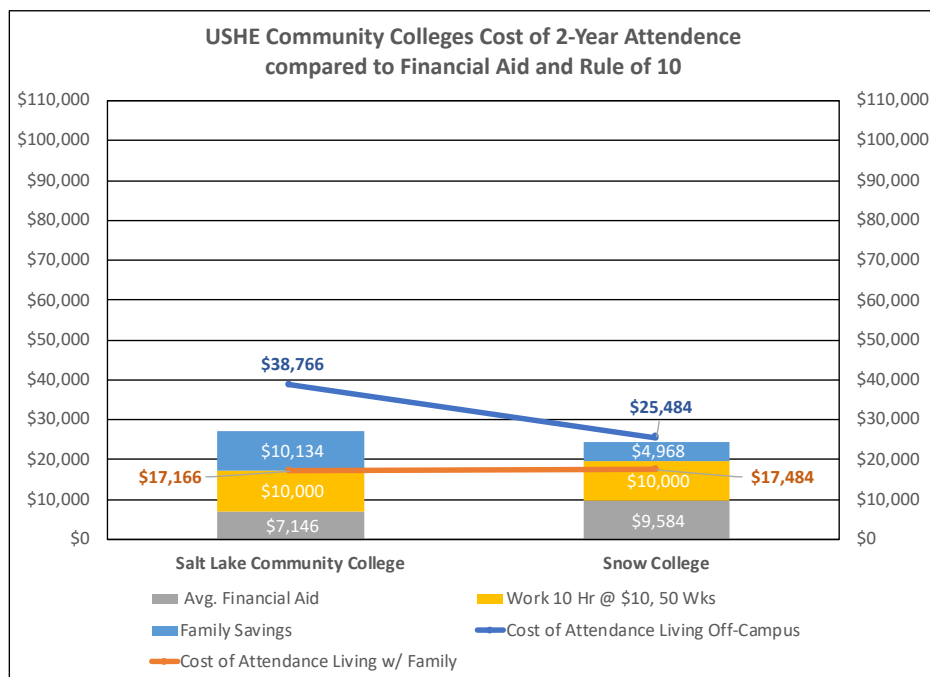
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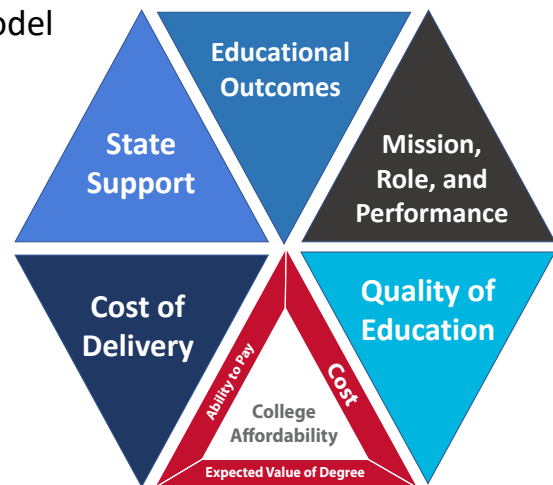
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10

Broader Question of Educational Value

- Continue work on the Affordability Model
 - Incorporate non-traditional students
 - Include UTECH
 - Compare with peer institutions
 - Use data to explore individual situations
- Explore Educational Value
 - Educational quality and outcomes
 - Cost efficiency and service delivery
 - Performance goals and attainment



11

Recommendation

- Adopt a working definition of affordability for 2020-21 tuition:
 - Affordability is the ability of a *traditional full-time* Utah student from a family of four to cover the cost of attendance at a USHE institution while living at home with financial aid, reasonable family savings, and the student contributing ten hours of weekly work earnings, without incurring student debt
- Continue the work of the Task Force with the new Board

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