



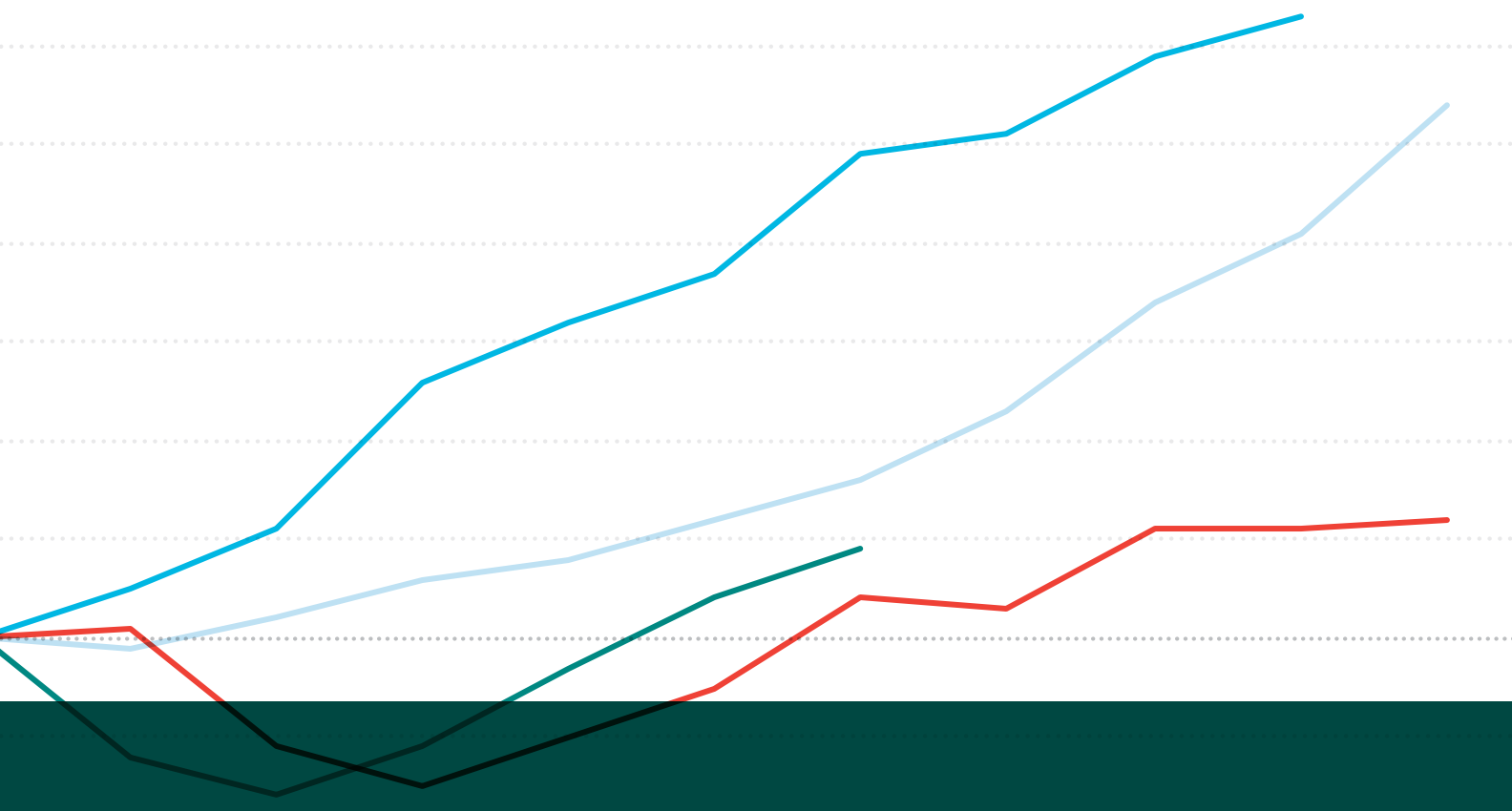
SHEEO

STATE HIGHER EDUCATION EXECUTIVE OFFICERS ASSOCIATION

SHEF 2018:

SHEF METHODOLOGICAL AND TECHNICAL INFORMATION

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The State Higher Education Executive Officers Association (SHEEO) is the national association of the chief executives of statewide governing, policy, and coordinating boards of postsecondary education. Founded in 1954, SHEEO serves its members as an advocate for state policy leadership, a liaison between states and the federal government, and a vehicle for learning from and collaborating with peers. SHEEO also serves as a manager of multistate teams to initiate new programs and as a source of information and analysis on educational and public policy issues. Together with its members, SHEEO advances public policies and academic practices that enable Americans to attain education beyond high school and achieve success in the 21st century economy.

An electronic version of this report, State Higher Education Finance (SHEF) FY 2018, and numerous supplementary tables containing extensive state-level data are available at www.sheeo.org. These may be freely used with appropriate attribution and citation. In addition, core data and derived variables used in the SHEF study for fiscal years 1980 through 2018 are available on the SHEEO website, along with interactive data visualizations via Tableau.

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ABOUT THE SHEF PROJECT

Every April for more than 15 years, SHEEO has released the annual State Higher Education Finance (SHEF) report for the most recently completed fiscal year.

HISTORY AND BACKGROUND

The SHEF report was originally built on Dr. Kent Halstead's *State Profiles: Financing Public Higher Education*, better known as the "Halstead Study." Starting in the 1970s, Research Associates of Washington, headed by Halstead, produced a model of the principal factors governing state support of public higher education. Through the presentation of raw state data, indexed data, weighted state comparisons, and national overviews, Halstead sought to provide states with the capability to assess their support of public higher education. He analyzed state full-time equivalent (FTE), appropriations, and net tuition data, along with data gathered from the U.S. Census Bureau, the Department of Treasury, and the National Center for Education Statistics, and created tables displaying state support, tax capacity, tax effort, and family share of funding. His results were published in two volumes—the annual *State Profiles: Financing Public Higher Education Rankings*, and the companion trend data, *State Profiles: Financing Public Higher Education Trend Data*. Both were last published in 1998.

In 2001, SHEEO resumed this endeavor. Like the "Halstead studies," the SHEEO study:

- Analyzes state support for higher education, setting aside support in categories that vary widely among states (research, medical education, and agricultural extension services) to enable analysis on appropriations for instruction and public service in more comparable areas;
- Collects annual student FTE enrollment data to calculate more comparable estimates of state support per student;
- Examines state support for higher education in the context of a state's capacity to raise revenue from taxation;
- Examines the relative contribution of students to the cost of public higher education; and
- Examines interstate differences in the cost of living and the enrollment mix among different types of institutions.

Additionally, SHEEO's annual survey provides national summary information on:

- State support for the education of students attending independent colleges and universities (direct state grants to institutions, or financial aid to students);
- State support of higher education operations through non-tax revenue, including lottery proceeds, royalties from natural resources, and state-supported endowments;
- Trends in state support for research, medical education, and agricultural extension services; and
- State-supported student financial assistance.

The SHEF longitudinal data set incorporates the original Halstead Study data for fiscal years 1980 through 2000 with SHEEO's data from 2001 to 2018.

ADDITIONAL PERSPECTIVES

Understanding state support for higher education is complicated by the various perspectives of organizations that measure monetary support. Aside from SHEF, two annual studies are national in scope and report different numbers based on unique definitions and data elements—Illinois State University's *Grapevine* survey and the National Association of State Budget Officers (NASBO) State Expenditure Report. Reconciling the differences between these surveys (both at the data collection and state levels) may be impossible; understanding them, however, is essential for interpreting information on state trends in financing higher education from different sources.

The following section summarizes data collected by NASBO and *Grapevine* in comparison to SHEF.

GRAPEVINE – STATE EFFORT

Grapevine reports on total "state effort" for higher education, defined as funds from all state sources for universities, colleges, community colleges, and state higher education agencies. The *Grapevine* data collection effort has merged with the SHEF data collection effort, and SHEEO collects data for the upcoming fiscal year on behalf of Illinois State. Therefore, *Grapevine*'s "state effort" and SHEF's "state support" definitions are now identical. The data collection requires that states follow these guidelines in reporting:

1. Report only appropriations, not actual expenditures.
2. Report only sums appropriated for annual operating expenses.
3. For state tax appropriations in complex universities, separate the sums appropriated for (or allocated to) the main campus, branch campuses, and medical centers (even if on the main campus). Medical center data should include the operations of colleges of medicine, dentistry, pharmacy, and nursing; and teaching hospitals; either lumped as one sum or set out separately, as preferred.

"State effort" for *Grapevine* includes:

- Funds appropriated for state aid to local public community colleges, state-supported community colleges, and vocational-technical 2-year colleges or institutions predominantly for high school graduates and adult students.
- Sums appropriated for statewide coordinating or governing boards (for expenses and/or allocation to other institutions) and sums appropriated directly to institutions of higher education.
- Sums appropriated for state scholarships or other student financial aid.
- Sums for higher education appropriated through another state agency.
- Sums appropriated for independent institutions of higher education or to students attending these institutions.

- Funding under state auspices for appropriated non-tax state support (such as monies from lotteries set aside for institutional support or for student assistance).
- Funding under state auspices for non-appropriated state support (such as monies from receipt of lease income and oil/mineral extraction fees on land set aside for public institution benefit).
- Interest or earnings received from state funded endowments set aside for public sector institutions.
- Portions of multiyear appropriations from previous years.
- Any other sources of state funding for higher education operations not listed above.

Excluded items include appropriations for capital outlays and debt service, and appropriations of sums derived from federal sources, student tuition and fee revenues, and auxiliary enterprises.

As a result of the combined data collection, the SHEEO definition of Total State Support is the same as the *Grapevine* definition of State Effort. However, SHEEO adds in local tax appropriations for higher education to calculate State and Local Support.

NATIONAL ASSOCIATION OF STATE BUDGET OFFICERS (NASBO) – STATE FUNDS

NASBO defines state support of higher education as expenditures reflecting support of state universities and university systems, community colleges, and vocational education. “State Funds” are defined as general funds plus certain other state funds. Fund revenue sources include:

- Sales tax
- Gaming tax
- Corporate income tax
- Personal income tax
- Other taxes and fees (Depending on the state, these may include cigarette and tobacco taxes, alcoholic beverage taxes, insurance premiums, severance taxes, licenses and fees for permits, inheritance taxes, and charges for state-provided services.)
- Tuition and fees and student loan revenue (in many states)

States are also requested to include capital spending (for some states this can be substantial and tends to vary widely from year to year). Exclusions include federal research grants and university endowments.

SHEF METHODOLOGY

OVERVIEW

The SHEF data collection would not be possible without the support of SHEEO's member agencies who provide the underlying data for the report each year. SHEF data collection begins in the fall as most state's fiscal years end. States first report information for the *Grapevine* survey, which collects projected information about state funds for the coming fiscal year.

A note about fiscal years

In most states, the fiscal year runs from July 1 to June 30. This means that, for example, fiscal 2018 refers to the period from July 1, 2017, to June 30, 2018. The corresponding academic year began in the fall of 2017. A few states have a different fiscal year:

- New York, April 1 to March 31
- Texas, September 1 to August 31
- Alabama and Michigan, October 1 to September 30

Nineteen states have a biennial budget, which means their appropriations are set every other year. The remaining 31 states set their budgets annually. SHEF tracks this information for every agency that provides data.

Once states submit their data for the *Grapevine* and SHEF surveys, SHEEO begins to review and confirm the data. SHEF data is cross-checked, where possible, with information from the U.S. Census, IPEDS, NASBO, NASSGAP, and other sources. In a handful of states, SHEEO staff review budget documents and annual reports to collect data not available to our members.

GLOSSARY OF TERMS

COST ADJUSTMENTS

1. **Consumer Price Index (CPI).** A measure of the average change over time in the price of a market basket of consumer goods and services. Sources: Bureau of Labor Statistics, U.S. Department of Labor.
2. **Employment Cost Index (ECI).** A measure of the change in labor costs, outside the influence of employment shifts, among occupations and industries. The ECI for private industry white-collar occupations (excluding sales) accounts for 75 percent of the State Higher Education Executive Officers Association (SHEEO) Higher Education Cost Adjustment (HECA). HECA uses the compensation series that includes changes in wages and salaries plus employer costs for employee benefits. Sources: Bureau of Labor Statistics, U.S. Department of Labor.
3. **Gross Domestic Product (GDP).** The total market value of all final goods and services produced in the country in a given year—the sum of total consumer spending, investment spending, government spending, and exports, minus imports. Sources: Bureau of Economic Analysis, Office of Economic Policy, U.S. Department of Commerce.

4. **Gross Domestic Product Implicit Price Deflator (GDP IPD).** Current dollar GDP divided by constant dollar GDP. This ratio is used to account for inflationary effects by reflecting both the change in the price of the bundle of goods comprising the GDP and the change to the bundle itself. The GDP IPD accounts for 25 percent of the SHEEO HECA. Sources: Bureau of Economic Analysis, Office of Economic Policy, U.S. Department of Commerce.
5. **Higher Education Cost Adjustment (HECA).** Measures cost inflation experienced by colleges and universities. The HECA uses two external indices maintained by the federal government—the ECI (accounts for 75 percent of the index) and the GDP IPD (accounts for the remainder).
6. **Higher Education Price Index (HEPI).** Developed by Kent Halstead, the HEPI measures the inflationary effect on college and university operations. It measures the average relative level in the price of a fixed market basket of goods and services purchased by colleges and universities through current fund educational and general expenses (excluding those for sponsored research, department sales and services, and auxiliary enterprises). Source: Commonfund (<https://www.commonfund.org/commonfund-institute/glossary>).
7. **Price Inflation.** The percentage increase in the price of a market basket of goods and services over a specific time period.

ENROLLMENT

1. **Full-Time Equivalent Enrollment (FTE).** A measure of enrollment equal to one student enrolled full time for one academic year, based on all credit hours (including summer sessions). The SHEF data capture FTE enrollment in public institutions of higher education from those credit or contact hours associated with courses that apply to a degree or certificate, excluding non-credit continuing education, adult education, and extension courses.

If courses meet the “formal award potential” criterion, they may include vocational-technical, remedial, and other program enrollment at 2-year community colleges and state-approved area vocational-technical centers. Medical school enrollment is reported but set aside from the net FTE used in “funding per FTE” calculations because states vary widely in the extent of medical school funding.

The FTE calculation differs for the type and level of instruction:

- Contact hour courses: One annual FTE is the sum of total contact hours divided by 900.
- Undergraduate credit hour courses: One annual FTE is the sum of total credits divided by 30 (for semester-based calendar systems) or 45 (for quarter systems).
- Graduate and first-professional credit hour courses: One annual FTE is the sum of total credits divided by 24 (for semester systems) or 36 (for quarter systems).

REVENUE

Appropriations. Money set aside by formal legislative action for a specific use.

1. **Educational Appropriations.**¹ Net State Support plus Local Tax Appropriations minus Research, Agricultural, and Medical (RAM) appropriations. Calculated by SHEEO.
2. **Gross State Support.** The sum of State Tax Appropriations (see below) plus:
 - Funding under state auspices for appropriated non-tax state support (e.g., lotteries, casinos, and tobacco settlement funds) set aside for higher education;
 - Funding under state auspices for non-appropriated state support (e.g., monies from receipt of lease income, cattle grazing rights, and oil/mineral extraction fees on land) set aside for higher education;
 - Sums destined for higher education but appropriated to some other state agency (e.g., administered funds or funds intended for faculty/staff fringe benefits that are appropriated to the state treasurer);
 - Interest or earnings received from state-funded endowments pledged to public sector institutions; and
 - Portions of multiyear appropriations from previous years.
3. **Local Tax Appropriations.** Annual appropriations from local government taxes for public higher education institution operating expenses.
4. **Net State Support.** State support for public higher education annual operating expenses, calculated by SHEEO. The difference resulting from Gross State Support less:
 - Appropriations returned to the state;
 - State-appropriated funds derived from federal sources;
 - Portions of multiyear appropriations to be distributed over subsequent years;
 - Tuition charges remitted to the state to offset state appropriations;
 - Tuition and fees used for capital debt service and capital improvement (other than that paid by students for auxiliary enterprise debt service);
 - State funding for students in non-credit continuing or adult education courses and non-credit extension courses;
 - Sums appropriated to independent institutions for capital outlay or operating expenses;

1. For FY 2009 through FY 2012, educational appropriations include funds allocated to states by the federal government through the American Recovery and Reinvestment Act of 2009 (ARRA), specifically, those funds from the Education Stabilization Fund and Other Government Services Fund that were to be used to fill shortfalls in state support for general operating expenses at public colleges and universities. In FY 2011, this totaled \$2.8 billion.

- Allocation of appropriations for financial aid grants to students attending in-state independent institutions; and
 - Allocation of appropriations for financial aid grants to students attending out-of-state institutions.
5. **Personal Income.** The income received by all persons from participation in production, from government and business transfer payments, and from government interest. Personal income is the sum of net earnings by place of residence, rental income, personal dividend income, personal interest income, and transfer payments. Net earnings are earnings by place of work (wage and salary disbursements, and proprietors' income) less personal contributions for social insurance, including an adjustment to convert earnings by place of work to earnings by place of residence. Personal income is measured before the deduction of personal income taxes and is reported in current dollars. Sources: Bureau of Economic Analysis, Office of Economic Policy, U.S. Department of the Treasury.
 6. **Research, Agricultural, and Medical Appropriations (RAM).** Special purpose appropriations targeted by legislative budget line-item identification or institutional designation for the direct operation and administrative support of research centers and institutes, agricultural experiment stations, cooperative extension services, teaching hospitals, health care public services, and four types of medical schools—medical, osteopathic, dental, and veterinary. Calculated by SHEEO.
 7. **State Tax Appropriations.** Appropriations from state government taxes for public and private higher education institution and agency annual operating expenses, excluding capital outlay (for new construction or debt retirement) and revenue from auxiliary enterprises. These sums are largely the same as those reported as part of the annual *Grapevine* survey of the Center for the Study of Higher Education Policy at Illinois State University.
 8. **Student Share.** The share of Total Educational Revenue from students or their families. Net Tuition Revenue as a percentage of Total Educational Revenue. Calculated by SHEEO.
 9. **Total Educational Revenue.** The sum of Educational Appropriations and Net Tuition Revenue. Calculated by SHEEO.

STATE TAX REVENUE, CAPACITY, EFFORT, AND HIGHER EDUCATION ALLOCATION

1. **Actual Tax Revenue (ATR).** General revenue derived from taxation by state and local governments. Source: U.S. Census Bureau.
2. **Effective Tax Rate (ETR).** Actual Tax Revenue per capita divided by Total Taxable Resources per capita, expressed as a percentage. In 2000, the national average effective tax rate was 7.8 percent, or \$3,086 divided by \$39,579. An indexed value is derived by dividing the state's effective tax rate by the national average effective tax rate. Sources: Population and Actual Tax Revenue from the U.S. Census Bureau; Total Taxable Resources from the Bureau of Economic Analysis, Office of Economic Policy, U.S. Department of the Treasury.

3. **State Higher Education Allocation.** Measures total state support and local appropriations to higher education as a percentage of state plus local tax revenues. Source: SHEEO calculation from SHEF and U.S. Census data.
4. **Total Taxable Resources Index (TTR).** Total Taxable Resources is the sum of Gross State Product (in-state production) minus components presumed not taxable by the state plus various components of income derived from out-of-state sources. An indexed value for each state is derived by dividing the state's TTR per capita by the national average TTR per capita. Sources: Bureau of Economic Analysis, the Office of Economic Policy, the U.S. Department of the Treasury, and the Internal Revenue Service.

TUITION AND FEE REVENUE

1. **Gross Tuition and Fees.** Gross assessments by public postsecondary institutions for tuition and mandatory education fees. Includes in-state and out-of-state tuition and fees.
2. **Net Tuition Revenue.** The sum of Gross Tuition and Mandatory Fee Assessments minus state-funded student financial aid, institutional discounts and waivers, and medical school student tuition revenue. Enrollment, state appropriations, and medical school tuition revenue are set aside in many SHEF analyses to improve interstate evaluation. This is not a direct measure of changes in tuition rates. Calculated by SHEEO.

PRIMARY SHEF MEASURES

To assemble the annual SHEF report, SHEEO collects data on all state and local revenues used to support higher education, including revenues from taxes, lottery receipts, royalty revenue, and state-funded endowments. It also identifies the major purposes for which these public revenues are provided, including general institutional operating expenses, student financial assistance, and support for centrally-funded research, medical education, and extension programs. SHEEO's analysis of these data yields the following key indicators:

- **State and Local Support** consists of state tax appropriations and local tax support plus additional non-tax funds (e.g., lottery revenue) that support or benefit higher education, and funds appropriated to other state entities for specific higher education expenditures or benefits (e.g., employee fringe benefits disbursed by the state treasurer). State and local support for 2009–2012 also includes federal American Reinvestment and Recovery Act (ARRA) revenue provided to stabilize these sources of revenue for higher education.
- **Educational Appropriations** are that part of state and local support available for public higher education operating expenses, defined to exclude spending for research, agricultural, and medical education, as well as support for independent institutions or students attending them. Since funding for medical education and other major non-instructional purposes varies substantially across states, excluding these funding components helps to improve the comparability of state-level data on a per-student basis.

- **Net Tuition Revenue** is the gross amount of tuition and fees, less state and institutional financial aid, tuition waivers or discounts, and medical student tuition and fees. This is a measure of the resources available from tuition and fees to support instruction and related operations at public higher education institutions and includes revenue from in-state and out-of-state students as well as undergraduate and graduate students. Net tuition revenue generally reflects the share of instructional support received from students and their families, although it is not the same as and does not take into account many factors that need to be considered in analyzing the “net price” students pay for higher education.²
- **Total Educational Revenue** is the sum of educational appropriations and net tuition revenue excluding any tuition revenue used for capital and debt service. It measures the amount of revenue available to public institutions to support instruction (excluding medical students). Very few public institutions have significant non-restricted revenue from gifts and endowments to support instruction. In some states, a portion of the net tuition revenue is used to fund capital debt service and similar non-operational activities. These sums are excluded from calculations used to determine total educational revenue.
- **Full-Time Equivalent Enrollment (FTE)** is a measure of enrollment equal to one student enrolled full time for one academic year, calculated from the aggregate number of enrolled credit hours (including summer session enrollments). SHEF excludes most non-credit or non-degree program enrollments; medical school enrollments also are excluded for the reasons mentioned above. The use of FTE enrollment reduces multiple types of enrollment to a single measure to compare changes in total enrollment across states and sectors and to provide a straightforward method for analyzing revenue on a per-student basis.

2. SHEF does not provide a measure of “net price,” a term that generally refers to the cost of attending college after deducting assistance provided by federal, state, and institutional grants. SHEF does not deduct federal grant assistance (primarily from Pell Grants) from gross tuition revenue, since these are non-state funds that substitute, at least in part, for non-tuition costs borne by students. Non-tuition costs (room and board, transportation, books, and incidentals) typically total \$10,000 or more annually in addition to tuition costs. This requires students with a low expected family contribution (most Pell recipients) to augment federal grants with a substantial contribution from part-time work or loans, even at comparatively low-tuition public institutions. In addition, the availability of federal tuition tax credits since 1999 has helped reduce “net price” for middle-income and lower-middle-income students. While these tax credits have no impact on the net tuition revenue received by institutions, they do reduce the “net price” paid by students. SHEF’s net tuition revenue statistic is not a measure of “net price,” but a measure of the revenue that institutions receive from tuition. It is a straightforward measure of the proportion of public institution instructional costs borne by students and families. Measures of net price for the student need to include non-tuition costs and all forms of aid.

METRIC CALCULATIONS

The primary SHEF metrics are calculated as follows:

1. **Net Full-Time Equivalent Enrollment (FTE).** Gross FTE, excluding non-credit or non-degree enrollment and medical school enrollments.
 - $\text{Net FTE} = \text{Gross FTE} - \text{Medical FTE}$
2. **Educational Appropriations.** The part of state and local support available for public higher education operating expenses, excluding spending for research, agricultural extension, and medical education, and support for independent institutions or independent student aid.
 - $\text{Educational Appropriations} = \text{Tax Appropriations} + \text{Non-tax Support} + \text{Non-appropriated Support} + \text{Endowment} + \text{Previous Appropriations} + \text{Other Support} - \text{Return Appropriations} - \text{Multiyear Appropriations} - \text{Non-credit - Independent Operating} - \text{Independent Aid} - \text{Out of State Aid} + \text{Local Support} - \text{Research Appropriations} - \text{Agricultural Extension Appropriations} - \text{Hospital Appropriations} - \text{Medical School Appropriations}$
3. **Net Tuition Revenue.** The gross amount of tuition and mandatory fees at public institutions, excluding state and institutional financial aid, tuition waivers or discounts, and medical student tuition and fees.
 - $\text{Net Tuition Revenue} = \text{Gross Tuition} - \text{Discounts and Waivers} - \text{State Public Aid} - \text{Medical Tuition}$
4. **Total Educational Revenue.** The sum of educational appropriations and net tuition revenue, excluding any tuition revenue used for capital and debt service.
 - $\text{Total Educational Revenue} = \text{Educational Appropriations} + \text{Net Tuition Revenue} - \text{Tuition for Debt Service}$

The calculated metrics are divided by Net FTE and by the adjustment factors (see next page) in each state:

1. **Educational Appropriations per FTE Adjusted** = Educational Appropriations / Net FTE / (HECA * COLI * EMI)
2. **Tuition Revenue per FTE Adjusted** = Net Tuition Revenue / Net FTE / (HECA * COLI * EMI)
3. **Total Educational Revenue per FTE Adjusted** = Total Educational Revenue / Net FTE / (HECA * COLI * EMI)

DATA ADJUSTMENTS

SHEF's analytic methods are designed to make basic data about higher education finance as comparable as possible across states and over time. It is difficult to compare interstate higher education unit costs. The analytical tools available are, at best, blunt instruments for measuring differences. Nevertheless, blunt instruments can be better than no instruments at all. Toward that end, financial indicators are provided on a per-student basis (using FTE enrollment as the denominator), and the SHEF report employs three adjustments to the "raw data" provided by states:

- **Higher Education Cost Adjustment (HECA)** to adjust for inflation over time;
- **Cost of Living Index (COLI)** to account for cost of living differences among the states; and
- **Enrollment Mix Index (EMI)** to adjust for differences in the mix of enrollment and costs among types of institutions with different costs across the states.

These adjustment factors, and the additional inflationary indices described here, are available on the [SHEF website](#). Our interactive data visualizations in [Tableau](#) enable users to view the data without adjustment or with alternative adjustments.

SHEEO welcomes comments on the utility and limitations of these analytical tools and any suggestions for improvement.

HIGHER EDUCATION COST ADJUSTMENT (HECA)

HECA: The State Perspective

Prices charged to students, the total cost of higher education, and the effect of inflation are all important issues for the public, state and federal governments, and colleges and universities. This section discusses two relevant dimensions of inflation in higher education—the consumer and the provider perspectives—and describes a tool to benchmark the inflation experienced by providers, colleges, and universities.

SHEEO developed the Higher Education Cost Adjustment (HECA) as an alternative to the CPI-U and the HEPI (discussed next) for estimating inflation in the costs paid by colleges and universities. HECA is constructed from two federally developed and maintained price indices—the Employment Cost Index (ECI) and the Gross Domestic Product Implicit Price Deflator (GDP IPD). The ECI reflects employer compensation costs including wages, salaries, and benefits.³ The GDP IPD reflects general price inflation in the U.S. economy.⁴ The HECA has the following advantages:

1. It is constructed from measures of inflation in the broader U.S. economy;
2. It is simple, straightforward to calculate, and transparent; and

3. The Employment Cost Index (ECI) for White Collar Workers (excluding sales occupations), which has traditionally been used in SHEF, was discontinued in March 2006. The ECI for management, professional, and related occupations (not seasonally adjusted) is the closest to the discontinued index and is now used in SHEF. This index is available back to 2001, and historical SHEF data have been adjusted to represent this new series.

4. Gross Domestic Product (GDP) is the total market value of all final goods and services produced in the country in a given year. It is equal to total consumer, investment, and government spending, plus the value of exports, minus the value of imports. The GDP Implicit Price Deflator is current dollar GDP divided by constant dollar GDP. This ratio is used to account for the effects of inflation by reflecting the change in the prices of the bundle of goods that make up the GDP as well as changes to the bundle itself.

3. The underlying indices are developed and routinely updated by the
Bureaus of Labor Statistics and Economic Analysis.

Because the best available data suggest that faculty and staff salaries account for roughly 75 percent of college and university expenditures, the HECA is based on a market basket with two components—personnel costs (75 percent of the index) and non-personnel costs (25 percent). SHEEO constructed the HECA based on the growth of the ECI (for 75 percent of costs) and the growth of the GDP IPD (for 25 percent of costs).

ALTERNATIVE INFLATIONARY INDICES (CPI-U, HEPI)

CPI-U: The Consumer Perspective

The student, parent, or student-aid provider most often views higher education prices compared to how much consumers pay for other goods and services. The Consumer Price Index for Urban Consumers (CPI-U) is most often used for such comparisons.

The CPI-U “market basket” consists of: housing (42 percent of the index), transportation (19 percent), food and beverage (18 percent), apparel and upkeep (7 percent), medical care (5 percent), entertainment (4 percent), and other goods and services (5 percent). To calculate the CPI-U, the Bureau of Labor Statistics measures average changes in the prices paid for these goods and services in 27 local areas.

Prices for different goods and services generally change faster or slower than the average rate of increase in the CPI-U. Incomes also grow or decline at different rates. Consumers notice when prices increase, and they become concerned when prices for important goods and services grow faster than their incomes. Prices for higher education and health care, for example, have grown faster than overall consumer prices. While consumer prices, as measured by CPI-U, grew by 75 percent between 1992 and 2017, the cost of medical care grew by 150 percent,⁵ and enrollment-weighted tuition and fees for 4-year public universities grew by 273 percent.⁶ U.S. income per capita grew by 85 percent⁷ during the same period—more than prices in general, but less than the health care and college tuition price increases.

Given these facts, it is not surprising that college prices are attracting national attention. Colleges and universities are certainly aware of the issues and the increase in their prices. At the same time, however, they face growth in the prices that they pay.

The CPI-U is based on goods and services purchased by the typical urban consumer. Colleges and universities spend their funds on different things, mostly (about 75 percent) on salaries and benefits for faculty and staff; and lesser amounts on utilities, supplies, books and library materials, and computing. Trends in the costs of these items don’t necessarily run parallel to the average price increases of the goods and services tracked by the CPI-U.

5. United States Council of Economic Advisers. *Economic report of the president*. (February 13, 2007). Appendix B, Table B-60: “Consumer price indexes for major expenditure classes, 1959-2006.” Washington, D.C.: Government Printing Office. Retrieved from <https://www.govinfo.gov/content/pkg/ERP-2007/pdf/ERP-2007-table60.pdf>

6. Source: Washington Higher Education Coordinating Board

7. Source: Bureau of Economic Analysis

HEPI: The Provider Perspective

Kent Halstead developed the Higher Education Price Index (HEPI) to track changes in the prices paid by colleges and universities. This index, which tracks price changes since 1961, is based on a 1972 market basket of expenditures for colleges and universities. To estimate price changes for components in this market basket, Halstead used trends in faculty salaries collected by the American Association of University Professors (AAUP), and a number of price indices generated by federal agencies.

Dr. Halstead last updated the HEPI in 2001, using regression analysis to estimate price increases for more recent years. Since 2005, Commonfund Institute has maintained the HEPI project, continuing to provide yearly updates to the data based on a regression analysis.

The HEPI has made an important contribution to our understanding of the cost increases borne by colleges and universities. Over the past years, SHEEO and chief fiscal officers of higher education agencies discussed the feasibility and desirability of a fresh analysis of higher education cost inflation, and reached the following conclusions:

- While the HEPI has been useful, it has not been universally accepted because it is a privately developed analysis and one of its main components, average faculty salaries, has been criticized as self-referential.
- The HEPI has not diverged dramatically from other inflation indices over short time periods. Hence, many policymakers reference indices such as the CPI-U in annual budget deliberations, especially in budgeting for projected price increases.
- It would be costly to update, refine, and maintain the HEPI in such a way that would meet professional standards for price indexing. The most labor-intensive work would be in refreshing the data in the higher education market basket.

For these reasons, SHEEO decided not to develop a successor to the HEPI. But, over an extended period of time, differences between the market basket of higher education cost increases and the CPI market basket cost increases are material. The most fundamental problem is that the largest expenditure for higher education is salaries for educated people.

ADJUSTMENTS FOR INTERSTATE COMPARISONS

The SHEF report provides separate analytical adjustments for differences among the states in the cost of living (COLI: Cost of Living Index) and the mix in enrollment among categories of institutions (EMI: Enrollment Mix Index).

Enrollment Mix (EMI)

Enrollment mix poses a challenge for interstate financial comparisons. Each level of higher education, from the lowest undergraduate work through doctoral studies, is progressively more expensive. A state or institution with a large proportion of enrollment in graduate programs will generally have a higher cost per FTE than a state or institution with a larger proportion of enrollment in undergraduate and 2-year degree programs. SHEEO updates the EMI in odd years of the SHEF report.

- SHEEO developed an adjustment for interstate enrollment mix differences based on the proportion of enrollment in each state compared to the national

proportions of enrollment by Carnegie Classification for FY 2015 (the most recent finance data available at the time of data collection and analysis). The essential steps are as follows:

- Integrated Postsecondary Education Data System (IPEDS) data were used to develop a national average cost per fall FTE for each of the Carnegie Classifications of institutions. This calculation used financial information from FY 2015 and fall 2014 FTE data.
- The proportion of each state's FTE in each of the Carnegie Classifications was calculated for fall 2014, and then multiplied by the national average cost per FTE in FY 2015 for each respective Classification. For each state, the products for each Classification were summed, which yielded the state's enrollment mix unit cost for the year.
- If the state has relatively more enrollment in higher-cost Carnegie Classifications (e.g., research universities), the enrollment mix unit cost will surpass the aggregated national unit cost. If the state has relatively more enrollment in lower-cost Carnegie Classifications (e.g., community colleges), the enrollment mix unit cost will be less than the aggregated national unit cost.
- The ratio of enrollment mix unit cost to aggregated national unit cost constitutes each state's enrollment mix "index." For example, the enrollment mix index for California in FY 2015 equals 0.93 because California has a large community college system. This calculation illustrates that if unit costs in each sector are at the national average, the statewide cost per FTE will be lower than the aggregated national unit cost by 7 percent.

Cost of Living (COLI)

The cost of living varies greatly across the 50 states. The most significant difference is in median housing values. In the 2016 American Community Survey census, median housing value was \$205,500 for the nation, but ranged from \$113,900 to \$592,000 across different regions and states.⁸

- While a cost of living adjustment does not solve the problem of differing intrastate costs of living, it offers a way to get a rough estimate of these differences for adjusting interstate unit cost data.
- In 2016, the SHEF report adopted a new Cost of Living Index (COLI).⁹ The new index is applied to all prior-year data in the SHEF report. This index is based on county-level data collected by the Council for Community and Economic Research. A state index is calculated based on the weighted average of all the counties in each state. COLI is referenced in the Census Bureau's Statistical Abstract of the U.S., and has also been used by the U.S. Bureau of Labor Statistics and the President's Council of Economic Advisors, among others. The data is updated yearly, includes Alaska and Hawaii, and has publicly available methods.¹⁰

8. U.S. Census Bureau. *2016 American community survey, geographic comparison tables. Median housing value of owner-occupied housing units (dollars) United States*. Retrieved from <https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>

9. The 2017 State Level Index is available at <http://coli.org/products>

10. Council for Community and Economic Research. (2016). *Cost of living index manual*. Arlington, VA. Available at <http://coli.org>

- Before FY 2016, the adjustment for interstate cost of living differences was drawn from the Berry index (a study by Berry et al. that provides a single index for each state).¹¹ The primary reason to adopt a new index was the age of the Berry index; many states have seen a significant change in the cost of living since 2003. Additionally, the Berry index did not provide an estimate of the cost of living in Alaska and Hawaii, two states with unique characteristics. In the past, Alaska was assigned the highest value of the 48 contiguous states and Hawaii was assigned a value 30 percent higher than the average in the 48 contiguous United States.

Each SHEF adjustment is expressed in index values where the national average equals 1.00. Hence, actual expenditures per FTE are divided by the SHEF adjustment to obtain the adjusted value. For example, presume that State X has an actual expenditure per FTE of \$8,000. If the **cost of living index** for State X equals 1.05, its expenditure per FTE, adjusted for differences in the cost of living, will be \$7,619 ($\$8,000/1.05$). If State X has an **enrollment mix index** of 0.98, its expenditure per FTE, adjusted for differences in enrollment mix, will be \$8,163 ($\$8,000/.98$). When both adjustments are made, State X will have an adjusted expenditure per FTE of \$7,775 ($\$8,000/1.05/.98$).

11. Berry, W.D., Fording, R.C. and Hanson, R.L. *Cost of living index for the American states, 1960-2003*. Available at ICPSR Publication-Related Archive, study # 1275. Retrieved from <http://www.icpsr.umich.edu/icpsrweb/DSDR/studies/1275>

INFORMATION FOR DATA PROVIDERS

DATA DEFINITIONS

STATE SUPPORT

This section intends to collect information about how much money the state provides to support higher education (excluding capital and debt service).

Includes:

- Sums appropriated for state aid to local public community colleges and operation of state-supported community colleges, and for vocational-technical 2-year colleges or institutes that are predominantly for high school graduates and adult students;
- Sums appropriated to statewide coordinating boards or governing boards, either for board expenses or for allocation by the board to other institutions or both;
- Sums appropriated for state scholarships or other state-level student financial aid programs;
- Sums destined for higher education but designated to some other state agency (as in the case of funds intended for faculty fringe benefits that are appropriated to the state treasurer); and
- Appropriations directed to private institutions of higher education at all levels.

Excludes:

- Sums for capital outlays and debt service;
- Sums derived from federal sources, student fees, and auxiliary enterprises; and
- Sums for students enrolled in dual-credit or dual-enrollment.

ALL state funding for higher education (even those sums that are appropriated to other state agencies) is reported in this section.

State support for all higher education is calculated by adding state tax support, non-tax support, non-appropriated support, endowment earnings, portions of multiyear appropriations from previous years, and other state support, and SUBTRACTING from that sum appropriations expected to be returned to the state and appropriations in the current year for use in other years (in other words, any appropriated funds that are not usable in the fiscal year in which they are appropriated).

Data elements collected in this section:

1. Appropriations from state government taxes to institutions for operations and other higher education activities;
2. Funding under state auspices for appropriated non-tax state support set aside by the state for higher education. These may include, but are not limited to, monies from lotteries (including lottery scholarships), tobacco settlements, casinos, or other gaming sources;
3. Funding under state auspices for non-appropriated state support. These may include, but are not limited to, monies from receipt of lease income, cattle-grazing rights fees, and oil/mineral extraction fees on land set aside by the state for higher education;
4. Interest or earnings received from state funded endowments set aside and pledged to public sector institutions;
5. Portions of multiyear appropriations from previous years;
6. Any other state funds not included above;
7. Appropriations you expect to be returned to the state; and
8. Portions of multiyear appropriations in the current year which are to be spread over other years.

In many states, the classification of colleges within the two sectors is less clear than it has been in the past as some community colleges have begun to offer and award bachelor's degrees. SHEF follows the definition of associate's colleges from the Carnegie basic classification: <http://carnegieclassifications.iu.edu>. **All data is reported by institutional Carnegie Classification, regardless of the degree program in which individual students are enrolled.** For example, if a state has a 2-year institution that also offers 4-year degrees, providers classify all appropriations, tuition revenue, and FTE enrollment for that institution under the 2-year sector.

Funds that cannot be easily allocated to 2-year or 4-year institutions, or students attending those institutions (meaning state financial aid awards), are included under "uncategorizable." For example, appropriations that go to students attending private institutions are included here. The sum of the sector breakouts ties to the total reported under State Support for All Higher Education.

ADJUSTMENTS

This section identifies funds that do not support *Public* Higher Education. Sums reported in this section will be subtracted from State Support for Higher Education to calculate State Support for *Public* Higher Education.

This section also includes Local Appropriations. Local appropriations reported here should reflect your best estimate, at the time of reporting, of actual and expected amounts provided to institutions during the fiscal year. **For analytical purposes, we assume that local appropriations support 2-year institutions.**

Data elements collected in this section:

1. State funding for students in continuing or adult education courses (non-credit) and non-credit extension courses which are not part of a regular program leading to a degree or certificate;
2. Sums to independent (private) institutions for operating expenses;
3. Allocation of state appropriations for student financial aid grants awarded to students attending state independent (private) institutions. Include dollars intended solely for students attending independent institutions or awarded to those students;
4. Allocation of appropriations for student financial aid grants awarded to students attending out-of-state institutions; and
5. Local Appropriations, from local government taxes to institutions for operating expenses.

ADDITIONAL FUNDING SOURCES

The sums collected in this section are for informational purposes only and are not subtracted from State Support.

Data elements collected in this section:

1. State appropriated funds derived from federal sources;
2. Tuition charges collected by the institutions and remitted to the state as an offset to the state appropriations;
3. Sums to independent (private) institutions for capital outlay (new construction and debt service/retirement); and
4. **NEW:** State funding for high school students in dual-enrollment or dual-credit courses.

RESEARCH-AGRICULTURE-MEDICAL (RAM)

As a component of total state and local appropriations, report collectively the appropriations intended for the direct operations of research, agriculture, public health care services, and medical schools. Indirect costs are excluded.

Does not include discretionary use by faculty of unrestricted appropriations supplemented by other revenues for short-term research primarily performed as an adjunct component of instruction (departmental research of an unsponsored nature).

When unknown, appropriations for sponsored research are estimated as equal to total research expenditures less state grants and contracts for research and federal and private revenues restricted for research. Assume no tuition revenues are used for research.

These funds are to be included in State Support for All Higher Education figures.

For analytical purposes, we will assume that RAM appropriations support 4-year institutions.

Data elements collected in this section:

1. Appropriated sums for research centers, laboratories, and institutes and appropriated sums separately budgeted by institutions for organized research. Generally, these are ongoing programs. Includes all health and science research;
2. Appropriated sums for agricultural experiment stations and cooperative extension services;
3. Appropriated sums for teaching or affiliated hospital operations and public service patient care. Include all medical, dental, veterinary, optometry, pharmacy, mental health, nursing, and other health science institutes, clinics, laboratories, dispensaries, etc., primarily serving the public; and
4. Appropriated sums for the direct operation and administrative support of the four major types of medical schools (medicine, dentistry, veterinary medicine, and osteopathic medicine) and centers corresponding to the medical enrollments previously reported.

PUBLIC TUITION REVENUE

This section collects information about tuition revenues from students attending public institutions in your state. One of the intents of this section is to calculate “Net Tuition Revenue,” which is used in the SHEF report as a measure of how much revenue institutions have to spend that is paid by students. “Net Tuition Revenue” is “Gross Tuition and Fees” less state-funded student aid, institutional discounts and waivers, and tuition revenue paid by medical students.

Data elements collected in this section:

1. Gross Tuition plus Mandatory “Education and General” Fees (public institutions);
 - Tuition and Fees waived or discounted by public institutions. Discounts and waivers include institutional aid transferred to a student’s account and tuition charges not collected from a student.
 - Institutional dollars that would not otherwise be available (e.g., restricted funds from institutionally managed endowments or designated for tuition grants) are not included as discounts.
2. State appropriated student aid for Tuition and Mandatory Fees for public institutions;
3. Tuition and Mandatory Fees paid by public medical students; and
4. Public institution tuition and fees used for capital debt service/retirement and capital improvement other than that paid by students for auxiliary enterprise debt service.

ANNUAL FTE ENROLLMENT

To calculate annual FTE, SHEF data providers determine the total number of degree credit hours¹² (including summer sessions) and apply the following conversion factors:

- 30 semester or 45 quarter **undergraduate** credit hours/year = 1 annual FTE student
- 24 semester or 36 quarter **graduate** credit hours/year = 1 annual FTE student

These conversion factors are based on 15 undergraduate and 12 graduate credit hours per semester or quarter.

To calculate annual FTE for non-degree credit,¹³ vocational-technical, remedial and other program enrollments at 2-year community colleges and state approved area vocational-technical institutes in courses which result in some form of a certificate or other formal recognition, providers determine the total yearly number of contact hours and apply the following conversion factor:

12. Credits counted in the FTE calculation should include credits that are state funded and could potentially lead to a degree for a postsecondary student. Non-degree students enrolled in a degree granting program should be included in the FTE calculation, but non-credit and dual-enrollment students should not.

13. Ibid.

900 contact hours/year = 1 annual FTE student. This conversion factor is based on a normal load of 25 contact hours per week for 36 weeks.

Data elements collected in this section:

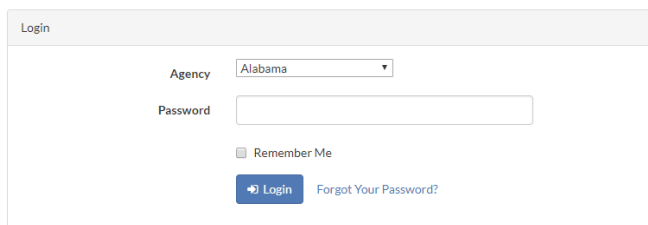
1. FTE enrollment calculated from course work creditable for a degree (including all health science and medical school enrollment) plus course work in a vocational or technical program normally terminal and which results in a certificate or some other formal recognition;
2. FTE enrollment in schools of medicine, dentistry, veterinary medicine, and osteopathic medicine (hereafter referred to as medical schools). **This is included in gross FTE;** and
3. FTE enrollment calculated for high school students in dual-enrollment or dual-credit courses. This is not included in gross FTE.

COLLECTION INSTRUCTIONS

Note: The collection instructions are nuanced and may change from year to year. Please read this document in its entirety. Last updated 09/18/2018.

STEP 1. LOG IN TO THE ACCOUNT FOR YOUR AGENCY

Navigate to the website <https://shef.sheeo.org> and click the link in the upper right corner to log in. Use the drop-down menu to select your agency name. (Accounts are tied to agencies, not individual data providers.)

A screenshot of the SHEEO login interface. At the top, there is a header bar with the word "Login" on the left. Below this, the form contains an "Agency" label next to a dropdown menu currently showing "Alabama". Below the agency selection is a "Password" label next to a text input field. Under the password field is a checkbox labeled "Remember Me". At the bottom of the form is a blue button with a white arrow icon and the text "Login", followed by a link that says "Forgot Your Password?".

If you do not remember your password, it can be reset by clicking the "Forgot Your Password?" link. This will send a password reset to the email address associated with your agency's account. The recovery email address is often linked to an individual user. If you are not that user or otherwise need to change the email address associated with your account, please contact Caitlin Dennis (cdennis@sheeo.org) for assistance. We recommend that you create a username and password that can be used by anyone in your agency, and that you save this information somewhere accessible.

STEP 2. REVIEW THE DATA COLLECTION GUIDELINES

After you log in, you will be redirected to the [Guidelines](#) page, which provides important information about deadlines and general instructions. **Please read the Guidelines page carefully!**

STEP 3. FILL OUT THE GRAPEVINE SURVEY

When you click on the *Fill out the Survey* link, you will see two questions at the top of the page. Please do not forget to answer these questions! *Note that the “biennial” question refers to the current/upcoming fiscal year.*

Does your agency have an annual or biennial budget?

- ☐ Annual
☐ Biennial

If you selected biennial, which part of your budget year are you in?

- ☐ 1st Year
☐ 2nd Year

The first part of the data collection is for *Grapevine* survey data for the current/upcoming fiscal year. This section has an earlier deadline. **Please complete the *Grapevine* survey by November 9, 2018.** Enter new information for fiscal year 2019 in the leftmost column and update the data for previous years if needed. You can hover over each variable for its detailed description. Once you complete the *Grapevine* survey, enter any comments about this data and check the box to indicate that your survey is complete.

Note that the sector breakdown in this section of the report will be published with the 2019 *Grapevine* tables. Please ensure that the data for years 2017, 2018, and 2019 is accurate. You can update your prior year data at any time.

Sector Breakdown

	2019	2018	2017	2016	2015	2014	2013	2008
State support, 2-year sector*	\$ <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
State support, 4-year sector*	\$ <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
State support, uncategorizable*	\$ <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total state support for all higher education	0	0	0	0	0	0	0	0
Difference (should be zero)	0	0	0	0	0	0	0	0

*Will be published this year.

Leave a comment explaining your circumstances below the *Grapevine* survey section if:

1. You are not able to account for the total state support for higher education (the red, difference bar is not zero);
2. More than 10 percent of state support is uncategorizable;
3. There is an inconsistency in the data between 2017 and 2019 (please explain what changed); or
4. There is anything else you think we should know about your sector breakdown data.

Comments - Grapevine Survey Only

STOP HERE FOR END OF GRAPEVINE SURVEY.
CHECK THE BOX IF COMPLETE. ☐

Save and exit

Save and continue

STEP 4. FILL OUT THE SHEF SURVEY

The SHEF survey is where you will enter information for the most recently completed fiscal year (2018). **Please complete the SHEF survey by December 7, 2018.** Begin at the top of the page ([State Support](#)) where you entered *Grapevine* data for 2019. Update the information in the 2018 column as well as any updated prior year data. ***Pay close attention to the years: after the State Support section, the newest year is 2018, rather than 2019.***

- As you move through the data collection, notice the blue rows with running totals. These calculations give you an early idea of the numbers we will use in SHEF.
- You can save your work at any time using the *save and continue* buttons near the top or at the very bottom of the page. **Please do not close the survey without saving.**

Note the jump between 2008 and 2013. We include the last five years of data because those are the most likely years for which you may have updates or changes. Data for 2008 are included because we use them as a pre-recession baseline in the SHEF report. If you would like to update data for the years prior to 2009 or between 2009 and 2012, contact Sophia Laderman (sladerman@sheeo.org) for an Excel spreadsheet with all data for your agency.

At the bottom of the data collection page, there is space to enter comments tied to each fiscal year. For example, if you update information from FY 2013, you can make a note explaining the changes in the [2013 Comments](#) section. Please use the comments section to note anything unusual about your data, such as:

1. Missing or provisional information;
2. Large changes (>10%) from year to year;
3. Changes in which data elements are included;

4. Places where your data does not match the SHEF definitions;
5. Inconsistencies across time (please explain what changed);
6. Notes about your sector breakdowns (see page 2 of this document); or
7. There is anything else you think we should know about your data.

When you have finished entering data, check the box to indicate the survey is complete. This does not authorize us to publish your data as is; it is used as an indicator of your progress. **We will not publish your data until you lock it on the next page of the survey.**

Is the Survey Complete?

Yes ☒

Save and View a Preview of Report

Save and Continue Working

Exit without Saving

STEP 5. VIEW A PREVIEW OF THE REPORT

At the bottom of the survey, you are able to view a preview of the report *whether or not you have marked the survey as complete*. Please note that if your data is incomplete, the survey preview may include calculation errors or false values.

For more information about how we calculate our metrics and adjust the data, see http://www.sheeo.org/projects/shef/learn_more.

On the [Report Preview](#) page, you have the option to download your data as an Excel file and/or a PDF. On this page, you can also publish and lock the data. We recommend that you wait to lock your data until the initial state data tables shared by SHEEO have been approved by your agency. Once the data are locked, please contact Sophia Laderman (sladerman@sheeo.org) if you need to make any changes. This ensures that we can make sure any changes in your data are reflected in the final report.

View and Print Survey Data and Report

[Download Excel Data](#)

[Download PDF Data](#)

Is the data accurate and ready to publish?

Yes, Publish and Lock the Data

We have a new feature for states that have multiple data providers. There is now an option to download the data submitted by all providers in a state. Once logged in, navigate to <https://www.sheeo.org/my-account> and click to download each Excel report. You can also find this by clicking on your agency name in the top right corner and clicking [View My Account](#).

SUBMISSION GUIDELINES

1. Make sure to check the boxes indicating you are finished. Marking these check boxes will help us measure your progress and will tell us that the data are accurate and complete.
2. Consistency from year to year is very important. You can edit any past data that need to be updated. If there is a substantial change in the methods used to compile your data and you need to update data prior to the editable years, contact sladerman@sheeo.org.
3. If you place your cursor on a data-element name for a few moments, a pop-up box will appear with additional guidance.
4. Please fill out the collection form as completely as possible. Leave any calculations to us (e.g., do not subtract RAM or state public aid before entering tax appropriations—include it, and enter that figure in the appropriate section).
5. If you are unable to provide actual figures but can provide an estimate, please do so. You can indicate which figures are estimates in the comment box corresponding to the appropriate year(s).
6. Please enter only whole numbers. If you have no data for an entry, please enter "0" so we know it is not an oversight. **If you leave a blank entry, you will encounter an error and be unable to save the page.**
7. Please pay careful attention to the years in which you enter data. The first section includes 2019, the rest do not.
8. Pay special attention to the sector breakouts. The total of your sector breakout should match the net total in the section above it. If you are unable to breakout sector data, please list the full amount as "uncategorizable" and leave a comment describing the issue. The "difference" row should always be zero.

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