STATE HIGHER EDUCATION EXECUTIVE OFFICERS ASSOCIATION

Tuition, Fees, And Financial Assistance 1979-2022 Longitudinal Dataset Technical Report

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TABLE OF CONTENTS

INTRODUCTION **3**
REPORT OVERVIEW 3

HISTORY AND BACKGROUND **5**

DATASET CONSTRUCTION **7**
LONGITUDINAL QUESTION SELECTION 9
LONGITUDINAL RESPONSES 9
STATE AGENCIES AND SECTORS 10
STATE DATA PROVIDERS 11
STATE REVIEW PROCESS 12
DATA CHALLENGE 13

APPENDIX A: LONGITUDINAL DATASET QUESTIONS AND SURVEY YEAR APPEARANCES **14**

APPENDIX B: QUESTION AND RESPONSE VARIATIONS **18**

APPENDIX C: MISSING STATES BY SURVEY YEAR **21**

APPENDIX D: LONGITUDINAL DATASET REVIEWERS **22**

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The full 2022 Tuition and Fee Survey Report, Longitudinal Dataset and Survey Instrument can be found on the SHEEO website at: sheeo.org/project/tuition-and-fee-survey/.

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The State Higher Education Executive Officers Association (SHEEO) serves the executives of statewide governing, policy, and coordinating boards of postsecondary education and their staffs. Founded in 1954, SHEEO promotes an environment that values higher education and its role in ensuring the equitable education of all Americans, regardless of race/ethnicity, gender, or socioeconomic factors. Together with its members, SHEEO aims to achieve this vision by equipping state higher education executive officers and their staffs with the tools to effectively advance the value of higher education, promoting public policies and academic practices that enable all Americans to achieve success in the 21st century, and serving as an advocate for state higher education leadership. For more information, visit sheeo.org.

INTRODUCTION

The State Higher Education Executive Officers Association (SHEEO) has produced 10 periodic reports and administered 11 surveys on state tuition and fee policies between 1979 and 2022. SHEEO administers this survey to state agencies to gather data on tuition and fee-related topics and issues in public higher education. Consistent questions asked over time have established a baseline of information about state policies regarding tuition, while additional questions have been added based on issues reflective of the social context relevant for members of that time. To date, this information has not been collected or shared in a way that allows for analysis spanning multiple survey years.

SHEEO is pleased to release the first longitudinal state-level dataset for the most frequently asked questions from our State Tuition, Fee, and Financial Assistance Policies survey series. The creation of this dataset was a yearlong endeavor, requiring substantial reconfiguration of existing report documents and careful attention to changes and adjustments to the tuition policy questions we have been asking our members over the decades. SHEEO is incredibly grateful to Casey McCoy-Simmons, state policy intern, who spent her time at SHEEO analyzing these historical reports, examining archival datasets, and matching tuition policy questions, response categories, and state agencies and sectors to compile this dataset. SHEEO is also grateful to the state data providers who reviewed their longitudinal data for consistency and accuracy; their expertise and state context greatly enhanced the final dataset. The longitudinal dataset with survey data from 1979 to 2022, past reports, and surveys are available online at sheeo.org/project/tuition-and-fee-survey/.

REPORT OVERVIEW

This report is a technical overview of the State Tuition, Fee, and Financial Assistance Policies survey series longitudinal dataset created using information collected from 11 surveys administered to the SHEEO membership between 1979 and 2022. First, we provide a brief history and background of the survey series and what led to the creation of the longitudinal dataset. Next, we provide a detailed description of how the dataset was constructed, including how the list of questions was curated and what challenges we faced in collecting data. Finally, additional information is shared in the appendices that consist of the full question list and survey year appearances (*Appendix A*), question and response variations (*Appendix B*), missing states by survey year (*Appendix C*), and longitudinal dataset reviewers (*Appendix D*).

HISTORY AND BACKGROUND

The State Tuition, Fee, and Financial Assistance Policies survey series consists of 10 published reports, one supplemental report (1988, Part II) and 11 survey instruments (the 1999 survey was never published). Surveys were typically administered every three years, except for the first two reports with almost a decade gap between them (e.g., 1979 and 1988). The survey series had a consistent focus on collecting and examining philosophies, policies, and procedures that drove decision-making regarding public college and university tuition, fees, and student financial aid programs. Later iterations added a special emphasis on college affordability and current economic conditions impacting short-term policy changes. The following list includes each survey with its special focus and other unique qualities as each iteration was adapted or revised to collect relevant and timely information. [1]

- 1979 served as the inaugural report that surveyed SHEEO/NCES Communication Network representatives to determine differing state practices regarding tuition and fees.
- 1988 (Part I) was completed by finance officers within the SHEEO membership and commissioned by the SHEEO Committee on College Costs.
- 1988 (Part II) anonymously surveyed state executive officers on their opinions on a variety of financial policy-related topics that resulted in a supplemental report in the survey series.
- 1993 covered topics including the heightened tension over tuition levels and policies, increased interest in tuition differentials, waivers, and student financial aid, and examined the growth of tuition as a source of revenue to support public higher education.
- 1996 included the first survey with complete state-level data and covered two new areas of interest: technology fees and state college savings plans.
- 1999 collected two- and four-year sector data for the first time, with the intention of updating and clarifying 1996 survey information but was never published as a report.
- 2003 included a new section on state policy responses to the federal educational tax credits implemented in 1997 and was the first survey to include a question about the impact of economic conditions on short-term policy changes.
- 2006 updated information from the 2003 survey and provided the most current analysis of the policies both undertaken and anticipated for tuition, student fees, and financial aid.
- 2011 updated information from the 2006 survey and provided information on the impact of American Recovery and Reinvestment Act funding.
- 2013 focused on the Great Recession's impact on tuition policies and financial aid programs.
- 2017 was significantly revised to better focus on how the policies and procedures around tuition and fee rate setting and financial aid align with state affordability strategies and attainment goals.
- 2022 expanded on revisions made in the 2017 survey and focused on the COVID-19 pandemic and its impact, including statewide or system-level changes, to the state agencies surveyed.

1. All published reports and survey instruments can be accessed online at: sheeo.org/project/tuition-and-fee-survey/

The periodic nature of these surveys makes research on the impacts of these policies difficult. Additionally, the absence of a longitudinal dataset of tuition-setting control, tuition limits and freezes, and state financial aid policies made it hard to study these issues. One of the main challenges was that there was previously no public repository for tuition and fee-setting information, as many of the past SHEEO surveys, data files, and reports existed only as hard copies in SHEEO archives and had not been digitized.

We recognized that researchers and the policy community interested in the impacts of tuition limits or freezes on student affordability or the relationship between other institutional revenues (such as state funding) and tuition, would benefit from access to historical documents and an accurate longitudinal dataset on these measures. By digitizing and combining survey data into one accessible longitudinal dataset, SHEEO will provide the first transparent dataset on state policies for tuition, fees, and financial assistance to researchers and the policy community interested in evaluating their impact on higher education.

In the next section, we will explain how the longitudinal dataset was constructed using report and survey information.

DATASET CONSTRUCTION

The data from SHEEO's State Tuition, Fee, and Financial Assistance Policies survey series have been used occasionally in empirical and non-empirical research and are regularly requested by SHEEO members. However, the irregular structure of the surveys over time has made the data difficult to use effectively when comparing multiple states, sectors, and survey years. SHEEO created this longitudinal dataset to include survey data from 1979 to the most recent iteration. We selected 61 questions that spanned tuition and fee philosophy, policy, and decisions made over the last four decades across both two- and four-year sectors. Datasets were collected, organized, or created for each survey year based on available documentation. This meant that some datasets were constructed solely based on findings in the published report (e.g., 1979, 1988, and 1993) whereas more recent surveys had original survey datasets (e.g., 2017).

In constructing the longitudinal dataset, we first gathered all physical and digital documentation with survey responses that were often partially complete, split up across multiple documents, or hard to decipher due to software changes and updates. *Table 1* shows the complete list of reports, datasets of raw responses, and survey instruments we were able to locate to help construct this project. In the following section, we explain how longitudinal questions were then selected and matched across survey years as well as the challenges faced when doing so (see *Appendix B* for variations in questions and responses due to challenges and inconsistencies across surveys).

TABLE 1

DOCUMENTATION AVAILABLE TO SHEEO FOR STATE TUITION AND FEE SURVEYS

SURVEY YEAR	PUBLISHED REPORT TITLE	SECTORS REPRESENTED	RAW RESPONSES AVAILABLE	SURVEY INSTRUMENT AVAILABLE
1979	State Tuition and/or Required Fee Policies for Public Postsecondary Institutions	Unknown	No	Yes
1988 (Part I)	Survey on Tuition Policy, Costs and Student Aid	Unknown	No	Partially (1988 report written in survey format)
1988 (Part II)	Tuition and Student Aid Policies: What Role for SHEEOs	Unknown	No	Partially (1988 report written in survey format)
1993	The Tuition Dilemma—State Policies and Practices in Pricing Public Higher Education	Unknown	No	Yes
1996	State Tuition and Fee Policies	Two- and four-year (manually assigned based on agency and responses)	Partial	Yes
1999	Not published	Two- and four-year (assigned in original survey instrument)	Yes	Yes
2003	State Tuition, Fees, and Financial Assistance Policies	Two- and four-year (manually assigned based on responding agency and responses)	Yes	Yes
2006	State Tuition, Fees, and Financial Assistance Policies for Public Colleges and Universities	Two- and four-year (manually assigned based on agency and responses)	Yes	Yes
2011	State Tuition, Fees, and Financial Assistance Policies for Public Colleges and Universities	Two- and four-year (manually assigned based on agency and responses)	Yes	Yes
2013	State Tuition, Fees, and Financial Assistance Policies for Public Colleges and Universities	Two- and four-year (assigned in original survey instrument)	Yes	Yes
2017	The State Imperative: Aligning Tuition Policies with Strategies for Affordability	Two- and four-year (manually assigned based on agency and responses)	Yes	Yes
2022	State Tuition, Fees, and Financial Assistance Policies 2022	Two- and four-year (assigned in original survey instrument)	Yes	Yes

LONGITUDINAL QUESTION SELECTION

Questions included in the longitudinal dataset were chosen based on consistent use over two or more survey reports. This was determined by a manual process of combing through each survey dataset and/or report to identify recurring questions. Once this process was completed, we created one primary question that could be generalized across all survey appearances without losing the original meaning, totaling 61 questions. A complete list of questions, and historical survey-year appearances, is available in *Appendix A*. The following list breaks down this process by each step:

1. A list of survey questions was created for each survey year. If raw responses were available, these were used as is or modified as needed to create consistency across questions and responses in the longitudinal dataset. If raw responses were not available, as much information as possible was extracted from published reports. For example, we did not have access to raw responses for the 1979 survey, but the report included hand-stamped maps or pie charts representing the state responses for each of the eight questions asked that year.
2. We manually combed through each dataset matching similar questions in descending survey-year order (for a full list of questions selected, see "Primary Question List" tab in dataset).
   - e.g., We searched 1979-2017 survey datasets for questions matching those asked in the 2022 survey. Once 2022 was completely combed through, we started the process over with the 2017 survey by matching questions (that were not used in the 2022 survey) with prior survey years, 1979-2013. This process was repeated until we cross-checked all survey years.
3. Once an initial list of longitudinal questions was created, we deleted questions that were not aligned closely enough for comparative purposes, while some questions were merged due to being similar in scope (e.g., tuition setting process for two-year versus four-year were combined into one question).
4. A general question text was created to convey what each survey year was asking without losing context.
5. The following list of eight question topics was created based on 2022 topic categories and manually assigned to each question in the longitudinal dataset: Tuition-Setting Philosophy, Tuition-Setting Authority, Other Tuition-Setting Policies, Tuition-Setting for Resident Students, Tuition Limits and Freezes, Student Fees, Student Affordability and Financial Assistance.

LONGITUDINAL RESPONSES

Once the longitudinal question dataset was completed, state responses were added. This process looked similar to collecting questions, with the additional challenge of accessing and aligning disaggregated state data. It was more difficult to identify state-level responses in older reports (e.g., 1988, 1993, and 1996) as these reports did not have individual state responses per question, and/or we only had access to the published reports sharing narratives and summaries of survey data. The 1979 survey was an exception as it was the only hard-copy report that included individual responses, in the form of a hand-stamped map, for the first half and a list of state respondents for the remaining four questions. Despite this information being available, some images were hard to discern due to the quality of the original hard copy or scanned pages.

Aligning responses across survey-year appearances was the most time-consuming step of this process. Even though consistent questions appeared over multiple survey years, the format of responses often varied. For example, question 49 in the dataset appeared in nine surveys, asking, "Does your state or a system within your state provide tuition waivers or discounting for particular categories of students?" The 2022 survey formatted this question as open-ended; the 2017 survey had a "yes" or "no" response followed by an open-ended option; and the 1996-2013 surveys asked for specific responses by category of student (e.g., graduate assistants, student-athletes, military) and type of assistance granted (e.g., assistance offered under statute). When response format inconsistencies like this occurred, we standardized the format as much as possible so the original information was not lost when transferred to the longitudinal dataset.

LONGITUDINAL RESPONSES

Each state-level response also includes the responding agency and sector (two-year, four-year, or both) they represented. The sector type was assigned based on what was listed in the published report, self-reported in the survey responses, or the institutional type(s) they served. If name, title, and/or agency were missing, then "Unknown" was used in the corresponding cell. If a sector was not clearly defined, then we assigned a sector based on the details outlined in *Table 3*.

TABLE 3

SECTOR CODES AND EXPLANATION?

HIGHER EDUCATION SECTOR	SECTOR CODE	ASSIGNED BY AGENCY	ASSIGNED BY QUESTION OR RESONSE
Both two- and four-year sectors	1	If agency had statewide oversight including both four-year and two-year institutions, then labeled as "1".	If questions or responses generally referred to statewide policies, then labeled "1" (e.g., the state's tuition policy is XYZ).
Two-year sector	2	If agency was a two-year system (e.g., state community college system), then labeled as "2".	If the question or response clearly asked/referred to only the two-year sector, then labeled "2" (e.g., two-year has no formalized policy).
Four-year sector	4	If agency was a four-year university system (e.g., university of state) without community/technical college oversight, then labeled as "4".	If the question or response clearly asked/referred to only the four-year sector, then labeled "4" (e.g., policy for four-year is set in statute).

Assigning sectors to each survey-year respondent was often a manual process based on limited available documentation. There are often multiple rows in the longitudinal dataset per state and per survey year due to the same state agency responding to a combination of the three possible sectors. Similar to the challenges faced in organizing survey questions and responses, the inconsistent formats of the survey instruments and lack of raw data in the earlier reports made this a cumbersome process. Specific challenges we faced in assigning sectors for state-level responses included:

- The first three surveys (1979, 1988, and 1993) did not include information on respondent or responding agency, and sector information was often not possible to glean from the available information. Because of this, the sector was listed as "Unknown" for all three survey years.
- Survey years 2003, 2006, 2011, and 2017 did not specify a sector in the questions but did include the responding agency name. Sectors were manually assigned to respondents based on the responding agency type (e.g., a state governing agency was usually assigned as representing both sectors) and responses (e.g., a response about community colleges would be assigned to the "2" sector).
- The four remaining surveys (1996, 1999, 2013, and 2022) clearly differentiated between the two sectors, in at least some of the questions.
  - The 1996 survey had only partial survey responses available because responses were found in multiple documents, with some variations that were difficult to reconcile. Even so, the available responses were often separated into four-year and two-year sectors as seen in the report appendices.
  - The 1999 survey's two-year responses mostly duplicated the four-year responses (e.g., responses would be listed as "Same as four-year"). Unique two-year responses were recorded in the longitudinal dataset, and we duplicated the four-year responses for the two-year sectors that listed their answers as being the same.
  - The 2013 survey instrument included several questions that specified whether it asked about two-year or four-year institutions, but questions that didn't include a sector were assumed to be answering for both sectors or the sector assigned to the responding agency.
  - The 2022 survey was very intentional about this issue and created an electronic survey that was customized depending on if the respondent represented two-year, four-year, or both sectors. Therefore, there is a clear delineation of sectors for the most recently administered survey.

STATE DATA PROVIDERS

SHEEO contacted data providers that represented state- or system-level agencies in each state to collect data for every iteration of the State Tuition, Fee, and Financial Assistance Policies survey series. A full list of historical data provider names, titles, and agencies can be found in the longitudinal dataset. Collecting state- and system-level data presents itself with unique challenges and each survey year had at least one state that did not respond or was not represented in the responses (see which states are missing responses from which year in *Appendix C*).

While some states or agencies may not have responded to the survey in any given year, there are also other reasons that states were not identified as respondents in the longitudinal dataset. Due to the inconsistency of tracking and digitizing data over time, older surveys (1979-1993) presented challenges in tracking down all relevant information, including survey respondents and individual state responses. Because of this, some survey years may have had state responses from those listed as missing, but these specific states were not explicitly called out in the documents we had access to in making the longitudinal dataset. Most notably, the 1993 survey had 38 missing states. The only document we had access to was the published report, which did not provide disaggregated information by state or a respondent list. Similarly, information from the 1979 and 1988 surveys was gathered from the corresponding published reports. Both reports were written in the form of a survey, though, so included each survey question and a greater breakdown of responses. The 1988 report varied in providing individual state responses or summarizing state responses as an aggregate total, while 1979 largely consisted of answers shared via a hand-stamped U.S. map. None of these three reports included a list of respondent information. Two respondents that have only been included in one survey each were not included in *Appendix C* but are included in the longitudinal dataset: Manitoba (1988) and the Northern Mariana Islands (2022).

In 2017, the most significant influence in tuition rate setting was the level of state general funds. Since 2017, continued increases in state support in most states,[2] alongside an increased focus on keeping public higher education affordable for all students, have made affordability a stronger influence than general fund appropriations. Student affordability is a key component of the tuition rate setting process as indicated across both state philosophy and influential factors.

STATE REVIEW PROCESS

The final step before publication was to request an external data review from state data providers. Fifty-nine state reviewers were selected and contacted based on the data provider list for the 2022 survey or staff serving in similar agency roles (see *Appendix D* for a list of longitudinal dataset reviewers). We did not have current contact information for data providers in Rhode Island, Puerto Rico, or Washington D.C., so these states/agencies were not included in the review process. Thirty-nine of the 59 state agencies we contacted provided updates to their data (18) or confirmed their data was correct with no additional edits (21). The remaining twenty state agencies did not respond to our request to review.

Data provider updates often included editing links to state legislation or initiatives, clarifying responses, and filling in blank responses. Due to question structure inconsistencies between survey years, some data provider edits were not included. For example, question one was an open-ended question in the 2017 survey, but a multiple-choice question in all other survey appearances. This meant that while the state's response to the question may not have changed between 2017 and 2022, the responses may have been different based on the original survey response options. All feasible updates were added to the final longitudinal dataset.

2. See shef.sheeo.org/ to learn more about recent increases in state support for higher education.

DATA CHALLENGES

As briefly discussed in the prior sections, we faced some challenges in creating this dataset due to the nature of the periodic administration of a survey dating back to 1979. The following list summarizes those challenges and includes additional notes to consider when reviewing the longitudinal dataset:

- The variability in question wording and response options across all surveys can lead to an inconsistent comparison among/across states and time.
- Raw responses from earlier surveys were often constructed manually, meaning a SHEEO staff member transcribed state responses versus downloading responses from an online survey, which introduces a level of human error that cannot be accounted for without access to original data.
- There may be variations in responding agencies for the same state across survey years. Reasons include reorganization of, or creation of, a state agency, or different agencies responding for the same state and sector over time.
- Agencies responding for both two- and four-year sectors (coded as sector "1") may have specific sector-level responses embedded that were not identified in constructing the dataset and will be missed if filtered by the coded sector.
- 1979, 1988, and 1993 surveys did not list a responding agency and did not always disaggregate responses by state. So, some cells marked "X" may still have had responses, but they were not visible in the data we had access to in making this dataset. "Unknown" Agency/Sector has responses included in the dataset, but no clear respondent.
- 1993 survey responses were not completely disaggregated by state, so many states that are "X" may have responded, but their individual responses were not shared in the report.
- 1996 survey had multiple documents with partial questionnaire responses in both digital and hard-copy formats that sometimes conflicted. When a conflict arose, the published report appendices were chosen as the final response included in the longitudinal dataset.

APPENDIX A:

LONGITUDINAL DATASET QUESTIONS AND SURVEY YEAR APPEARANCES

QUESTION ID	QUESTION TEXT	SURVEY YEAR APPEARANCE
Q001	What is the overall tuition-setting philosophy in your state?	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1993
Q002	Describe the rationale for the overall tuition-setting philosophy in your state (e.g., tuition should be low to maximize access, high tuition is combined with high financial aid, institutions best understand their fiscal situations, etc.).	2013, 2011, 2006, 2003, 1999
Q003	How is tuition philosophy formalized in your state?	2022, 2017, 2013, 2011, 2006, 2003, 1999
Q004	Have economic conditions over the last three years led to any short-term actions or policies on tuition that are in conflict with general philosophies?	2022, 2017, 2013, 2011, 2006, 2003
Q005	Please describe any difference in philosophy or policy concerning tuition at public two-year vs. four-year institutions in your state.	2011, 2006, 2003
Q006	Describe any tuition policy changes in your state in the past three fiscal years.	2013, 2011, 2006, 2003, 1999, 1996
Q007	Please describe any potential tuition policy changes under consideration for the immediate future in your state.	2013, 2011, 2006, 2003, 1999, 1996
Q008	Please provide a link to the tuition-setting statute(s) in your state (if applicable).	2022, 2017
Q009	Please briefly describe how tuition is set in your state.	2022, 2017, 2013, 2011, 1988
Q010	What role does each of the actors below play in establishing resident undergraduate student tuition rates in your state? Governor, legislature, statewide coordinating/governing board for multiple systems, coordinating/governing board(s) for individual systems, local district governing board(s)	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1993, 1988, 1978
Q011	Which of the entities in Q010 has primary authority for establishing tuition?	2017, 2013, 2011, 2006, 2003, 1999
Q012	If individual institutions have primary authority to set tuition rates, which of the following statements best describes the nature of their authority?	2022, 2017, 2013, 2011, 2006, 2003
Q013	What incentives (explicit or implicit) exist at the state or institutional level to minimize tuition increases?	2013, 2011, 2006, 2003
Q014	What tuition revenue appropriation policies are in place in your state?	2022, 2013, 2011, 2006, 2003, 1999, 1996, 1993, 1988
Q015	How has the tuition-setting process and authority changed in your state over the last three years and what has caused those changes?	2013, 2011, 2006, 2003
Q016	Differential tuition results when groups or individuals pay different tuition rates based on certain criteria, such as level of study, major, etc. Indicate if there are state- or system-level policies regarding differential tuition used for undergraduate students at public colleges and universities in your state.	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1993
Q017	Describe the relationship (formal or informal) between the tuition policies and fee policies in your state (e.g., viewed as similar but different source of funds, no relationship, etc.).	2013, 2011, 2006, 2003, 1999

QUESTION ID	QUESTION TEXT	SURVEY YEAR APPEARANCE
Q018	How is your state working to coordinate state appropriations, tuition, and financial aid policies?	2013, 2011, 2006
Q019	Does your state have explicit state policies (legislation, rules, written guidelines) which govern tuition and fee policy in the following areas? Briefly describe.	2003, 1996, 1993, 1988, 1979
Q020	Has a formal study group or commission on tuition policy been established in your state at any time in the past three fiscal years? If yes, please provide a link to or a copy of any written report resulting from the initiative.	2006, 2003
Q021	Please indicate the level of influence exerted by each of the individuals/groups in decision-making about public resident undergraduate tuition levels in your state. No influence, minimal influence, moderate influence, significant influence, controlling influence	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1993, 1988
Q022	Please indicate the three most influential factors in setting resident undergraduate tuition rates in your state over the past three fiscal years.	2013, 2011, 2006, 2003, 1988
Q023	Regardless of any state guidance or policy, what approximate percentage of the cost of instruction for resident undergraduate students was covered by tuition?	2022, 2017, 2013, 2011, 2003, 1999, 1996, 1993
Q024	What practices regarding resident undergraduate block tuition exist within your state?	2013, 2011, 2006
Q025	If you indicated that tuition is set at a flat rate for full-time students, please indicate the number or range of credit hours taken, if known, and describe to which institutions/sectors the flat rate applies.	2017, 2013
Q026	Has your state considered a policy regarding tuition rates for undocumented students? If so, what is the tuition rate for undocumented students who reside in your state?	2022, 2013, 2011, 2006
Q027	How is nonresident undergraduate tuition set in your state?	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1979
Q028	Regardless of any state guidance or policy, what approximate percentage of the cost of instruction for nonresident undergraduate students was covered by tuition (for most recent fiscal year available)?	2022, 2013
Q029	In addition to the general undergraduate tuition reciprocity agreements that exist within the regional higher education compacts, does your state have a policy specifically for undergraduate students from neighboring states or individual counties (for example, a "good neighbor" policy)?	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996, 1993
Q030	Has there been a state- or system-level freeze or other limit placed on resident undergraduate tuition at any time in your state in the past five fiscal years?	2022, 2017, 2013, 2011, 2006, 2003, 1999
Q031	Who applied the freeze or limit on resident undergraduate tuition?	2022, 2017
Q032	Has there been a curb, cap, freeze or other limit placed on fees in the past three fiscal years?	2013, 2011, 2006, 2003, 1999
Q033	As an alternative to raising tuition, have individual institutions or state offices responded with attempts to reduce costs (e.g., eliminating programs, freezing new hires, delaying capital outlay projects, etc.)?	2011, 2006

QUESTION ID	QUESTION TEXT	SURVEY YEAR APPEARANCE
Q034	Please provide a link to student fee-setting statutes in your state.	2022, 2017
Q035	Describe the philosophy in your state related to mandatory student fees and how this differs from tuition philosophy.	2022, 2017, 2013, 2011, 2006, 2003, 1999
Q036	Describe any differences in philosophy or policy concerning fees at public two-year vs. four-year institutions in your state.	2011, 2006, 2003, 1999
Q037	How is the student fee-setting policy formalized in your state?	2022, 2013, 2011, 2006, 2003, 1999
Q038	Describe any fee policy changes in your state in the past three fiscal years (not changes in fee levels).	2013, 2011, 2006, 2003
Q039	Are there any potential fee policy changes under consideration in your state? If so, please describe.	2013, 2011, 2006, 2003
Q040	Which actor(s) are primarily responsible for setting undergraduate student fees in your state?	2022, 2017, 2013, 2011, 2006, 2003, 1999, 1996
Q041	What is the relationship between tuition and financial aid policies in your state (i.e., do you aim for low tuition and low aid, high tuition and high aid, or something else)?	2022, 2013, 2011, 2006, 2003, 1999, 1996, 1993
Q042	What policies have been formally proposed and/or adopted by governor or state legislature in the past five years for consideration in your state?	2022, 2017
Q043	Describe any initiatives being discussed in your state to address the affordability of college for students and their families. Include any initiatives or collaboration with other agencies to provide consumer information on college price and the financing of higher education, including financial aid programs. Please provide a link (or indicate where documentation can be obtained) to any written materials developed.	2017, 2013, 2011, 2006, 2003, 1999
Q044	Does your state have a unified strategy for student affordability that considers institutions' tuition and financial aid?	2022, 2017
Q045	Does your state have a formal policy regarding the mix between merit- and need-based aid?	2017, 2013, 2011, 2006, 2003, 1999
Q046	Describe how reductions or shortfalls in available state funding for financial aid programs have been handled in your state (e.g., grant awards made based on "first come, first served," changes made to eligibility requirements to control for population sizes, etc.). Specify where this policy is formalized, if applicable.	2022, 2017, 2013
Q047	Describe any financial aid policy changes made in the last five years (not financial aid appropriations) and the reasons for them.	2017, 2013, 2011, 2006, 2003, 1999
Q048	Does your state have plans for how to alter major state financial aid programs if there are reductions or shortfalls in future years?	2022, 2017, 2013, 2006, 2003, 1999
Q049	Does your state or a system within your state provide tuition waivers or discounting for particular categories of students (examples: international students, nonresident students, military personnel, children of faculty members, etc.)?	2022, 2017, 2013, 2011, 2006, 2003, 1996, 1993, 1988
Q050	Which student financial assistance programs does your state offer?	2013, 2011, 2006, 2003, 1999, 1996, 1993, 1988
Q051	Does your state board or institutional boards have a policy that requires a portion of revenue from tuition increases to be set aside for student financial aid?	2022, 2017, 2013, 2011, 2006, 1993, 1979

QUESTION ID	QUESTION TEXT	SURVEY YEAR APPEARANCE
Q052	Enter the percentage applied to financial aid, and provide a link to your state policy.	2022, 2017
Q053	Understanding that multiple financial aid programs might exist in your state to meet a variety of objectives, please indicate the relative influence of each of the goals in the creation and adjustment of a comprehensive financial aid program.	2011, 2006, 2003
Q054	Which of the goals in Q053 has the greatest influence on financial aid policy in your state?	2006, 2003
Q055	How is the financial aid philosophy formalized in your state?	2011, 2006, 2003, 1999
Q056	In response to federal legislation creating various education tax credits and deductions, what policy action(s) have been taken in your state or are under consideration?	2013, 2011, 2006, 1999
Q057	In which occupational areas does your state provide assistance, loan forgiveness, and/or loan repayment programs to those who provide service to the state following graduation?	2013, 2011, 2006
Q058	Please describe any differences in philosophy or policy concerning student financial aid at public two-year vs. public four-year institutions in your state.	2013, 2011, 2006, 2003
Q059	What consideration, if any, has been given in your state to the impact that tuition prepayment programs or college savings plans may have on tuition levels? By whom?	2013, 2011, 2006, 1999
Q060	If your state is considering any development of, or changes in, a prepaid tuition program or a college savings plan, please describe.	2013, 2011, 2006, 1999
Q061	Describe the financial aid policies in your state with regard to independent institutions.	2013, 2011, 2006

APPENDIX B: QUESTION AND RESPONSE VARIATIONS

The following section details anomalies in and adjustments made to the 1979-2022 longitudinal survey dataset. These anomalies were identified during the construction and analysis of the dataset. In Table 4 we list variations that led to the decision to edit or discard survey questions and how we handled other missing or unclear information. Most instances noted were due to inconsistencies with the formatting of a question and/or response options. Question variation notes across survey years are also included in the longitudinal dataset.

DATA ANOMALIES AND VARIATIONS AMONG QUESTIONS AND RESPONSES

QID	VARIATION NOTES
Q001	• 1993 does not include complete individual state data. Responses referred to research universities/state colleges and universities. See page 7 of the 1993 report for an overview of responses by institutional type. • 1996-2013 & 2022 are multiple-choice questions plus an option for additional comments (options vary slightly between years). • 2017 is an open-ended question.
Q005	• 2003's original survey question F.1 is duplicated for Q005, Q039, & Q062.
Q010	• 1993 does not include individual state data. See page 10 of the 1993 report for an overview of responses by institutional type. • 2003 has additional comments per actor in original dataset. • 2006 does not include comments per individual actor. • 2017's question 3.4 was removed as it asks for actors who PROPOSE, not establish, tuition policies.
Q014	• 1988 has two answers for California from UC and CSU. • 1993 does not include individual state data, only high-level summary in report.
Q016	• 1993 does not include state-level responses. See report for high-level summary.
Q019	• 1996 answers all say "see attachment," which cannot be located. • 1993 has no state-level data, only aggregated responses: 34 = non-resident undergraduates, 25 = graduate/professional students, 9 = level/program differentiation for undergraduates, 33 = mandatory non-instructional fees, 11 = special non-traditional programs.

QID	VARIATION NOTES
Q021	• 2013, 2017, and 2022 categorized "minimal to no influence" as one answer and these were placed under "minimal influence" in the longitudinal dataset. • 2017 responses allowed multiple answers per respondent, so the highest level of influence was kept in the longitudinal dataset. • 2013 did not specify which agency in Minnesota responded for Q021 (B.1) so defaulted to "University of Minnesota." • 1999 and 1996 response options differed from the other survey years, so they were categorized as follows: Directly Indexed = Controlling Influence, Indirectly Indexed = Moderate Influence, Not taken into account = No Influence. • 1993 does not include state-level data. • 1988 has no state-level data, only aggregated responses: 14 = CPI, 12 = HEPI, 7 = Personal Income, 33 = Peer Institutions, 30 = Other; 1993 does not include individual state data: 2 indexed / 23 indirect = CPI, 3 indexed / 17 indirect = HEPI, 1 indexed / 20 indirect = Personal Income, 6 indexed / 32 indirect = Peer Institutions, 10 indexed / 27 indirect = cost of education/instruction, 8 indexed / 31 indirect = state general fund appropriations for higher education.
Q022	• 1988 has no state-level data, only aggregated responses: 3 = CPI, 2 = HEPI, 0 = Personal Income, 15 = Peer Institutions, 12 = Other.
Q023	• 1993 does not include state-level data, see report for high-level summary. • 1988's question 2 was omitted as it applied to "education and general costs" vs. explicitly cost of instruction.
Q029	• 1993 has no state-level data, only aggregated responses: 33 = Yes.
Q036	• 2003's question F.1 is duplicated for Q005, Q039, & Q062.
Q041	• 1993 does not include state-level data. See report for high-level summary.
Q042	• 2017 split Q042 into two survey questions. • 2022 combined Q042 into one question with multiple response options (considered, proposed, adopted).
Q049	• 2022 is a y/n format, all responses in "other/comment" column. • 2017 is a y/n plus open-ended question format. All responses combined in "other/comment" column. • 1993 has no state-level data. See report page 20 for data table. • 1988 has no state-level data, only aggregated responses: 46 = Yes, 4 = No, & 19 = Senior citizens, 17 = Faculty or staff or other institutional employees or their dependents/spouses, 12 = Academic scholarships, 11 = Teaching assistants, 10 = Athletic scholarships, 11 = Graduate assistants.
Q050	• 1993 has limited state-level data. See report page 22. • 1988 has open-ended responses that are listed in "Other/Comment" column.
Q051	• 1993 does not include state-level data. See report for high-level summary. • 1988's question 13 was omitted as it didn't explicitly ask about setting aside revenue for financial aid.
Q053	• 2013's question 8.3 is not included. While it has a similar question, it is too different from the others to be compared: "The following is a list of possible goals of student financial aid policy. Understanding that multiple programs might exist in your state to meet a variety of objectives, please indicate the goals that are most influential in the creation and administration for each type of state financial aid program."

QID	VARIATION NOTES
Q055	• 2013's question 8.4 is not included. While it has a similar question, it is too different from the others to be compared. It is broken down by specific financial aid policy, not the general state financial aid policy formalization.
Q057	• 2013 included an additional option not seen in other survey years: loan forgiveness.
Q058	• 2003's question F.1 is duplicated for Q005, Q039, & Q062.
Q061	• 2013's question 8.11 varied slightly from the other survey years but was still included: "For each of the programs in your state, specify whether students attending independent, nonprofit and independent, for-profit institutions are eligible to receive aid." Responses were combined to include all financial aid that each state said was available (a "yes" response) to either nonprofit or for-profit independent institutions.

APPENDIX C: MISSING STATES BY SURVEY YEAR

State	2022	2017	2013	2011	2006	2003	1999	1996	1993	1988	1979
ALABAMA			X						X		
ALASKA						X			X	X	
ARIZONA			X								
ARKANSAS			X						X	X	
CALIFORNIA						X					
COLORADO						X			X		
CONNECTICUT									X		
DELAWARE									X		
FLORIDA					X				X		X
GEORGIA									X		
HAWAII											
IDAHO											
ILLINOIS											
INDIANA									X		
IOWA									X	X	
KANSAS									X		
KENTUCKY											
LOUISIANA									X		
MAINE									X	X	
MARYLAND									X		
MASSACHUSETTS			X					X			
MICHIGAN			X	X		X		X	X		
MINNESOTA			X								
MISSISSIPPI									X		
MISSOURI			X						X		
MONTANA						X			X		
NEBRASKA									X		
NEVADA				X					X	X	
NEW HAMPSHIRE				X					X		
NEW JERSEY			X	X					X		
NEW MEXICO			X								
NEW YORK										X	
NORTH CAROLINA			X								
NORTH DAKOTA									X		
OHIO									X		
OKLAHOMA									X		
OREGON						X			X		
PENNSYLVANIA								X	X		
PUERTO RICO	X		X	X	X	X		X	X	X	X
RHODE ISLAND	X		X	X					X		
SOUTH CAROLINA									X		
SOUTH DAKOTA									X		
TENNESSEE									X		
TEXAS									X		
UTAH			X						X		
VERMONT			X						X		
VIRGINIA			X								
WASHINGTON				X							
WASHINGTON D.C.	X	X	X	X	X	X	X	X	X	X	
WEST VIRGINIA									X		
WISCONSIN											
WYOMING											

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