

Technical Review Panel No. 27 and 18 Requirements of the Higher Education Opportunity Act: State Higher Education Spending Chart

Final Actions

On April 21 and 22, 2009, RTI International, the contractor for the IPEDS web-based data collection system, convened a meeting of the IPEDS Technical Review Panel (TRP) in Bethesda, MD. The purpose of this meeting was to solicit input from the postsecondary community regarding the creation of a state higher education spending chart to be posted annually on College Navigator. (https://edsurveys.rti.org/IPEDS_TRP/documents/TRP_27.pdf)

On October 27 and 28, 2009, RTI International, convened an additional meeting of the IPEDS TRP in Washington, DC, to further examine the draft State Higher Education Spending Chart calculated using data currently collected by the National Center for Education Statistics (NCES) in IPEDS and to consider a draft state higher education spending chart calculated using other data sources. Both draft charts were calculated using the formulas recommended by the TRP that met in April 2009. Ultimately, the TRP suggested that IPEDS data be used to calculate the state spending charts. (https://edsurveys.rti.org/IPEDS_TRP/documents/TRP_28_Requirements_of_the_Higher_Education_Opportunity_Act_State_Spending_Chart.pdf)

After careful consideration of the available data, the formulas suggested by the TRPs were modified slightly to provide more precise calculations. The formulas used to calculate the state spending charts that are posted on College Navigator are shown below.

State Spending Chart Item 1: Percentage Change in Spending by the State per FTE Undergraduate Student

- 1) *the percentage change in spending by such State per full-time equivalent undergraduate student at all public institutions of higher education in such State, for each of the five most recent preceding academic years;*

$$\text{State spending per FTE} = \frac{\sum (\text{state appropriations} + \text{local appropriations})}{\sum \text{Undergraduate FTE}}$$

State Spending Chart Item 2: Percentage Change in In-State Tuition and Fees

- 2) *the percentage change in tuition and fee for such students for all public institutions of higher education in such State for each of the five most recent preceding academic years;*

Tuition and fees =	$\frac{\sum [(in\text{-}district\text{ tuition and fees}) \times (estimated\ in\text{-}district\ FTFTUGS) + (in\text{-}state\text{ tuition and fees}) \times (estimated\ in\text{-}state\ FTFTUGS)]}{\sum (estimated\ in\text{-}district\ FTFTUGS + estimated\ in\text{-}state\ FTFTUGS)}$
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State Spending Chart Item 3: Percentage Change in the Total Amount of Need-Based Aid and Merit-Based Aid Provided by the State to Full-Time Students

- 3) *the percentage change in the total amount of need-based aid and merit-based aid provided by such State to full-time students enrolled in the public institutions of higher education in the State for each of the five most recent preceding academic years.*

Total amount of aid per resident FTFTUG =	$\frac{\sum \text{total amount of state and local government grants and scholarships}}{\sum (estimated\ in\text{-}district\ FTFTUGS + estimated\ in\text{-}state\ FTFTUGS)}$
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For State Spending Chart Items 2 and 3, the estimated in-district and in-state counts were derived from counts of full-time, first-time undergraduate students paying in-district tuition and fees and in-state tuition and fees, as reported on the Student Financial Aid (SFA) dataset. Students reported as ‘unknown’ in the SFA database were allocated to the in-district and/or in-state category based on (1) the institution’s own distribution of in-district and in-state counts, if the total number of unknowns was less-than 50 and the percentage of unknowns was less than 25%, or (2) the state level distribution of in-district and in-state counts, calculated within level of institution, for cases where the total number of unknowns was greater than or equal to 50, or the percentage of unknowns was greater than or equal to 25%.