

INFORMED STATES STATE FINANCIAL AID DATASET

Dataset Documentation

The InformEd States State Financial Aid Dataset contains detailed information on state financial aid programs based on need, merit, and a combination of need and merit from Fiscal Years 2004 through 2020. The dataset contains the following information for financial aid programs that are available to incoming first-year students in each state (please see additional documentation for inclusion criteria):

- The amount of funds awarded based on need, merit, and a combination of need and merit each year
- The number of students who receive grant aid based on need, merit, and a combination of need and merit each year
- The average amount of grant aid per student based on need, merit, and a combination of need and merit each year (derived from the previous two data elements)
- Name of financial aid programs based on need, merit, and a combination of need and merit each year
- For the most inclusive need-based program in the state in a given year:
 - Indicators for how states define need (e.g., through expected family contribution as determined by FAFSA, income)
 - Threshold the state uses to determine need (this information is only recorded when it was available)
 - Indicators for the institutions where funds can be used (two-year, four-year, private, proprietary)
- For the most inclusive merit-based program in the state in a given year:
 - Indicators for how states define merit (e.g., college entrance exam, high school GPA)
 - Threshold the state uses to determine merit (this information is only recorded when it was available)
 - Indicators for the institutions where funds can be used (two-year, four-year, private, proprietary)
- For the most inclusive combination (need and merit) program in the state in a given year:
 - Indicators for how states define need (e.g., through expected family contribution as determined by FAFSA, income)
 - Threshold the state uses to determine need (this information is only recorded when it was available)
 - Indicators for how states define merit (e.g., standardized test scores, high school GPA)
 - Threshold the state uses to determine merit (this information is only recorded when it was available)
 - Indicators for the institutions where funds can be used (two-year, four-year, private, proprietary)

We created this dataset by examining more than 4,000 state financial aid documents, including state budgets and higher education agency and aid commission websites and reports. When historical information was not available on current websites, we used the Internet Archive: Wayback Machine to locate older documents. We also used the Thomson Reuters Westlaw Database to locate historical state administrative code that outlined program requirements. When we were unable to locate information or found inconsistent information, we reached out to state higher education officials to request clarification.

Missing states/state-year combinations: For New Hampshire and Rhode Island, we were unable to find any data on financial aid programs (Rhode Island shared that this data is not maintained statewide, and New Hampshire was not able to direct our research team to an agency that was able to share this information). These two states are excluded from our dataset. When we were unable to collect the amount of aid or number of recipients for any need, merit, or combination program, we considered those data to be missing for all state financial aid for that year. In our final dataset, this restriction affects one year for South Dakota, nine years for Nevada, and ten years for Delaware where we consider need, merit, and combination aid to be missing. In other cases, if state officials were not able to provide data or clarification, we supplemented our data with NASSGAP data on the amount disbursed and number of recipients and noted this in the notes columns. When we could not find a primary source for eligibility criteria and we had data in the years surrounding the missing year that did not change, we imputed the missing data using information from the surrounding years and noted this in the notes columns. In some instances, we imputed data with only one surrounding year of data, often the first year a program was offered. For example, we could not find primary documents for FY2006 for Massachusetts (the first year of the John & Abigail Adams Scholarship). However, we were able to find them for FY2007 and given that they did not change, we used 2007 to complete data for FY2006.

Financial aid program inclusion criteria: Our dataset focuses on state financial aid programs that are available to students entering postsecondary education for the first time. We excluded programs that are explicitly focused on returning college students and programs that are focused on specific student populations (e.g., youth formerly in foster care, children of deceased police/service workers) since these are narrowly targeted and may have very specific eligibility criteria. Additionally, since our focus is on state financial aid programs, we excluded programs that are funded through tuition revenue (if the funding source for the program was clear) rather than through state general funds or other public funds, since these are funds that students pay. When possible, we excluded federal contributions to state financial aid programs (e.g., LEAP funds), but this was not always possible. We included notes in the notes columns indicating whether federal funds were included or excluded, if that information was available.

Since the focus of our study was on the relationship between state spending on student financial aid and completion outcomes, we excluded programs that were for certificate or non-degree study only in order to focus on programs that awarded funds toward the completion of an associate or bachelor's degree. Some aid

programs can be used for trade programs, such as certificates, as well as associate degrees; we included these programs (e.g., Montana Governor’s Best and Brightest Trade Scholarship) since they could also be used toward the completion of an associate degree.

Finally, if the selection process or criteria for a financial aid program was unclear (e.g., the program required recommendations, a nomination, interview, or other criteria that was not clearly described), we excluded it since there was not a clear threshold or criteria for students who were selected to receive the scholarship.

Determining most inclusive program: To code the eligibility criteria for state need, merit, and combination programs, we selected the most inclusive program in the state that does not have field of study restrictions. For instance, if a state had two merit aid programs, one with a 3.5 high school GPA requirement and another with a 3.0 high school GPA requirement, we coded eligibility criteria based on the more inclusive program with the 3.0 high school GPA requirement. When an extensive program with multiple sub-programs exists under one umbrella program (e.g., Louisiana TOPS, Florida Bright Futures, Alaska Performance Scholarship) and aid type (need/merit/combo), we use the most inclusive tier of eligibility requirements for students to code eligibility requirements. The notes column for each type of aid (need, merit, and combination) lists the program for which we coded eligibility criteria in a given year. If it was not clear which program was the most inclusive in a given year, we coded eligibility criteria based on the largest aid program.

Suggested Citation

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Contact Information

Requests for additional information on the data or technical questions can be directed to info@informedstates.org.

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