

## GUIDELINES

The fiscal year 2020 data collection is due on Friday, December 11, 2020. Please read the following guidelines carefully, as both the data collection system and the underlying data elements have changed substantially this year. **The data collection includes several new data elements this year. Newly added data elements fall under two categories:**

1. Required: Data for 2019 and 2020 are required this year. If available, please also provide as much prior year data as possible.
2. Optional: Some data elements are part of a pilot collection and are not required this year, but will be required next year. If available, please provide whichever optional data elements you can and take steps toward ensuring that you can provide these data elements in the next collection cycle.

In some cases, previously entered data is listed along with new data elements, for your convenience. For example, local appropriations will now be provided by sector (two-year vs. four-year). All previously reported local appropriations will be shown for the next two years as we transition to a sector-level reporting structure. Please allocate these appropriations by sector or list them as uncategorizable.

### GENERAL INSTRUCTIONS:

- Starting this year, we ask that you leave cells **blank** if you are not able to provide the data. Blanks will be differentiated from zeros, which are assumed to be true zeros—that is, a zero indicates that you have access to the data but have nothing to report, while a blank indicates that you are not able to provide the data element at this time.
- When you have finished filling out the survey, make sure to check the box indicating you are finished. Marking this checkbox opens up the “Preview Report” page, which shows final calculated metrics used throughout the SHEF publications. In addition, checking this box will help us measure your progress and will tell us that your data submission is complete. This will also trigger our automated validations, which check for large changes and other abnormalities in your reported data.
- Note that you should not lock your data until you have 1) reviewed the initial tables we will send you in January, and 2) verified that no changes are needed.
- Consistency from year to year is very important. Beginning this year, you have the ability to edit any prior year data (back to 2001) that needs to be updated. If there is a substantial change in the methods you use to compile your data, we ask that you update prior year data using the new methodology in order to maintain consistency in the trend data.

- If you place your cursor on a data element name for a few seconds, a pop-up box will appear with additional guidance. [Click here to view all Data Definitions.](#)
- 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).
- If you are unable to provide actual figures but can provide an estimate, please do so. You can indicate which figures are estimates by adding a comment in the appropriate data entry cell.
- The data entry form allows you to enter formatting (i.e., dollar signs and commas) but will not accept negative numbers, letters, or non-formatting symbols.
- Finally, please pay special attention to the sector breakouts. The total of your sector breakout should match the net total in the corresponding section. If you are unable to break out sector data, please list the full amount as “uncategorizable” and leave a comment describing the issue.

Thank you for all that you do to make the annual SHEF data collection possible! The final datasets and reports resulting from your efforts are valuable tools for many researchers, policymakers, analysts, and reporters.