NC-SARA 2018 ENROLLMENT REPORT

Prepared for NC-SARA by

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National Council for State Authorization Reciprocity Agreements

A voluntary, regional approach to state oversight of distance education

October 15, 2018

Preface

NC-SARA and Its Regional Partners

In 2013, the National Council for State Authorization Agreements (NC-SARA) became a nationwide coordinating entity, in partnership with the country's four regional education compacts (NEBHE, MHEC, SREB, and WICHE) to establish uniform standards and procedures for state oversight of postsecondary distance education delivered across state lines. States participating in SARA through any one compact are recognized as reciprocal partners with states participating in SARA through any other regional compact. And institutions are assured that their participation in one region's SARA initiative will carry full value in any other SARA state, from any other region.

SARA institutions' distance education data

Distance education enrollment data collected by NC-SARA provide a significant advance in the national collection and reporting of such information. NC-SARA's data provide greater transparency about which institutions are enrolling online students and where those students are located. Unlike the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS), in NC-SARA reporting, student enrollment data are disaggregated by state, delivering clarity as to where distance education activity takes place. The adoption of SARA by the states and the participation of institutions within them provides a new and more reliable source of information about distance education offerings in the U.S. than previously available.

Overall growth

Since the 2017 NC-SARA enrollment data collection in the spring of 2017, two states (Florida and Massachusetts) and Puerto Rico have joined SARA. SARA members now include 49 states (all but California), the District of Columbia, Puerto Rico and the U.S. Virgin Islands.

The path ahead

NC-SARA will convene, for the fourth year, a committee to assess and review NC-SARA's data reporting policies and procedures to maximize the knowledge that has been gained from the annual data collection cycle.

NC-SARA's commitment to transparency in distance education data collection continues to set a collaborative tone that may help establish a new norm for institutions. Continued improvement in the processes, systems and communication related to the annual NC-SARA data collection will improve the process and give all who use these data a renewed confidence in what they tell us about distance education.
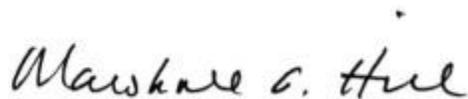
Marshall A. Hill

Executive Director, NC-SARA

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Executive Summary

The 2018 NC-SARA Enrollment Report summarizes 2018 institutional reporting to the National Council as outlined in the State Authorization Reciprocity Agreement (SARA). Distance Education enrollment data are reported annually each fall by institutions in the Fall Enrollment (EF) component of their submissions to the federal Integrated Postsecondary Education Data System (IPEDS). IPEDS data collection is required by the federal government for all institutions that participate in federal student financial assistance programs. Distance education data for 2017 were reported to IPEDS in the fall of 2017; those same data, disaggregated by state, were submitted to NC-SARA in the spring of 2018. Similarly, distance education data for 2016 were reported to IPEDS in the fall of 2016 and to NC-SARA in the spring of 2017. NC-SARA now has three years of reported data.

This report summarizes the 2018 data reported and provides comparisons to the 2016 and 2017 data reported to NC-SARA. The process of states joining SARA and institutions within them applying to operate under SARA is ongoing. Therefore, the annual reporting provides a snapshot of the distance education data as of each year's fall IPEDS reporting.

Institutions Reporting

In May 2018 NC-SARA sent requests via email with a link to report fall 2017 distance education enrollments to the institutional contacts at 1,804 institutions then operating under SARA. NC-SARA received responses from 1,791 institutions during the annual reporting window in the spring of 2018. The response rate was 99.3% (non-reporting institutions have provided assurances that they will report in future years). The number of institutions operating under SARA increased 20.8% from 1,494 in 2017 to 1,804 in 2018. During this reporting period two states (Florida and Massachusetts) and Puerto Rico were approved to operate under SARA. However, of these new members only institutions in Florida had an opportunity to apply before the reporting period began on May 21, 2018. Sixty-six Florida institutions began operating under SARA this year. These Florida institutions combined reported 37,814 distance education enrollments, or 69.6% of the reported growth. Institutions in Massachusetts and Puerto Rico are currently in the process of applying to participate in SARA, but none of those distance education enrollments were counted in the current year.

Year	Number of Institutions Operating Under SARA	Number of Institutions Reporting to NC-SARA	Number of Institutions Reporting Distance Education Enrollments
2017	1,494	1,477	1,394
2018	1,804	1,791	1,778
Increase	310	314	384

Table 1. Institutions Reporting

Reporting Institutions by Sector

Public institutions made up just over half (53.0%) of all institutions reporting enrollment to NC-SARA in 2018. Private non-profit institutions represent 41.0% and independent for-profit institutions account for 5.9% of reporting institutions operating under SARA and reporting in 2018. In addition, two Tribal institutions reported to NC-SARA in 2018, representing 0.1% of the total. The relative size of the sectors remained consistent between the 2017 and 2018 reporting.

2018 Reporting Institutions by Sector
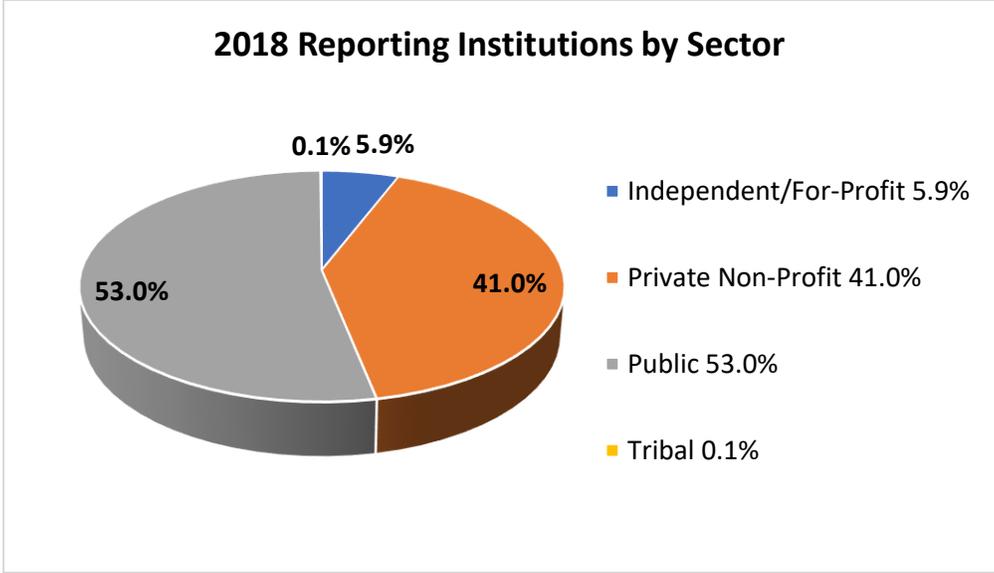
Figure 1. 2018 Reporting Institutions by Sector

Sector	Number of Institutions Reporting	% of Total Institutions Reporting
Independent/For-Profit	104	5.9%
Private Non-Profit	735	41.0%
Public	950	53.0%
Tribal	2	0.1%
Total	1,791	

Table 2. 2018 Reporting Institutions by Sector

Reported Distance Education Enrollment

For the 2018 reporting period the institutions operating under SARA in 48 states, the District of Columbia (DC) and the US Virgin Islands reported 1,225,022 distance education enrollments, 88.5% in states operating under SARA and 11.5% in non-SARA states. For the 2017 reporting period, the institutions operating under SARA in 47 states, DC and the U.S. Virgin Islands reported 1,170,725 distance education enrollments, 82.9% in SARA states and 17.1% in non-SARA states. This increase of 54,297 reported distance education enrollments represents 4.6% growth between the second and third year of reporting. Reported enrollment in states operating under SARA increased 11.7% between 2017 and 2018; reported enrollment in non-SARA states declined 29.6% in the same time period.

The slower growth in enrollment reported in 2018 may be attributable to the fact that only the state of Florida joined SARA early enough in the year to allow institutions within the state to apply to operate under SARA. In addition, there were no new large institutions of higher education that began operating under SARA during the period.

	SARA State Reported Enrollments	Non-SARA State Reported Enrollments	Total Reported Enrollments
2017	970,548	200,177	1,170,725
2018	1,084,008	141,014	1,225,022
Change in Reported Enrollment	113,460	-59,163	54,297
% Change	11.7%	-29.6%	4.6%

Table 3. 2018 Reported Enrollments by Sector

Highly Concentrated Distance Education Enrollment

As reported last year[1], enrollment data reported to NC-SARA supports prior independent analyses of the distance education industry. This research affirms that distance education enrollments are highly concentrated. According to the *Grade Increase: Tracking Distance Education in the United States,* "Students enrolled in distance education remain highly concentrated in a relatively small number of institutions. Almost half of distance education students are accounted for in just 5% of institutions: the 235 institutions that represent only 5.0% of the higher education universe command 46.9% (2,985,347) of the student distance enrollments."[2] These data are based on 2016 IPEDS reporting.

The 2018 NC-SARA reporting reveals that the three institutions reporting the largest distance education enrollments together represent 21.9% (267,767) of all distance education enrollments reported to NC-SARA. The ten institutions with the largest reported enrollment combined represent 46.0% (563,323) of distance education enrollments reported to NC-SARA.

In-State Distance Education Enrollment is Significant

NC-SARA focuses specifically on out-of-state distance education enrollments. While this focus aligns with the mission of SARA, it does not completely reflect the distance education enrollment patterns for U.S. institutions of higher education. For example, public institutions of higher education are primarily charged to serve students in their own state. Since in-state enrollment has historically not been reported to NC-SARA, the reported NC-SARA data reflects enrollment patterns across state lines, but not within a given state. The lack of in-state enrollment data reported provides a skewed picture of public institution distance education activity.

An analysis of 2016 IPEDS data submitted by 951 public institutions operating under SARA during the 2018 reporting period reveals that 83.9% (931,374) of their exclusively distance education enrollments were in-state, while 16.1% (179,088) were in another state. These data support the assertion that public institutions primarily serve in-state students, even when those students are studying exclusively through distance education.

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[1] Straut, T. (2017) NC-SARA 2017 Enrollment Report, p. 8.
http://ncsara.org/files/docs/2017%20Enrollment%20Data%20Report%20Publish%201.pdf
[2] Allen, I.E., Seaman, J. and Seaman, J. (2018) Grade Increase: Tracking Distance Education in the United States, 2018, p. 22. https://onlinelearningsurvey.com/reports/gradeincrease.pdf

These proportions remained remarkably consistent to those reported in 2017. Last year, 83.7% (737,977) of public institutions' exclusively distance education enrollments were in-state, while 16.3% (144,241) were in another state.

2016 IPEDS Public Institutions' Exclusively Distance Education Enrollment

- IPEDS Reported Enrollment Same State 83.9%
- IPEDS Reported Enrollment Other States 16.1%
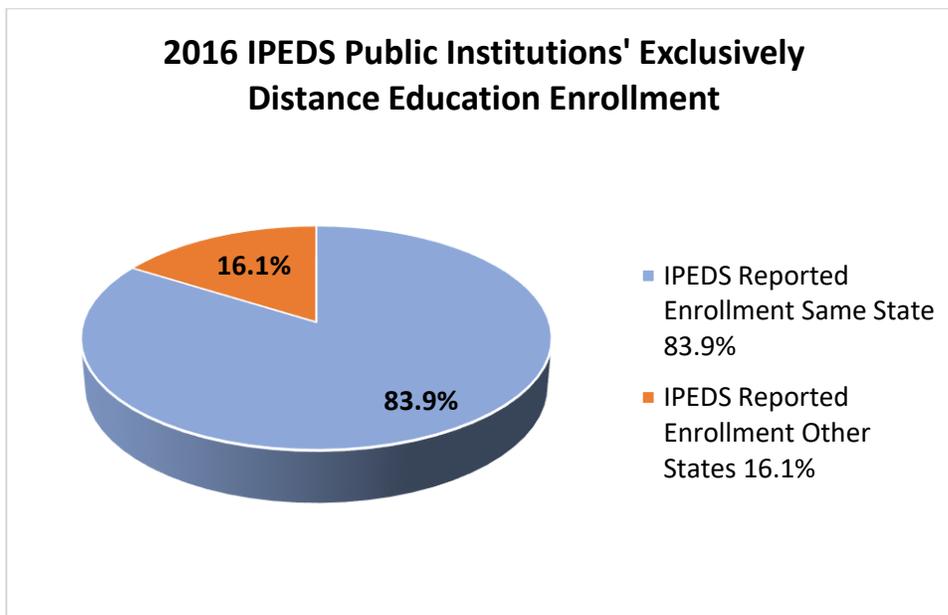
Figure 2. Reported 2016 IPEDS Enrollment In-state & Other States

	2016 Reported IPEDS Enrollments in Same State	2016 Reported IPEDS Enrollments in Other States	2016 Reported Total Enrollments
Reported Enrollments	931,374	179,088	1,110,462
Enrollment %	83.9%	16.1%	

Table 4. Reported 2016 IPEDS Enrollment In-state & Other States

Given the magnitude of in-state distance education enrollments, the NC-SARA Board has approved adding the reporting of these enrollments to NC-SARA beginning with the 2019 reporting period. Institutions already collect and report that data in their normal IPEDS reporting. All institutions operating under SARA have been alerted to this change in policy and procedures.

Reporting Challenges

As reported in 2017, in an attempt to standardize reporting requirements for institutions, SARA relies on IPEDS definitions, schedules, etc. Unfortunately, it is clear from the comments submitted again this year that confusion persists. Many institutions continued to struggle to understand how they should report to IPEDS; even though the *2018 Data Reporting Guide* was edited in response to the questions and comments provided in 2017 and all institutions were given access to the guide in preparation for 2018 reporting. And, since NC-SARA's basic instructions are stated in *The NC-SARA Enrollment Data Reporting Guide*, "The required data reporting is based on the enrollment data your institution reports to IPEDS

each year; NC-SARA asks you to disaggregate some of that data",[3] those misunderstandings affect NC-SARA reporting. Over half (55.4.7%) of comments provided in the Comment field of 2018 survey specifically mentioned lack of clarity about what data to report, confusion about IPEDS definitions and concerns with how to report military students and those in U.S. territories. This finding is consistent with 2017, when 51.7% of comments also were related to these issues.

Continued Progress Towards Transparency

The reporting process and mechanisms to receive the data worked well for the third NC-SARA reporting period; no systemic issues were reported. Improvements to the survey and instructions for 2018 facilitated the participation of the growing number of institutions reporting to NC-SARA. Continued improvement in the processes, systems and communication related to the annual NC-SARA data collection will improve the process and give all who use these data a renewed confidence in what they communicate about distance education adoption and use across state lines in the U.S.

Starting in 2019, the data collected from institutions will include in-state distance education enrollments, providing a more comprehensive picture of distance education in the U.S. NC-SARA's commitment to transparency in distance education data collection and reporting is setting a collaborative tone that may help establish a new norm for institutions of higher education.

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[3] The NC-SARA Enrollment Data Reporting Guide, p. 2. http://www.nc-sara.org/files/docs/NC-SARA_Spring_2018_DataReportingGuide_FINAL.pdf (Retrieved September 17, 2018).

Introduction

The National Council for State Authorization Reciprocity Agreements (NC-SARA) has completed three years of distance education enrollment data collection. The purpose of this report is to provide a summary and analysis of the fall 2017 enrollment data collected by NC-SARA in the spring of 2018. Comparisons to the enrollment data collected in the spring of 2017 and 2016 are included on key points of interest to SARA stakeholders. In addition, data reporting challenges and recommendations to improve spring 2019 reporting are included.

Background

About NC-SARA

NC-SARA is a nationwide coordinating entity established to ensure that the SARA initiative provides a national solution to the challenges of state authorization of distance education. NC-SARA works with the country's four regional compacts to establish and implement uniform standards and procedures for accepting and monitoring states participating in each of their respective regions: New England Board of Higher Education (NEBHE), Midwestern Higher Education Compact (MHEC), Southern Regional Education Board (SREB), and Western Interstate Commission for Higher Education (WICHE). States participating in SARA through any one compact are recognized as reciprocal partners with states participating in SARA through any other regional compact. And institutions are assured that their participation in one region's SARA initiative will carry full value in any other SARA state, from any other region.

About SARA

The State Authorization Reciprocity Agreement (SARA) is a voluntary agreement among its member states and U.S. districts and territories that establishes national standards for interstate offering of postsecondary distance education courses and programs. It is intended to make it easier for students to take online courses offered by postsecondary institutions based in another state and provide them certain assurances of quality and additional means to resolve problem that may occur. SARA is a voluntary process of state oversight of distance education that assures consistent consumer protection and relieves the burden of meeting individual state authorization requirements for participating institutions of higher education.[4]

As of May 2018, all U.S. states except California were SARA member states. Neither Guam, American Samoa, nor the Commonwealth of the Northern Mariana Islands (CNMI) are members of SARA. Since Massachusetts (MA) and Puerto Rico (PR) were accepted as SARA members after the start of the spring reporting period, enrollments reported in MA and PR are still counted as non-SARA for the 2018 report. The map below shows SARA states and territories in green.

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[4] NC-SARA, About SARA. (n.d) Retrieved from NC-SARA Website. http://www.nc-sara.org/about
 (Retrieved July 18, 2018).

Figure 3. Map of SARA States, Districts and Territories

Out-of-State Learning Placements

During the development of SARA, commitments were made to the state regulator community about assessing the number of learning placements occurring in their states. The goal of this reporting is to help institutions better attend to and meet professional licensure obligations in the states in which they enroll students, and for compliance with federal regulations affecting institutions' abilities to participate in federal Title IV student assistance programs. This spring, NC-SARA invited institutions operating under SARA to voluntarily report their learning placements in all states, territories and districts other than their own. The results of the 2018 pilot are shared in the 2018 *NC-SARA Out-of-State Learning Placement Report* on the NC-SARA website. The NC-SARA Board has made such reporting mandatory for spring 2019. A separate survey link will be provided for institutions to provide their learning placement data and the results will be reported in a separate publication annually.

Methodology

NC-SARA and IPEDS Reporting

NC-SARA relies on the existing definitions and reporting schedules required by the federal government's Integrated Postsecondary Education Data System (IPEDS). IPEDS data collection is managed by the U.S.

Department of Education through the National Center for Education Statistics (NCES) and reporting is required of all institutions of higher education that offer federal financial aid in the U.S. states and territories. NCES has been requiring institutions to report distance education data since the IPEDS Fall Enrollment (EF) reporting in 2012. Additional information about prior IPEDS Distance Education analysis is available in Appendix A: Technical Notes.

NC-SARA Reporting Schedule

Distance education enrollment data are reported by institutions annually, each fall in the Fall Enrollment (EF) component of their submission to the federal IPEDS data collection. Distance education data for 2017 were reported to IPEDS in the fall of 2017 and to NC-SARA in the spring of 2018. Similarly, distance education data for previous years were reported to IPEDS in the fall and to NC-SARA in the spring of the following year. NC-SARA now has three years of data reported. The figure below illustrates when institutions report distance education enrollments to IPEDS and to NC-SARA.

Timeline of Reporting Students Enrolled in Distance Education Activity

Fall 2015	Student Enrollment	Report to IPEDS	
Spring 2016			Report to NC-SARA
Fall 2016	Student Enrollment	Report to IPEDS	
Spring 2017			Report to NC-SARA
Fall 2017	Student Enrollment	Report to IPEDS	
Spring 2018			Report to NC-SARA

Figure 4. Timeline of Reporting Students Enrolled in Distance Education Activity

IPEDS defines a Distance Education Course as "a course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education."[5]

Institutions participating in SARA annually report the number of students enrolled in the institution via distance education delivered *outside* the home state of the institution. The data are disaggregated by the state, territory, or district where the learning takes place. SARA enrollment data are reported in May-June of each year. The data are reported to NC-SARA annually in the spring following the due date for institutions to make their fall enrollment reports to IPEDS.

Unique Features of NC-SARA Enrollment Reporting

While NC-SARA reporting relies on the existing IPEDS reporting schedules and definitions, there are some unique features of NC-SARA reporting. These include:

- Historically, institutions do *not* report distance education enrollments in their own state to NC-SARA. If an institution does report their in-state enrollments, NC-SARA removes that data from the totals reported. In future years, this in-state data will be reported to more accurately reflect total distance education enrollments.

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[5] U.S. Department of Education, NCES National Center for Education Statistics, *IPEDS Glossary for 2018-2019 Data Collection System* https://surveys.nces.ed.gov/ipeds/Downloads/Forms/IPEDSGlossary.pdf

- Non-SARA state and territory enrollments are not published individually. Each institution's non-SARA state enrollments are combined by NC-SARA and reported in one field as non-SARA enrollments.
- For the first reporting year, 2016, institutions were instructed *not* to report enrollment in a state if there were fewer than 10 students because of concerns about student privacy. For subsequent reporting periods (2017 and 2018) that restriction was removed; however, some institutions still did *not* report enrollment under 10 for a state. The result is an enrollment undercount, though the extent of the undercount is not known.
- The process of states joining SARA and institutions within them applying to operate under SARA is ongoing; year to year comparisons of enrollment are affected by that fact. Therefore, the annual reporting provides a snapshot of the distance education data as of each year's fall IPEDS reporting.
- The NC-SARA website (www.nc-sara.org) publishes detailed reporting of these data by institution name.
- The spring 2018 data discussed in this report are available for download from the NC-SARA website.

Screenshots of the 2018 instructions and survey are in Appendix B.

Reporting Institutions by Sector

Public institutions made up just over half (53.0%) of all institutions reporting enrollment to NC-SARA in 2018. Private non-profit institutions represent 41.0% and independent for-profit institutions account for 5.9% of reporting institutions operating under SARA and reporting in 2018. In addition, two Tribal institutions reported to NC-SARA in 2018, representing 0.1% of the total. The relative size of the sectors remained consistent between the 2017 and 2018 reporting.

Figure 5. 2018 Reporting Institutions by Sector

Sector	Number of Institutions Reporting	% of Total Institutions Reporting
Independent/For-Profit	104	5.9%
Private Non-Profit	735	41.0%
Public	950	53.0%
Tribal	2	0.1%
Total	1,791	100.0%

Table 5. 2018 Reporting Institutions by Sector

Distance Education Enrollment

In May 2018 NC-SARA sent requests via email with a link to report fall 2017 enrollment to the institutional contacts at 1,804 institutions operating under SARA. NC-SARA received responses from 1,791 institutions during the annual reporting window in the spring of 2018. The response rate was 99.3%, up from 98.9% in 2017. Annual reporting to NC-SARA is a mandatory part of participation. This fact contributes to the consistently high response rate. The 13 non-reporting institutions have provided assurances that they will report next year.

Total Reported Distance Education Enrollment

Of the 1,791 responses received, 165 or 9.2% reported no distance education enrollment. While some institutions may participate in SARA in anticipation of future distance education offerings, others have existing distance education offerings but remain challenged regarding identifying their students' locations, and still others join for the ability to offer out-of-state learning placements to their students. Institutions operating under SARA reported 1,225,022 distance education enrollments, 88.5% in SARA states and 11.5% in non-SARA states. The graphic and table below present the enrollment data for 2018.
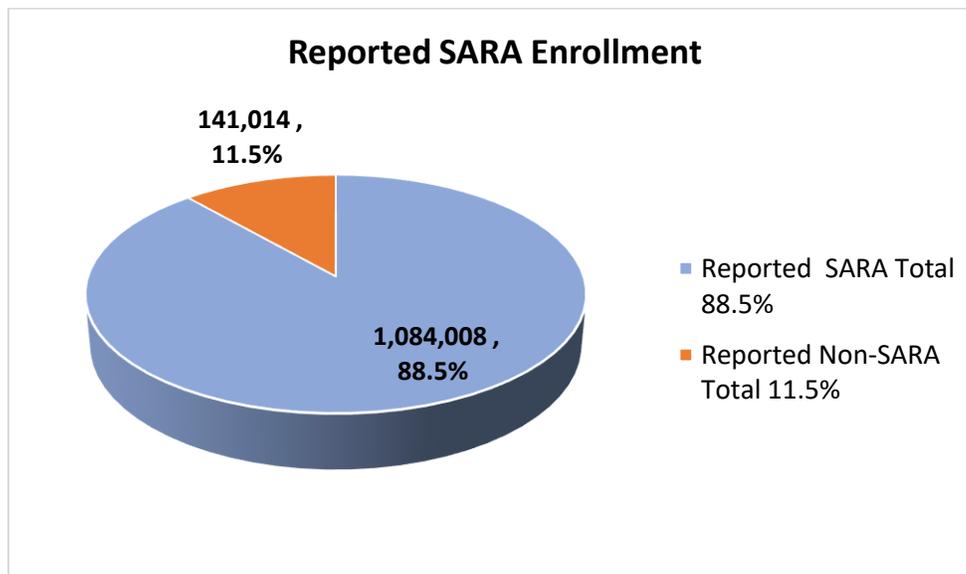
Figure 6. Reported SARA vs. Non-SARA Enrollment

	Reported Enrollment in SARA States	Reported Enrollment in Non-SARA States	Total Reported Enrollment
2018 Reported Enrollment	1,084,008	141,014	1,225,022
Enrollment %	88.5%	11.5%	100.0%

Table 6. Reported SARA vs. Non-SARA Enrollment

Florida, Massachusetts and Puerto Rico became members of SARA during the period between 2017 and 2018 data reporting. However, Massachusetts and Puerto Rico were approved to participate in SARA after the beginning of the data collection period in May 2018, so those enrollments are categorized as non-SARA in 2018. As of September 2018, California is the only state that is not a member of SARA.

The U.S. Virgin Islands, through affiliation with SREB, has joined SARA. Guam, American Samoa and the Commonwealth of the Northern Mariana Islands (CMNI) are members of WICHE, but they are not at present members of SARA.

Reported Enrollment by Sector

Private non-profit institutions represent 41.4% of reported enrollment in 2018. Independent for-profit institutions represent the second largest sector by enrollment with 36.1% of reported enrollment. Public institutions reported 22.5% of all distance education enrollment reported to NC-SARA in 2018. Additionally, two Tribal institutions reported to NC-SARA in 2018, but their combined reported enrollment made little impact on the totals.
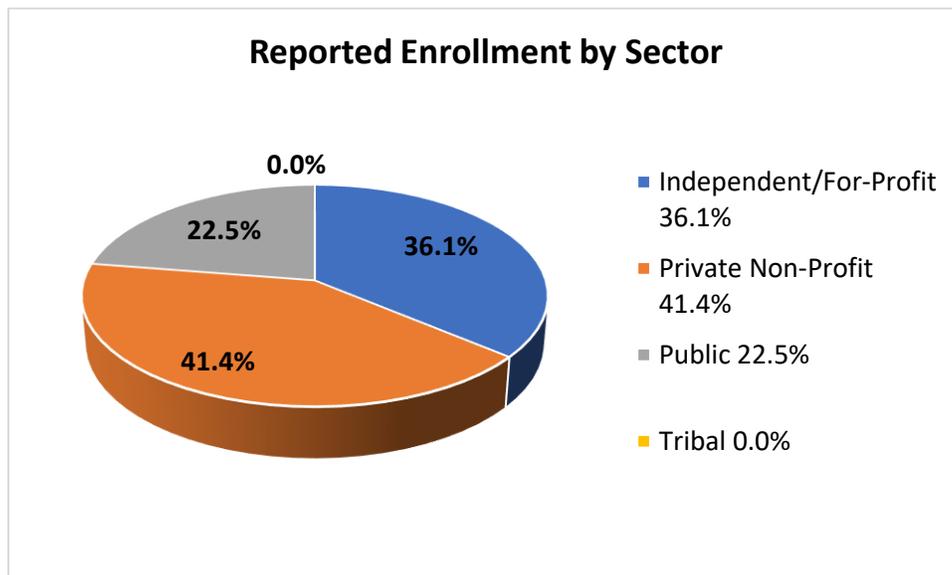
Figure 7. Reported Enrollment by Sector

Sector	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment	% of Total Reported Enrollment
Independent/For-Profit	391,802	50,387	442,189	36.1%
Private Non-Profit	456,102	51,297	507,309	41.4%
Public	236,188	39,330	275,518	22.5%
Tribal	6	-	6	0.0%
Total	1,084,008	141,014	1,225,022	100.0%

Table 7. Reported Enrollment by Sector

2018 State Summary Data

Institutions operating under SARA report their distance education enrollments by state. The enrollment data are available on the [NC-SARA website](#). Historically, NC-SARA has asked institutions not to report in-state enrollment since SARA addresses enrollment across state lines. When institutions report in-state enrollment, NC-SARA removes that data from the totals. The data tables presented in this report have been adjusted to remove reported in-state enrollment.

In-State Enrollment

In-state enrollment represents a large proportion of the data reported to IPEDS for most institutions operating under SARA since the mission of many institutions is to serve their local community, even with courses that are delivered exclusively by distance education. For this reason, the NC-SARA Data Committee recommended that NC-SARA collect and report in-state enrollment beginning with the 2019 data collection. These data will provide a more comprehensive view of distance education enrollment among institutions operating under SARA.

State-Level Enrollment Reporting

The following table compiles SARA and non-SARA state enrollment for institutions in each SARA state and territory reporting in 2018. For example, Alaska's institutions participating in SARA reported enrolling 430 students in other SARA states and 78 students in non-SARA states, for a total of 508 out-of-state students reported. This answers the question, "Where are my state's institutions enrolling students?" In addition, 5,918 student enrollments were reported in Alaska by SARA institutions located in other SARA states or territories. This answers the question, "Who's enrolling students in my state?" Essentially, these are two different ways of looking at the reported data.

State/ District	Total Reported Enrollment in SARA States	Total Reported Enrollment in Non-SARA States	Total Enrollment Reported	Enrollment in State Reported by SARA Institutions from Other SARA States
AK	430	78	508	5,918
AL	42,397	3,506	45,903	19,883
AR	3,627	140	3,767	10,754
AZ	181,768	51,062	232,830	19,011
CO	51,903	6,158	58,061	22,606
CT	7,543	972	8,515	12,781
DC	44,694	1,407	46,101	3,700
DE	3,559	70	3,629	4,184
FL	33,836	3,978	37,814	73,287
GA	45,816	4,823	50,639	65,365
HI	300	374	674	8,677
IA	8,519	522	9,041	9,090
ID	20,659	3,986	24,645	8,326
IL	19,915	1,842	21,757	42,113

State/District	Total Reported Enrollment in SARA States	Total Reported Enrollment in Non-SARA States	Total Enrollment Reported	Enrollment in State Reported by SARA Institutions from Other SARA States
IN	50,365	3,477	53,842	20,921
KS	19,033	1,266	20,299	9,795
KY	12,176	1,010	13,186	15,319
LA	4,834	400	5,234	19,410
MD	12,979	1,743	14,722	32,061
ME	3,983	904	4,887	4,523
MI	6,747	706	7,453	27,430
MN	44,539	3,638	48,177	14,847
MO	21,724	2,267	23,991	21,877
MS	3,746	204	3,950	14,210
MT	926	179	1,105	5,104
NC	4,465	423	4,888	57,508
ND	4,245	416	4,661	4,036
NE	8,301	760	9,061	5,065
NH	64,875	13,152	78,027	3,468
NJ	8,005	1,196	9,201	31,643
NM	3,915	609	4,524	9,483
NV	579	631	1,210	16,339
NY	34,596	3,389	37,985	43,229
OH	21,522	2,386	23,908	39,855
OK	3,302	296	3,598	13,259
OR	9,049	2,313	11,362	13,018
PA	26,162	3,278	29,440	42,841
RI	1,201	370	1,571	3,493
SC	2,301	526	2,827	30,564
SD	3,587	254	3,841	3,303
TN	4,607	216	4,823	31,746
TX	14,518	2,857	17,375	103,319
UT	92,770	11,623	104,393	14,310
VA	59,297	3,979	63,276	53,166
VI	1	2	3	639
VT	3,622	657	4,279	2,276
WA	3,496	1,303	4,799	42,085
WI	6,570	475	7,045	17,131
WV	43,351	4,007	47,358	6,578
WY	533	41	574	4,462
Totals	**1,084,008**	**141,014**	**1,225,022**	**1,084,008**

Table 8. State Level Enrollment Reported

States with institutions that have large distance education operations report much higher out-of-state enrollment than states that do not have such institutions. The three states with the largest reported out-of-state enrollment are Arizona, Utah and New Hampshire, each of which has at least one major distance education provider.

Highly Concentrated Distance Education Enrollment

The NC-SARA enrollment reporting supports prior independent analysis of the distance education industry, affirming that distance education enrollments are highly concentrated. According to the *Grade Increase: Tracking Distance Education in the United States,* "Students enrolled in distance education remain highly concentrated in a relatively small number of institutions. Almost half of distance education students are accounted for in just 5% of institutions: the 235 institutions that represent only 5.0% of the higher education universe command 46.9% (2,985,347) of the student distance enrollments."[6] These data are based on 2016 IPEDS reporting.

Top Ten Institutions by Size of Reported Enrollment

The institutions that reported the largest enrollment are University of Phoenix, located in Arizona; Western Governors University, located in Utah, and Southern New Hampshire University, located in New Hampshire. These three institutions together represent 21.9% (267,767) of all distance education enrollments reported to NC-SARA in 2018. The ten institutions with the largest reported enrollment combined represent 46.0% (563,323) of all distance education enrollments reported to NC-SARA. These ten institutions are reported in the table below. None is a public institution.

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[6] Allen, I.E., Seaman, J. and Seaman, J. (2018) Grade Increase: Tracking Distance Education in the United States, 2018, p. 22. https://onlinelearningsurvey.com/reports/gradeincrease.pdf

Institution Name	State	Sector	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
University of Phoenix	AZ	Independent/for-profit	84,547	15,899	100,446
Western Governors University	UT	Private/non-profit	81,455	10,098	91,553
Southern New Hampshire University	NH	Private/non-profit	63,229	12,539	75,768
Liberty University	VA	Private/non-profit	49,668	3,011	52,679
Grand Canyon University	AZ	Private/non-profit	43,226	8,673	51,899
American Public University System	WV	Independent/for-profit	39,492	3,567	43,059
Ashworth College	GA	Independent/for-profit	38,551	3,753	42,304
Strayer University	DC	Independent/for-profit	36,848	529	37,377
Capella University	MN	Independent/for-profit	31,813	2,856	34,669
Penn Foster College	AZ	Independent/for-profit	30,286	3,283	33,569

Table 9. Top Ten Institutions by Size of Reported Enrollment

Top Ten Private For-Profit Institutions

Private for-profit institutions represent six of the top ten institutions that reported out-of-state enrollment to NC-SARA in 2018. The table below provides details for the ten private for-profit institutions that reported the largest distance education enrollment in 2018.

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
University of Phoenix	AZ	84,547	15,899	100,446
American Public University System	WV	39,492	3,567	43,059
Ashworth College	GA	38,551	3,753	42,304
Strayer University	DC	36,848	529	37,377
Capella University	MN	31,813	2,856	34,669

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
Penn Foster College	AZ	30,286	3,283	33,569
Columbia Southern University	AL	29,931	2,932	32,863
Colorado Technical University	CO	21,169	954	22,123
Full Sail University	FL	9,797	989	10,786
College for Financial Planning	CO	8,753	1,394	10,147

Table 10. Top Ten Private For-Profit Institutions

Top Ten Private Non-Profit Institutions

Private non-profit institutions represent four of the top ten institutions that reported out-of-state distance education enrollments to NC-SARA in 2018. The table below provides details for the ten private non-profit institutions that reported the largest enrollment in 2018. The top three institutions maintained the same ranking, based on enrollment reported in 2017 and 2018. Grand Canyon University was an independent for-profit institution during the 2017 reporting period.

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
Western Governors University	UT	81,455	10,098	91,553
Southern New Hampshire University	NH	63,229	12,539	75,768
Liberty University	VA	49,668	3,011	52,679
Grand Canyon University	AZ	43,226	8,673	51,899
Excelsior College	NY	25,641	2,017	27,658
Brigham Young University - Idaho	ID	18,050	3,486	21,536
Embry-Riddle Aeronautical University - Daytona Beach	FL	8,635	1,405	10,040
American College	PA	7,467	874	8,341
Park University	MO	4,741	519	5,260
Johns Hopkins University	MD	4,488	908	5,396

Table 11. Top Ten Private Non-Profit Institutions

Top Ten Public Institutions

There are many public institutions that reported significant out-of-state distance education enrollments to NC-SARA in 2018. The public institutions ranked by the highest reported enrollment are found in the table that follows. It is important to note the Purdue University, Global, Inc. is a new public institution created when Purdue acquired Kaplan University[7]. Kaplan was a for-profit institution during the 2017 reporting period, reporting 35,889 total distance education enrollments to NC-SARA last year.

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
Arizona State University	AZ	27,405	12,233	39,638
Purdue University Global, Inc.	IN	29,896	1,935	31,831
Pennsylvania State University	PA	6,750	1,257	8,007
University of Maryland - University College	MD	6,736	710	7,446
Colorado State University-Global Campus	CO	5,796	1,531	7,327
Thomas Edison State University	NJ	5,591	1,003	6,594
Eastern Gateway Community College	OH	4,118	465	4,583
Oregon State University	OR	2,858	883	3,741
Georgia Institute of Technology - Main Campus	GA	2,876	794	3,670
The University of Texas at Arlington	TX	2,325	1,158	3,483

Table 12. Top Ten Public Institutions

Public Institutions Largely Serve In-State Students

Public institutions of higher education are primarily charged to serve students in their own state. The data support this fact. An analysis of 2016 IPEDS data submitted by the 951 public institutions that were operating under SARA during the 2018 reporting period reveals that 83.9% (931,374) of their reported exclusively distance education enrollments were in-state, while 16.1% (179,088) were in another state.

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[7] Purdue Officially Launches Purdue University Global, WLFI.com, http://www.wlfi.com/content/news/Purdue-officially-launches-Purdue-Global-478542633.html

2016 IPEDS Public Institutions' Exclusively Distance Education Enrollment

- IPEDS Reported Enrollment Same State 83.9%
- IPEDS Reported Enrollment Other States 16.1%
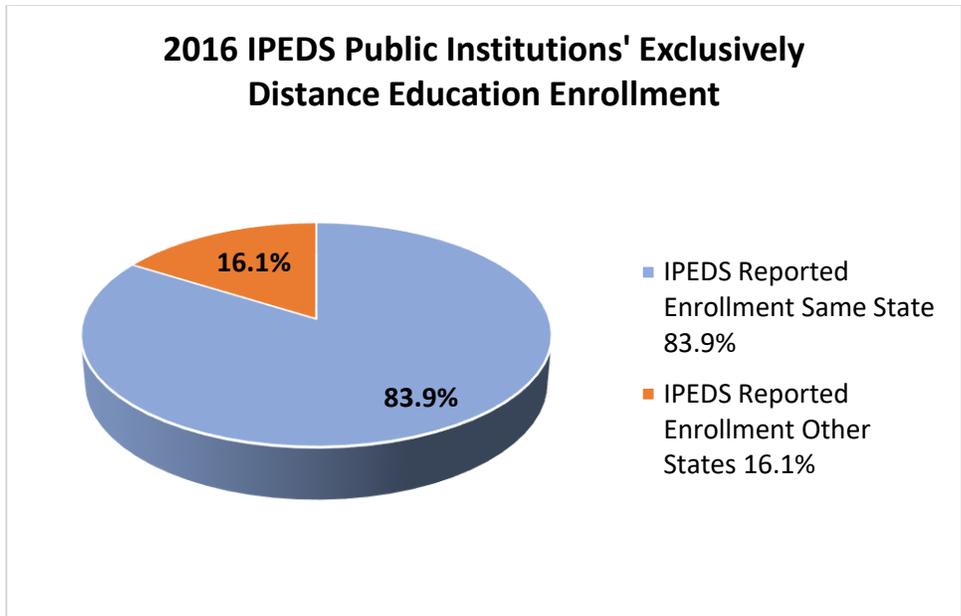
Figure 8. 2016 IPEDS Public Institutions' Exclusively Distance Education Enrollment

	Reported IPEDS Enrollment in Same State	Reported IPEDS Enrollment in Other States	Total Reported Enrollment
Reported Enrollments	931,374	179,088	1,110,462
Enrollment %	83.9%	16.1%	

Table 13. 2016 IPEDS Public Institutions' Exclusively Distance Education Enrollment

These proportions remained remarkably consistent to those reported in 2017. Last year, 83.7% (737,977) of public institutions exclusively distance education enrollments were in-state, while 16.3% (144,241) were in another state.

National IPEDS distance education data also confirm that public institutions continue to primarily serve in-state students, even with their distance education courses. According to a recent Babson Research Group study, "Enrollment patterns reveal that public institutions are much more likely to design their programs and recruiting efforts to serve local students. The vast majority (84.2%) of students taking exclusively distance courses enrolled at public institutions are located in the same state as the institution. This compares to slightly more than a third (35.5%) for private not-for-profit institutions, and only 16.5% for private for-profit institutions."[8] Historically, NC-SARA has not collected or reported in-state enrollment data. This results in distance education enrollments reported for public institutions far below their actual enrollment total.

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[8] Allen, I.E., Seaman, J. and Seaman, J. (2018) *Grade Increase: Tracking Distance Education in the United States*, 2018, p. 17. https://onlinelearningsurvey.com/reports/gradeincrease.pdf

To provide a more accurate picture of institutions' distance education activity, beginning in 2019 NC-SARA will collect in-state distance enrollments in addition to out-of-state distance education enrollments from SARA institutions. This information will facilitate more accurate institution comparisons by sector. This reporting will take the place of the current process that pulls IPEDS data for institutions operating under SARA from the previous year's reports. In-state enrollment reporting will be required of all institutions operating under SARA.

Data Trends: Spring 2016 through Spring 2018

NC-SARA has been collecting and reporting enrollment data since 2016. This section reports enrollment trends over the three years of data collection. The data reflect annual growth in states/territories joining SARA as well as enrollment growth as institutions apply to participate under SARA. These trends reflect the fact that states and territories must first take action to join SARA through an application to a regional compact. Once the state (territory or district) is approved to operate under SARA, institutions in that state may apply to participate in SARA.

Number of SARA Member States

At the time of the 2016 reporting, there were 36 SARA states; by 2017 that number had increased by 30.6% to 47. In 2018, two states (Florida and Massachusetts) and the territory of Puerto Rico became members. However, since Massachusetts and Puerto Rico were approved after the beginning of the 2018 reporting cycle, reported distance education enrollments are still counted as non-SARA this year.
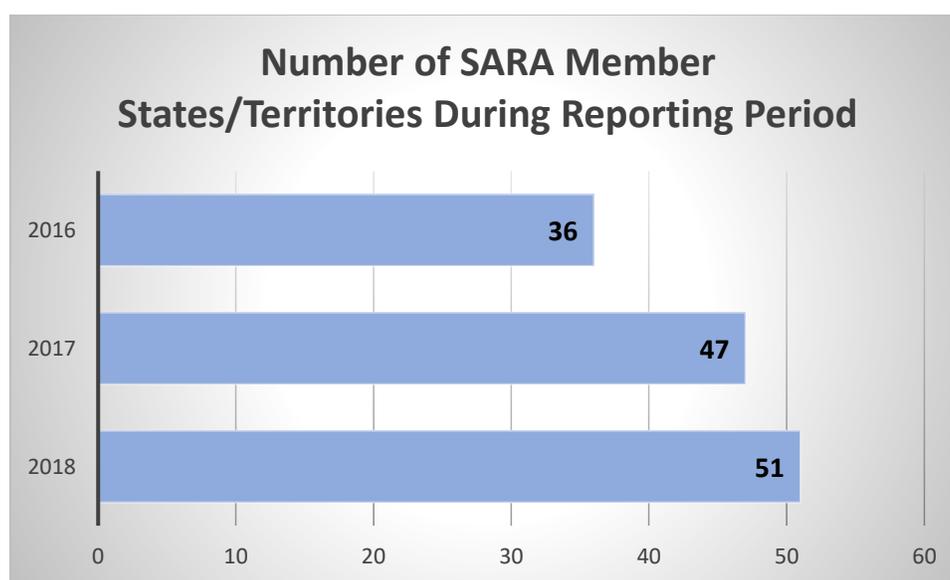
Figure 9. Number of SARA States/Territories 2016-2018

	Number of Member States/Territories	% Increase from Prior Year
2016	36	
2017	47	30.6%
2018	51	8.5%

Table 14. Number of SARA States/Territories 2016-2018

Number of Institutions Reporting

As expected, growth in the number of institutions operating under SARA slowed between 2017 and 2018 reporting periods. Between May 2016 and May 2017, eleven states joined SARA, allowing the institutions in those states to begin the process of applying for participation.

For the 2018 reporting year, Florida was approved as a SARA state in October of 2017 and 66 Florida institutions applied and were approved to operate under SARA by the start of the reporting period on May 21, 2018. The new SARA institutions in Florida reported 37,814 distance education enrollments, or 69.6% of the growth in reported enrollment between 2017 and 2018. There are no institutions in Massachusetts or Puerto Rico reporting enrollment data in the 2018 period because these entities were approved after the start of the 2018 enrollment reporting period.
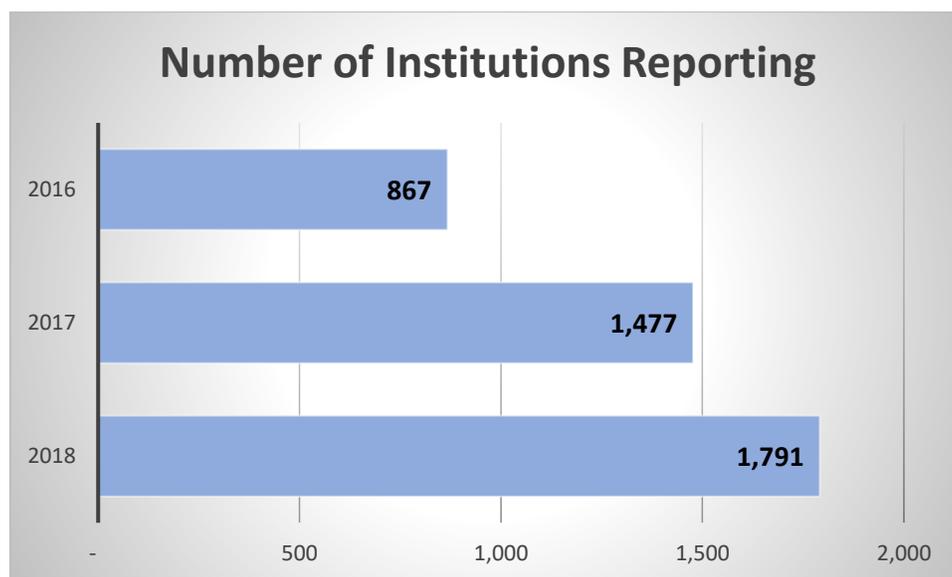
Figure 10. Number of Institutions Reporting 2016-2018

	Number of Institutions Reporting	% Increase from Prior Year
2016	867	
2017	1,477	70.4%
2018	1,791	21.3%

Table 15. Number of Institutions Reporting 2016-2018

SARA and Non-SARA Reported Enrollment

Over the three years of reported data, the number of SARA states has steadily increased. The bar graph and data table below reveal the proportion of SARA state/territory enrollment continuing to increase as a proportion of the total each year. This is true, even as the total enrollment has also increased significantly each year.
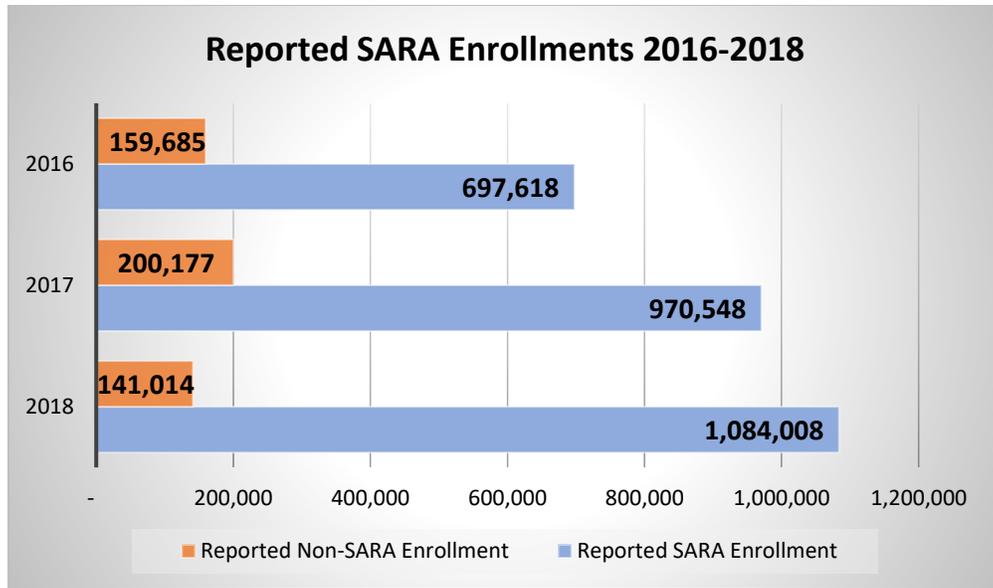
Figure 11. Reported SARA Enrollments 2016-2018

	Reported SARA Enrollment	Reported Non-SARA Enrollment	Reported Total Enrollment	% Change from Prior Year Total Enrollment
2016	697,618	159,685	857,303	
2017	970,548	200,177	1,170,725	36.6%
2018	1,084,008	141,014	1,225,022	4.6%

Table 16. Reported SARA Enrollments 2016-2018

As the number of states/territories and institutions operating under SARA increases each year, so does the proportion of reported distance education enrollments that are in SARA states/territories. Those proportions are reported below.
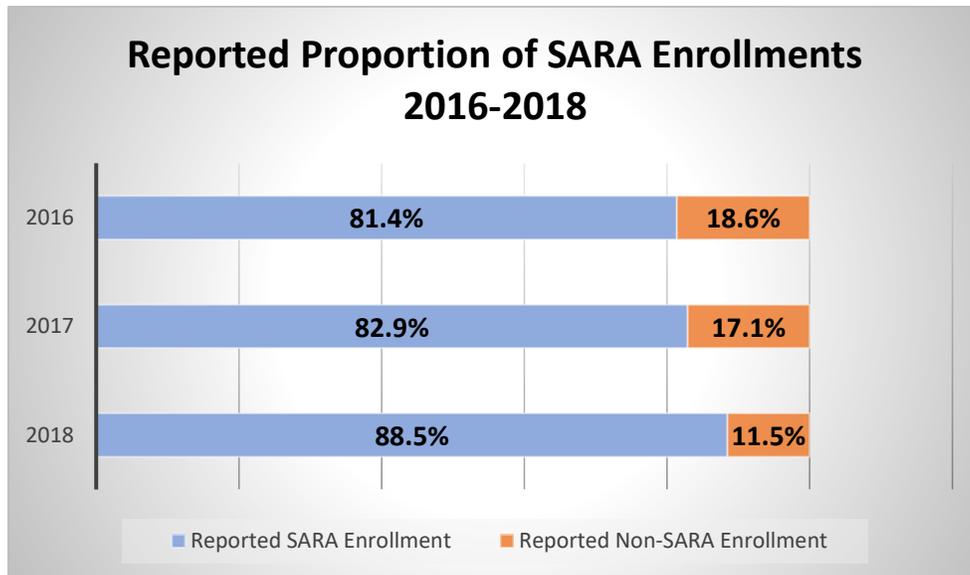
Figure 12. Reported Proportion of SARA Enrollments 2016-2018

|	Reported SARA Enrollment	% Reported SARA Enrollment	Reported Non-SARA Enrollment	% Reported Non-SARA Enrollment	Reported Total Enrollment
2016	697,618	81.4%	159,685	18.6%	857,303
2017	970,548	82.9%	200,177	17.1%	1,170,725
2018	1,084,008	88.5%	141,014	11.5%	1,225,022

Table 17. Reported Proportion of SARA Enrollment 2016-2018

Changes in Enrollment by Sector

Between 2017 and 2018 total reported enrollment grew by 4.6%. Reported public sector distance education enrollments increased by 35.9%; private non-profit sector enrollments increased by 31.4%, while reported independent for-profit enrollments declined by 24.0%. Tribal institutions represent a new reporting sector of NC-SARA in 2018 and represented less than 0.1% of reported distance education enrollments.

As noted previously, a single institution with large enrollment can significantly impact these data. For example, Kaplan University reported a total of 35,971 distance education enrollments to NC-SARA in 2017. Kaplan represented 6.2% of the for-profit enrollment reported last year. When Kaplan was acquired and became a public institution, Purdue University Global, Inc., that large enrollment (31,831 in 2018) became categorized as public rather than for-profit. The result was that Purdue University Global, Inc. became the public institution reporting the second largest distance education enrollments (and the largest reported enrollment in SARA states) to NC-SARA in 2018.

NC-SARA staff postulate that institutions are getting better at tracking student location. Improved processes for tracking and reporting student location should result in more accurate data with each year of reporting.
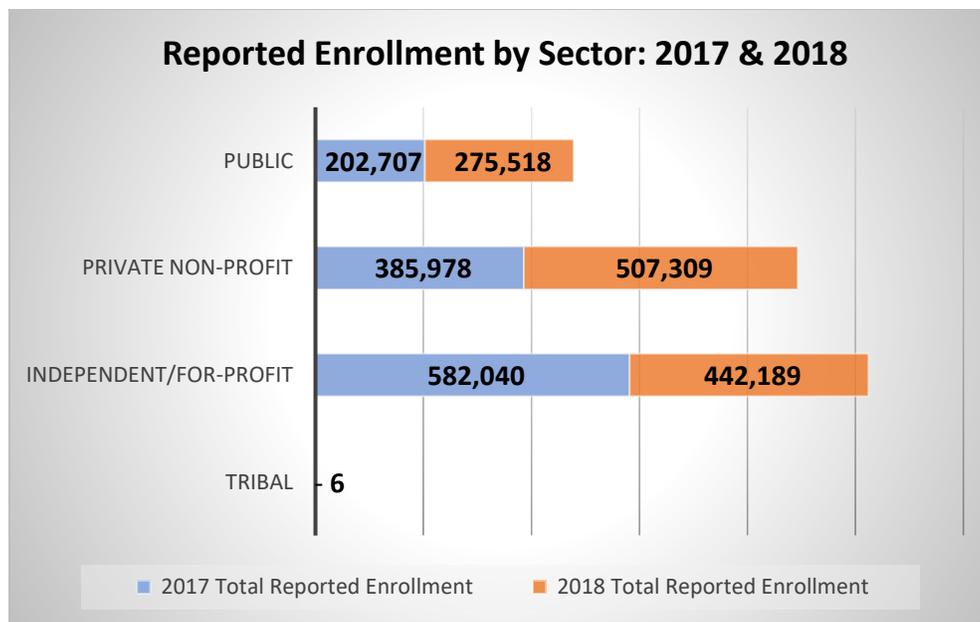

Figure 13. Reported Enrollment by Sector: 2017 & 2018

Sector	2017 Total Reported Enrollment	2018 Total Reported Enrollment	Change in Enrollment	% Change in Enrollment
Public	202,707	275,518	72,811	35.9%
Private Non-Profit	385,978	507,309	121,331	31.4%
Independent/For-Profit	582,040	442,189	(139,851)	-24.0%
Tribal	0	6	6	
Totals	1,170,725	1,225,022	54,297	4.6%

Table 18. Reported Enrollment by Sector: 2017 & 2018

During the 2017 reporting cycle, some institutions reported that they applied to operate under SARA in preparation for distance education programs that are in the planning stages; many mentioned similar plans in the Comments field of the 2018 survey as well. This dynamic could partially account for the fact that the composition of reported enrollment by sector shifted significantly in this past year. As previously noted, the data reported to NC-SARA are merely a snapshot at a point in time. Programs planned in 2016 were launched in 2017 and reported to NC-SARA in spring of 2018.

It may also be true that it takes public institutions longer to gain the internal approvals and set up the necessary systems to seek approval to operate under SARA. If that is the case, growth in public sector enrollment for the next few years may increase as institutions in newer SARA states continue the work toward the goal of participating in SARA. For a variety of reasons, total enrollments (whether on-campus or distance education) in the for-profit sector have been dropping for the past several years.[9] This trend is evident in the reported NC-SARA data as well.

There were several comments in the 2018 survey that suggest that institutions continue to apply to participate in SARA in preparation for new programs and offerings. This information is anecdotal, therefore, not quantifiable.

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[9] Lederman, D. (2016) *For-Profit College Sector Continues to Shrink*, Inside Higher Education,
https://www.insidehighered.com/quicktakes/2016/07/15/profit-college-sector-continues-shrink

Reporting Challenges

It is clear from the comments submitted again this year that even with the additional instructional information provided by NC-SARA, many institutions struggle with reporting because of their confusion about how they should report to IPEDS. Over half (55.4.7%) of comments provided in the Comment field of 2018 survey specifically mentioned lack of clarity about what data to report, confusion about IPEDS definitions and concerns with how to report military students and those in U.S. territories. This finding is consistent with 2017, when 51.7% of comments also were related to these issues. It is important to note that some of the comments and questions NC-SARA received regarding reporting issues were, in fact, answered in the 2018 NC-SARA Data Reporting Guide (e.g., how to report military students).

SARA member institutions continue to describe enrollment reporting issues related to IPEDS protocols. These include:

- *Conflict between IPEDS and institutional definitions of distance education course.* IPEDS' definition of a "Distance Education Course" as one delivered exclusively via distance education is a source of confusion as reported by many providing the enrollment data for their institutions. Some institutions have their own definitions, usually less narrow, that they use to generate distance education reports. It is a burden to the institutions to have to maintain data using different definitions.
- *Confusion about instructions to report in-state (home state) enrollments.* In-state enrollment was not reported by NC-SARA in 2018. Reporting of in-state enrollment will be mandatory in 2019 and it will be included in the 2019 Enrollment Report. These data will provide a more complete picture of distance education enrollment in institutions operating under SARA.
- *Confusion about how to report military students (APO, etc.).* Many survey respondents provided details about their military students in the Comments field.
- *Confusion about how to report enrollment in the U.S. territories.* Comments reveal uncertainty about which territories to report and where to report that enrollment in the survey. Neither Guam, American Samoa, nor the Commonwealth of the Northern Mariana Islands (CNMI) are members of SARA. But CMNI has a data entry field in the form, while the other non-member territories do not. There is a field for Other Territories, but the instructions were not clear about which territories to report there. Adding to the confusion is the fact that no territories are included in the IPEDS Distance Education reporting.
- *Inconsistent use of the "Other Location" field in the current NC-SARA survey*. This field was used by many respondents to report enrollment in the categories that they couldn't find an appropriate field to capture. Some also used this field to report international students.

In addition to reporting challenges related to IPEDs protocols, other reporting concerns related to SARA requirements and unique institutional challenges were also reported.

These include:

- *Difficulty completing the NC-SARA survey accurately due to inconsistency in how data is displayed*. The NC-SARA survey alphabetizes states and territories by their complete name rather than by the state abbreviation. Many institutions' reports alphabetize by state/territory abbreviation. This means that the data are out of order during data input into the NC-SARA survey, increasing the possibility of reporting enrollment incorrectly.

- *Variation in institutions' enrollment patterns.* A small number of institutions reported that they have continuous enrollment throughout the year, so the IPEDS "Fall Enrollment" date has little meaning for them. Some institutions report the full year of enrollment, others use the IPEDS date as a cut off, knowing the result is under-reporting enrollment.
- *Inability to capture summer enrollments.* A small number of institutions reported that the only time they offer online courses is in the summer, therefore, their only online enrollments are not counted since the Fall Enrollment report is the basis for reporting. This also results in an under-reporting of enrollment.
- *Some institutions deviate from the requested reporting strategy.* A small number of institutions indicated that they did not report state enrollment totals less than ten because of continuing concerns about student privacy. Most mentioned that they are not reporting small enrollment on advice of legal counsel. NC-SARA has obtained a legal opinion on the issue regarding cell size limit.[10]

In addition, institutional changes that either merge previous IPEDS Unit IDs or separate units that previously reported together into individual campus IDs remain a problem for the institutions affected and those comparing institutional data over time. The IPEDS Unit ID is a unique numeric identification number assigned to an institution by IPEDS. To assist with these comparisons, NC-SARA added a field in the 2018 survey that requires each reporting institution to provide their IPEDS number.

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[10] Steven Y. Winnick to Marshall A. Hill, March 16, 2017, Reporting Small Cell Size Data to NC-SARA. http://www.nc-sara.org/files/docs/NC-SARA-Memo-EdCouncil_2017.pdf

Recommendations to Improve Reporting

Based on a review of the comments provided by those reporting distance education data to NC-SARA in the spring of 2018 and interviews with NC-SARA staff, the following recommendations should be considered as NC-SARA continues to refine the data reporting process:

- *Ensure there are fields for all five U.S. territories in the enrollment survey.* These include: U.S. Virgin Islands, Puerto Rico, CNMI, American Samoa, and Guam. This would require adding American Samoa and Guam, or if they will not participate in SARA, provide clear instructions for where those territory enrollments should be reported.

- *Consider deleting the "Other Location" field in the survey.* Or clarify what that field should be used to document in the instructions and the *Reporting Guide*.

- *Ensure that all instructions consistently include the requirement that in-state enrollment is required beginning with the 2019 reporting period.* Clarity about this requirement is necessary so that in-state data are accurate and can be reported next year.

- *Incorporate a review of communications and instructions related to the 2019 reporting period by non-NC-SARA staff*. An independent review would be an addition to the quality assurance process.

- *Add contact fields.* These might include: Name, Title, Email, and Phone Number of the person completing the report.

- *Add instructions that explain that the data reported to IPEDS and NC-SARA will not necessarily match.* SARA requires institutions to report enrollment in member territories, IPEDS does not. IPEDS has fields that are not relevant to SARA data collection, those include: "Student in U.S., Location Unknown", "Student Located Outside the U.S." and "Student Location Unknown".

- *Keep the Comments field.* Those reporting in 2018 continued to use this field to explain discrepancies from IPEDS data, inform NC-SARA of changes in IPEDS Unit number, provide their contact information, and report issues that were confusing to them. It is a useful addition to the data survey since it allows NC-SARA to identify trends and areas for improvement.

- *Consider adding state abbreviations next to state name in the survey*. Institutions' system queries often return reports by two letter state abbreviations. Alphabetic listings of state names and state abbreviations return the states *in different order*. Including the abbreviation in the label of the survey for each state should improve the reliability of the data reported. Survey responders mentioned this discrepancy in the Comments field.

- *Standardize the display of data by state to be consistent between tables, both in the surveys and in data tables on the NC-SARA website.* Alphabetize either by state name or abbreviation consistently.

- *Consider adding a Total field that automatically totals submissions, if not technically burdensome*. This request continues to be recommended by survey responders in the Comments field. It would assist those filling out the survey to ensure that their reporting matches their IPEDS reporting, as appropriate.

- *There were also comments about not being able to save the data and come back in to complete the survey.* NC-SARA staff confirm that this capability exists, so better communication about the functionality and how to use it should be added to the instructions.

- *Communicate with NCES regarding the confusion about IPEDS terms and processes.* Confusion about IPEDS terms and processes continue to be communicated to NC-SARA by survey respondents.

Continued Progress Towards Transparency

The reporting process and mechanisms to receive the data worked well for the third NC-SARA reporting period, no systemic issues were reported. Improvements to the survey and instructions for 2018 facilitated the participation of the growing number of institutions reporting to NC-SARA. Continued improvement in the processes, systems and communication related to the annual NC-SARA data collection will improve the process and give all who use these data a renewed confidence in what they tell us about distance education adoption and use across state lines in the U.S.

Starting in 2019, the data will include in-state enrollment, providing a more comprehensive picture of distance education in the U.S. NC-SARA's commitment to transparency in distance education data collection and reporting is setting a collaborative tone that may help establish a new norm for institutions of higher education.

Appendix A: Technical Notes

Definitions

The following definitions are provided by The Department of Education National Center for Educational Statistics (NCES)[11].

Distance Education - Education that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously. Technologies used for instruction may include the following: Internet; one-way and two-way transmissions through open broadcasts, closed circuit, cable, microwave, broadband lines, fiber optics, satellite or wireless communication devices; audio conferencing; and video cassette, DVDs, and CD-ROMs, if the cassette, DVDs, and CD-ROMs are used in a course in conjunction with the technologies listed above.

Distance Education Course - a course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education.

Distance Education Program – A program for which all the required coursework for program completion is able to be completed via distance education courses.

The historic use of definitions:

The IPEDS Fall Enrollment report asks institutions to separate students into three categories:

- Enrolled Exclusively in Distance Education Courses
- Enrolled in Some (But Not All) Distance Education Course
- Not Enrolled in Any Distance Education Courses

To approximate the historic distance education surveys conducted by the Babson Survey Research Group (BSRG) that used a definition of approximately 80% of the course online, the WICHE Cooperative for Educational Technologies (WCET) and others have combined the IPEDS reporting for Exclusively in Distance Education courses and Some But Not All Distance Education course. This combination of reporting has been referred to as "Enrolled in At Least One" Distance Education Course. Reporting of IPEDS distance education data often utilizes this category.

Additional SARA-specific definitions are available in the current version of the *State Authorization Reciprocity Agreements Manual*.[12]

Acknowledgment of Prior IPEDS Distance Education Analysis. Prior to the 2012 IPEDS reporting, the Babson Survey Research Group (BSRG) collected data on online enrollments annually, beginning in the

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[11] U.S. Department of Education, NCES National Center for Education Statistics, *IPEDS Glossary for 2018-2019 Data Collection System* https://surveys.nces.ed.gov/ipeds/Downloads/Forms/IPEDSGlossary.pdf
[12] NC-SARA, *State Authorization Reciprocity Agreements Manual* (2018). Version 18.2, May 11, 2018, http://www.nc-sara.org/files/docs/NC-SARA_Manual.pdf

Appendix A: Technical Notes-Continued

fall 2002 period.[13] BSRG used the distance education definition of 80% of the content delivered online. The BSRG survey is a sampling, not a reporting of the entire population of institutions of higher education. Analysis by the [WICHE Cooperative for Educational Technology](#) (WCET) provides greater detail about methodology of historic distance education reports and the differences in the data and definitions used.[14] NC-SARA thanks the professionals who developed and shared the methodology used to create the IPEDS comparisons in this report.

SARA Institutions Reporting In-State Enrollment

The *NC-SARA Manual* outlines data submission requirements for participating institutions. The instructions say, "Institutions participating in the State Authorization Reciprocity Agreements (SARA) shall annually report to the National Council for State Authorization Reciprocity Agreements the number of students enrolled in the institution via distance education delivered outside the home state of the institution, disaggregated by state, territory, or district in which the students reside."[15]

In addition, the 2018 email instruction indicate, "Enter 0 for your home state."

For the first three reporting years, 2016-2018, NC-SARA returns in-state enrollment reported by institutions to zero to ensure accurate reporting at the state in and institutional level, in alignment with the historic SARA guidelines.

Beginning with the 2019 reporting, institutions will be required to report their in-state enrollment and all Guides and instructions will be edited to reflect this change in policy approved by the Board in May 2018.

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[13] Allen, I.E. and Seaman J., (2003). *Sizing the Opportunity: The Quality and Extent of Online Education in the United States*, Babson Survey Research Group.

[14] Poulin, R. and Straut, T. (2016). *WCET Distance Education Enrollment Report 2016*. http://wcet.wiche.edu/initiatives/research/WCET-Distance-Education-Enrollment-Report-2016

[15] NC-SARA, *State Authorization Reciprocity Agreements Manual* (2018). Version 18.2, May 11, 2018, http://www.nc-sara.org/files/docs/NC-SARA_Manual.pdf

Appendix B: Instructions and Survey

Below are screenshots of the instructions and the survey screens that institutions completed for the 2018 NC-SARA enrollment data collection.

National Council for State Authorization Reciprocity Agreements

A voluntary, regional approach to state oversight of distance education

All SARA institutions are to report annually the number of students they enroll via distance education delivered **outside** the institution's home state.

This required data submission is based on the enrollment data your institution last fall reported to the Integrated Postsecondary Education Data System (IPEDS); for SARA, that data is to be disaggregated by the state*, territory, or district in which the students reside. Institutions are to determine the locations to report for their students by whatever means they currently employ.

What's different for spring 2017 reporting?

- For spring 2017, report between May 22-June 14, 2017.

- There is no longer a cell size limit on reporting enrollments; report actual enrollments in each state. (In 2016 we instructed institutions to report "zero" for each state in which their enrollments were fewer than ten students. For 2017, there is no such directive. *Report actual enrollment numbers for each state, regardless of number.*)

- For spring 2017, **DO NOT include experiential learning placements** in the enrollment data you report.

- Enter "0" for your home state

- Within the online form on which you will report your enrollments, we've added a space to briefly comment on any apparent anomalies in your data. Please do not ask questions here as this box will not be actively monitored in that respect. Please email data@nc-sara.org directly for any questions not resolved by your state's SARA entity.

*A value must be entered for each state. Once you have entered enrollments for SARA states and territories, you then fill in your enrollment numbers for non-SARA states. You can reference the NC-SARA Data Reporting Guide for additional guidance, if needed.

Please note that Institutional enrollment data will be reported on the NC-SARA website as portrayed in the Reporting Guide.

Please note the important data sharing disclaimer, which is incorporated by reference.

Confirmation of the submission of the report will be sent from NC-SARA's system to all active institution contacts on file.

We thank you for your participation.

Please note: CNMI refers to the Commonwealth Northern of the Mariana Islands

Appendix B: Instructions and Survey-Continued

SARA States & Territories

Alabama *		Alaska *	
Arizona *		Arkansas *	
Colorado *		Connecticut *	
Delaware *		Georgia *	
Hawaii *		Idaho *	
Illinois *		Indiana *	
Iowa *		Kansas *	
Kentucky *		Louisiana *	
Maine *		Maryland *	
Michigan *		Minnesota *	
Mississippi *		Missouri *	
Montana *		Nebraska *	
Nevada *		New Hampshire *	
New Jersey *		New Mexico *	
New York *		North Carolina *	
North Dakota *		Ohio *	

Appendix B: Instructions and Survey-Continued

Non-SARA States & Territories

California * [   ]   CNMI * [   ]

Florida * [   ]   Massachusetts * [   ]

Other Territories [   ]   Puerto Rico * [   ]
*

Comments

[   ]

Confirmation and Authorization

By checking this box, your institution agrees to the terms   ☐ I agree.
noted in the published NC-SARA Data Sharing Agreement,
found here. *

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Appendix C: About the Author

Terri Taylor Straut, CEO and Solution Architect at Ascension Consulting Group is an independent consultant and an experienced researcher, project manager, and higher education administrator. As the founding director of CU Online (for the University of Colorado) and a member of the founding management team of the Western Governors University (WGU), Terri has been part of the distance learning industry since its infancy in the mid-1990s. Terri has significant experience implementing distance education projects in corporations as well as non-profit organizations. She is very familiar with IPEDS distance education reporting through her work on the annual distance education IPEDS reporting for the WICHE Cooperative for Education Technologies' (WCET) Policy and Analysis unit. Terri earned her Master of Business Administration from Northeastern University and her Bachelor of Arts from the University of Delaware. (Terri_Straut@msn.com)

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