

NC-SARA 2017 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*

September 18, 2017

Preface

The State Authorization Reciprocity Agreement (SARA) has been the catalyst for change in state authorization and distance education.

Higher education institutions have navigated the complex and confusing regulatory waters of state authorization since the infancy of correspondence courses. The concept of “authorization” has not changed significantly despite the incredible technological innovations in education over the past two decades.

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 accepting and monitoring states participating in each of their respective regions. 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.

Imperative of Accountability and Quality Assurance

SARA has created greater capacity for institutional accountability and interstate collaboration to address student concerns or issues. SARA prioritizes the fulfillment of institutions’ obligations to the students that they serve by promoting three core values:

- Institutional quality and compliance established by being a U.S. degree-granting institution that is accredited by an accrediting body recognized by the U.S. Secretary of Education
- Adherence to clear, concise complaint processes, overseen by a designated state portal entity
- A demonstrated financial responsibility index score from the U.S. Department of Education that is 1.5 or above for non-public institutions

As the focus shifts from the design and implementation of the nationwide framework with 48 states now participating, NC-SARA publishes findings of its 2017 Distance Education Enrollment Data.

Why is this so valuable?

These data provide a significant advance in the national collection and reporting of such information. The collection of these data delivers on one of many key goals: Transparency in who is enrolling online students and where these students are located. Unlike IPEDS, student enrollments are disaggregated by state, delivering clarity as to where distance education activity takes place. The adoption of SARA by the states and the institutions within them provides a new and more reliable source of information about distance education offerings in the U.S. than previously available.

Since the first NC-SARA enrollment data collection in the spring of 2016, in addition to adding eleven states and the District of Columbia, many institutions were added to the list of those operating under SARA as their applications were created, submitted and approved by their respective SARA states. Between the first and second year of reporting, the number of institutions reporting increased by 70.4%.

Conclusion

Overall Growth

The 2017 data demonstrates the significant growth in SARA membership over the two-year period of enrollment collection. The total increase in student enrollment because of an increase in institutional membership year over year was 36.6%.

Points for consideration

IPEDS reporting and definitions

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

Highly concentrated out-of-state distance education enrollments

The data reveal that the ten institutions with the largest reported enrollment combined represent 51.4% of enrollments reported. The data support prior analyses of the distance education industry which reveal that distance education enrollments are highly concentrated in a relatively few institutions:

Distance education enrollments remain highly concentrated in a relatively small number of institutions. Almost half of the distance education students are concentrated in just five percent of the institutions, while the top 47 institutions, only 1.0% of the total, enroll 23.0% of all distance students.

Digital Learning Compass Distance Education Enrollment Report based on 2015 IPEDS data

In-state distance education enrollment

NC-SARA focuses specifically on out-of-state distance education enrollment. While this focus aligns with the mission of SARA, the distance education picture in the U.S. is much broader. For example, public institutions are primarily focused on serving students in their own state. An analysis of the 788 public institutions who are operating under SARA during the 2017 reporting cycle reveal 83.7% exclusively distance education enrollments in the institutions' home states, while just 16.3% of their distance education enrollments are reported in other states.

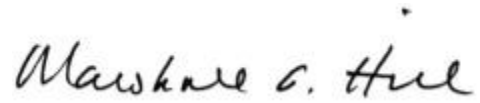
Participation by sector and equitable accountability

All institutions, public, private non-profit or independent for-profit who are SARA members are accountable for accurately reporting their distance education students.

The path ahead

Upon recommendation from the regional compacts and their regional steering committees, NC-SARA will convene, for the third 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 and reporting is setting 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 across state lines.

A handwritten signature in black ink that reads "Marshall A. Hill". The signature is written in a cursive style with a small dot above the letter 'i' in "Hill".

Marshall A. Hill

Executive Director

NC-SARA

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Executive Summary

The 2017 NC-SARA Enrollment Report summarizes 2017 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 offer federal financial aid. Distance education data for 2016 were reported to IPEDS in the fall of 2016; those same data, in disaggregated form, were submitted to NC-SARA in the spring of 2017. Similarly, distance education data for 2015 were reported to IPEDS in the fall of 2015 and to NC-SARA in the spring of 2016. NC-SARA has two years of data reported.

This report summarizes the 2017 data reported and provides comparisons to the 2016 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

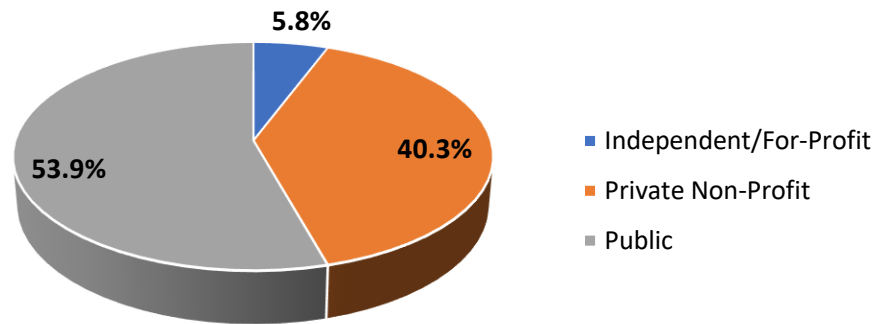
NC-SARA sent requests via email with a link to report fall 2016 enrollments to the institutional contacts at 1,494 institutions then operating under SARA. NC-SARA received responses from 1,477 institutions during the annual reporting window in the spring of 2017. The response rate was 98.9%. The number of institutions operating under SARA increased 70.4% from 867 in 2016. While the response rate in 2016 was 97.6%, of the 846 institutions who completed the survey, 280 or 33.1% reported no distance education enrollments. In the initial reporting period instructions were given not to report state enrollments less than 10 because of concerns with student privacy. Thirty-six states were members of SARA during the 2016 reporting period and 47 states were members during the 2017 reporting period.

Year	Number of Institutions Operating Under SARA	Number of Institutions Reporting to NC-SARA	Number of Institutions Reporting Distance Education Enrollment
2016	867	846	567
2017	1,494	1,477	1,394
Increase	627	631	827

Reporting Institutions by Sector

Public institutions made up just over half (53.9%) of all institutions reporting enrollment to NC-SARA in 2017. Private non-profit institutions represent 40.3% and independent for-profit institutions represent just under 6% of reporting institutions operating under SARA and reporting in 2017.

Reporting Institutions by Sector



Sector	Number of Institutions Reporting	% of Total Institutions Reporting
Independent/For-Profit	85	5.8%
Private Non-Profit	596	40.3%
Public	796	53.9%
Total	1,477	

Reported Distance Education Enrollment

For the 2017 reporting period the institutions operating under SARA in 47 states and the District of Columbia reported 1,170,725 distance education enrollments, 82.9% in SARA states and 17.1% in Non-SARA states. For the 2016 reporting period, the institutions operating under SARA in 36 states reported 857,303 distance education enrollments, 81.4% in SARA states and 16.8% in Non-SARA states. This 313,422 increase in enrollment represents 36.6% growth between the first and second year of reporting.

	SARA State Reported Enrollment	Non-SARA State Reported Enrollment	Total Reported Enrollment
2017	970,548	200,177	1,170,725
2016	697,618	159,685	857,303
Increase in Reported Enrollment	272,930	40,492	313,422
% Increase	39.1%	25.4%	36.6%

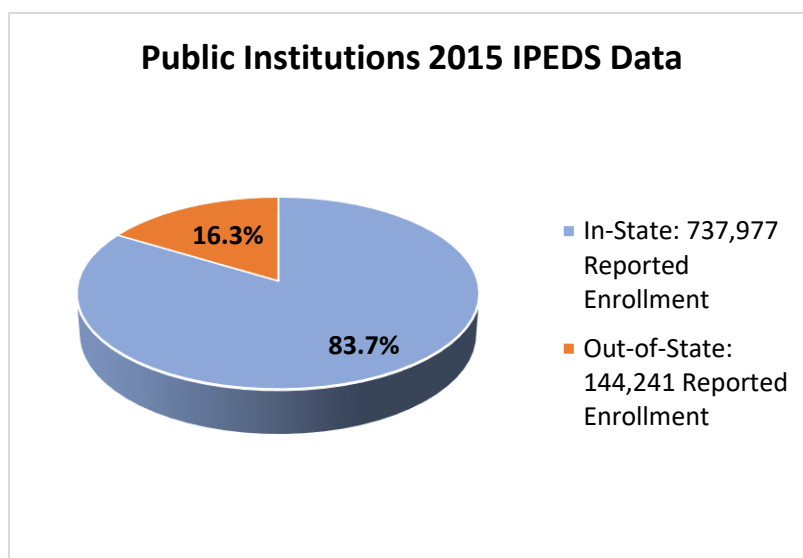
Highly Concentrated Distance Education Enrollments

The NC-SARA enrollment reporting supports prior analyses of the distance education industry, affirming that distance education enrollments are highly concentrated. According to the Digital Learning Compass Distance Education Enrollment Report based on 2015 IPEDS data, “Distance education enrollments remain highly concentrated in a relatively small number of institutions. Almost half of the distance education students are concentrated in just five percent of the institutions, while the top 47 institutions, only 1.0% of the total, enroll 23.0% (1,385,307) of all distance students”.¹ Details about the distance education definitions used can be found in Appendix A: Technical Notes.

The 2017 enrollment reported to NC-SARA reveals that the ten institutions with the largest reported enrollments combined represent 51% (601,395) of enrollments reported to NC-SARA.

In-State Distance Education Enrollment is Significant

NC-SARA focuses specifically on out-of-state distance education enrollment. While this focus aligns with the mission of SARA, it does not accurately reflect the distance education enrollment patterns for U.S. institutions of higher education. For example, public institutions of higher education are primarily focused on serving students in their own state. The Digital Learning Compass report reveals that public institutions enroll two-thirds (67.8%) of all distance learners enrolled in distance education courses reported to IPEDS in 2015, private non-profits institutions represent 17.8% and independent for-profit institutions represent 14.5%.² Those enrollments include in-state enrollments that are not reported to NC-SARA. An analysis of the 788 public institutions who are operating under SARA during the 2017 reporting window reveals 83.7% of exclusively distance education enrollments (737,977) in the institutions’ home states while just 16.3% of their enrollments (144,241) are reported in other states.



¹ Allen, I.E. and Seaman, J., (2017) Digital Learning Compass: Distance Education Enrollment Report 2017, p. 4. <http://digitalllearningcompass.org/>

² Allen, I.E. and Seaman, J., (2017) Digital Learning Compass: Distance Education Enrollment Report, p. 13. <http://digitalllearningcompass.org/>

Reporting Challenges

In an attempt to standardize reporting requirements for institutions, NC-SARA relies on IPEDS definitions, schedules, etc. Unfortunately, it is clear from the comments submitted in 2017 that many institutions struggle to understand how they should report to IPEDS. And, since SARA's basic instructions are to "report as you do for IPEDS, but disaggregate by state, territory, or district in which the students reside",³ those misunderstandings affect NC-SARA reporting. Over half (51.7%) of comments provided in the Comment field of 2017 survey specifically mentioned variations from IPEDS data, definitions and concerns with how to report military students and those in the five U.S. territories.

Collaboration with the National Center for Educational Statistics to improve the definition of a "Distance Education Course" and other related definitions used by IPEDS could help improve the consistency and reliability of all distance education data reported, both to NC-SARA and to IPEDS.

Encouraging Transparency

Overall, the reporting process and mechanisms to receive the data worked well for the second NC-SARA reporting period. The rapid adoption of SARA by the states and the institutions within them provides a new and likely more reliable source of information about distance education offerings in the U.S. than was previously available through the Babson Survey Research Group (BSRG) surveys⁴ and prior IPEDS Distance Education reporting by the WICHE Cooperative for Educational Technologies (WCET)⁵ and others. 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. 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.

³ NC-SARA State Authorization Reciprocity Agreements Policy and Operations Manual (2016). Version 16.3., http://www.nc-sara.org/files/docs/NC-SARA_Manual_Final_2016.pdf, p. 34.

⁴ Allen, I.E. and Seaman, J., (2016) Online Report Card: Tracking Online Education in the United States. <http://onlinelearningssurvey.com/reports/onlinereportcard.pdf>

⁵ Poulin, R. and Straut, T. (2016). WCET Distance Education Enrollment Report 2016. <http://wcet.wiche.edu/initiatives/research/WCET-Distance-Education-Enrollment-Report-2016>

Introduction

Purpose

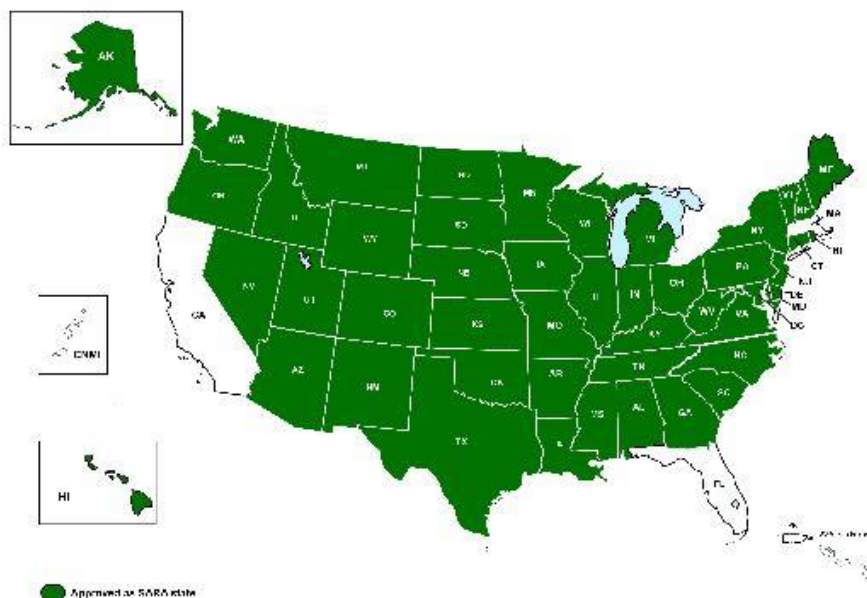
The National Council for State Authorization Reciprocity Agreements (NC-SARA) has completed two years of distance education enrollment data collection. The purpose of this report is to provide a summary and analysis of the fall 2016 enrollment data collected by NC-SARA in the spring of 2017. Comparisons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

Background

About SARA

The State Authorization Reciprocity Agreement (SARA) is a voluntary agreement among its member states and U.S. districts and territories that establishes comparable 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. 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.⁶

At the time of spring 2017 reporting, all U.S. states except California, Florida and Massachusetts were SARA member states. The District of Columbia is also a member. The map below shows SARA states and territories in green.



⁶ About SARA. (n.d) Retrieved from NC-SARA Website. <http://www.nc-sara.org/about> (Retrieved July 8, 2017).

About NC-SARA

National Council for State Authorization Reciprocity Agreements (NC-SARA) is a nationwide coordinating entity established to ensure that the SARA initiative provides a national solution, rather than four regional solutions. 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, Midwestern Higher Education Compact, Southern Regional Education Board, and Western Interstate Commission for Higher Education). States participating in SARA through any one compact will be recognized as reciprocal partners with states participating in SARA through any other regional compact. And institutions will be assured that their participation in one region's SARA initiative will carry full value in any other SARA state, from any other region.

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.

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 fall 2002 period.⁷ 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.⁸ NC-SARA thanks the professionals who developed and shared the methodology used to create the IPEDS comparisons in this report. Distance Education definitions are also provided 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 2016 were reported to IPEDS in the fall of 2016 and to NC-SARA in the spring of 2017. Similarly, distance education data for 2015 were reported to IPEDS in the fall of 2015 and to NC-SARA in the spring of 2016. NC-SARA therefore has two years of data reported.

⁷ 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.

⁸ Poulin, R. and Straut, T. (2016). *WCET Distance Education Enrollment Report 2016*.

<http://wcet.wiche.edu/initiatives/research/WCET-Distance-Education-Enrollment-Report-2016>

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.”⁹

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 is disaggregated by the state, territory, or district where the students reside while receiving the instruction. 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:

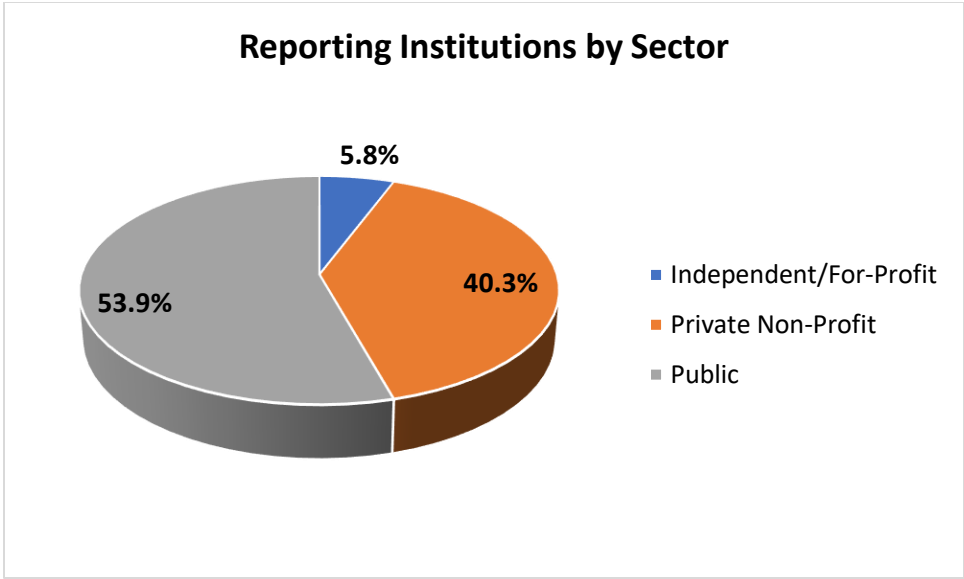
- Institutions do *not* report distance education enrollments in their own state to NC-SARA. Several institutions did report in-state distance education enrollment to NC-SARA. NC-SARA removed the enrollment reported in error in the data published in this report.
- Non-SARA state enrollments are not published individually. Each institution’s Non-SARA state enrollments are combined by NC-SARA and reported in one field as Non-SARA enrollments.
- For the 2016 data reporting, institutions were instructed *not* to report enrollments in a state if there were fewer than 10 students because of concerns about student privacy.
- For the 2017 data reporting that restriction was removed; however, some institutions still did *not* report enrollments 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. 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 2017 data discussed in this report is available for download from the [NC-SARA website](#) (www.nc-sara.org).

Screenshots of the 2017 instructions and survey are in Appendix B.

Reporting Institutions by Sector

Public institutions made up just over half (53.9%) of all institutions reporting enrollment to NC-SARA in 2017. Private non-profit institutions represent 40.3% and independent for-profit institutions represent just under 6% of reporting institutions operating under SARA and reporting in 2017.

⁹ U.S. Department of Education, NCES National Center for Education Statistics, *IPEDS Glossary for 2016-2017 Data Collection System* <https://surveys.nces.ed.gov/IPEDS/Downloads/Forms/IPEDSGlossary.pdf>



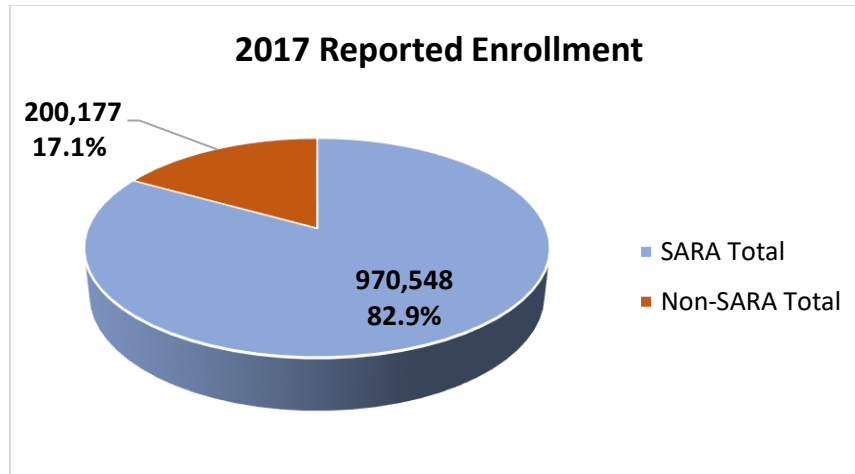
Sector	Number of Institutions Reporting	% of Total Institutions Reporting
Independent/For-Profit	85	5.8%
Private Non-Profit	596	40.3%
Public	796	53.9%
Total	1,477	

2017 Distance Education Enrollment

NC-SARA sent requests via email with a link to report fall 2016 enrollment to the institutional contacts at 1,494 institutions operating under SARA. NC-SARA received responses from 1,477 institutions during the annual reporting window in the spring of 2017. The response rate was 98.9%.

Total Reported Distance Education Enrollment

Of the 1,477 responses received, 115 or 7.8% reported no distance education enrollment. The institutions operating under SARA in these 47 states and the District of Columbia reported 1,170,725 distance education enrollments, 82.9% in SARA states and 17.1% in Non-SARA states.



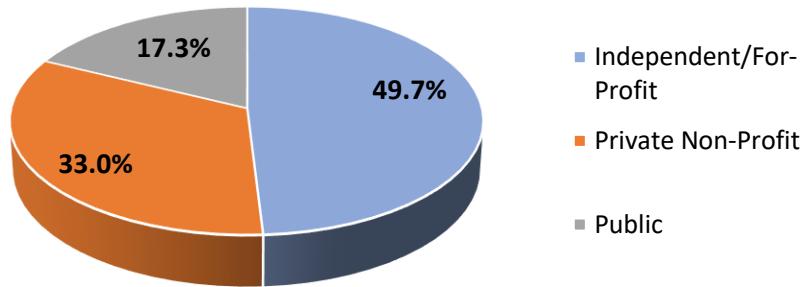
	Reported Enrollment in SARA States	Reported Enrollment in Non-SARA States	Total Reported Enrollment
2017 Reported Enrollments	970,548	200,177	1,170,725
Enrollment %	82.9%	17.1%	100%

Eleven states and the District of Columbia became members of SARA during the period between 2016 data reporting and 2017 reporting. Those states are: Connecticut, Delaware, Hawaii, Kentucky, North Carolina, New Jersey, New York, Pennsylvania, South Carolina, Utah and Wisconsin.

Reported Enrollment by Sector

Analysis of the 2017 reported enrollments by sector reveals that while independent for-profit institutions represent the smallest number of reporting entities, they also account for the largest proportion of reported enrollment with 49.7%. Private non-profits represent 33.0% of reported enrollment and public institutions just 17.3%. Details of the data are provided below.

2017 Reported Enrollment by Sector



Sector	Reported Non-SARA State Enrollment	Reported SARA State Enrollment	Total Reported Enrollment	Sector Total %
Independent/For-Profit	97,987	484,053	582,040	49.7%
Private Non-Profit	64,719	321,259	385,978	33.0%
Public	37,471	165,236	202,707	17.3%
Total	200,177	970,548	1,170,725	

2017 State Summary Data

Institutions operating under SARA report their distance education enrollments by state. This enrollment data is available on the [NC-SARA website](#). Many institutions reported in-state distance education enrollments to NC-SARA despite instructions *not* to report those enrollments. The data tables presented in this report have been adjusted to remove the in-state enrollment reported in error.

The following table compiles SARA and Non-SARA state enrollments for institutions for each SARA state reporting in 2017. For example, Alaska’s institutions participating in SARA reported enrolling 296 students in other SARA states and 90 students in Non-SARA states, for a total of 386 out-of-state students reported. This answers the question, “Where are my state’s institutions enrolling students?” In addition, 5,703 enrollments were reported in Alaska by SARA institutions located in other SARA states. This answers the question, “Who’s enrolling students in my state?”

State/ District	Total Reported Enrollments in SARA States	Total Reported Enrollment in Non-SARA States	Total Enrollment Reported	Enrollment in State Reported by SARA Institutions in Other SARA States
AK	296	90	386	5,703
AL	27,185	5,896	33,081	19,190
AR	5,668	566	6,234	10,448
AZ	181,768	51,062	232,830	17,315
CO	49,379	9,707	59,086	32,677
CT	5,954	1,233	7,187	11,615
DC	37,940	3,640	41,580	3,451
DE	2,470	76	2,546	3,811
GA	44,059	9,719	53,778	63,986
HI	184	131	315	9,468
IA	36,783	6,200	42,983	8,915
ID	16,539	4,172	20,711	7,632
IL	17,969	2,890	20,859	40,929
IN	17,468	2,706	20,174	20,365
KS	28,150	1,988	30,138	9,894
KY	10,093	1,379	11,472	15,168
LA	2,934	639	3,573	19,370
MD	10,406	2,128	12,534	31,594
ME	2,243	637	2,880	4,361
MI	5,751	1,107	6,858	13,891
MN	41,505	8,553	50,058	13,194
MO	21,086	4,123	25,209	21,044
MS	2,985	550	3,535	13,891
MT	603	114	717	4,565
NC	2,386	560	2,946	55,959
ND	3,757	477	4,234	4,293
NE	8,991	1,245	10,236	4,814

NH	44,816	12,954	57,770	3,342
NJ	9,111	1,850	10,961	28,656
NM	2,968	599	3,567	8,610
NV	283	401	684	15,425
NY	35,147	6,913	42,060	39,111
OH	16,815	2,772	19,587	36,299
OK	3,099	530	3,629	13,224
OR	9,138	3,083	12,221	11,930
PA	23,871	4,208	28,079	39,791
RI	876	454	1,330	2,968
SC	1,752	568	2,320	29,835
SD	3,313	327	3,640	3,119
TN	5,491	611	6,102	30,343
TX	12,270	3,690	15,960	98,911
UT	74,198	14,437	88,635	11,774
VA	48,814	7,718	56,532	51,624
VT	3,274	793	4,067	2,161
WA	2,828	861	3,689	36,923
WI	6,673	796	7,469	16,429
WV	80,832	14,994	95,826	6,110
WY	427	30	457	4,286
Totals	970,548	200,177	1,170,725	958,414

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 enrollment are Arizona, West Virginia and Utah.

Highly Concentrated Distance Education Enrollments

The NC-SARA enrollment reporting supports prior analysis of the distance education industry, affirming that distance education enrollments are highly concentrated. According to the Digital Learning Compass Distance Education Enrollment Report based on 2015 IPEDS data, “Distance education enrollments remain highly concentrated in a relatively small number of institutions. Almost half of the distance education students are concentrated in just five percent of the institutions, while the top 47 institutions, only 1.0% of the total, enroll 23.0% (1,385,307) of all distance students”.¹⁰

The institutions that reported the largest enrollments are University of Phoenix, located in Arizona; American Public University, located in West Virginia, and Western Governors University, located in Utah. These three institutions together represent 25.5% (298,549) of all distance education enrollments reported to NC-SARA in 2017. The ten institutions with the largest reported enrollments combined represent 51.4% (602,067) of enrollments reported to NC-SARA. These ten institutions are reported in the table below. None is a public institution.

¹⁰ Allen, I.E. and Seaman, J. (2017) Digital Learning Compass: Distance Education Enrollment Report 2017, p. 4. <http://digitalllearningcompass.org/>

Institution Name	State	Sector	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
University of Phoenix	AZ	Independent For-Profit	100,552	27,150	127,702
American Public University System	WV	Independent For-Profit	78,140	14,480	92,620
Western Governors University	UT	Private Non-Profit	65,465	12,762	78,227
Southern New Hampshire University	NH	Private Non-Profit	43,210	12,192	55,402
Ashworth College	GA	Independent For-Profit	39,222	8,344	47,566
Liberty University	VA	Private Non-Profit	41,078	6,308	47,386
Grand Canyon University	AZ	Independent For-Profit	36,558	10,457	47,015
Capella University	MN	Independent For-Profit	30,432	5,562	35,994
Kaplan University	IA	Independent For-Profit	30,532	5,439	35,971
Excelsior College	NY	Private Non-Profit	28,962	5,222	34,184

Top Ten Private Non-Profit Institutions

Private non-profit institutions represent four of the top ten institutions who reported out-of-state distance education enrollment to NC-SARA in 2017. The table below provides details for the ten private non-profit institutions that reported the largest enrollment in 2017.

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
Western Governors University	UT	65,465	12,762	78,227
Southern New Hampshire University	NH	43,210	12,192	55,402
Liberty University	VA	41,078	6,308	47,386
Excelsior College	NY	28,962	5,222	34,184
Brigham Young University - Idaho	ID	14,439	3,601	18,040
American College	PA	8,316	1,415	9,731

Columbia College, Columbia	MO	4,501	1,619	6,120
Park University	MO	4,193	574	4,767
Johns Hopkins University	MD	3,654	1,084	4,738
Bellevue University	NE	3,880	617	4,497

Top Ten Public Institutions

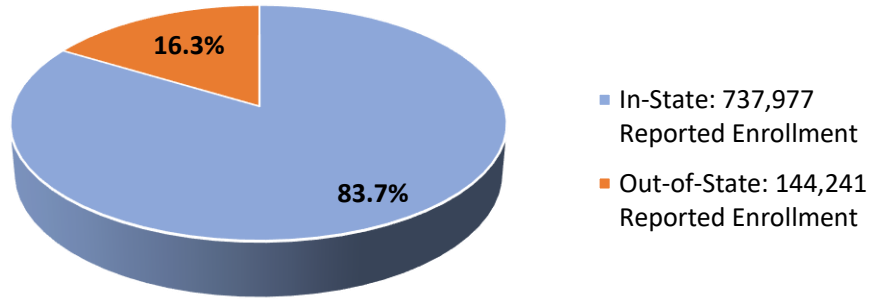
While the largest enrollment is reported from independent for-profit and private non-profit institutions, there are also many public institutions that reported significant enrollment to NC-SARA in 2017. The public institutions ranked by the highest 2017 reported enrollment are found in the table that follows.

Institution Name	State	Reported SARA State Enrollment	Reported Non-SARA State Enrollment	Total Reported Enrollment
Arizona State University	AZ	10,736	5,893	16,629
Thomas Edison State University	NJ	7,843	1,593	9,436
Pennsylvania State University	PA	5,600	1,373	6,973
Colorado State University-Global Campus	CO	4,956	1,724	6,680
University of Maryland - University College	MD	5,709	908	6,617
Oregon State University	OR	3,253	1,535	4,788
The University of Texas at Arlington	TX	2,257	1,580	3,837
Troy University	AL	2,836	972	3,808
Ohio University - Main Campus	OH	2,962	339	3,301
University of Arkansas-Fayetteville	MI	2,577	360	2,937

Public Institutions Serve In-State Students

Public institutions of higher education are primarily focused on serving students in their own state. An analysis of 2015 IPEDS data submitted by the 788 public institutions that were operating under SARA during the 2017 reporting period reveals that 83.7% (737,977) of their exclusively distance education enrollments were in-state, while 16.3% (144,241) were in another state. The public institutions' focus on serving in-state students should be considered when comparing reported NC-SARA data by sector.

2015 IPEDS Exclusively Distance Education Enrollment



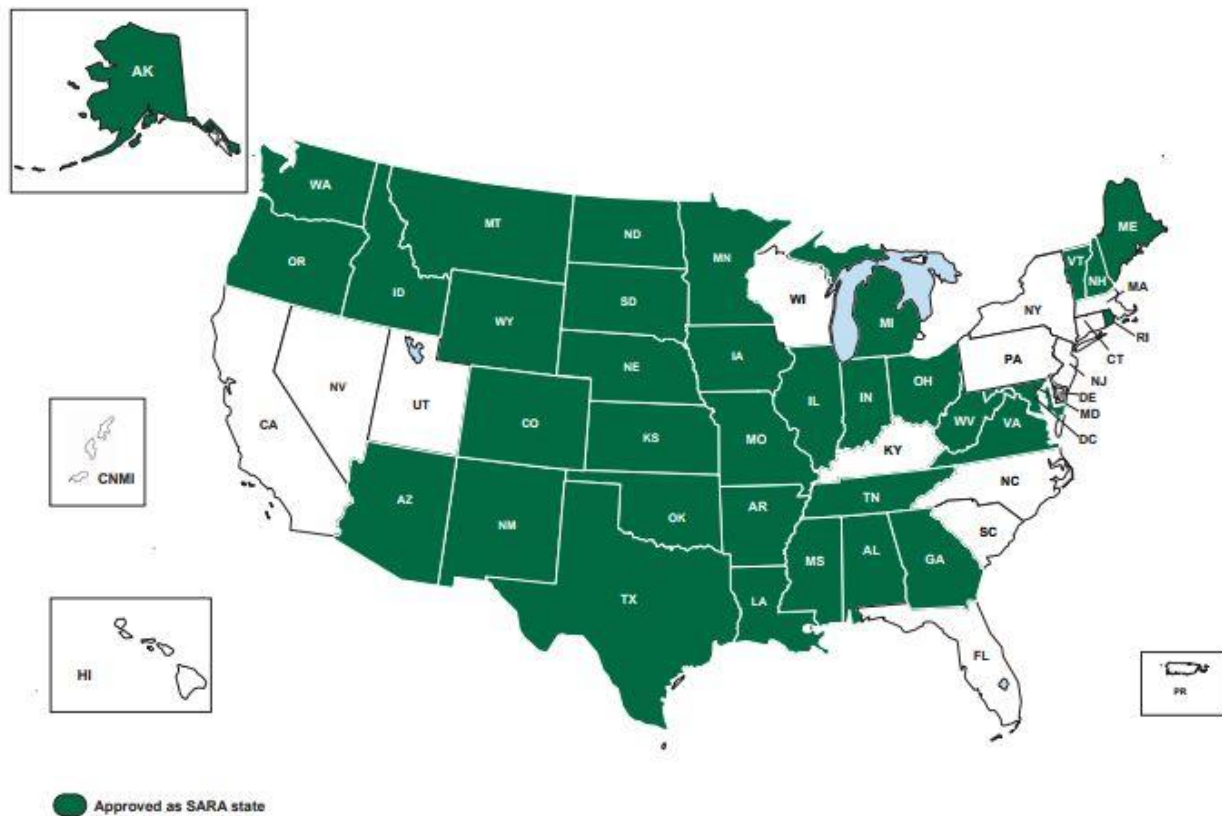
	Reported IPEDS Enrollment Same State	Reported IPEDS Enrollment Other States	Total Reported Enrollment
Reported Enrollments	737,977	144,241	882,218
Enrollment %	83.7%	16.3%	

Prior Year Distance Education Enrollment

In the spring of 2016, NC-SARA sent requests via email with a link for the reporting of fall 2015 out-of-state enrollments to the institutional contacts at 867 institutions operating under SARA. NC-SARA received responses from 846 institutions during the annual reporting window in the spring of 2016. The response rate was 97.6%.

Of the 846 responses received, 280 or 33.1% reported no distance education enrollments. The institutions operating under SARA at that time reported 899,337 distance education enrollments. In this initial reporting, instructions were given not to report state enrollments less than 10 because of concerns with student privacy.

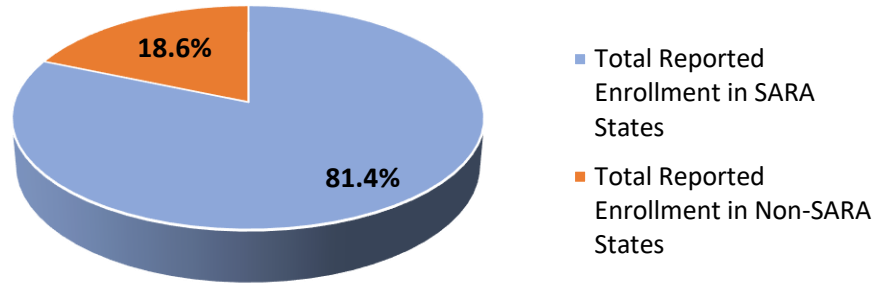
The following 36 states were members of SARA during the 2016 reporting period: AK, AL, AR, AZ, CO, GA, IA, ID, IL, IN, KS, LA, MD, ME, MI, MN, MO, MS, MT, ND, NE, NH, NM, NV, OH, OK, OR, RI, SD, TN, TX, VA, VT, WA, WV, and WY.



2016 Reported Distance Education Enrollment

Despite the significant increase in SARA membership by states and increased participation by institutions of higher education, the proportion of enrollments in SARA vs. Non-SARA states remained remarkably consistent, with 82.9% of enrollments in SARA states in 2017 and 81.4% in 2016.

2016 Reported Enrollment



	Total Reported Enrollment in SARA States	Total Reported Enrollment in Non-SARA States	Total Reported Enrollment
2016	697,618	159,685	857,303
Enrollment %	81.4%	18.6%	100%

2016 State Summary Data

The following table compiles SARA and Non-SARA state enrollments for institutions each SARA state reporting in 2016. For example, Alaska’s institutions participating in SARA reported enrolling 136 students in other SARA states and 64 students in Non-SARA states, for a total of 200 out-of-state students reported. This answers the question, “Where are my state’s institutions enrolling students?” In addition, 4,255 enrollments were reported in Alaska by SARA institutions located in other SARA states. This answers the question, “Who’s enrolling students in my state?”

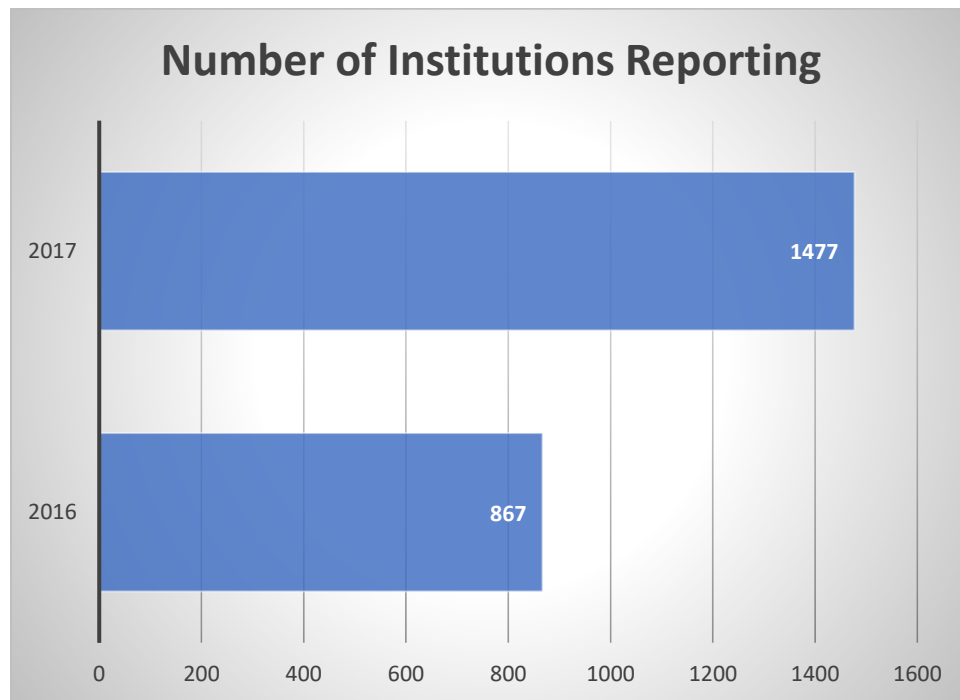
State/ District	Total Reported Enrollments in SARA States	Total Reported Enrollment in Non-SARA States	Total Enrollment Reported	Enrollment in State Reported by SARA Institutions in Other SARA States
AK	136	64	200	4,255
AL	24,428	5,730	30,158	14,568
AR	2,251	227	2,478	8,456
AZ	195,945	50,599	246,544	9,777
CO	46,213	10,777	56,990	15,362
GA	3,229	1,151	4,380	57,885

IA	42,044	7,086	49,130	6,993
ID	1,662	470	2,132	4,656
IL	13,651	2,385	16,036	33,077
IN	11,288	1,314	12,602	11,749
KS	17,554	2,175	19,729	8,029
LA	2,022	605	2,627	14,139
MD	4,111	1,084	5,195	23,203
ME	2,035	658	2,693	4,559
MI	3,923	802	4,725	20,588
MN	77,363	14,741	92,104	8,684
MO	22,459	4,349	26,808	14,383
MS	1,345	156	1,501	12,676
MT	43	22	65	3,055
ND	3,380	412	3,792	2,808
NE	8,485	1,180	9,665	3,946
NH	34,630	10,625	45,255	2,630
NM	2,597	626	3,223	6,414
NV	48	395	443	10,508
OH	8,884	1,875	10,759	29,914
OK	1,724	288	2,012	9,493
OR	8,793	2,826	11,619	7,373
RI	468	279	747	1,859
SD	3,129	339	3,468	2,105
TN	4,287	445	4,732	18,702
TX	8,273	2,980	11,253	69,923
VA	50,311	8,606	58,917	34,751
VT	1,784	550	2,334	1,349
WA	1,973	707	2,680	20,585
WV	86,893	23,136	110,029	4,406
WY	257	21	278	2,850
Totals	697,618	159,685	857,303	505,709

Data Comparison: Spring 2017 vs Spring 2016

Number of Institutions Reporting

Participation in SARA continued to increase significantly between the 2016 and 2017 reporting periods. In addition to adding eleven states and the District of Columbia, many institutions were added to the list of those operating under SARA as their applications were created, submitted and approved. Between the first and second year of reporting, the number of institutions reporting increased by 610 (or 70.4%) in one year.



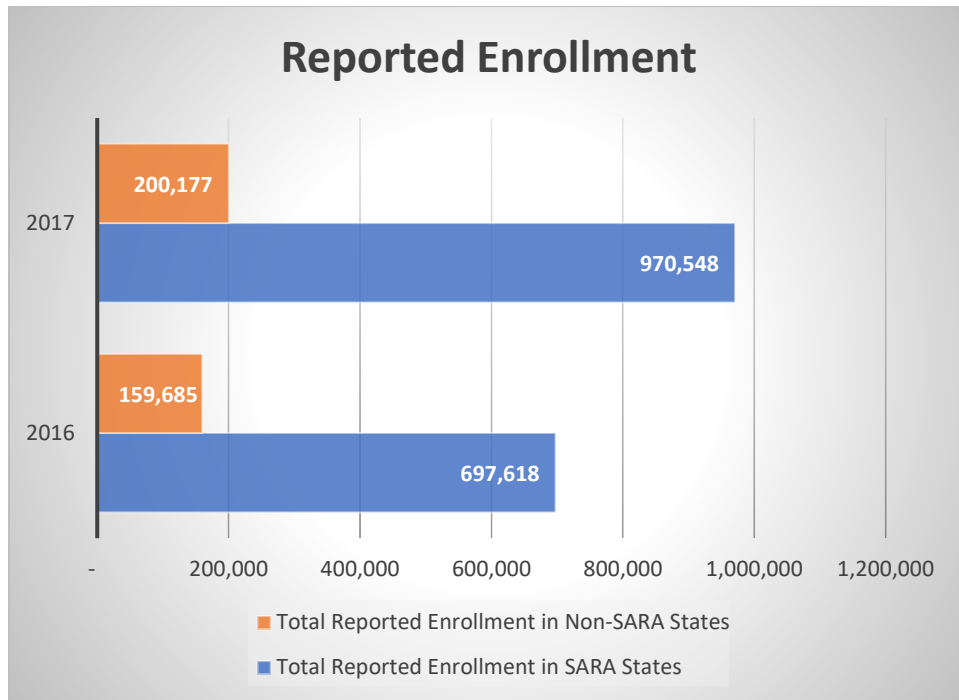
	Number of Institutions	% Increase
2016	867	
2017	1,477	70.4%

Distance Education Enrollment Reported

The data below summarizes reported enrollment for the two years. It demonstrates the significant growth in participation over the period. Institutions reported 39.1% larger combined total enrollment in SARA states from 697,618 in 2016 to 970,548 in 2017. The same institutions reported 25.4% more enrollments in Non-SARA state enrollments. The total increase in reported enrollment in the one-year period was 36.6%.

Some institutions report that they are applying to operate under SARA in preparation for distance education programs that are in the planning stages; many mentioned those plans in the Comments field of the 2017 survey. This dynamic could partially account for the fact that the number of participating institutions is growing at a faster rate than reported enrollments during the 2017 reporting period.

These institutions appear to be ramping up their operations to facilitate new distance education offerings. This information is anecdotal, therefore, not quantifiable.



	SARA State Reported Enrollment	Non-SARA State Reported Enrollment	Total Reported Enrollment
2017	970,548	200,177	1,170,725
2016	697,618	159,685	857,303
Increase in Reported Enrollment	272,930	40,492	313,422
% Increase	39.1%	25.4%	36.6%

Reporting Challenges

In an attempt to standardize reporting requirements for institutions, SARA relies on IPEDS definitions, schedules, etc. Unfortunately, it is clear from the comments submitted in 2017 that many institutions struggle to understand how they should report to IPEDS. And, since NC-SARA's basic instructions are to "report as you do for IPEDS, but disaggregate by state, territory, or district in which the students reside",¹¹ those misunderstandings affect NC-SARA reporting. Over half (51.7%) of comments provided in the Comment field of 2017 survey specifically mentioned variations from IPEDS data, definitions and concerns with how to report military students and those in territories.

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

- 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.
- Significant numbers of institutions continued to report in-state enrollments despite instructions that indicate not to report those enrollments to NC-SARA.
- Confusion about how to report military students (APO, etc.).
- Confusion about the U.S. Territories and the fact that they are not included by name in IPEDS reporting.
- Inability to report some fields that are in IPEDS, but not in NC-SARA data collection; these include: "Student in U.S., Location Unknown", "Student Located Outside the U.S." and "Student Location Unknown".
- 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.
- A small number of institutions indicated that they did not report state totals less than ten because of continuing concerns about student privacy.

The Comments field is a welcome addition to the reporting process. Many respondents used the Comments field to explain how their NC-SARA reporting was different from their IPEDS data reporting. This attention to detail and willingness to share the differences so transparently is a major step toward distance education data integrity for SARA and the entire distance education industry.

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.

¹¹ NC-SARA Manual, p. 34. http://www.nc-sara.org/files/docs/NC-SARA_Manual_Final_2016.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 2017 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: U.S. Virgin Islands, Puerto Rico, CNMI, American Samoa, and Guam. Spell out Commonwealth of the Northern Mariana Islands (CNMI) on the survey screen; a few people commented that they didn't know what it was despite the instructions that highlighted this territory by name.
- Continue to highlight the fact that in-state distance education enrollments are not reported to NC-SARA. A significant number of institutions continue to report these enrollments in error. Reported in-state enrollment is removed from the published totals in this report.
- Add contact fields: Name, Title, Email, Phone number of person completing the report.
- Add instructions that explain that the data reported to IPEDS and NC-SARA will not necessarily match. IPEDS will include the home state "exclusively distance education" enrollments, SARA will not. IPEDS also 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". SARA data collection includes reporting enrollment for the U.S. Territories and the District of Columbia; IPEDS does not.
- Keep the Comments field. Those reporting in 2017 used the 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 since system queries often return two letter state abbreviations. Alphabetic listings of state names and state abbreviations return the states in different order. Including as much information in the label of the survey for each state should improve the reliability of the data reported.
- Standardize the display of data by state to be consistent between tables. Alphabetize either by state name or abbreviation consistently.
- Consider adding a Total field that automatically totals submissions, if not technically burdensome.

Collaboration with NCEES to improve the definition of a "Distance Education Course" and other related definitions used by IPEDS would be a big step toward improving the consistency and reliability of all distance education data reported.

Overall, the reporting process and mechanisms to receive the data worked well for the second NC-SARA reporting period. The rapid adoption of SARA by the states and the institutions within them provides a new and likely more reliable source of information about distance education offerings in the U.S. than was previously available through the Babson Survey Research Group (BSRG) surveys¹² and prior IPEDS

¹² Allen, I.E. and Seaman, J., (2016) Online Report Card: Tracking Online Education in the United States. <http://onlinelearning survey.com/reports/online report card.pdf>

Distance Education reporting by the WICHE Cooperative for Educational Technologies (WCET)¹³ and others. 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. 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.

¹³ Poulin, R. and Straut, T. (2016). WCET Distance Education Enrollment Report 2016.
<http://wcet.wiche.edu/initiatives/research/WCET-Distance-Education-Enrollment-Report-2016>

Appendix A: Technical Notes

Definitions

The following definitions are provided by The Department of Education National Center for Educational Statistics (NCES)¹⁴.

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 *SARA Policy and Operations Manual*.¹⁵

¹⁴ U.S. Department of Education, NCES National Center for Education Statistics, *IPEDS Glossary for 2016-2017 Data Collection System* <https://surveys.nces.ed.gov/IPEDS/Downloads/Forms/IPEDSGlossary.pdf>

¹⁵ NC-SARA, *State Authorization Reciprocity Agreements Policy and Operations Manual* (2016). Version 16.3. http://www.nc-sara.org/files/docs/NC-SARA_Manual_Final_2016.pdf

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.”¹⁶

Despite these instructions, many institutions continue to report in-state enrollments to NC-SARA. 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 SARA guidelines.


¹⁶ NC-SARA Manual, p. 34. http://www.nc-sara.org/files/docs/NC-SARA_Manual_Final_2016.pdf

Appendix B: Instructions and Survey

Below are screenshots of the instructions and the survey screens that institutions completed for the 2017 NC-SARA data collection.

NC-SARA Annual Enrollment Reporting

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**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

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[Need assistance with this form?](#)

NC-SARA Annual Enrollment Reporting

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Institution

SARA States & Territories

Alabama *	<input type="text"/>	Alaska *	<input type="text"/>
Arizona *	<input type="text"/>	Arkansas *	<input type="text"/>
Colorado *	<input type="text"/>	Connecticut *	<input type="text"/>
Delaware *	<input type="text"/>	Georgia *	<input type="text"/>
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Pennsylvania *	<input type="text"/>	Rhode Island *	<input type="text"/>
South Carolina *	<input type="text"/>	South Dakota *	<input type="text"/>
Tennessee *	<input type="text"/>	Texas *	<input type="text"/>

New Jersey	<input type="text"/>	New Mexico	<input type="text"/>
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Virginia *	<input type="text"/>	Washington *	<input type="text"/>
Washington DC *	<input type="text"/>	West Virginia *	<input type="text"/>
Wisconsin *	<input type="text"/>	Wyoming *	<input type="text"/>

Non-SARA States & Territories

California *	<input type="text"/>	CNMI *	<input type="text"/>
Florida *	<input type="text"/>	Massachusetts *	<input type="text"/>
Other Territories *	<input type="text"/>	Puerto Rico *	<input type="text"/>

Comments

Confirmation and Authorization

By checking this box, your institution agrees to the terms noted in the published [NC-SARA Data Sharing Agreement, found here.](#) I agree.

[Need assistance with this form?](#)

Appendix C: About the Author

Terri Taylor Straut, Senior Research Analyst, WICHE Cooperative for Educational Technology (WCET) and independent consultant is 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 WCET's Research and Analysis unit. Terri earned her Masters of Business Administration from Northeastern University and her Bachelor of Arts from the University of Delaware. (Terri_Straut@msn.com)

Appendix D: References

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