**Suggestions for Collecting and Sharing State Level SARA Organizations**

**Collected at the S-Steering Committee Meeting on June 5, 2018**

Recommendation:

Given that NC-SARA already surveys the state portal entities once a year with questions that overlap the draft SREB State Portal Entity Organizational Structure survey, it is recommended that NC-SARA modify its survey to include questions of interest that were shared in the June 5 SREB Steering Committee meeting and that the solicitation of that information be done with SPE understanding that the information will become public through the revised NC-SARA website.

Advantages of this approach include:

* Broader compilation of information (entire SARA state membership) so greater likelihood that states can find similarly structured states when seeking advice.
* No duplication in information gathering.
* Easy modification/expansion of information needed on an annual basis.

Suggestions for Inclusion:

Below are suggestions for what is of interest that emerged from the June 5 discussion. Some suggested that it would have been most helpful to reference such a spreadsheet across all states available when states joined because at this point, much has already been constructed as needed at the state level. However, some did point out that if a state felt it needed more staff, as an example, it would be most helpful to compare a state with a similar number of member institutions to make the case for additional staff or additional funding.

1. While it makes sense that the SPE point of contact be the person who completes the survey, in situations where that is not the case, knowing the name and title of the person who does submit the information would be helpful.
2. Order of the questions should be logical and build in cases where that makes sense – as an example the name of the organization responsible for SARA oversight should appear early near the top of the spreadsheet – perhaps even at the top.
3. The question that references whether the organization that manages SARA was an existing entity or a new one for SARA purposes might need to include a hybrid option in which the entity existed but the SARA structure did not. Related to this is the need to be sure to define level of structure – entity probably should refer to the state level umbrella organization like a Board of Regents or an Assistance Authority or an entirely new state level structure as opposed to an office within a state agency.
4. Using FTE as the way to track staffing levels appeared to be the one that made the most sense and is the way NC-SARA already collects such information.
5. For the question seeking whether or not decisions/actions are made by an individual or an individual in collaboration with a staff team - or perhaps a committee/council, it was indicated that individual actions related to SARA might be handled by different approaches. For this reason activities such as application approval/renewal and complaints might be addressed separately.
6. Some of the information is known from the state application process and could be populated in a spreadsheet without asking the question. An example is the source of the authority to join SARA. Similarly, state fees to join are known.
7. There didn’t appear to be substantial interest in knowing when the fee is paid – at the time of application or upon approval.
8. Likewise, the use for fees range across the board so there didn’t appear to be substantial interest in having individuals identify how this money is used. In fact, some expressed concern of making this type of information public.
9. While folks did seem interested in having an organization chart showing where the SARA ‘office’ is located, it was recommended that this be gathered through a template to help those who are less skilled in constructing such a diagram.
10. Rather than collecting actual job descriptions of SARA positions, although if they exist it would be great if NC-SARA is able to get them in a generic form for sharing, a listing of the roles/responsibilities/duties that SARA requires to get the work done would be more useful. NC-SARA might be best equipped to develop such a list of core responsibilities or perhaps an SPE could offer to submit job descriptions if available.
11. It was apparent from the discussion that states vary in terms of the work they do as the SPE. Some review applications and if they are complete, they are approved. Others confirm that what is stated is, in fact, accurate. Still others, hold meetings, webinars and distribute information to reduce the number of inquiries they receive. While the process is becoming more familiar and many institutions have joined or renewed, there will continue to be turnover and documented processes and procedures will make personnel changes more efficient.
12. Information regarding the state level process for the various activities (application timeline, meetings, etc.) – perhaps a flow chart – is already collected in some way by NC-SARA. A review of this to see if it is easily comparable across states would be useful, and a template might serve to make this collection easier.