



Managing Institution Mergers and Alignments



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AGENDA

- * Mergers and Alignments from a SARA perspective**
- * Panelist Q&A**
- * Small group discussion and report out**
- * How can NC-SARA help?**

Favorite Vacation Memory





SARA Institution Mergers and Alignments

- Any currently participating institution with a renewal date prior to the official merger date (and closing if applicable) will need to complete their annual renewal process **and** submit data during the annual collection period
- Any currently participating institution that will no longer continue as an individually accredited institution will need to submit a “non renewal” form (AF5), as well as a “change of ownership” form (AF6) when applicable
- If the merger/alignment will create an entirely new entity, an “application for SARA participation” will need to be completed
- Work with NC-SARA and Regional Compact staff to coordinate timelines and paperwork submissions to ensure seamless continuation of participation, especially for continuing students



Panel Question #1

Describe an experience with a merger or alignment including how you navigated this with the institutions and for (hopefully) the seamless transition of students. Include details such as other partners you typically work with (accreditors, other states, other state agency personnel/offices).



Panel Question #2

There have been widely reported developments in aligning/merging public institutions, in particular in both of your states (Connecticut and Pennsylvania), is there anything further you'd want to comment on that could be interesting to others as their states may plan to do the same?



Panel Question #3

Do you have any advice to fellow state agency personnel/SPEs when navigating these processes? What are the first 1-2 things you want to do or think of when this arises?



Panel Question #4

What didn't go well that you would encourage others to consider?



Panel Question #5

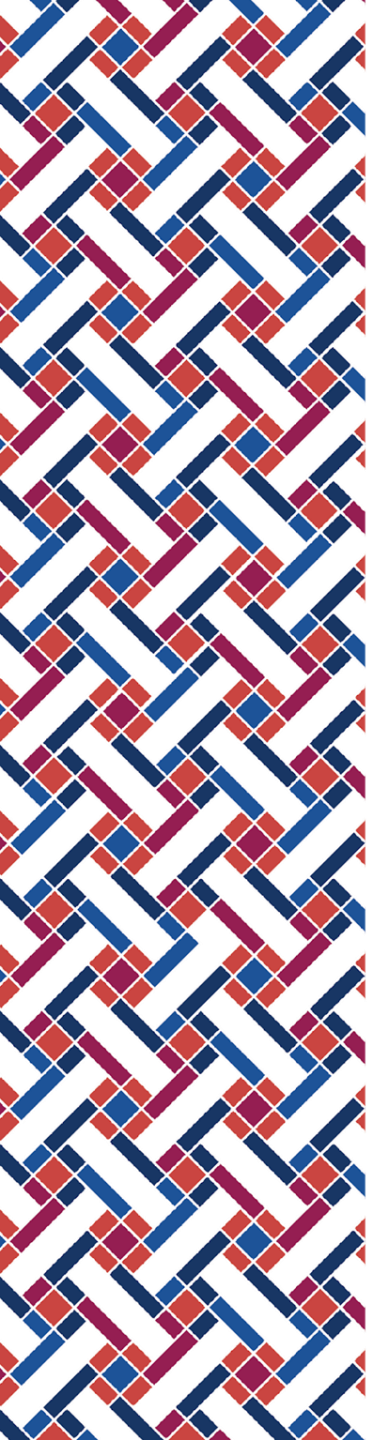
What would make this process smoother for SARA participation purposes?

Small Group Discussion



Now it's your turn:

- Raise your hand if you have significant experience in this topic. Take note of each other, and please spread out!
- Break into smaller groups around where you're sitting.
- Using the questions we just asked, have discussion in your group.
- **Select one person** who will report out with any key points, thoughts, ideas etc. that would be of interest to everyone else.
- **Focus on** advice for other SPEs and how NC-SARA can better support these processes for seamless SARA participation.



1. Share an experience with a merger or alignment including how you navigated this with the institutions and for (hopefully) the seamless transition of students. Include details such as other partners you typically work with (accreditors, other states, other state agency personnel/offices).
2. There are widely reported developments in aligning/merging institutions across the country, anything you can share or comment on that would be interesting to others as their state institutions may do the same?
3. Do you have any advice to fellow state agency personnel/SPEs when navigating these processes? What are the first 1-2 things you want to do or think of when this arises?
4. If you've experienced a merger/alignment that didn't go well, what would you encourage others to consider?
5. What would make this process smoother for SARA participation purposes?

Small Groups Report Out



Thank You!

For **NC-SARA** questions please email:

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NC-SARA Website: www.nc-sara.org

