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# Guidelines for the Release of Data

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## **Contents**

1	<b>Overview of the Guidelines</b>
2	<b>Section 1: What Constitutes College Board Data?</b>
4	<b>Section 2: Guidelines for Aggregate Data</b>
5	<b>Section 3: Guidelines for Institution and District-Level Data</b>
7	<b>Section 4: Guidelines for Individual-Level Data</b>
9	<b>Section 5: Procedures for Requesting College Board Data</b>
12	<b>Section 6: Third Parties</b>
13	<b>Section 7: Requests to Institutions and Districts for College Board Data from Third Parties</b>
14	<b>Section 8: Guidelines for Posting Data on the Internet</b>
15	<b>Section 9: Future Modifications to the Guidelines</b>
16	<b>Appendix A: Data Request Form</b>
17	<b>Appendix B: Sample Data License Agreement</b>
21	<b>Appendix C: Non-Releasable Data Elements by Program</b>
23	<b>Appendix D: Data Elements Needed for Matched Data</b>

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# Overview of the Guidelines

1. The College Board respects student privacy and is committed to protecting students and their data. We have therefore created these *Guidelines for the Release of Data* (hereinafter "*Guidelines*") to address how the College Board processes third-party requests to use College Board Data.
2. The College Board's various program release data and other reports, e.g., AP<sup>®</sup>/CLEP<sup>®</sup>/SAT<sup>®</sup> score reports, AP Instructional Planning Reports ("routine and ordinary reporting") to individuals, schools, districts, and other approved organizational units. These *Guidelines* do not apply to such routine and ordinary reporting. The use of these routinely reported data is discussed in the publication *Guidelines on the Uses of College Board Test Scores and Related Data*. However, the College Board may provide qualified requesters with additional data on students, schools, districts, states, or the nation, and if it does, will do so only under the conditions described in these *Guidelines*.
3. In order to protect the privacy of students, schools, and districts, data with individual student, school, or district identifying information, is generally only released by the College Board to third parties who have the authority and jurisdiction over the data or have consent from the appropriate party to access the data ("Qualified Requester"). However, in certain circumstances, the College Board may agree to assist Qualified Requesters with their analysis/research by matching the requester's data file with College Board Data and then providing a de-identified file back to the requester. (E.g., matching students, or employing one of several methods of statistical disclosure limitation to ensure data confidentiality) to prevent the release of individual or institutional identifying information as applicable.
4. Exceptions to the policy regarding the release of individual personally identifying information (PII) may be made for state departments of education or other organizations if (a) they have authority and jurisdiction over the students and/or the data and (b) they sign a data license agreement that specifies how the data will be used and ensures that the confidentiality of the data and the College Board's proprietary rights in the data will be protected and maintained.
5. Exceptions to these *Guidelines* will only be made upon the approval of a senior College Board officer and/or an internal Data Governance Council decision.
6. Requests for embargoed data should be made/forwarded to the College Board's Communications department at the College Board. Communications will work with the appropriate department to evaluate these data requests.
7. The College Board may charge a fee for fulfilling requests for data or reports.

## SECTION 1

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# What Constitutes College Board Data?

College Board Data is defined as information collected, derived, and generated from student, educator, and institutional participation in College Board programs and services and includes, but is not limited to, information such as test scores; test volumes; identification of student names and addresses; identification of the secondary schools that students attend (AI, or attending institution), and the postsecondary institutions that receive scores (DI, or designated institution); and data from the SAT Questionnaire such as the course-taking patterns and extracurricular interests of individual students, as well as demographic information on student family background variables, such as self-reported race/ethnicity, parental education, and family income.<sup>1</sup>

The *Guidelines* are intended to provide guidance to third parties regarding how the College Board releases data associated with its programs. The College Board Data and programs include, but are not limited to, the Advanced Placement Program® (AP®); SAT Program, which includes the SAT and SAT Subject Tests™, and PSAT-related assessments, which include the PSAT™ 8/9, PSAT™ 10, and PSAT/NMSQT®; the ACCUPLACER® Program, CSS/Financial Aid PROFILE®, and College-Level Examination Program® (CLEP®). The *Guidelines* also pertain to additional College Board databases that combine data elements or fields from the College Board with external data. When external data are owned by a separate entity and are not intended for public use (e.g., data from a state, district, foundation, or other organization), the College Board generally will not have the authority to release the merged data under any conditions. In addition, this data release policy covers other miscellaneous data collected by the College Board, including, but not limited to, survey data, marketing research data, and any data collected as part of a pilot study, including data collected on any website owned and/or operated by or affiliated with the College Board.

Data collected by the College Board represent a valuable source of information and are derived and developed through considerable time and expense. As such, requests for data will be evaluated with careful consideration, and the College Board reserves the right to deny any request that it deems to be an inappropriate use of its data. College Board Data may be used only for the purposes specified, either in the publication *Guidelines on the Uses of College Board Test Scores and Related Data* (which refers to aggregate data), or in a data license agreement between the requester and the College Board. In addition, in recognition of the intrinsic value of the data as well as the costs incurred by the College Board in collecting and processing data, the College Board may charge a license fee for the use of the data.

Procedures for requesting College Board Data can be found in Section 5 of this document; a Data Request Form can be found in Appendix A, and a sample Data License Agreement can be found in Appendix B.

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1. This list is not intended to be exhaustive but rather illustrative of the type of data that the College Board collects.

The pricing of the request and a license fee will be assessed after the College Board's review of the Data Request Form.

For the purpose of these *Guidelines*, College Board Data is classified into three broad categories: aggregate level, institution/district level, and individual level. These terms are defined below:

**1.1 Aggregate-Level Data:** Aggregate-level data are data that have been aggregated from individual-level data to create data associated with a particular state or with the entire nation. Examples of aggregate-level data include the average SAT Math score for all college-bound seniors in New York State in a given year; counts of all college-bound seniors in the country who took the SAT Math section by standard score bands; counts of all college-bound seniors in California by self-reported race/ethnicity; etc. Most of these data can be shared with the public because they are aggregated at a level that makes it impossible to identify a particular individual, institution, or school district. See Section 2 of this document for further information on the release of aggregate-level data.

**1.2 Institution-/District-Level Data:** An institution is defined as any entity with an attending institution (AI) code designation, designated institution (DI) code designation, or CSS code designation and includes, but is not limited to, middle schools or schools of secondary education (or their equivalents) or institutions of postsecondary education. Institution-/district-level data are data that have been aggregated from individual-level data to create data associated with a particular institution or school district. Examples of institution-/district-level data include: total AP Biology Exam volumes for a high school; the average SAT Math score for a school district; the average SAT Math score for students applying to a college or university; etc. In order to protect the confidentiality of institutions and districts, institution-/district-level data (information that would allow the user to identify a particular institution/district, e.g., AI/DI code or zip code) are never released, with the sole exception of direct requests from the institutions/districts to which these data pertain (e.g., state departments of education). In addition, when necessary, data at this level may require the application of one or more methods of statistical disclosure limitation to prevent disclosure of protected individual-level data. See Section 3 of this document for further information on the release of institution-/district-level data.

**1.3 Individual-Level Data:** Individual-level data are associated with a particular individual, such as a particular student or teacher. Examples of individual-level data include individual SAT scores; AP scores; number of AP Exams taken by an individual student; SAT Questionnaire responses; date of birth; high school attended; etc. In order to protect the privacy of individuals, these data are considered highly confidential. Except for direct requests by the individuals to whom the data pertain, individual-level data are never released with information that would allow the user to identify a particular individual, without the consent of the individual student. See Section 4 in this document for further information on the release of individual-level data.

## SECTION 2

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# Guidelines for Aggregate Data

Aggregate data are disseminated by the College Board as a matter of course in publications such as *College-Bound Seniors: Profile Report*. These published data are available to the public, usually without cost. However, there are many cases when an individual or an institution requests particular data aggregated in a particular manner that is not readily available. For example, an institution may require a cross-tabulation of the SAT Evidence-Based Reading and Writing (ERW) or Math standard score bands by parental education or income for the national population of college-bound seniors over a period of several years, or aggregate national data for students planning to major in engineering. For these types of requests, the following guidelines will be observed:

- 2.1 General Guidelines Regarding Aggregate-Level Data:** Requests for aggregated College Board Data as defined in Section 1 from any individual or institution, if granted, will follow the pricing and procedural guidelines (see below). If aggregate data containing identifying information at the state, district, or school level are requested, sign-off may be required by the state department of education or the entity that has jurisdiction over the desired data prior to their being released.
- 2.2 Fees for Aggregate-Level Data:** The College Board may charge a fee for custom-aggregated data (that is, data in a form not readily available in published format) in accordance with the time and effort necessary to process the request. Individuals or institutions interested in reprinting aggregated College Board Data in their own publications or for use on a website must request permission from the College Board and can do so by visiting [collegeboard.org/inquiry/cbpermit.html](https://collegeboard.org/inquiry/cbpermit.html).
- 2.3 How to Request Aggregate-Level Data:** Procedures to request aggregate-level data may be found in Section 5.1 of this document.

## SECTION 3

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# Guidelines for Institution and District-Level Data

Institution- and district-level data are considered more confidential than aggregate data, and the release thereof follows more stringent guidelines. The College Board does not routinely release such data to anyone other than the institution or district to which the data pertain. County-level data will not be provided unless the county is equivalent to a public school district. The following guidelines govern the release of all institution-/district-level data. In addition, see Appendix C for a list of institution-/district-level data elements by program, which are not released to bodies other than those to which the data pertain.

**3.1 General Guidelines Regarding Institution-/District-Level Data:** Requests for institution- and/or district-level College Board Data from a Qualified Requester will be reviewed thoroughly. The decision of whether or not to release such data will be made based strictly upon these guidelines, and any data that are released by the College Board to any Qualified Requester remain the property of the College Board and may not be used for any purpose other than that specified in the license agreement between the requester and the College Board. The College Board reserves the right to refuse any data request involving institution-/district-level data; however, nothing herein shall prohibit institutions/districts from releasing data pertaining to their own institution or district.

**3.2 What Institution-/District-Level Data May Be Requested Standard Data Requests:** The College Board will release, for an established fee, institution-/district-level data to the institutions/districts to which the data pertain in the form of reports and electronic files of data specific to that institution/district. Other inquiries from Qualified Requesters will be considered for institution- or district-level data with no identifying information provided (e.g., no AI/DI codes provided for institutions and no zip codes for districts) and appropriate statistical disclosure limitation methods (e.g., cell suppression, random noise addition, etc.). Data will not be provided for entire cities or counties, as these jurisdictions often do not constitute a single school district. This guideline is intended to protect the confidentiality of data aggregated at the institution and district level and to prevent inappropriate use of the data; therefore, the College Board will monitor all requests for attempts to circumvent this provision (e.g., requests for data aggregated across all schools that form a district, and thus would result in district-level data for that particular district). If specific institution-/district-level data are needed, the party requesting the data must obtain written permission from each institution or district, specifying the data to be released, before the College Board will release any data with institution or district information identified. The College Board will provide a sample letter the requester may use.

**3.2.2 Data Request Exceptions:** Under certain circumstances, data containing personally identifiable information (“PII”) may be requested for specific institutions and/or districts without obtaining written permission from each institution or district. For example, the College Board will release identifiable institution- and district-level data to governing entities that have direct jurisdiction and authority over those institutions and/or districts, such as state education agencies, central agencies of state systems of higher education, and school districts. The College Board will monitor all such requests, including requests fulfilled by the Educational Testing Service (ETS). The College Board Data Release Appeals Committee must approve any other release of institution- or district-level data that contain identifying information.

**3.2.3 Data License Agreement:** Institutions/districts that request data associated with their own institutions/districts are required to sign a license agreement. However, other Qualified Requesters that request institution-/district-level data will be required to enter into a data license agreement with the College Board that sets forth the required provisions with respect to confidentiality and release of information.

**3.3 Fees for Institution-/District-Level Data:** The College Board may charge a fee for institution-level and/or district-level data.

**3.4 How to Request Institution-/District-Level Data:** Procedures to request institution-/district-level data may be found in Section 5.2 of this document.



## SECTION 4

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# Guidelines for Individual-Level Data

Individual-level data are considered more confidential than aggregate data and institution-/district-level data and are subject to more stringent guidelines. The College Board does not release such data with PII to anyone other than the individual to whom the data pertain without the consent of the individual. Requests for individual-level data will require a data license agreement to be signed between the requester and the College Board. The following guidelines govern the release of all individual-level data. In addition, see Appendix C for a list by program of individual-level data elements that are not released.

**4.1 General Guidelines Regarding Individual-Level Data:** Requests for individual-level College Board Data from a Qualified Requester will be given a thorough analysis. The decision of whether or not to release such data will be based strictly upon these guidelines. All College Board Data that are released to an individual or institution remain the property of the College Board and may not be used for any purpose other than that specified in a license agreement between the requester and the College Board. The College Board reserves the right to refuse any data request involving individual-level data; however, nothing herein shall prohibit individuals from releasing their own data for personal use.

**4.2 What Individual-Level Data May Be Requested:**

**Standard Data Requests:** The College Board routinely releases individual-level data to the individual associated with the data or to those institutions and entities that the individual indicates should receive the data in the form of score reports and electronic data files. Other requests for individual-level data from Qualified Requesters will be thoroughly evaluated and, if approved, the College Board may release the data but only after the data have been stripped of all personally identifying student information (e.g., names, addresses, dates of birth). In addition, statistical disclosure limitation methods will be employed as necessary to protect the individuals' confidentiality and privacy.

In some instances, if a requester has a pre-existing data file with identifying information, such as student name and other PII, the College Board may perform a match for the requester and append the College Board Data to the requester's file. All identifying information will be stripped from the file before it is returned to the user to prevent post hoc identification of student records. This would be desirable, for example, in a case where a researcher has collected independent data on a set of subjects and would like College Board Data, such as individual SAT scores, to augment the data set. If specific individual-level data are needed, the party requesting the data must obtain written permission from each individual, specifying the data to be released, before the College Board will release that data.

**4.2.1 Data Request Exceptions:** Under certain circumstances, data containing identifying information may be requested for specific individuals without obtaining written permission from each individual. For example, the College Board will release identifiable individual-level data to state education agencies and central agencies of state systems of higher education upon request. The College Board will monitor all such requests, including requests that will be completed by ETS. The Data Governance Council must approve any other release of individual data with identifying information. **Under no circumstances will the College Board ever release all the data elements for an entire cohort or population.**

**4.2.2 Data License Agreement:** Individuals who request data pertaining to themselves, or institutions/districts that request data pertaining to individuals either attending their institutions or applying to their institutions, are required to complete a data license agreement. Other Qualified Requesters requesting individual-level data will be required to enter into a license agreement with the College Board that sets forth the required provisions with respect to confidentiality and release of information.

**4.3 Fees for Individual-Level Data:** The College Board may charge a fee for individual-level data.

**4.4 How to Request Individual-Level Data:** Procedures to request individual-level data may be found in Section 5.3 of this document.

## SECTION 5

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# Procedures for Requesting College Board Data

### 5.1 Aggregate-Level Data:

- 5.1.1** Any person or institution is qualified to request aggregate-level data.
- 5.1.2** Aggregate-level data in the form of existing published reports may be requested from the appropriate program.
- 5.1.3** Custom aggregate-level data may be requested by contacting a College Board regional office, the appropriate program officials in the New York Office, or the Fulfillment Operations group. The Fulfillment Operations group at the College Board will send the requester written notification of the request, detailing the specifications, the time required to complete the work and a cost estimate for the use of data.
- 5.1.4** Aggregate-level data that includes identifying information may require sign-off from the school, district or state department of education, depending on the level of aggregation. Data will not be released without the appropriate sign-off.

### 5.2 Institution-/District-Level Data:

- 5.2.1** The following categories of users ("Qualified Requester") are generally considered qualified to request institution-/district-level data:

**Researchers/Policymakers:** Includes researchers or policymakers who are affiliated with either an educational institution (e.g., college or university, public or private primary, or secondary school system), a governmental research agency or legislative commission, or a private research or policy institution.

**State Education Departments:** Includes state education agencies, state departments of elementary and/or secondary education, and state departments of higher education.

**Institutions/Districts:** Includes persons with authority to represent public and private primary and secondary schools, local school districts, and institutes of higher education, such as colleges and universities.

**Other Interested Parties:** Includes recognized educational organizations (e.g., state education associations, the National Council of Teachers of Mathematics, etc.).

**Local and National Press:** All requests for data should be directed to the Communications department in the New York Office of the College Board. The Communications department will work with the media to garner the necessary permissions for the data release.

**5.2.2** All requests for institution-level and/or district-level data from a Qualified Requester must be submitted in writing and include the following information: (1) the rationale for the data request; (2) any and all purpose(s) for which the data will be used; (3) name(s) and title(s) of all parties having access to the data; and (4) the name of the agency funding the research, if applicable. (See Appendix A for a sample Data Request Form.) Those requesting College Board Data should allow at least two to three weeks for the College Board to review and respond to the request. If the request is approved, the College Board will send a draft license agreement to the requester and inform the requester of the estimated time needed to compile the data. Finalized timelines for the release of the data will be provided upon full execution of the license agreement.

**5.2.3** Requests for institution-level and/or district-level data should be directed to the appropriate program officials in the New York Office.

**5.2.4** The College Board reserves the right to refuse any data request involving institution-/district-level data; however, nothing herein shall prohibit institutions and/or districts from releasing data pertaining to their own institution or district.

### **5.3 Individual-Level Data:**

**5.3.1** The following categories of users are generally considered qualified to request individual level data:

**Researchers/Policy makers:** Includes researchers or policymakers who are affiliated with either an educational institution (e.g., college/university, public/private primary or secondary school system), a governmental research agency or legislative commission, or a private research or policy institution.

**State Education Departments:** Includes state education agencies, state departments of education, and central agencies of state systems of higher education.

**Institutions/Districts:** Includes persons with authority to represent public and private primary and secondary schools, local school districts, and institutes of higher education, such as colleges and universities.

**Other Interested Parties:** Includes recognized educational organizations (e.g., state education associations, the National Council of Teachers of Mathematics, etc.).

**Local and National Press:** Requests for data by local and national press shall be directed to the Communications department in the New York Office of the College Board.

- 5.3.2** All requests for individual-level data from a Qualified Requester must be submitted in writing and specifically state: (1) the rationale for the data request; (2) all purpose(s) for which the data will be used; (3) name(s) and title(s) of all parties having access to the data; and (4) the name of the agency funding the research, if applicable. (See Appendix A for a sample Data Request Form.) Those requesting College Board Data should allow at least two to three weeks for the College Board to review and respond to the request. If the request is approved, the College Board will send a draft license agreement to the requester and inform the requester of the estimated time needed to compile the data. Finalized timelines for the release of the data will be provided upon full execution of the license agreement.
- 5.3.3** Requests for individual-level data should be directed to the appropriate program officials in the New York Office.
- 5.3.4** The College Board reserves the right to refuse any data request involving individual-level data; however, nothing herein shall prohibit individuals from releasing their own data for personal use.

## SECTION 6

# Third Parties

Occasionally, a Qualified Requester may request to share or provide institution-/district-level and/or individual-level data with a third party. When release of data to third parties is desired, a license agreement must be executed with the requester and the third party. The requesting party must specify all information described below as well as any additional uses of the data by the third party. The following guidelines govern the release of all institution-/district-level and individual-level data to third parties:

- 6.1** When individual-level or institution-/district-level data are provided to or shared with a third party, a separate license agreement will also be required from the third party that specifically states: (1) the rationale for the data request; (2) all purpose(s) for which the data will be used; (3) name(s) and title(s) of all parties having access to the data; and (4) the name of the agency funding the research, if applicable. Those requesting College Board Data should allow at least two to three weeks for the College Board to review and respond to the request. If the request is approved, the College Board will send a cost estimate to the requester and inform the requester of the time needed to compile the data.
- 6.2** The College Board reserves the right to charge third parties an additional fee for licensing and use of the data.
- 6.3** Third parties are NOT permitted to retain data after the completion of their work. Third parties are required to return data to the requesting party or to the College Board. Alternatively, the College Board may request that the data be permanently destroyed and that written certification of destruction be sent to the College Board.
- 6.4** At all times the requesting party is ultimately responsible for ensuring that its third-party vendor complies with the terms of the license agreement executed with the College Board.
- 6.5** The College Board reserves the right to refuse any data request involving institution-/district-level data or individual-level data. State education department agencies and other central agencies of state systems of higher education may publish institution-/district-level data in report format under their own authority; however, they shall not release College Board Data to any third party for any purpose without the prior written consent of the College Board.

## SECTION 7

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# Requests to Institutions and Districts for College Board Data from Third Parties

Occasionally, an institution/district will receive a request from a third-party for their data that includes College Board Data related to the institution/district. When release of data to third parties is requested, written permission must be obtained from the College Board before allowing the inclusion of any College Board Data to be released. A license agreement with the institution/district is usually required, and must specify all information described above in Section 6.1 as well as any additional uses of the data by the third party. The following guidelines govern the release of all institution-/district-level and individual-level data from outside third parties:

- 7.1** When individual-level or institution-/district-level data are provided to or shared with a third party, a separate license agreement will also be required from the third party that specifically states: (1) the rationale for the data request; (2) any and all purpose(s) for which the data will be used; (3) name(s) and title(s) of all parties having access to the data; and (4) the name of the agency funding the research, if applicable. Those requesting that College Board Data be included in their request should allow at least two weeks for approval of their request, which will be accompanied by a cost estimate if the request is approved, and an additional two weeks to obtain the written release for the desired data.
- 7.2** The College Board reserves the right to charge the third party a fee for licensing College Board Data.
- 7.3** The third party is NOT permitted to retain College Board Data and is required to either return the College Board Data to the institution/district upon completion of the work or permanently destroy College Board Data and send written certification of destruction to the College Board.
- 7.4** At all times the requesting party is ultimately responsible for ensuring that any third-party vendor associate or collaborator operates within the terms of the license agreement made with the College Board.
- 7.5** The College Board reserves the right to refuse any data request involving institution-/district-level data or individual-level data; however, nothing herein shall prohibit requesters from releasing data pertaining to their own institution or district. State education department agencies and other central agencies of state systems of higher education may publish institution-/district-level data in report format under their own authority; however, researchers and state agencies should be aware of their obligation not to release College Board Data to any third party for any purpose other than that stated in the license agreement.

## SECTION 8

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# Guidelines for Posting Data on the Internet

Education-related state agencies, institutions, and districts are permitted to post College Board Data (over which they have jurisdiction) on their own websites; however, the College Board recommends that such data only be posted in a manner consistent with these *Guidelines*. All other recipients of College Board Data, including, but not limited to, third parties working with state agencies, institutions, and districts, are NOT permitted to post College Board Data on their websites, or republish or post College Board Data that appear on [collegeboard.org](https://collegeboard.org) or in College Board print materials without the express written consent of the College Board.

Dissemination of College Board Data in any format that could compromise institutions' and individuals' rights to confidentiality is strictly prohibited. Requesters of College Board Data must be familiar with relevant and applicable state and federal statutes governing such issues and professional practices in protecting testing data (see *Standards for Educational and Psychological Testing*, 2014, AERA, APA, and NCME). A violation of any such law or standard may, at the sole discretion of the College Board, result in the immediate revocation of the license for the provided data and the refusal to license and/or provide data in the future.



## SECTION 9

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# Future Modifications to the Guidelines

The *Guidelines* will also cover additional data and information generated from additional products and services that may be developed and provided to students, educational institutions, and other parties in the future. These *Guidelines* will be reviewed annually at the discretion of the College Board, and modifications may be incorporated as needed. Individuals requesting College Board Data should review the most current version of the *Guidelines* at research [collegeboard.org](https://collegeboard.org) or contact the Research department.

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# Appendix A: Data Request Form

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Institution: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Please indicate your data user category:

- Researcher/ Policymaker
- State Education Department Official
- Other State Official (Specify): \_\_\_\_\_
- School District Official
- Institution Official
- Media/Press
- Other (Specify): \_\_\_\_\_

If you are associated with a state, district, or institution, are you requesting data that pertain only to the students and/or schools over which you have jurisdiction?

- Yes
- No (Explain: \_\_\_\_\_)

Funding Source (If Applicable): \_\_\_\_\_

Third Party (If Applicable): \_\_\_\_\_

Data request rationale/purposes for which data will be used:

\_\_\_\_\_  
\_\_\_\_\_

Data set being requested:

\_\_\_\_\_  
\_\_\_\_\_

If data is being matched, please attach a list of variables that you will provide. Please see Appendix D for a list of items to ensure the best match.

Complete list of persons having access to the data:

\_\_\_\_\_  
\_\_\_\_\_

Please attach your institution's Internal Review Board (IRB) approval form.

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# Appendix B: Sample Data License Agreement

**THIS IS A SAMPLE. DO NOT USE.**

Signatory Name  
Signatory Title  
Licensee Organization  
Address  
Address

This license agreement (the “Agreement”) between [insert Licensee name], (the “Licensee,”) and the College Board, (the “Licensor” or the “College Board”) will govern Licensee’s use of the College Board Data identified below (the “Licensed Data”). The College Board grants the Licensee a limited, nonexclusive, nontransferable, non-assignable license to use the Data for [insert use of data:] pursuant to the License Grant (below) only through [insert date], the expiration date of this Agreement, unless amended prior to the expiration, to extend the term of the Agreement, in accordance with the terms and conditions stated herein.

- A.
  - 1. **Licensed Data:** [insert description of data]
  - 2. **License Grant:** These Data are to be licensed for the sole purpose of: [Insert description of how data will be used.]
  - 3. **License Fee:** The license fee for the Data is \$\_\_\_\_\_.
  - 4. **Format of Data:** The Data will be provided to you as documented in the license agreement, typically Excel, PDF, or Word.
  - 5. **Recipient of Data:** [Contact] will receive the data on behalf of the Licensee.
- B. To preserve the confidentiality of students, Licensee agrees not to reveal or report any aggregate data if the number of students in a category is less than fifteen (15).
- C. Because these proprietary Data contain confidential information, the Licensee, hereby agrees to be fully bound by the following terms and conditions:
  - 1. The Data are, and at all times will remain, the sole property of the College Board. The College Board retains all rights, title, and interest in and to the Data, and all copies thereof (including, without limitation, all copyrights, trade secrets, trademarks, patents, and other similar proprietary rights therein). The rights and Data contained herein are nontransferable.
  - 2. Licensee will maintain and protect the confidentiality of these Data and the Data will be kept in a secure environment with restricted access given only to Licensee’s staff who are conducting the analyses and interpretation of the Data and who have been made aware of and have agreed to abide by the terms of this Agreement.

3. Licensee will not release or otherwise reveal, directly or indirectly, the Data to any third party and Licensee shall not transfer or assign any rights hereunder, in whole or in part, whether voluntary or by operation of law, without the prior written consent of the College Board.
4. Licensee may include the Data **in the aggregate** in reports, but may not reproduce the Data, as a whole, in any written format. Upon termination or expiration of the Agreement, whichever comes first, Licensee will permanently destroy these Data, and any and all copies thereof and shall send written certification to the College Board that all Data have been permanently destroyed. Licensee may retain any analysis, research reports, and publications that were created prior to the termination of this Agreement.
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[College Board Contact]  
Research Department  
The College Board  
250 Vesey Street, 17th Fl.  
New York, NY 1023

The Data will be provided to [Insert Licensee name] after this Agreement has been fully executed by all parties.

[College Board Signatory]

Licensee hereby represents and warrants that he/she has read, understood, and agrees to comply with all the terms and conditions stated above.

Licensee Organization

By: \_\_\_\_\_ (Signature)

Name: \_\_\_\_\_ (Print Name)

Title: \_\_\_\_\_

Date: \_\_\_\_\_

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# Appendix C: Non-Releasable Data Elements by Program

## **SAT®**

### **SAT Subject Tests™**

#### **SAT® Questionnaire Program Data**

Institution-Level Data: The following data elements will not be provided in institution-level data sets to those requesters that do not have governance over requested institution's data:

- Zip Code/Zip+4
- Attending Institution (AI) Code
- Volumes by Examination

District-Level Data: The following data elements will not be provided in district-level data sets to those requesters that do not have governance over requested district's data:

- Zip Code/Zip+4
- Volumes by Examination

Individual-Level Data: The following data elements will not be provided in individual-level data sets to those requesters that do not have governance over requested individual's data:

- First Name
- Last Name
- Middle Initial
- Street Address
- City
- Zip Code/Zip+4
- Phone Number
- Date of Birth
- Attending Institution (AI) Code
- Designated Institution (DI) Code

Exceptions may be requested. The College Board is under no obligation to agree to any exception.

#### **AP® Program Data**

Institution-Level Data: The following data elements will not be provided in institution-level data sets to those requesters that do not have governance over requested institution's data:

- Zip Code/Zip+4
- Attending Institution (AI)
- Code Frequencies by Examination

District-Level Data: The following data elements will not be provided in district-level data sets to those requesters that do not have governance over requested district's data:

- Zip Code/Zip+4
- Frequencies by Examination

Individual-Level Data: The following data elements will not be provided in individual-level data sets to those requesters that do not have governance over requested individual's data:

- First Name
- Last Name
- Middle Initial
- Zip Code/Zip+4
- Date of Birth
- Attending Institution (AI) Code
- Designated Institution (DI) Code

Exceptions may be requested. The College Board is under no obligation to agree to any exception.

### **PSAT-Related Assessment Data**

Institution-Level Data: The following data elements will not be provided in institution-level data sets to those requesters that do not have governance over requested institution's data:

- Zip Code/Zip +4
- Attending Institution (AI) Code
- Volumes by Examination

District-Level Data: The following data elements will not be provided in district-level data sets to those requesters that do not have governance over requested district's data:

- Zip Code/Zip+4
- Volumes by Examination

Individual-Level Data: The following data elements will not be provided in individual-level data sets to those requesters that do not have governance over requested individual's data:

- First Name
- Last Name
- Middle Initial
- Street Address
- City
- Zip Code/Zip+4
- Phone Number
- Email Address
- Date of Birth
- Attending Institution (AI) Code

Exceptions may be requested. The College Board is under no obligation to agree to any exception.



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# Appendix D: Data Elements Needed for Matched Data

The following is a list of items in weighted order (the more items you have from the top of this list the better the chances are of matching data):

- Last Name
- Date of Birth (MMDDYY, with leading zeros, if applicable)
- First Name
- High School Attending Institution Code or College Board Code (with leading zeros provided, six digits total)
- Sex
- Middle Initial
- Student's Home/Street Address
- Student's Home Zip Code (with leading zeros, if applicable)
- Electronic Mail (Email) Address
- Race/Ethnicity

Notes in parentheses should be in place in the data files provided.

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