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## Then and Now: An Analysis of Broad-based Merit Aid Initial Eligibility Policies after Twenty Years

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## **Introduction and Background**

The origins of broad-based merit aid as a policy innovation are generally traced back to the early 1990s in the state of Georgia (e.g., Doyle, 2006; Cohen-Vogel et al., 2008; Heller & Marin, 2002, 2004; Orsuwan & Heck, 2009; Ness, 2008). This program became known as the Helping Outstanding Pupils Educationally (HOPE) Scholarship. Since then, state-funded broad-based merit aid programs have been adopted by legislatures in over a dozen states (See Figure 1). Broad-based merit aid programs vary in their characteristics, such as eligibility requirements, continuing eligibility requirements, award amounts, maximum number of years of eligibility.

Since their enactment and until the present day, there has been much debate among policymakers and higher education scholars alike as to whether public funds spent on broad-based merit aid programs would be better spent on need-based aid (e.g., Domina, 2014; Heller & Marin, 2002, 2004). The extant research on broad-based merit aid has examined the impacts of scholarship programs on various outcomes. These include enrollments among historically under-represented minority groups and students from low socio-economic backgrounds (e.g., Binder & Ganderton, 2004; Dynarski, 2000, 2002; Heller, 2004; Heller & Rassmussen, 2002). Studies have tended to be state-specific (e.g., Binder et al., 2002, 2004; Bruce & Carruthers, 2014; Cornwell, Mustard, & Sridhar, 2006; Dee & Jackson, 1999; DeFrank-Cole, Cole, & Garbutt, 2009; Henry et al., 2002, 2004; Ness & Tucker, 2008; Stanley & French, 2009; Welch, 2014). However, there are a small number of multi-state studies that have examined the impacts of merit aid on student migration (Domina, 2014; Orsuwan & Heck, 2009; Zhang & Ness, 2010). Other researchers sought to explain how and why these policies spread across adopting states (Cohen-Vogel & Ingle, 2007; Cohen-Vogel et al., 2008; Doyle, 2006; Ingle & Petroff, 2013; Ness, 2008, 2010; Ness & Mistretta, 2010).

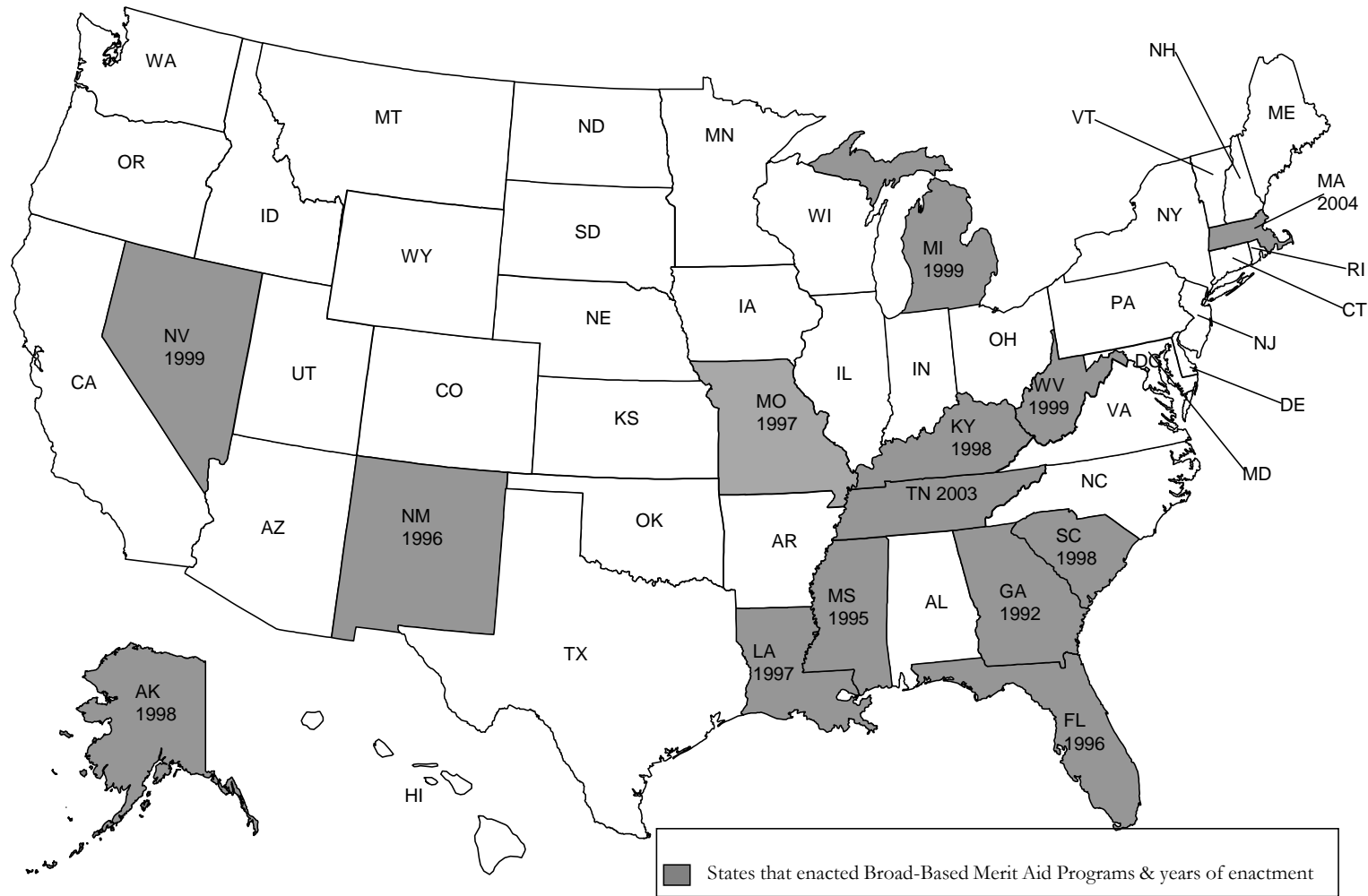


Figure 1. Broad-based Merit Aid Programs in the USA.

Researchers have analyzed the evolution of policies over time (e.g., Hall, 1993; Khalifeh, Cohen-Vogel, & Grass, 2011; Triadafilopoulos, 2010). Notably, Hall (1993) analyzed changes in macroeconomic policy in terms of *policy goals*, *instruments*, and *settings*, providing examples to contextualize these concepts. A policy goal (i.e., the alleviation of financial problems among the elderly) is simply a public problem that the policy seeks to address. A policy instrument is the “tool” that seeks to accomplish the policy goal—say, the enactment and funding of an old age pension. Finally, there is the policy setting—the level at which a program or legislation is funded or benefits are set. In his analysis of economic policymaking in the United Kingdom, Hall (1993) documented three distinct kinds of changes in policy—*first order change*, *second order change*, and *third order change*. A first order change is one in which instrument settings are changed in the light of experience and new knowledge while the overall goal(s) and instrument(s) of policy remain the same. A second order change is one in which instrument(s) and setting(s) are altered in response to past experience even though the overall goals of policy remain the same. A third order change is one in which there are simultaneous changes in all three components of policy: the instrument(s), their setting(s), and the goal or hierarchy of policy goal(s).

Khalifeh et al. (2011) have shown how robust economic growth contributed to the expansion of Headstart programs. Others (Kelley & Trebilcock, 1998; Triadafilopoulos, 2010) have documented how immigration policies in the US and Canada have been adjusted based on economic conditions, such that immigrants from ‘non-preferred’ countries of origin were limited during economic downturns. In recent years, the “Great Recession” has forced state policymakers to look critically at all state expenditures, including these highly popular merit aid programs (Zumeta, 2010). Well before the Great Recession, policymakers in broad-based merit aid adopting states foresaw the potential strains that broad-based merit aid could place on state coffers. In Georgia, for example, the General

Assembly passed Senate Resolution 220 in 2003, creating the Improvement of the HOPE Scholarship Joint Study Commission in order to address concerns about the costs associated with HOPE, to evaluate the program, and recommend actions or legislation necessary to improve and sustain the program. Noted merit aid scholar and critic Donald Heller (2004) foresaw the potential of broad-based merit aid programs to be both a blessing and a curse; being politically popular and having the potential to be fiscally burdensome.

Through the analysis of program legislation, regulations, government reports, program websites from adopting states, we sought to document the changes in broad-based merit aid programs over time and classify these changes in the wake of the Great Recession. Although changes in single states have been discussed (e.g., Cornwell & Mustard, 2004), we know of no other study to examine changes to broad-based merit aid programs in multiple states across the United States over time.

### **Data and Analysis**

Our data consisted of archival state legislation, regulations, government reports, and websites pertaining to broad based merit aid programs in adopting states as identified in recent scholarly work on merit scholarships (e.g., Doyle, 2006; Heller & Marin, 2004, McLendon, Heller, & Young, 2005). Broad-based merit aid legislation and regulations were collected from twelve states: Alaska, Florida, Georgia, Kentucky, Louisiana, Massachusetts, Michigan, Mississippi, Nevada, New Mexico, South Carolina, Tennessee, and West Virginia. Our document analysis was theory-driven, guided by Hall's (1993) framework of policy changes. Programs were analyzed in terms of stated policy goals, instruments, and settings. For the purposes of this paper, we focused our attention on overall program goals and settings associated with initial eligibility requirements and award amounts. Following Hall (1993), policy changes were coded as first-, second, or third-order changes. Like Coburn (2001) and others, we used the following methodological strategies to help ensure that reported patterns represent

policy changes over time in adopting states: coding by multiple analysts; systematic, iterative coding of data (Strauss & Corbin, 1990) and a team memo-writing process (Birks et al., 2008). However, there are some limitations of this study. First and foremost, we relied solely on document analysis and, unlike others (e.g., Cohen-Vogel et al., 2008; Ness, 2008, 2010), we did not speak directly to key policy actors who played central (supporting or opposing) roles in adapting merit policies to changing political and economic circumstances in their respective states. We did not seek explicitly to explain why these changes occurred; simply to document and categorize them. Nor did we look at merit aid states that initially began and kept income caps (e.g., Arkansas).

### **Findings: Policy Goals and Rationales**

Our analysis revealed no changes in the official goals and rationales for broad-based merit aid programs between “then and now” with one exception<sup>1</sup>—the state of Michigan’s Merit Aid Program, which had as its goal that of “Increas[ing] access to postsecondary education and reward academic achievement” Hall (1993) puts forth that the process by which changes occur to all three components of a policy (instrument, settings, and policy goals) is a third order change. Like many merit aid adopting states, the Michigan Merit Aid Program was championed by a Governor (John Engler, Republican) who, along with key legislative leaders, were successful in getting merit aid on the agenda and legislated. Another factor that facilitated the enactment of broad-based merit aid in Michigan was the availability of a funding source—the 1998 Tobacco Master Settlement Agreement, in which Attorneys General from 46 states settled state lawsuits to recover costs associated with treating smoking-related illnesses (Ingle & Petroff, 2013).

In January 2003, Jennifer Granholm (Democrat) took the oath as Governor of Michigan, serving as Engler’s successor until 2011. Prior to taking the oath as Governor, Granholm (who served

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<sup>1</sup> Given the consistency over time, as well as the interest of page limitations, the official goals/rationales of broad-based merit aid programs in tabular form were not include. They are, however, available upon request from the authors.

as State Attorney General) was critical of Governor Engler's use of Michigan's \$321 million tobacco settlement for Michigan Merit Award program, stating:

I think it's outrageous that the purposes for which the lawsuit was brought in the first place are not even being considered [for funding]. The statement seems to be that the government of Michigan does not take seriously the number one preventable threat to our public health. ("Tobacco money", 2001, A1)

But as Governor, Granholm reversed course, embracing merit aid for its potential to spur economic growth through a better educated state populace. In 2004, Governor Granholm appointed a commission (led by Lieutenant Governor John Cherry) to review a variety of policy options that would increase the number of college graduates. The commission forwarded 19 recommendations, the first and foremost of which was making higher education "universal" (Lt. Governor's Commission on Higher Education and Economic Growth, 2004).

The Michigan Merit Award Program was modified and renamed the Promise Scholarship during the Granholm administration, but financial exigencies and party politics sounded the death knell for broad-based merit aid in Michigan. State Republicans that originally championed the scholarship in 1999 led efforts in 2009 to dismantle it, while state Democrats that challenged merit aid at its outset then found themselves seeking to protect its iteration of merit aid. In 2009, when the appropriations bill for fiscal year ending September 30, 2010 was approved in the state legislature, signed by the Governor, and the scholarship program was de-funded. Section 318 of House Bill Number 4441 (2009) states, "It is the intent of the legislature that if the economy improves, and additional state revenue is available, one of the foremost priorities for the expenditure of additional

revenue in the higher education budget will be to fund the provisions of the Michigan Promise Grant Act.” To date, broad-based merit aid in Michigan remains unfunded.

### **Findings: Policy Instruments and Settings**

#### **Instruments**

In turning to policy instruments and settings<sup>2</sup>, it is appropriate that we first turn to Georgia and its HOPE Scholarship—the initial innovating state and program. On September 1, 1993, the Georgia State Finance Commission issued its initial HOPE Scholarship regulations for the 1993–1994 academic year. It is often forgotten that the initial regulations included an income cap of \$66,000. This income cap was raised to \$100,000, and eventually the income cap requirement was removed altogether, and provisions were made for home-schooled students (HOPE Scholarship Joint Study Commission, 2003). In 2013, Georgia HOPE continues to operate without an income cap. Although Georgia HOPE’s program goals have not changed since 1993, instruments and settings have. As such, changes in Georgia HOPE were classified as a second order change.

The loss of the income cap was one early change in settings between 1993 and 2013, but there were others. Like Florida, Louisiana, and Mississippi, Georgia opted to create a tiered scholarship program that awards more scholarship dollars for higher academic merit. Named in honor of former Governor and US Senator who created Georgia HOPE, legislation establishing the Zell Miller Scholarship was enacted in 2011. The new scholarship requires higher eligibility requirements; specifically, a 3.7 GPA and a minimum score of 1200 on the SAT (math and reading) or a 26 composite ACT score. However, 2011 was also the year in which Governor Nathan Deal (Republican) and state lawmakers reduced award payouts and tightened eligibility requirements for

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<sup>2</sup> See Appended Tables A1 and A2 that show initial eligibility requirements and award at program creation and present day, respectively.



the existing Georgia HOPE program. These changes were made in order to prevent the lottery-funded scholarship from running out of money. The hallmark of Georgia HOPE's eligibility requirements—a 3.0 (B) average—remains consistent between 1993 and 2013, but policymakers added “additional rigor requirements”, beginning with students graduating from high school on or after May 1, 2015. This change in settings requires 2015 high school seniors to receive credit in at least two Academic Rigor courses<sup>3</sup> prior to graduating. For 2016, the number of Academic Rigor classes increases to three. For 2017, the number increases to four. Furthermore, students on HOPE Scholarship as of fall 2011 received an award based upon a per hour rate at the institution he or she is attending (up to 15 hours of coursework). For example, an eligible student at Georgia State University taking 15 hours of coursework would receive \$3,181 for the term. This amount is less than the full tuition that was previously covered by Georgia HOPE. As to the Zell Miller Scholarship, it requires more in terms of merit, but it also awards more in scholarship funds. In comparison to a HOPE eligible student at Georgia State University receiving \$3,181 for a 15 hour term, a Zell Miller Scholarship recipient would receive \$3,768 at the same institution (Georgia Student Finance Commission, 2012).

## Settings

Adjustments to policy settings were done in order to constrain initial eligibility and expenditures to prevent cost overruns, but continuing to incentivize staying in-state among the top-level performers (as evidenced by test scores and high school GPAs). Although there was bipartisan support for the adjustments made to Georgia HOPE, there have been recent Democratic efforts seeking to turn back the contractions to what has been a very popular program among Georgia

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<sup>3</sup> These courses consist of: Advanced math (e.g., Advanced Algebra and Trigonometry); Advanced science (e.g., Chemistry, Physics, Biology II); Advanced Placement courses in core subjects; International Baccalaureate courses in core subjects; Courses taken at a unit of the University System of Georgia in core subjects where such courses are not remedial and developmental courses; Advanced Foreign Language courses taken at an eligible high school or taken for degree level credit at an eligible postsecondary institution (Georgia Student Finance Commission, 2012).

constituents (Diamond, 2013). In response, Governor Deal has considered policies that would expand gaming in Georgia in the form of internet sales of lottery tickets and coin-operated gambling machines in order to bring in additional revenue. This is in contrast to his party's (and his own) opposition to gambling expansion (Bluestein, 2013).

Similarly to Georgia, Florida policymakers tightened eligibility and award amounts for the state's Bright Futures Scholarship, but continuing to incentivize the highest performers. Both Florida Academic Scholars (FAS) and Florida Merit Scholars (FMS) are now being awarded a per hour rate dependent on institution attended. Initially, Bright Futures awards received awards that funded 100% or 75% of tuition costs (See Table A1). A student receiving an FAS award and attending a four-year public university will receive \$100 per semester hour or \$67 per quarter hour. Policymakers created an added incentive for top performing students through the Academic Top Scholars Program (ATS). ATS is a new policy instrument that provides additional funds for each school Florida school district's highest performing senior as determined by high school GPA and SAT/ACT scores. There are only 67 school districts<sup>4</sup> in Florida, meaning only 67 ATS awards annually. In 2013, a Florida student receiving an FMS award and attending a four-year public university will receive \$75 per semester hour or \$50 per quarter hour.

As to eligibility requirements, FAS qualifications for fall 2013 include at least a 3.5 high school GPA, which includes a college preparatory curriculum. The standardized test requirement increased from 1270 to 1280 with the ACT minimum remaining the same (28). To qualify for FMS in fall of 2013, students must have a 1020 SAT or a 22 ACT (in addition to a 3.0 high school GPA, which includes a college preparatory curriculum). Also like Georgia, Florida is looking beyond the high school graduating class of 2012-2013. The Florida Department of Education's Office of Student

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<sup>4</sup> Florida school districts are coterminous with county lines.

Financial Aid (2012) further increased the minimum ACT/SAT scores for the graduating classes of 2013-2014 forward (1290 SAT/ 29 ACT for FAS; 1170 SAT / 26 ACT).

Recent research (Ingle & Petroff, 2013) has documented that Nevada's Republican Governor Kenny Guinn (Republican, 1999-2007) introduced broad-based merit aid as an important part of his first gubernatorial campaign and his first state of the state address. With support from key legislative and higher education leaders, Governor Guinn<sup>5</sup> was the visible public entrepreneur who led the efforts to create a broad-based merit aid program in order to improve a low college going rate in the state low college going rate. Like Georgia HOPE, Nevada's Millennium Scholarship originally required a 3.0 GPA, but also required a college preparatory curriculum and passing scores on the Nevada High School Proficiency exam. Nevada also opted to only allow the scholarship program to be used at in-state public institutions of higher learning.

In 2013, economic conditions in Nevada caused legislators to reduce higher education allocations over the past two legislative sessions and alter program settings in order to keep the scholarship solvent. The latter was done by increasing the minimum GPA requirement to 3.25 and paying only \$1,920 per academic year (\$80 per enrolled credit hour at a public four institution for a maximum of 12 credits per semester for fall and spring).

South Carolina has three merit scholarship programs. The Palmetto Fellows Scholarship pre-dates even Georgia HOPE, having been established in 1988. However, this program (then and now) provides a higher level of funding for higher academic performance, as defined as a minimum of a 27 ACT/1220 SAT and being in the top 6% of graduating class. In 1998, the LIFE Scholarship was established, requiring a minimum of a 24 ACT/1100 SAT and a 3.0 high school GPA. The third scholarship, (South Carolina HOPE) began as a one-time award of \$5,300 given to students for achieving a minimum of 3.0 high school GPA. In 2013, it was the broadest of broad-based merit aid

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<sup>5</sup> In 2005, the Millennium Scholarship was renamed in honor of Governor Guinn.

programs, South Carolina HOPE, which took the biggest cut. The award is now a one-time award of \$2,800. In Tennessee, policymakers opted to increase the awards amounts for its broad-based merit aid programs, but this was accompanied with an increase in the minimum ACT/SAT scores required for initial eligibility in its HOPE scholarship (from a 19 ACT / 890 SAT to a 21 ACT/ 980 SAT). The more demanding General Assembly Merit Scholarship was left alone. Although minimum GPA remained the same in 2013 as they were in 1999 when the program, West Virginia increased its minimum ACT/SAT scores in order to tighten eligibility and the payout is capped at \$4,750, which is less than current tuition and fees at the state's flagship institution.

Georgia was not the only state to make provisions for home-schooled children after the program was established. The states of Louisiana, Nevada, and West Virginia also added provisions after their merit aid programs were created. Other states (Florida, Kentucky, Michigan, Mississippi, New Mexico, South Carolina and Tennessee) enacted programs with home school provisions from the very beginning. Alaska's UA Scholars Program and Massachusetts' John and Abigail Adams Scholarship were created without any provision for home-schooled children. These programs use class rank and top 25% of performers within a school district, respectively. In the process of researching state programs for this manuscript, we found evidence of home school advocacy groups (notably, the Home School Legal Defense Association, HSLDA) seeking changes in existing merit aid policies. For example, The New Mexico Higher Education Department allows for home-schooled children to qualify for Legislative Lottery Scholarships, but only if they pass the New Mexico GED. HSLDA counsel sent out "E-letters" to its listserv members, calling for New Mexican subscribers to contact state representatives and senators to vote yes in favor of a bill (House Bill 359) that would remove the GED requirement for New Mexican home-schooled students (Schmidt, 2011). The legislation would eventually die in a Senate Committee when the legislature adjourned on March

19, 2011. The Financial Impact Report cited “very limited information on the academic ability of students who participate in New Mexico's home-based education programs”, state data indicating that home-schooled children require higher rates of remediation, and concerns about the financial solvency of program, the Legislative Finance Committee (LFC) cautioned against expanding eligibility by removing the GED requirement unless additional funding through legislative action. The LFC also cautioned that HB359 could create an “unintentional loophole for students who do not graduate from New Mexico high schools, but still wish to receive the Legislative Lottery Scholarship” (New Mexico Legislative Finance Committee, 2011).

Five of thirteen broad-based merit aid programs, their initial eligibility settings and award settings were left as is. We begin with Alaska's UA Scholars program—unique in that it is an institutional award rather than a legislated award, but “broad” in that it provides scholarships to the top 10 percent of every Alaskan high school's graduating class, regardless of SAT /ACT scores or GPA. The eligibility and award settings have remained the same. What is also interesting about the state of Alaska is that, at a time when many states are struggling to keep broad-based merit aid programs solvent, Alaska has actually expanded broad-based merit aid. In 2009, Sean Parnell used his highly visible position as Republican Governor to build support for a state-legislated scholarship programs—the Alaska Performance (a merit award) and AlaskaAdvantage [sic.] Scholarships (a need-based award). In 2010, Governor Parnell signed legislation creating these programs. In 2012, Governor Parnell worked with the state legislature in creating a long-term funding source for these programs.

In terms of broad-based merit aid legislation, the Alaskan economy has been one identified as providing employment opportunities not requiring a college degree, such as commercial fishing, mining, and oil drilling. The availability of such employment have shaped residents' and their elected

officials' perceptions of the value and need for higher education and broad-based merit aid programs. This, coupled with the state's low tax burden, conservative trending legislature and the existence of an annual stipend paid to state residents from the sale of the state's natural resource also were factors reported by informants as limiting the success of merit aid legislation (Ingle & Petroff, 2013). Recently, oil prices have fluctuated and thus impacted the state's coffers (Doogan, 2015). Such changes in the economy beg the question of whether the state will be able to pay for broad-based merit scholarship programs at a time when such programs could eventually lead to a more diversified economy that can withstand swings in prices and production of a limited natural resource.

New Mexico's eligibility requirements and awards remain static. Among broad-based merit aid programs, it remains unique in that scholarship eligibility is earned after establishing an academic record at the students' institution of higher learning. The eligibility and award settings for Kentucky's Educational Excellence Scholarship (KEES) also remained unchanged, but from its very beginning, KEES provided varying awards for varying levels of merit. KEES incentivized K-12 student performance by awarding more scholarship dollars for higher high school GPAs. Additional scholarship dollars could be earned, depending on the students' performance on the SAT or ACT. The program was designed in such a way to combat concerns about grade inflation and the loss of continuing eligibility (due to poor academic performance in the first year of study) that were reported in earlier adopting states, particularly Georgia (Cohen-Vogel & Ingle, 2007). In 1998 and now, KEES awarded a maximum of \$1,000 per year. At its maximum, KEES is a modest award.

Although initial eligibility settings and award settings in a number of programs remained static, the cost of college attendance has not (See Table 1). With the exception of New Mexico's Lottery Success Scholarship and to a lesser extent, Louisiana's Taylor<sup>6</sup> Opportunity Program for

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<sup>6</sup> In 2008 the Louisiana Legislature renamed the Louisiana Tuition Opportunity Program for Students, changing it Taylor Opportunity Program for Students in honor of Patrick F. Taylor, a successful Louisiana businessman, philanthropist, and

Students (TOPS), no other programs with static eligibility and award settings have kept up with increases in tuition costs. Massachusetts, for example, still requires a graduating senior to be in to top 25% of MCAS performers in their school district. The John and Abigail Adams Scholarship continues to pay for tuition costs at any of the commonwealth's public institutions of higher learning, but a full-time student on the Adams Scholarship attending the University of Massachusetts-Amherst will only have \$1,714 of the total tuition and fees (\$13,230) paid for. Similarly, Mississippi's Eminent Scholars (MESG) and Tuition Assistance (MTAG) Grants' eligibility requirements and awards remain the same in 2013 as they were in 1995 when the programs began; but a student receiving MESG at the University of Mississippi would only have \$2,500 of the total \$6,282 of tuition and fees paid for. Long (2004) found that four-year colleges in Georgia, particularly private institutions increased student charges in the wake of Georgia HOPE, thus reducing the intended benefit of the scholarship and increasing the cost of college for non-recipients.

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vocal advocate for public support for broad-based merit aid programs across the nation through the Patrick F. Taylor Foundation. Mr. Taylor passed away 2004.

Table 1

*Published Tuition and Fees for 2007-2008 and 2012-2013 at Flagship Universities in Broad-based Merit Aid Adopting State (in 2012 dollars)*

<i>Flagship Universities</i>	<i>Tuition &amp; Fees 2007-2008*</i>	<i>Tuition &amp; Fees 2012-2013*</i>	<i>Percentage Change (5 years)*</i>	<i>Merit Aid Award Amount Per Year (2012-2013)</i>
University of Alaska-Fairbanks	\$4,945	\$6,006	21.5%	\$2,750
University of Florida	\$3,707	\$6,143	65.7%	\$2,400 (FAS for 24 credit hours, fall and spring) \$1,800 (FMS for 24 credit hours, fall and spring)
University of Georgia	\$5,784	\$9,842	70.2%	\$6,363 (HOPE at 15 hours per semester) \$7646 (Zell Miller at 15 hours per semester)
University of Kentucky	\$7,805	\$9,676	24.0%	\$1,000 max.
Louisiana State University	\$4,997	\$6,989	39.9%	\$5,982 (Honors) \$5,582 (Performance) \$5,182 (Opportunity)
University of Massachusetts-Amherst	\$10,915	\$13,230	21.2%	Full tuition (not fees) \$1,714
University of Michigan	\$11,490	\$14,263	24.1%	—
University of Mississippi	\$5,425	\$6,282	15.8%	\$2,500 (MESG) \$500 (MTAG 1 <sup>st</sup> two years) \$1,000 (MTAG last two years)
University of Nevada-Reno	\$4,431	\$6,603	49.0%	\$1,920 max.
University of New Mexico	\$5,028	\$6,049	20.3%	\$6,049
University of South Carolina	\$9,180	\$10,488	14.3%	\$6,700 1st year, \$7,500 subsequent (Palmetto Fellows) \$5,000 (LIFE) \$2,800 one-time award (HOPE)
University of Tennessee-Knoxville	\$6,524	\$9,092	39.4%	\$4,000 (HOPE) \$5,000 (GAMS)
West Virginia University	\$5,194	\$6,090	17.3%	\$4,750

\*Source: College Board (2012).



## Summary

In applying Hall's typology of policy change, our comparison of broad-based merit aid programs (goals, instruments, and settings) in 13 states at inception and in the present day revealed five first-order changes (Nevada, South Carolina, Tennessee, West Virginia) in which initial eligibility requirements were increased, making it harder to earn the merit aid scholarship and/or award settings were decreased, such that recipients received less (See Table 2). Two states (Florida and Georgia) had second order changes. Georgia, as the initial innovating state, lost its income cap requirement that it originally had. In addition to making provisions for home-schooled students, decreasing merit awards, and increasing curriculum requirements, Georgia lawmakers also created a new policy instrument (the Zell Miller Scholarship) that awards the students with higher merit with more scholarship dollars. Similarly, Florida created an additional level of merit (its ATS award) for the students with the highest merit. This was in addition to increases in minimum ACT/SAT scores for initial eligibility. There was only one third order change—the Michigan Merit Award Program met its end.

There were a number of programs that have not changed initial eligibility requirements and award settings (Alaska, Kentucky, Massachusetts, Mississippi, and New Mexico). Although the policy settings, instruments, and goals have remained static, the scholarship dollars awarded do not go as far as they did at program inception due to increases in overall cost of attendance, particularly in terms of fees charged. There are two exceptions. Louisiana's TOPS and New Mexico's Lottery Success Scholarship's award amount appear to have kept up with increased cost of attendance.

Table 2

*Merit Aid Policy Changes in Merit Aid Initial Eligibility and Awards between 1993 and 2013*

<i>Hall's (1993) Typology of Policy Changes</i>	<i>State</i>	<i>Settings</i>			<i>Instruments</i>
		<i>Changes in Initial Eligibility</i>	<i>Changes in Award Amounts</i>	<i>Home School Provisions Added</i>	<i>New Merit Levels</i>
<i>First Order Change</i> Policy settings are changed, but policy goals and instruments remain the same.	Louisiana	--	--	X	--
	Nevada	Increased GPA	Decreased	X	--
	South Carolina	--	Decreased	--	--
	Tennessee	Increased ACT/SAT (HOPE)	Increased (HOPE & GAMS)	--	--
	West Virginia	Increased ACT/SAT	Decreased	X	--
<i>Second Order Change</i> Policy instrument(s) and settings are altered, but policy goals remain the same.	Florida	Increased ACT/SAT (FMS)	Decreased	--	Academic Top Scholars
	Georgia	Dropped income cap Increased Curriculum Requirements	Decreased	X	Zell Miller Scholarship
<i>Third Order Change</i> Changes in all three components of policy: instrument(s), settings, and the hierarchy of policy goals.	Michigan	Unfunded	Unfunded	Unfunded	Unfunded
Unchanged	Alaska	--	--	--	--
	Kentucky	--	--	--	--
	Massachusetts	--	--	--	--
	Mississippi	--	--	--	--
	New Mexico	--	--	--	--

There are also some nuances of these merit aid programs that are not adequately captured by Hall's typology of policy changes. Two scholarship programs (Nevada's and Louisiana's) were re-named in honor of key policy actors that were integral to the establishment of merit aid in their state or beyond. Although these honorific titles are a change to the instruments, they are not substantial changes to program goals or settings.

### **Implications for Policy and Future Research**

Our study is significant for several reasons. It is one of a growing number of qualitative studies that explores broad-based merit aid programs. Future research may want to undertake quantitative analysis, which seeks to understand the relationship between state demographic, economic, and political characteristics and changes in program goals, instrument(s), and setting(s). An extensive review of the scholarly literature revealed that the vast majority of the empirical work on broad-based merit-based aid programs has focused on the diffusion of the innovation across states, program evaluation, and outcomes, but we know of no other study to empirically analyze changes to broad-based merit aid programs in multiple states across the United States over time. Of course, these programs are subject to change further as they age, so future research will want to revisit the changes in these programs as they continue to evolve. For example, Georgia lawmakers have enacted additional regulations for the state's future graduating classes, requiring increasing numbers of "rigorous" course prior to graduation (Georgia Student Finance Commission, n.d.).

At the federal level, policymakers struggle to reign in deficit spending and quarrel over how best to address this far-reaching problem—tax increases, cuts in spending, or some admixture of both. The broader world economy and national economy are intertwined with those of individual US states. As US states continue to struggle with what has been a slow recovery, decreased tax revenue, and increasing demands for public programs, state policymakers continue to look critically at any and all

state expenditures, seeking ways to cut the budget. This includes popular programs such as broad-based merit aid. In essence, political and economic factors at the international and national level can have impacts on state level spending. As the U.S. economy and individual state economies continue to improve in the wake of the Great Recession, will policymakers stop the contraction of policy settings (merit aid programs and their eligibility requirements) or will the contractions of policy instruments and settings reverse in response to improving economic conditions? This remains to be seen.

We did not seek explicitly to explain why these changes occurred; simply to document and categorize them, assuming that economic conditions were the primary driving force for changes to highly popular programs among state voters. Future research is needed to examine why these changes may have occurred beyond budgets, speaking to key policy actors directly and getting inside of the “black box” of policy making. While research has identified Georgia and its former governor Zell Miller as the initial innovating state and policymaker, it may be that policymakers and policy networks are now discussing innovative ways in which lawmakers can dismantle popular programs in politically adept ways. As has been shown, broad-based merit aid programs are popular among parents and students who benefit from them. Future research may want to examine the role that student and other advocacy groups (e.g., Home School Legal Defense Association) play in shaping the policy process as related to broad-based merit aid.

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Table A1  
*Broad-Based Merit Aid Program Instruments and Settings When First Enacted*

Instrument(s)		Settings				
<i>State (Merit Aid Program)</i>	<i>Year Enacted</i>	<i>Initial Eligibility— Minimum High School GPA</i>	<i>Initial Eligibility— Core Curriculum</i>	<i>Initial Eligibility— Minimum Test Score Requirement</i>	<i>Award Amount (per Year)</i>	<i>Eligible Institutions</i>
Alaska (UA Scholars Award)	1999	No (Top 10% of graduating class)	No	No	\$2,750	University of Alaska campuses only
Florida (Bright Futures, Florida Academic Scholars— FAS; Florida Medallion Scholars—FMS)	1996	3.5 (FAS)  3.0 (FMS)	Yes	1270 SAT or 28 ACT (FAS)  980 SAT or 20 ACT (FMS)	Full Tuition (FAS)  75% Tuition (FMS)	In-state public and private colleges and universities
Georgia (Helping Outstanding Pupils Educationally, HOPE)	1993	3.0 high school GPA*	No	No	Full tuition	In-state public and private colleges and universities
Kentucky (Educational Excellence Scholarship, KEES)	1998	2.5	Yes	15 ACT or 740 SAT	\$1,000 max. (graduated scale based on ACT/SAT and HS GPA)	In-state public and private colleges and universities
Louisiana (Tuition Opportunity Program for Students, TOPS)	1998	2.5 (Opportunity) 3.0 (Performance) 3.0 (Honors)	Yes	State average ACT (Opportunity) 23ACT (Performance) 27 ACT (Honors)	Full tuition (Opportunity)  Full tuition + \$400 (Performance)  Full tuition + \$800 (Honors)	In-state public and private colleges and universities
Massachusetts (John & Abigail Adams Scholarship)	2006	No	No	Top 25% of MCAS scores	Full tuition	In-state public colleges and

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				in school district		universities
Michigan (Merit Award Scholarship)	2000	No	No	“Acceptable” score on all components of MEAP, or “acceptable” score on two tests & 24 ACT	One-time award of \$2,500 in-state, or \$1,000 out-of-state	In-state or out-of-state public and private colleges and universities
Mississippi (Eminent Scholars Grant, MESG & Tuition Assistance Grant, MTAG)	1995	3.5 (MESG) 2.5 (MTAG)	No	29 ACT (MESG) 15 ACT (MTAG)	\$2,500 (MESG) \$500 for freshmen and sophomore years; \$1,000 for junior and senior years (MTAG)	In-state public and private colleges and universities
Nevada (Millennium Scholarship)	1999	3.0	Yes	Passing scores on Nevada High School Proficiency Examination	\$2,500 (4-year) \$1,250 (2-year)	In-state public colleges and universities
New Mexico (Legislative Lottery Scholarship)	1996	2.5 GPA on first 12 college credit hours	No	No	Full tuition	In-state public colleges and universities
South Carolina (Palmetto Scholars, Legislative Incentive for Future Excellence, HOPE)	1988 (Palmetto Fellows) 1998 (LIFE) 2001 (HOPE)	3.5 (Palmetto Fellows) 3.0 (LIFE) 3.0	No	27 ACT/1220 SAT; top 6% of high school graduating class (Palmetto Fellows) 24 ACT/1100	\$6,700 first year, \$7,500 subsequent years (Palmetto Fellows) \$5,000 (LIFE)	In-state public and private colleges and universities

		(HOPE)		SAT (LIFE) None (HOPE)	\$5,300 non-renewable one time award (HOPE)	
Tennessee Education Lottery Scholarships (TELS)	2003	3.0 (HOPE) 3.75 (General Assembly Merit)	Yes	19 ACT/890 SAT (HOPE) 29/1280 SAT (General Assembly Merit)	\$3,000 (HOPE) \$4,000 (General Assembly Merit)	In-state public and private colleges and universities
West Virginia (Providing Real Opportunities for Maximizing In-State Student Excellence, PROMISE)	1999	3.0	Yes	21 ACT/980 SAT	Up to full tuition and fees at public institutions	In-state public and private colleges and universities

\*HOPE initially had an income cap of \$66,000, which was raised to \$100,000 for the 1994–1995 academic year. The income cap was removed completely for the 1995–1996 academic year.

Table A2  
*Broad-Based Merit Aid Program Instruments and Settings (2013)*

Instrument		Settings				
<i>State (Merit Aid Program)</i>	<i>Year Enacted</i>	<i>Initial Eligibility— Minimum High School GPA</i>	<i>Initial Eligibility— Core Curriculum</i>	<i>Initial Eligibility— Minimum Test Score Requirement</i>	<i>Award Amount</i>	<i>Eligible Institutions</i>
Alaska (UA Scholars)	1999	No (Top 10% of graduating class)	No	No	\$2,750	University of Alaska campuses only
Florida (Bright Futures, Florida Academic Scholars—FAS; Florida Medallion Scholars—FMS)	1996	3.5 (FAS) 3.0 (FMS)	Yes	1280 SAT or 28 ACT (FAS) 1020 SAT or 22 ACT (FMS)	\$100 per semester hour or \$67 per quarter hour (FAS)** \$75 per semester hour or \$50 per quarter hour (FMS)	In-state public and private colleges and universities
Georgia (Helping Outstanding Pupils Educationally, HOPE & Zell Miller Scholarship Program)	1993	3.0 (HOPE) 3.7 (Zell Miller)	Yes (HOPE & Zell Miller)*	No (HOPE) 26 ACT/1200 SAT (Zell Miller)	Per hour rate (up to 15 hours) dependent on institution and hours taken per semester (HOPE and Zell Miller***)	In-state public and private colleges and universities
Kentucky (Educational Excellence Scholarship, KEES)	1998	2.5	Yes	15 ACT/740 SAT	\$1,000 max. (graduated scale based on ACT/SAT and high school GPA)	In-state public and private colleges and universities

Louisiana (Taylor Opportunity Program for Students, TOPS)	1998	2.5 (Opportunity) 3.0 (Performance) 3.0 (Honors)	Yes	State average ACT (Opportunity) 23ACT (Performance) 27 ACT (Honors)	Full tuition (Opportunity) Full tuition + \$400 (Performance) Full tuition + \$800 (Honors)	In-state public and private colleges and universities
Massachusetts (John & Abigail Adams Scholarship)	2006	No	No	Top 25% of MCAS scores in school district	Full tuition	In-state public colleges and universities
Michigan (Merit Award Scholarship)	2000	—	—	—	—	—
Mississippi (Eminent Scholars Grant, MESH & Tuition Assistance Grant, MTAG)	1995	3.5 (MESH) 2.5 (MTAG)	No	29 ACT (MESH)  15 ACT (MTAG)	\$2,500 (MESH)  \$500 for freshmen and sophomore years; \$1,000 for junior and senior years (MTAG)	In-state public and private colleges and universities
Nevada (Guinn Millennium Scholarship)	1999	3.25	Yes	Passing scores on Nevada High School Proficiency Examination	\$1,920 Max.	In-state public colleges and universities
New Mexico (Legislative Lottery Scholarship)	1996	2.5 GPA on first 12 college credit hours	No	No	Full tuition	In-state public colleges and universities
South Carolina (Palmetto Scholars, Legislative Incentive for Future Excellence, HOPE)	1988 (Palmetto Fellows)  1998 (LIFE)	3.5 (Palmetto Fellows)  At least two of the following:	No	27 ACT/1220 SAT and top 6% of graduating class (Palmetto Fellows)	\$6,700 for 1st year, \$7,500 subsequent years (Palmetto Fellows)	In-state public and private colleges and universities

	2001 (HOPE)	3.0 GPA; top 30% of class; test score (LIFE)  3.0 (HOPE)		Fellows)  24 ACT/1100 SAT (LIFE)  None (HOPE)	\$5,000 (LIFE)  \$2,800 non- renewable one time award (HOPE)	
Tennessee (Education Lottery Scholarships, TELS)	2003	3.0 (HOPE)  3.75 (General Assembly Merit)	Yes	21 ACT/980 SAT (HOPE)  29/1280 SAT (General Assembly Merit)	\$4,000 (HOPE)  \$5,000 (General Assembly Merit)	In-state public and private colleges and universities
West Virginia (Providing Real Opportunities for Maximizing In-State Student Excellence, PROMISE)	1999	3.0	Yes	22 ACT (minimum of 20 in English, Mathematics, Science, and Reading) or 1020 SAT (minimum of 480 in Mathematics and 490 in Critical Reading)	\$4,750 max.	In-state public and private colleges and universities

\*Increasing number of “Academic Rigor” courses beginning with the high school graduating class of 2015.

\*\*Additional funds available if selected as the Academic Top Scholar for the county, as determined by high school GPA and SAT/ACT scores.

\*\*\* For each semester of eligibility, Zell Miller Scholars shall be awarded an amount in addition to the HOPE award equal to the difference between the HOPE award amount and current academic year standard undergraduate tuition amount at the institution (if public).