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A Case Study of the History, Impact, and Political Reforms of the HOPE Scholarship in Georgia

By

Stephen Crawford Boyd

A Dissertation
Submitted in Partial Fulfillment of the Requirements for
The Degree of Doctor of Education
In Curriculum and Leadership
Educational Leadership

Keywords: HOPE Scholarship, Lottery, Education, Zell Miller, Merit-Based Scholarship

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DEDICATION

To my wife Amber, Mary, Sarah, family, friends, and colleagues, thank you for believing in me and having patience with me through this long journey. Your faith, support, and patience through this process is what got me through it. I love each one of you.

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To Zell Miller, for creating the greatest merit-based scholarship in American history and for leading the way in education in Georgia regardless of politics.

ABSTRACT

The qualitative bounded case study examined the HOPE Scholarship including the policy changes it went through since its inception and the impact HOPE has made on postsecondary education in Georgia. HOPE is the largest merit-based scholarship in the United States and is facing issues with funding for future scholars. This dissertation addressed its inception by Governor Zell Miller, the changes that it went through as issues arose, and the impact it has made on postsecondary education since 1993.

The problem addressed by this dissertation was there was a lack of longitudinal research data on the topics addressed in this dissertation. Nine different archival documents were chosen to not only extract data from, but to tell the narrative of this enormous merit-based scholarship. A document content analysis was conducted on each document to answer the research questions. Future recommendations for research were also proposed.

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CHAPTER I: INTRODUCTION

Study Background

One of the most influential legislative acts of the last century was the Lottery for Education Act of 1992 that funded the most popular merit-based scholarship in the United States called the “HOPE” Scholarship which stands for Helping Outstanding Pupils Educationally (Miller, 1998). Since the enactment of the HOPE Scholarship more than a dozen states have implemented merit-based scholarships like the HOPE Scholarship with the sole purpose to keep students at in state colleges and universities (Eby-Ebersole, 1999). The HOPE Scholarship is a merit-based scholarship that rewards students with a specific grade point average to continue their studies in a public or private college or technical school in Georgia. At the time of this study, it is the largest merit-based scholarship in the United States with more than two million recipients (Georgia Student Finance Commission, 2021). HOPE was created in 1993 and the scholarship’s major goal was to incentivize through grant funding via a lottery system for high school students who wanted to seek a post-secondary degree or technical school training who otherwise would not have been able to afford a college education (Miller, 1998). The scholarship is considered a grant and the student does not have to pay it back but must maintain the requirements of its provisions under the discretion of the Georgia state legislature and the Georgia Student Finance Commission (GSFC, 2021). The HOPE Scholarship has been modified many times since its creation and the dynamics for eligibility have changed from the original intent. The HOPE Scholarship continues to make an impact on education in Georgia in many areas, but especially in how public high schools educate their students. The current study has analyzed and interpreted the impact of the HOPE Scholarship on public high schools in Georgia and developed a historic case study to evaluate how HOPE has changed education in Georgia

from pre-k to college. In addition, the current study intends to add more research data to an area of education that is lacking.

Statement of the Problem

Public schools, across Georgia, have dramatically transformed the way they educate and develop their curriculum for their students due to the requirements to receive the benefits of the HOPE Scholarship (Joint Study Commission Report, 2003). There are very few studies concerning its origins and the changes that have been implemented due to a number of factors including reduction of funds, increasing enrollment, and the changing of award amounts (GSFC, 2021). HOPE has impacted the enrollment of colleges and technical schools in Georgia and the impact should be studied more in detail (Bugler, Henry, & Rubenstein, 1999). Public high schools have re-arranged which type of classes and programs they offer students in order to give these students more of a chance to obtain HOPE and advance their education into the post-secondary education arena. Grading systems had to become universal and simplified in order to ensure every student had the same chance to become HOPE eligible (Rubenstein, 2003). This merit-based scholarship was very controversial at its birth, and it continues to be a challenge to fund to ensure all eligible Georgians receive its benefits (Georgia Student Finance Commission, 2021). Therefore, the problem to be examined in this study is what is the historical motives for the HOPE Scholarship and the changes that have taken place over the ensuing twenty-nine years.

Purpose of the Study

The purpose of this research is to examine the history and political reforms of the HOPE Scholarship and how it has impacted education pre-k through higher education in Georgia and to examine through a historical analysis its evolution into what the scholarship is today. This research will examine the history of the creation of the HOPE Scholarship and the changes it has

went through since its inception. The HOPE Scholarship has changed many times since its inception in 1993, and these changes have affected the education of millions of Georgians in public and private schools, but also had an economic impact on Georgia's economy in multiple ways (Bugler, Henry, & Rubenstein, 1999). The HOPE Scholarship has transformed public and private schools in Georgia and has attached funding to its long list of incentives for students seeking higher education and for dual enrolled students in high school (Bugler, Henry, & Rubenstein, 1999).

The HOPE Scholarship has historically helped many minorities and subgroups of students who otherwise would not have been able to afford a post-secondary education (Rubenstein, 2003). The troubling aspect is whether or not high schools have transformed their coursework to make it easier to obtain HOPE funding, but at the same time did not prepare their students for a college education (Davis, Hall, & Henry, 1996). The funding of dual enrollment with the HOPE Scholarship has changed class sizes and has added new opportunities for high school students. The purpose of this study was to explore these changes and to tell the story of how HOPE has had to change over the years to fulfill its obligations.

Definition of Terms

- ACT: Stands for American College Testing and is an exam given to students wishing to apply to college to evaluate their skills for college (ACT, 2021)
- Georgia Lottery Corporation (GLC): The organization that carries out the approved lottery games for the state of Georgia (GLC, 2021).
- HOPE Scholarship: A merit-based scholarship that rewards grant money to Georgia high school students who meet the program's requirements (GSFC, 2021).

- LIFE Scholarship: This stands for the Legislative Incentive for Future Excellence (LIFE) Scholarship, which is a merit-based scholarship program administered by South Carolina to any student that wants to receive the award and must attend any eligible public and independent college and university in South Carolina (SCCHE, 2021).
- Lottery: Gambling where numbers are chosen by a machine or by the purchaser and a drawing decides which numbers win and the amount (Merriam-Webster, 2021).
- Merit-based Scholarship: A scholarship that is reward based off of certain academic or achievement criteria (Davis, Hall, & Henry, 1996).
- SAT: Stands for Scholastic Aptitude Test and is administered to students wishing to enroll into college (College Board, 2021).
- TOPS: Stands for the Louisiana state merit-based scholarship Taylor Opportunity Program for Students who wish to attend an in-state college intuition (LOSFA, 2021).

Rationale for the Study and Significance of the Study

This current research study will explore the history of the HOPE Scholarship and its impact on education in public and private schools in Georgia and how the HOPE Scholarship has changed and influenced education in Georgia the last 30 years. Georgia's public and private schools have significantly changed their curriculum due to the HOPE Scholarship's funding requirements (Rubenstein, 2003). Public and private high schools have added new duties to their counselors to ensure as many students as possible receive this opportunity, dual enrollment funding comes directly from HOPE, and the course work structure for a high school diploma has changed due to HOPE (Vamplew, 2016). The impact of these changes needs to be studied to understand whether or not they have improved education in Georgia and whether or not more students received post-secondary degrees because of the scholarship. The current study also will

analyze the historical journey that the HOPE Scholarship has endured and how the process has affected education in Georgia and will analyze the dangers facing the scholarship as it advances into the 2020's.

Research Questions

- RQ 1: What are the legislative policy changes enacted by the Georgia State Legislature that have impacted eligibility for the HOPE Scholarship?
- RQ 2: How have the legislative policies enacted by the Georgia State Legislature changed the HOPE Scholarship's impact on post-secondary education in Georgia?

Overview of Methodology

The overall design for this study is a qualitative case study employing a historical approach relying on a document analysis where data is strictly archival in nature derived from a series of documents detailing the HOPE Scholarship's impact, recommended reforms, and the future of the scholarship. A document analysis qualitative research design was implemented where the qualitative data was collected through an analysis of documents that detailed the HOPE Scholarship's impact, recommended reforms, and the future of the scholarship (Eby-Ebersole, 1999). Document analysis was implemented to create a narrative of the HOPE Scholarship's story and how it has changed over the last 28 years (Bowen, 2009). The documents consisted of studies, senate reports, house reports, political documents, recommendations by the Georgia Student Finance Commission, and a joint commission study's analysis of the HOPE Scholarship and its future.

This study focused on telling the story of the creation of the HOPE Scholarship from Zell Miller's point of view. This study also used document analysis to explain how this merit-based scholarship was shaped and changed over time and the details of what led to change. The

document analysis will use textual evidence to explore the changes of the HOPE Scholarship and how Georgia's political body envisioned reforms in order to fulfill the obligations that HOPE was originally established for. This study focused on telling the narrative of the HOPE Scholarship as viewed by policy makers and those who carry out the education policy in public education in Georgia today (Eby-Ebersole, 1999). The main goal of the current study was to focus on the creation of the HOPE Scholarship and how it has impacted education in Georgia since its creation in 1993.

Implications

This current research study may lead to the discovery of how the HOPE Scholarship has affected millions of Georgians and ultimately changed pre-k through higher education in Georgia (Rubenstein, 2003). This current research study may also discover whether or not the changes made to HOPE over the last three decades have had a negative or positive impact on grade point average, courses offered, dual enrollment, SAT scores, and enrollment at colleges in Georgia. The primary goal of the current study is to tell the narrative of the HOPE Scholarship and how it has impacted education and the lives of many people (Eby-Ebersole, 1999). This current research study will also be adding to a field of study that does not have a lot of literature written about it.

Limitations/Delimitations

Limitations are things that restrict the research (Creswell, 2012). There were also some limitations to content analysis (Bowen, 2009). There were some documents that were lacking detailed information (Bowen, 2009). The documents chosen for this study were in-depth and related to the research questions (Creswell, 2012). Another limitation was low retrievability (Bowen, 2009). A second limitation was that it was difficult to obtain and it required a great deal of time to discover all of the documents (Bowen, 2009). The literature review provided the

documents for the data collection and data analysis section of the current study (Creswell, 2012). Bias selectivity was also a limitation of this research design (Bowen, 2009). The documents were selected with purposive sampling, and therefore each were purposely selected in order to help explain the researched phenomenon (Bowen, 2009). The data collection methods of this study used protocols to ensure that bias was greatly limited from the study (Creswell, 2012). The last limitation on the current study was the truthfulness of each document because the authors could have had a bias view of the impact of the HOPE Scholarship (Creswell, 2012).

Delimitations are the boundaries established in a study (Creswell, 2012). There were also some delimitations to this study. The study was delimited to documents that discussed the history and impact of the HOPE Scholarship (Bowen, 2009). The study was also focused just on the HOPE Scholarship's impact on education in Georgia and not economic factors or how it personally affected those who received its (Creswell, 2012). A further delimitation of this study was that archival documents were the only source of data for data analysis, and the study did not use interviews to get specific data from personnel involved in the creation and reform of the HOPE Scholarship (Creswell, 2012). The delimitations of the study are that it only includes participants who were school officials or policy makers and not actual high school or college students who are currently or will be affected by its impact. The study is delimited to the historical documents the researcher was able to obtain from a variety of sources. Another delimitation is the time period that is being researched from 1988 to 2021.

Future Research Directions

The economic impact on the Georgia economy should definitely be explored next after this current research is completed. A study on how Georgians have used the degrees they obtained from being awarded the HOPE Scholarship would be essential to gauge its economic

impact of its original goal to keep Georgia students in Georgia for college (Miller, 1998).

Research could also help the Georgia state legislature regulate the HOPE Scholarship to be more efficient when it comes to eligibility and the needs of Georgians financially. Another joint commission study would be very beneficial to the economic health of the HOPE Scholarship. A study on a comparison between the HOPE Scholarship and Florida's Bright Futures Program would also be beneficial in order to analyze how Florida has been able to keep most of their tuition assistance intact with their lottery system unlike with the HOPE Scholarship (Zhang, Hu, Sun, & Pu, 2016). Future research should also explore how this scholarship has impacted the poor, the middle class, and minority groups and whether or not the scholarship has given any of the mentioned groups more of an economic advantage than if the scholarship was not around.

Summary

This current research study should bring some valuable information to the educational world in explaining how a lottery funded merit-based scholarship can impact an entire state's educational program (Eby-Ebersole, 1999). The current study will analyze the different aspects and narratives of the HOPE Scholarship's creation all the way to present day. The HOPE Scholarship is not exactly as it was when it began, but it continues to make a lasting impact on the lives of millions of Georgians. The HOPE Scholarship is one of the most popular merit-based scholarships in the United States and many more states copied parts of its concepts (Eby-Ebersole, 1999). The current study plans to tell the narrative of how HOPE was given to millions of Georgians thanks to the work of a north Georgia educator and politician named Zell Miller (Miller, 1998).

CHAPTER II: LITERATURE REVIEW

The literature review section will cover past and present research that deals with not only the HOPE Scholarship, but the inception of the document from Zell Miller's childhood (Creswell, 2012). The focus of the literature review was to describe how the HOPE Scholarship was created. The first domain of the literature review will discuss the background on lotteries from a historical perspective. The second domain was written to describe Zell Miller's life and how he created the HOPE Scholarship (Miller, 1998). The third domain was written to discuss merit-based scholarships in the United States. The last domain was written to detail the criticisms of the HOPE Scholarship. The chapter will conclude with a brief summary.

Outline of the Literature Review

In 1993, one of the most impactful scholarships was created to help struggling students in Georgia obtain a college education (Eby-Ebersole, 1999). This scholarship was called the HOPE Scholarship. HOPE stands for Helping Outstanding Pupils Educationally (Miller, 1997). The scholarship was the brainchild of Governor Zell Miller (Eby-Ebersole, 1999). The idea was very popular among politicians because it called for a lottery for education instead of a tax increase to be funded by the state (Miller, 1998). A lottery system would be used to fund the scholarship and it had to be approved by the voters of Georgia, not just the state legislature (Miller, 1997). The scholarship passed the public vote by less than 100,000 votes (GA College 411, 2015a). The scholarship has existed now for 28 years and has impacted public high schools across Georgia and has given an opportunity to thousands of Georgians to go to a post-secondary school with financial support (Eby-Ebersole, 1999).

The HOPE Scholarship was the grand idea of Governor Zell Miller (Miller, 1997). He envisioned a state sponsored scholarship that would help lift thousands of Georgia's students out

of poverty by helping finance their post-secondary education in a Georgia college, university, or technical school (Eby-Ebersole, 1999). Not any governor or politician could have passed this legislation, but Governor Miller due to his political support and his long family standing of being educators (Miller, 1985). Zell Miller was born and raised in north Georgia in the community of Young Harris (Barlament, 2007). He was a true southern conservative democrat and was liked and admired by people on both sides of the aisle (Eby-Ebersole, 1999).

Merit-based scholarships are nothing new in education and several states have programs like Georgia's HOPE Scholarship. Fourteen different states have merit scholarships that are similar to Georgia's HOPE Scholarship (Lohman, 2000). Four states, which include California, Louisiana, Missouri, and South Carolina actually use general tax dollars to fund their scholarships (Lohman, 2000). Four states, which include New Mexico, Kentucky, Tennessee, and Florida have similar lottery systems like Georgia (Lohman, 2000). Georgia has set the precedent for other states to follow in how to use a lottery to finance a merit-based scholarship to ensure all students eligible can fulfill their dream of affording a college education.

Florida has one of the most interesting merit scholarship programs as compared to the HOPE Scholarship. Their scholarship program is called the Florida Bright Futures Scholarship Program. Florida sets aside six cents out of every dollar spent for a lottery ticket to fund the program (Lohman, 2000). Florida has set award amounts for different achievements for their students. The primary way to receive this scholarship is by having a certain grade point average and SAT score (Lohman, 2000). The highest level you can qualify for also requires community service hours also. This is different than Georgia's HOPE Scholarship. HOPE does not require community service hours like Florida's Bright Futures Scholarship. In a similar fashion as the HOPE Scholarship, the Bright Futures scholarship tends to pay a bigger share of public tuition

costs than private school tuition costs. The Florida lottery inspired Zell Miller to come up with his own idea for a scholarship and to use gambling as a source of revenue for education without reducing state funds for education (Eby-Ebersole, 1999). Florida had a lottery system first, but did not have the “Hope” like scholarship until after Georgia started its own (Lohman, 2000).

Merit scholarships have had a controversial past and there is a lot of empirical data on this subject (Vamplew, 2016). State legislatures are always trying to figure out ways to increase the economic status of their citizens and merit scholarships have been one of these tried tools. One of the major pitfalls to merit scholarships is that the middle- and upper-income families tend to qualify for them at a much higher rate than lower economic status students (JSCR, 2003). There is also some evidence that shows that lower income households tend to have less knowledge about receiving these scholarships and that has impacted their eligibility (Horn, Chen & Chapman, 2003). The HOPE Scholarship was originally designed for only the lower income brackets, but over time the legislature changed the eligibility to allow all income brackets to receive it (Miller 1998).

One of the biggest complaints high school counselors have of merit scholarships is how students qualify for them (Vamplew, 2016). The qualifications for receiving the HOPE Scholarship have changed multiple times over the last three decades and the dynamics of qualifying for each scholarship is different (Dilonardo, 2012). This has made it very difficult to discuss with students how to plan their high school careers and which college to attend in order to be eligible for these scholarships (Rapp, 2005). There have been several other studies done about whether the HOPE Scholarship was being communicated properly and fairly to the less economic affluent areas of Georgia (Butrymowicz & Kolodner, 2017).

Prior to the creation of the Hope Scholarship, most merit scholarships were produced and awarded by colleges to specific students to increase enrollment, especially in private schools across the country (Cornwell, Mustard, & Sridhar, 2006). Since the conception of the HOPE Scholarship, multiple states have used merit scholarships to justify increasing college enrollment, and university systems are doing as much as possible to receive these funds for education (Long, 2003). Between 1993 and 1997, Georgia saw an increase in four-year college enrollment of six percent (Cornwell, Mustard, & Sridhar, 2006) due to financial aid from the HOPE Scholarship.

The HOPE Scholarship program has served as an example for other states to follow. Florida has a very similar program called the Bright Future's Program. The program was officially funded by a state lottery in 1997, which was four years after HOPE was created (Zhang, Hu, Sun, & Pu, 2016). The Bright Future's Program is very close to the HOPE Scholarship in that you must maintain a certain high GPA, enroll in a state institution, similar test scores on the ACT or SAT, and the recipient also gets some other fees paid for (Zhang, Hu, Sun, & Pu, 2016). The one major difference between the lottery systems between Georgia and Florida is that even though Florida has a larger pool of participants than Georgia, Florida also has to cover more costs due to its larger population and high-priced colleges. The current literature review will compare and contrast different states like Florida and how Georgia's HOPE Scholarship influenced their merit-based scholarship programs.

The HOPE Scholarship has been through many changes and this study covered the multiple reforms to the popular program. Those who qualified for the HOPE Scholarship have been greatly impacted. In 1993, when the scholarship was first created, only students with a B average and their parents made less than \$66,000 a year could qualify (Barlament, 2007). The original intent of the scholarship was to help those in the most financial need and not to support

all students, but Miller changed that in 1995 (Miller, 1997). In 2004, the legislature changed politically and the HOPE Scholarship changed with the political times.

Since the economic requirements were removed in 1995, there has been a considerable difference on how higher income brackets and lower income brackets have benefited from the scholarship funds (Trant, Crabtree, Ciancio, Hart, Watson & Williams, 2014). This action by the state legislature has made more students strive to receive the financial assistance, but at the same time the purpose of the scholarship has been altered (Trant, Crabtree, Ciancio, Hart, Watson & Williams, 2014). This study also analyzed the criticisms of the HOPE Scholarship and how it has impacted public education in Georgia.

Most of the literature on the HOPE Scholarship deals with the changes and financial impact of the scholarship's funding. Most literature discusses how colleges have taken advantage of receiving HOPE funding by raising their tuition, student fees, housing, and lessening the aid they offer students so students become solely dependent on HOPE funding (Long, 2004). The impact on high schools is significant because students want to go to the best schools, but cannot afford them and the HOPE Scholarship was designed to keep them in state (Cornwell & Mustard, 2001). This has brought about the need for high schools to make changes to their curriculum and grading scales so more students could receive this funding (Cornwell & Mustard, 2001).

There is literature on the negative impact of the HOPE Scholarship also. Georgia has seen a dramatic increase in those eligible for the HOPE Scholarship and the number qualifying every year is growing (Bugler, Henry, & Rubenstein, 1999). There are some researchers that have written articles pointing to public high schools that make qualifying for HOPE easier as the reason why so many HOPE scholars do not finish their four-year degree (Trent & et al, 2014).

There are significant gaps in the literature on the subject of the HOPE Scholarship. There is especially a large gap when it comes to research design and data collection on the HOPE Scholarship's transformation of public education. The research up to now has primarily centered on about eligibility and the financial impact of the scholarship on the state of Georgia. There needs to be a much more in-depth look at how curriculum and public high schools have been transformed because of this historic merit-based scholarship.

Background of Lotteries in the United States

There have always been controversies over whether lotteries are not only an effective way to raise revenue, but whether they are morally right for states to use for programs (Nelson & Mason, 2003). Southern states have historically rejected legalizing lotteries for any type of benefit for the public due to gambling being a moral issue and the fear that crime would increase with the presence of gambling in the community (Nelson & Mason, 2003). Lotteries are not a new idea in American history. Lotteries were used during the American Revolution to raise money for George Washington's army (Mercer & Duvall, 2004). Several states have used lotteries to fund projects for public works and even higher education (Mercer & Duvall, 2004). By the mid-1980's most northern states had lotteries and not a single southern state did (Nelson & Mason, 2003). Mississippi was the first state to allow casino gambling and was the test case example for others to follow in the early 1990's (Nelson & Mason, 2003).

The popular notion that lotteries do not get approved by legislatures mostly stems from a moral point of view, but some researchers have found out that lotteries are very much supported by the voters (Nelson & Mason, 2003). Between 1964 and 1988, over 30 states held referendums on state lotteries and 28 out of 30 approved the referendums (Nelson & Mason, 2003). The most popular form of gambling in America has been lotteries and charitable bingo

(Nelson & Mason, 2003). The literature points to the fact that states with heavily Roman Catholic voters tend to support lotteries versus states that have a larger percentage of Baptists who tend to not support gambling in any form (Nelson & Mason, 2003). Catholics use bingo “lotteries” to raise money for the church’s needs and this money is used to pay for items needed for the poor (Nelson & Mason, 2003).

Lotteries have mostly passed through state legislatures and by public referendums during a time of economic down fall (Nelson & Mason, 2003). When state legislatures are reviewing new sources of revenue, lotteries tend to be an easier sale to voters than a tax increase because they are viewed as a choice instead of a mandated tax (Miller, 1997). There are also some other reasons why lotteries tend to be a favorable avenue of choice for revenue in harsh financial climates. Neighboring states play a major factor also (Nelson & Mason, 2003). Neighboring states with lotteries tend to influence their neighbor states to adopt them also if they are viewed successful (Nelson & Mason, 2003). This was one of the reasons pushed by Governor Zell Miller in Georgia to support a lottery. One of his campaign points was that many Georgians were playing the lottery in Florida just across the border and that Georgia was missing out on revenue it could be using to fund his merit-based scholarship proposal (Hyatt, 1997). Governor Miller pointed to the fact that Georgia was losing millions every year and that Florida was reaping all the benefits economically (Hyatt, 1997).

When researching the politics of gambling, Mississippi and Georgia are two very similar cases and were both approved in the same time era. Mississippi did not go after a lottery system, but instead went after casino gambling because a lottery system would need the support statewide instead of just in certain areas like near the Mississippi River (Nelson & Mason, 2003). The prospect of allowing any type of gambling in the South in 1990 was viewed negatively by

the voting public due to the area being dominated by Protestant voters (Nelson & Mason, 2003). One of the key factors for both states being successful with their gambling and lottery programs was the way they crafted the state policies for their implementation and what the funds would be used for (Nelson & Mason, 2003).

Mississippi first tried to legalize gambling with a lottery test vote in 1990 (Nelson & Mason, 2003). The vote failed. The vote required support in the state legislature from different districts who would be impacted by the lottery (Nelson & Mason, 2003). Representatives wanted to legalize gambling, but only in certain areas of the state and the lottery would be statewide so it failed (Nelson & Mason, 2003). What is very interesting is that the legislature was open to passing casino gambling. The casino gambling industry, at the time, was lobbying the state government very hard for legalization, but at the same time was lobbying against a lottery (Nelson & Mason, 2003). Casinos did not want to compete with a lottery system (Nelson & Mason, 2003). The compromise on allowing casino gambling was based around the proposition that casinos would only be allowed on the western border of Mississippi and the Gulf Coast (Nelson & Mason, 2003). This meant that the casinos could be built along the waterways of the state, but not the interior. Before the 21st Century, Mississippi would become the second largest casino gambling state in the nation (Nelson & Mason, 2003).

One of the main reasons gambling was allowed in Mississippi was what Iowa had done a few years before (Nelson & Mason, 2003). Since Mississippi lies on the river, a lot of traffic flows down its waterway every day. In 1989, Iowa allowed casinos on boats on the Mississippi River (Nelson & Mason, 2003). Gambling “riverboats” that looked like something out of a Mark Twain book started to dock outside the Iowa cities of Davenport and Bettendorf and were a huge financial success (Nelson & Mason, 2003). Iowa’s neighboring state of Illinois wanted to

receive the same financial benefit and allowed riverboat casino gambling on some of its river cities (Nelson & Mason, 2003). The Mississippi state legislature felt like Louisiana was going to allow casinos outside of New Orleans and made a move to legalize it in their state (Nelson & Mason, 2003). The Mississippi legislature also wanted to pass a lottery system. A conservative estimate in 1990 said that the state could gain at least 50 million dollars a year in profit for the state treasury (Nelson & Mason, 2003). The lottery gained a majority vote in both chambers of the state legislature but failed to get the two-thirds vote required by their state constitution to legalize it (Nelson & Mason, 2003). Casino gambling did not need a 2/3rds vote and was a much easier route to revenue than the lottery (Nelson & Mason, 2003).

The politics of passing casino gambling in Mississippi made the difference to its passage. A lottery system would not have been supported by voters across the state and their support was needed for final approval (Nelson & Mason, 2003). Casino gambling was restricted to certain areas of the state and did not affect most parts of the state so the only support it needed was from the representatives and senators from those areas where it was allowed. A statewide political campaign was not needed in Mississippi for casino gambling unlike in Governor Miller's situation in passing a lottery for education (Nelson & Mason, 2003). The economic impact was also a viable argument to make for its passage due to most of the money would return to areas in need of economic assistance (Nelson & Mason, 2003). Casinos led to people staying in hotels and eating in local restaurants making the economic impact even greater for the surrounding areas (Nelson & Mason, 2003). Economists predicted 200 million dollars a year in extra revenue for the state from casino business (Nelson & Mason, 2003). Proponents also argued in favor of casinos that they would create more jobs where a lottery would only employ a few people

(Nelson & Mason, 2003). Mississippi's casino gambling operation was so successful that several gambling riverboats left Iowa to make profits in Mississippi (Nelson & Mason, 2003).

Casino gambling went so well for Mississippi that in 1992, the state legislature allowed the voters to decide whether or not a lottery would be permissible. Under the Mississippi state constitution, voters could make it permissible, but the state legislature would have to pass a revenue measure by a three-fifths vote in each chamber (Nelson & Mason, 2003). The voters approved the lottery by six percentage points, but the vote was closer than proponents thought it would be (Nelson & Mason, 2003). The lottery did not have the support it needed in the state legislature due to opposition from casino gambling lobbyists and opponents of gambling (Nelson & Mason, 2003). The lottery was finally approved by the state legislature in 2018 with a promise that the proceeds would go to highway improvement and education (Mississippi Lottery, 2021). Mississippi set the stage for Governor Miller to make an argument that it was time for Georgia to allow a lottery system that would generate revenue for education (Miller, 1997).

Over the last several decades, the Georgia Lottery has received a lot of criticism for not being a viable revenue source and many analysts point to the idea that lotteries cannot sustain large spending ventures over an extended period of time (Mercer & Duvall, 2004). Lotteries have been around in the United States since the creation of the nation. The debate over whether or not they are moral or are effective has been written about and researched thoroughly in the United States. Opponents of a lottery system tend to argue that the poor are usually the ones who participate the most and receive little to no benefit (Mercer & Duvall, 2004). Opponents of gambling often argue that crime tends to increase where gambling is legalized and that it disproportionately targets the poor (Mercer & Duvall, 2004). Proponents of a lottery system point to the fact that Americans gamble in high numbers in areas where it is legal and illegal and

that the government can regulate gambling to where revenues could be used to help the citizens (Mercer & Duvall, 2004).

Researchers have studied the purpose of lotteries for several decades now to point to factors for their passage. The justification given by most state legislatures in passing lotteries in the United States has been to generate a new source of revenue in order to avoid raising taxes (Mercer & Duvall, 2004). Other areas that researchers have reviewed is whether or not lotteries bring crime and poverty with them (Mercer & Duvall, 2004). President Thomas Jefferson once said that lotteries should be legal because life was a game of chance (Evans & Hance, 1998). The main reason it is important to review whether lotteries are proper or not is to evaluate whether or not the impact of the Georgia Lottery on education is worth the negatives that come with legalized gambling (Rubenstein & Scafidi, 2004).

Declining general funds and the avoidance of raising taxes has made many states look at legalizing gambling including lottery programs (Nelson & Mason, 2003). Lottery programs have been viewed as being relatively inexpensive to form since you do not need a lot of workers to carry out its functions (Mercer & Duvall, 2004). In United States history, lotteries have helped generate revenue for welfare programs, education, and transportation upgrades (Nelson & Mason, 2003). After the American Civil War ended, southern states were allowed to hold lotteries to rebuild the south (Nelson & Mason, 2003). Several states, including Georgia, use lotteries to fund educational programs for the betterment of their citizens. One of the prime reasons for supporting a lottery system has been that it is a voluntary tax where a participant has the chance to win a financial prize or receive financial assistance on their college degree (Nelson & Mason, 2003). The states of Indiana and Mississippi were able to improve their road systems due to lottery proceeds (Nelson & Mason, 2003). In Georgia, the lottery is funding Pre-K,

technology enhancements in public schools, and the HOPE Scholarship for those who are eligible (Hyatt, 1997). The lottery in Georgia, also employs over 8,000 people (Nelson & Mason, 2003). The Georgia Lottery is the 4th largest source of revenue in the state (Nelson & Mason, 2003). As of 2001, lottery data revealed a gain in over 30 billion dollars in state revenues for legislatures across the United States (Nelson & Mason, 2003). Proponents of a lottery system say states should pass lotteries to keep their citizens from crossing state lines to play the lottery in a neighboring state (Nelson & Mason, 2003). Governor Zell Miller argued that Georgia was losing millions in revenue every year to the Florida lottery and that if people are going to gamble, the state should regulate it and put the revenue to good use (Hyatt, 1997). Another point made was that playing the lottery is a choice mechanism and adults who participate know that their chances are of winning are slim, but the government should use that money to benefit its citizens (Nelson & Mason, 2003).

There are also opponents of the lottery system regardless what public benefit is paid for with its revenues. Opponents of lotteries recognize their economic benefits and the fact that over 37 states allow it and over 100 countries in the world use lottery systems for revenue (Clotfelder, Cook, Edell, & Moore, 1999). Some researchers point to the fact that lotteries are inherently regressive in nature (Waite, 2004). People that have the lowest income tend to spend the largest percentage portion of their check playing the lottery (Waite, 2004). African Americans tend to be a large percentage of those playing the lottery and are not receiving that same percentage portion in governmental benefits such as HOPE scholarships, educational grants, and road improvements (Heberling, 2002). Researchers have also found data that supports a disparity in ages that participate in the lottery. As of 2002, people 65 and older were spending on average \$475 dollars a year on lottery games and people between the ages of 18-29 were only spending

\$152 annually (Heberling, 2002). Opponents also accuse the lottery of false advertising and that the lottery does not tell participants about taxes and true payout amount (Waite, 2004).

Opponents also point to the fact that lotteries tend to payout large amounts to certain programs like education early in their creation and that it decreases over time (Waite, 2004). The HOPE Scholarship is an example of this argument. When Governor Miller put HOPE into place, it paid full tuition where now most HOPE Scholarship recipients only receive partial tuition assistance (Georgia Student Finance Commission, 2021). Opponents of the lottery also claim that the prizes do not match the award amounts (Waite, 2004). In 2000, the average lottery pay out per dollar was 55 cents for prizes, 12 cents for retailers, and 33 cents for the states (Waite, 2004). Counselors also point out that lottery gambling can become addictive and cause people to face financial ruin (Waite, 2004). Lottery gambling was second behind casino gambling for the reason why most people called a help line for gambling addiction between 1983 and 2000 (Waite, 2004).

Creation of the HOPE Scholarship

The evolution of the HOPE Scholarship began in the northeast part of the mountains in Georgia with the birth of Zell Bryan Miller. The HOPE Scholarship was the idea of Governor Zell Miller who spent most of his life in the area of Young Harris, Georgia and raised by a family devoted to education (Miller, 1985). Governor Miller's idea that a program that awarded college tuition to support students with a "B" average and whose parents made less than 62,000 dollars could keep students in Georgia schools and provide a boost to Georgia's growing economy (Hyatt, 1997). This idea of using a lottery system to pay for this program did not come from the halls of the state legislature, but from his upbringing in north Georgia (Hyatt, 1997).

Zell Miller was born in February 1932, 17 days before the death of his father (Miller, 1985). His father left an everlasting impact on him. His father, Stephen Grady Miller had been a politician, a teacher, and a businessman (Miller, 1985). Zell Miller's mother pushed him to be like his father and she never remarried (Miller, 1985). Zell Miller grew up hearing stories about his father and all the things he accomplished not only from his mother, but neighbors, and friends of the family (Miller, 1985). One of the most important things in the Miller family, that was pressed on Zell Miller as a child was education (Miller, 1985). His father had been a teacher and leader at Young Harris College and this legacy drove Miller to want to teach also (Miller, 1985). Miller's father was remembered by the president of the college as someone who raised the standards of scholarship and was a friend to all students (Miller, 1985). This family legacy influenced Miller to be involved, and to have a determination to be a scholar, and also help provide a quality education for others who were underprivileged like himself (Miller, 1985).

Growing up in the poor area of the mountains and being raised in a single parent household, Miller's mother had the greatest impact on his aspirations in life (Miller, 1985). Miller grew up in an area of Georgia that did not have running water or electricity all the time (Miller, 1985). He recalled in several of his books how the power company would make their lights blink three times before the power was shut off for the night (Miller, 1985).

Birdie Bryan Miller taught her son to read before he started school at the age of five (Miller, 1985). His mother never had a permanent home because they moved around so much (Miller, 1985). After Zell's father died, his mother was determined to build her kids a permanent home in Young Harris (Miller, 1985). This determination gave Zell Miller the work ethic to push through any tough time and his mother taught him to value education (Miller, 1985). In order to provide a home for Zell and his sister, his mother went to work in Atlanta during World War II

making buckles for gas masks and slowly but surely, she paid for the land (Miller, 1985). His mother also served on the Young Harris city council and this also influenced Zell to try politics out (Miller, 1985). Zell Miller's parents taught him work ethic, the power of an education, and how to uplift others around him (Miller, 1985). Growing up in the mountains of North Georgia, the future governor learned about the importance of an education and that all should be entitled to a quality education thanks to his parents who both had connections to education (Hyatt, 1997).

Going to Young Harris College as a public education student had a great effect on Zell Miller's views of the world and his role in life (Miller, 1985). Miller felt pressured to be someone important at Young Harris College because his father, mother, and his aunt all had taught there and the college served as his high school (Miller, 1985). He played baseball there and was on the debate team (Miller, 1985). Being a champion debater at Young Harris gave Miller the courage to want to be a politician in life and it taught him how to take a stand for what he believed in (Miller, 1985). Miller also witnessed returning World War II veterans going to Young Harris College for free on the GI Bill and this was an inspiration to the idea that everyone could earn their way to acquire a college education no matter what their individual circumstances or financial conditions were (Miller, 1985).

One of the most challenging parts of Miller's life was when he earned a scholarship to Emory University and felt so intimidated by the students there that he quit school and enlisted in the Marines (Miller, 1985). The Marines provided Zell Miller the father figure that he lacked in life (Miller, 1997). While he was in the Marines, he married his sweetheart and started a family (Miller, 2005). The Marines and marriage made him regain the determination that he lost at Emory University and after his enlistment was up, he re-enrolled into college at the University of Georgia to finish the degree he started before the Marines (Miller, 1985). After he graduated, he

taught part time at the University of Georgia while he finished his Master's degree and this gave him an opportunity to meet students from all over the state and interact with them about their life experiences (Miller, 1985). His time teaching at the University of Georgia provided Zell Miller with the desire to want to help Georgia's students stay in school in Georgia (Hyatt, 1997).

In 1959, Zell Miller took a job at Young Harris College as a professor of history and political science (Miller, 1985). While Miller was teaching, he decided to run for the Georgia State Senate in 1960 because he desired to live up to the values that his family had instilled in him (Miller, 1985). All of these events in his life, up to this point, were inspired by his family heritage and a dedication to education and the idea of helping others (Miller, 2005). Many of the students that he taught at Young Harris worked on his future campaigns for office (Miller, 1985). Several of these students influenced him to campaign on a platform of educational reform (Miller, 1998).

Politics was a very tricky business for a young Zell Miller. Georgia was full of colorful politicians in the 1960's and the country was going through a civil rights movement that was not popular in parts of Georgia (Miller, 1985). Growing up in the mountains of North Georgia taught Miller how to campaign in a divided electorate (Miller, 1985). The area that he grew up in was almost evenly divided among democrats and republicans in the 1960's and 1970's even though most of the state supported the Democratic Party (Miller, 1985). He learned the art of compromise in the mountains where 40% were democrats and 40% were republicans and somehow you had to win over half the remainder to be elected in either party (Miller, 1985). The mountains taught Miller that it is okay to vote your conscience and not necessarily the way the public wants you to because the voters he represented did not fit within strict political party ideologies (Miller, 2005).

Running for Lieutenant Governor in 1974 gave Miller a chance to make a stand on the issues of the time (Miller, 1985). The integration of schools had taken place in Georgia and many voters were still angry about the combining of schools between white and black students (Miller, 1985). Miller tried to calm down conservative voters who were against the change by telling them it was not the end of the world and that communities could work together in education (Miller, 2005). Serving as Lieutenant Governor gave Miller a chance to stand on his own about education and gave him insight of how to pass controversial legislation on education (Miller, 1985). Before running for Lieutenant Governor, Miller had run for Congress and gotten his name out there to most Georgia voters, so he was a top choice in 1974 for the Lieutenant Governor position (Miller, 1985). He very much lived in the shadow of Lester Maddox who was also a governor and Lieutenant Governor right before Miller (Hyatt, 1997). Georgia was moving in a new direction as the civil rights movement came to an end and the state was starting to urbanize (Hyatt, 1997).

When Miller ran for Lieutenant Governor, he promised that his focus would be on improving public education and reducing crime across the state (Miller, 1985). “There is a direct correlation between crime and education. I’m the only Georgian who has ever served in all three areas of criminal rehabilitation” (Hyatt, 1997, p. 151). He also made his focus on expanding kindergarten in Georgia (Hyatt, 1997). In addition, he learned the art of compromising by having to deal with the Speaker of the House, Tom Murphy, for his entire Lieutenant Governor career (Miller, 1998). He also learned that the interests of north Georgia were not the interests of the rest of the state (Miller, 1998). Miller had to find ways to compromise to accomplish the goals he set out to reach with other leaders of the state in the legislature (Hyatt, 1997). There is a great picture of Zell Miller and Speaker Tom Murphy smoking a “peace pipe” with Governor Busbee

in 1979 to illustrate how Miller had grown into a compromising leader and also how to advertise his political skills (Hyatt, 1997). His experiences as Lieutenant Governor helped Miller get ready for the great task of finding issues that he could get Republicans and Democrats to agree upon once he became governor.

The campaign for governor in 1990 started with the relationship of two former Marines, Zell Miller and James Carville (Hyatt, 1997). Carville wanted to reform Miller into a new type of Democratic candidate and to push towards new ideas such as education reforms and budget increases supported by progressives (Hyatt, 1997). Miller had always had a hard time taking campaign advice from others and following it all the way through (Hyatt, 1997). If Zell Miller was going to stand out as a fresh democratic voice for governor, he was going to have to push for new ideas that would bring both sides together (Miller, 1998).

In the late 1980's, traditional Georgia Democratic voters were starting to lean towards supporting the Republican Party, especially in presidential elections (Hyatt, 1997). The Democratic Party in Georgia had to run strong, family-based campaigns to win statewide (Hyatt, 1997). It was not a secret in the Georgia state legislature that Zell Miller supported a lottery, but selling the lottery to the public was going to be a great challenge (Miller, 2005).

When the Georgia state constitution was changed in 1868, a lottery was forbidden without a constitutional amendment (Hyatt, 1997). Zell Miller used Florida's lottery as an example of success and claimed that Georgians were crossing the border every day to play the Florida lottery and that Georgia could replicate their success (Hyatt, 1997). Miller was coming back from several campaign stops in South Georgia and several people asked him if Georgia would ever have a lottery (Hyatt, 1997). Miller felt like this was his opportunity to stand out as the candidate that would propose a lottery for education (Miller, 1998). The biggest issue was

whether or not voters and the state legislature would support the idea (Hyatt, 1997). Miller also had to consider how much of the lottery would fund education, especially since he did not have any real data on how much proceeds would be or whether it could sustain the rising costs of an education (Hyatt, 1997).

The idea of using a lottery to fund education priorities started with a poll suggested by campaign strategist James Carville (Hyatt, 1997). The poll showed a 2-1 support for a lottery that helped fund education without any real details except that it would not reduce general revenue funding for education (Hyatt, 1997). “I had found an issue that would set me apart from all the other candidates” (Hyatt, 1997, p. 239). The issue now was going to be putting together an educational package that could benefit Georgians and also not have any funding come out of the state budget. One of the political dangers of his lottery for education idea was those who were opposed to the idea were strongly opposed (Hyatt, 1997). Many of these people grew up with Zell Miller in Young Harris and the religious voting block was adamantly against it (Miller, 2005).

The key to get Miller elected to the governorship resided with his plan for public education in Georgia (Hyatt, 1997). Miller saw that the Georgia economy was not as strong as it could be because many young Georgians were leaving the state for college and not returning (Miller, 2003). None of the other Democratic nominees for governor supported the lottery (Hyatt, 1997). Miller spun the lottery as way to avoid a tax increase by quoting Thomas Jefferson calling the lottery a fair tax because it only targets those who participate (Hyatt, 1997). His idea for HOPE was slowly coming together when he started to tell people that the lottery would help decrease the wealth gap for poor Georgians by using lottery funds to pay for higher education

(Hyatt, 1997). Miller coasted to being the nominee for the Democratic Party, but barely won the governor's race with 53% of the vote (Hyatt, 1997).

Zell Miller knew there was a financial crisis looming for Georgia in 1991, but was bound and determined to pass a lottery for education (Hyatt, 1997). He promised that not a single lottery dime would supplant the education budget (Hyatt, 1997). The first thing he did was gather support for the lottery in the state house of representatives and find co-sponsors for his amendment to the state constitution (Miller, 1998). The amendment sailed through committee and passed on the house floor 126-51 (Hyatt, 1997). The amendment then passed through the senate a week later 47-9 (Hyatt, 1997). The main obstacle facing Governor Miller were the voters. There was strong sentiment against gambling in Georgia at the time and religious organizations lined up against it (Hyatt, 1997). Since gambling was forbidden in the state constitution, the lottery for education had to be approved by the voters in order to amend the state constitution (Miller, 2005). In early 1992, Governor Miller addressed the state legislature and proposed that 90% of lottery funds would go to three programs: voluntary pre-kindergarten, tuition grants, and public-school capital outlay (Hyatt, 1997). Ten percent would be set aside as a reserve fund in case lottery funds did not meet expectations (Hyatt, 1997). Proponents of the lottery for education claimed that over 200 million Georgian dollars were going into the Florida lottery and that if the lottery for education passed it would stop a tax increase (Hyatt, 1997).

Opponents lined up against the 1992 constitutional amendment (Hyatt, 1997). One newsman from California called the lottery a sucker's game and that it did improve education because it made people smart enough to quit playing (Hyatt, 1997). Governor Miller campaigned across the state for the amendment as if he were running for re-election (Hyatt, 1997). Religious organizations, including Miller's own church, came out against the lottery for

moral reasons and one ad against the lottery for education included Atlanta Braves player Dale Murphy, who was very popular in the state (Hyatt, 1997). On a more personal note, the researcher's own parents participated in a protest against the lottery for education with their church in Warner Robins, Georgia. The margin of victory was closer than expected with only 52% in favor (Hyatt, 1997). Black Georgia voters made the difference by voting in favor of the lottery for education by a 2-1 margin (Hyatt, 1997).

HOPE, which stands for Helping Outstanding Pupils Educationally, was created by Governor Miller himself while sitting on his couch in his office and he started using the idea publicly a month after the amendment passed (Hyatt, 1997). Miller's idea was to use the lottery for education funds to give tuition, books and fees for students who finished high school with a "B" average (Miller, 2005). At first, he did not want it tied to an income level and he wanted it to be a merit scholarship for all (Hyatt, 1997). He called it his "GI Bill" (Hyatt, 1997, p. 306). Miller's HOPE scholarship was predicted to send 90,000 Georgians to college in 1993, create Pre-K schools in volunteer districts, and help improve the state's educational facilities (Hyatt, 1997).

The governor did have to compromise on who would be eligible for HOPE. Every student with a "B" average could not be funded by the lottery system (Miller, 1998). He proposed that families with a max income of \$66,000 would be eligible for HOPE (Miller, 1998). His proposal had five components to it. The merit scholarship would require the recipient to stay at a school in Georgia (Miller, 1998). The first component of his proposal would require a "B" average in high school with a family income of less than \$66,000 a year and the student must attend an institution in the University System of Georgia (Miller, 1998). The second component was a loan for the second year that a HOPE scholar enters college (Miller, 1998). If they

maintained the “B” average the loan would be forgiven (Miller, 1998). The third component covered eligible students who did not want to go to college, but to attend state technical school instead (Miller, 1998). The fourth component covered students who dropped out of high school and obtained their GED (Miller, 1998). Governor Miller wanted to provide them \$500 for books, materials, or fees at a public Georgia college or technical school (Miller, 1998). Governor Miller noted this could benefit up to 16,000 Georgians in 1993 (Miller, 1998). The last and fifth component he proposed was for HOPE to include private schools by bringing tuition equalization grants up to \$1,500 dollars (Miller, 1998). The goal behind the components was to keep Georgia’s students in the state and to increase college participation, which the governor hoped would lead to better paying jobs for graduates (Eby-Ebersole, 1999).

The lottery started in June of 1993 and was a huge hit with Georgians (Eby-Ebersole, 1999). The first-year goal for the lottery was set at 465 million dollars, which the lottery met within five months (Eby-Ebersole, 1999). At the end of the first full year, the lottery had made over a billion dollars (Eby-Ebersole, 1999). Over 360 million dollars was set aside the first year for Governor Miller’s programs (Eby-Ebersole, 1999). Most lottery systems see a decrease in sales after the first year or two in sales. By the time Miller left the governor’s mansion, the lottery was bringing in 1.7 billion dollars per year and in his eight years as a governor over three billion dollars was set aside for education from lottery sales (Eby-Ebersole, 1999).

One of the issues facing the state to implement HOPE was the implementation of a fast roll out to get all students who were eligible for HOPE verified before the fall semester (Miller, 1998). Governor Miller appointed the administrative duties for the HOPE Scholarship to the Georgia Student Finance Commission (Eby-Ebersole, 1999). The commission was tasked with trying to inform all 180 school districts of the qualifications of HOPE and to mail individual

letters to over 100,000 seniors in high school to ensure all students were knowledgeable about the eligibility requirements and how to apply for them (Eby-Ebersole, 1999). The commission also had to task each high school with providing them a list of all eligible seniors (Eby-Ebersole, 1999). Counselors and administrators had to educate themselves on HOPE in a short amount of time in order to ensure their students received the benefits that were due to them. (Vamplew, 2016). Meetings were also held across the state called “HOPE Nights” to ensure the public knew about the merit scholarship’s benefits (Eby-Ebersole, 1999). The commission also created an hour-long television program called “Dollars for Scholars: The HOPE Scholarship Program” (Eby-Ebersole, 1999).

Governor Miller saw the success of the lottery and decided after year one to expand the priorities of the HOPE scholarship (Miller, 1998). In early 1994, Governor Miller added 15 million more dollars to the HOPE scholarship (Miller, 1998). He believed that most people did not realize the first year they were eligible for HOPE or that their high schools knew enough about it to get the information to all students (Miller, 1998). For the 1995 fiscal year, he proposed 87 million more dollars for HOPE to change the requirements of who would be eligible for HOPE (Miller, 1998). Governor Miller was getting push back from education organizations that the requirement that a family must make less than \$66,000 a year was leaving teacher’s kids out of the equation (Hyatt, 1997). Governor Miller proposed to change the \$66,000 a year requirement to \$100,000 a year (Miller, 1998). He believed that this would cover the middle class. This was the first expansion of the HOPE scholarship from its original intent of just helping the poorest of Georgians obtain a merit-based scholarship to now allowing the middle class to be eligible. He also pushed that second year to expand HOPE to cover a student’s junior and senior years of college (Miller, 1998). He told the legislature that the expansion proposed

would make HOPE unlike any merit-based scholarship ever seen before and that a student who qualifies could have an entire degree paid for with lottery funds (Miller, 1998). The politics of the idea was too much for the legislature to ignore and the lottery was receiving more than projected in sales (Eby-Ebersole, 1999).

In 1995, Governor Miller proposed more changes to the HOPE scholarship (Miller, 1998). His first proposal was to allow students who lost the HOPE Scholarship to have a second chance to get it back by regaining a 3.0 grade point average (Miller, 1998). His second proposal was to get rid of the family income maximum and allow all families eligible for the scholarship (Miller, 1998). Governor Miller did not include figures in his proposals of how many more Georgians would now be eligible for the scholarship, but suggested that since the lottery was doing better than expected it would be financially responsible to offer HOPE to all Georgia's students who maintain a "B" average (Miller, 1998). He also added an initiative to the HOPE Scholarship to allow teachers seeking advance degrees to receive a scholarship in areas of the state's greatest needs (Miller, 1998). He also added \$500 more dollars to tuition equalizations grants for students at private schools in Georgia (Miller, 1998). The success of the lottery made these changes possible and the governor did not see a decrease in lottery participation in the first few years to make him think twice about these changes (Miller, 1998).

In 1996, the lottery had a surplus of \$138 million dollars (Miller, 1998). The governor had been taking ten percent of all lottery funds for the HOPE Scholarship and putting it into a reserve fund just in case lottery participation decreased (Miller, 1998). The lottery was so successful up to 1996, that Governor Miller felt like he could make even more changes to the benefits the HOPE Scholarship was already providing to recipients (Miller, 1998). He made a major change for private school students' benefits by giving them \$3,000 dollars a year instead

of \$1,500 a year, but under the condition that they maintain a “B” average also just like the public-school students. (Miller, 1998). Governor Miller also proposed a change to how the “B” average would be figured up in high school. He proposed that academic courses be the measure of the “B” average instead of all courses taken (Miller, 1998). This would calculate their average from four years of English classes, three years of math classes, three years of science classes, three years of social studies classes, and two years of foreign language (Miller, 1998). The reason for the change was not because of a monetary problem, but because universities and colleges were giving the state feedback that many HOPE scholars needed remedial classes their first year because they seemed unprepared for the course work of college (Miller, 1998). Governor Miller pointed to the success of the HOPE Scholarship and pointed to the fact that over 105,000 students had received benefits from HOPE’s first two years of existence (Miller, 1998).

In 1997, Governor Miller addressed the legislature and claimed that over 234,000 Georgians had benefited from HOPE at a cost of 291 million dollars (Miller, 1998). He stressed how much attention the program was getting nationwide and asked for more changes (Miller, 1998). He wanted to target the students who did not initially obtain HOPE and proposed reducing the requirement of two years in college with a “B” average to obtain HOPE to one year with a “B” average (Miller, 1998). This would give students who did not academically succeed in high school a chance to participate in the HOPE Scholarship if they worked hard enough their first year of college. The governor also pointed out in his speech that thanks to HOPE covering the costs of what would have come out of general funds, that the state has been able to increase education spending in other areas such as teacher pay raises and technology (Miller, 1998). The HOPE Scholarship did not only impact college tuition, but freed up spending for other needed areas in the educational field. He also pointed to the fact that Georgia, by 1997, had become the

fourth largest university system in the United States (Miller, 1998). The impact of the lottery for education was starting to show results within three years of its existence.

1998 was Governor Zell Miller's last year in office. This was his last chance to make the HOPE Scholarship an effective merit-based scholarship. 299,000 Georgians had been recipients of the HOPE Scholarship by the beginning of 1998 (Miller, 1998). Governor Miller at his "State of the State Address" introduced to the crowd the 300,000th recipient of the HOPE Scholarship to show what an impact the scholarship had made in such a short amount of time (Miller, 1998). The recipient had two other siblings and Governor Miller pointed out that receiving the HOPE Scholarship kept money in their pockets because they did not have to spend money on tuition or other expense of school (Miller, 1998). Governor Miller told the crowd by the end of the year over 500 million dollars would be used on HOPE Scholarships (Miller, 1998). Governor Miller's last year in office was spent ensuring the HOPE Scholarship was financially safe for the next governor and showcasing its results (Eby-Ebersole, 1999). He compared the creation of the HOPE Scholarship to Columbus setting sail for America and encouraged other states and eventually the United States Senate to create something similar in their prospective areas (Miller, 2003). He created one of the largest merit-based scholarships in the United States and the scholarship was the first nationwide to cover so many qualifying students (Hyatt, 1997). Many governors after Miller would face challenges continuing to fund the HOPE Scholarship and the program itself still faced many more changes. Zell Miller had accomplished his goal to create a lottery for education that would fund the largest merit-based scholarship in the United States (Eby-Ebersole, 1999).

Post Zell Miller HOPE Era to 2021

The HOPE Scholarship has been through many changes since Governor Miller left his position. In 1998, to protect HOPE the Georgia voters added a constitutional amendment to protect HOPE from being greatly changed for political reasons (Eby-Ebersole, 1999). Roy Barnes was elected governor in 1999 as Zell Miller entered his final year as governor, and he had made many campaign promises to keep HOPE secure (Bugler, Henry, & Rubenstein, 1999). In 1999, the Council for School Performance did an evaluation of the HOPE Scholarship. The document described how 358,000 students from Georgia received over \$658 million dollars in college money (Bugler, Henry, & Rubenstein, 1999). Some of the council's findings were very key to changes that the HOPE Scholarship would have to endure in the near future. Since 1993, the eligibility for HOPE for high school seniors went from 46.8% to 59.5% (Bugler, Henry, & Rubenstein, 1999). One of the great worries, when creating HOPE, was whether or not the lottery could continue to fund it fully (Miller, 1998). This evaluation of HOPE was an early sign that HOPE was a big success and that its funding requirements were going to grow (Bugler, Henry, & Rubenstein, 1999). The evaluation also pointed to the fact that fewer than 25% of HOPE Scholars kept their scholarships through all four years and that African American students were most likely to lose HOPE within two years (Bugler, Henry, & Rubenstein, 1999). Changes to HOPE were going to be needed if it was going to continue in the 21st Century.

The Council for School Performance's evaluation in 1999 of the HOPE Scholarship also had more significant data about the impact of the scholarship (Bugler, Henry, & Rubenstein, 1999). One of Governor Miller's goals was to keep students in Georgia' public and private universities and technical colleges (Miller, 1998). The report declared that since 1993, almost 1,500 students have enrolled in the University of Georgia institutions, which increase slightly the

percentage of first year in state students (Bugler, Henry, & Rubenstein, 1999). The report also explained that another impact of the HOPE Scholarship has been a 32.8% increase in African-American enrollment in college since the creation of the lottery (Bugler, Henry, & Rubenstein, 1999). In the first five years since the creation of the HOPE Scholarship, minority groups had outpaced white students in enrollment percentage gain at Georgia's most competitive institutions such as Georgia Tech and the University of Georgia (Bugler, Henry, & Rubenstein, 1999).

The 1999 Council for School Performance did find some negative consequences from the HOPE Scholarship. One very troubling aspect was that 75% of all eligible HOPE Scholars were losing HOPE before graduating (Bugler, Henry, & Rubenstein, 1999). Governor Miller, before he left office, wanted this addressed and changed the requirements of obtaining a "B" average to a select group of high school core classes and foreign language (Miller, 1998). Of the 75% who lost HOPE eligibility, over 40% of them left college without obtaining a degree (Bugler, Henry, & Rubenstein, 1999). Only six percent gained HOPE back after two years (Bugler, Henry, & Rubenstein, 1999). The different subgroups that lost HOPE were higher for minority students than white students (Bugler, Henry, & Rubenstein, 1999). Almost 60% of African American students lost HOPE during their first two years of college, 46% of Hispanic students, and 45% of white students (Bugler, Henry, & Rubenstein, 1999). University systems pointed to the idea that these students were enrolling in colleges unprepared for the amount and rigor of the coursework, and asked for public high schools to help address this problem (Eby-Ebersole, 1999).

In March 2003, the Georgia state legislature created a commission to research ways to keep the HOPE Scholarship viable and affordable under the lottery system. A growing number of high school graduates were enrolling in college thanks to being eligible for the HOPE Scholarship and the rising costs of a college education had the state government worried about

the lottery being able to sustain the priorities set for its revenues. One of the major issues was that by 2003 the lottery was spending all of its revenues on just the HOPE Scholarship and the Pre-K initiatives (Rubenstein, 2003). From the beginning of the lottery, these programs only made up a little over 60% of the revenue spending from the lottery (Eby-Ebersole, 1999). The first seven years of the lottery showed increase revenues and in 2003 the money started to stay consistent, but the cost of college increased (Rubenstein, 2003).

The 2003 HOPE Scholarship Joint Study Commission was charged with finding ways to make the lottery cost effective and to be able to fulfill the educational goals set forth by the Miller administration (Joint Study Commission Report, 2003). Of course, there were a lot of political discussions about what would and would not be supported when it came to changing HOPE funding. Several ideas were “trial ballooned” out to the public from the study to see if the ideas would be supported by the public and members of the state legislature. The most unpopular idea was proposed by the sitting governor at the time, Governor Sonny Perdue, to make a student’s SAT score tied to HOPE eligibility (Jacobson, 2003). Other ideas included not paying for textbooks, student fees, and possibly adding the income salary cap as a requirement (Jacobson, 2003). The goal of the commission was to find ideas that the state legislature could agree on because public polling data showed that 80% of the public supported the program so making drastic cuts would be viewed poorly by the voting public (Jacobson, 2003). Financial trouble was on the horizon for financing the HOPE Scholarship and economists were predicting that HOPE would need tax dollars to be fully funded by 2007 (Rubenstein, 2003).

The changes proposed by the HOPE Scholarship Joint Study Commission would not take effect until the graduating class of 2007 entered college that Fall (Georgia Student Finance Commission, 2007). The main change was how grade point average was calculated for HOPE

eligibility (Georgia Student Finance Commission, 2007). The commission found what they called errors in how schools calculated grade point averages (Georgia Student Finance Commission, 2007). Schools were not calculating Advanced Placement, International Baccalaureate, and Honors courses correctly and this calculation gave an advantage to certain students for HOPE eligibility (Georgia Student Finance Commission, 2007). Under the new provision, public and private schools would no longer configure a student's eligible grade point average, but instead would send their transcripts and the grading scale data to the Georgia Student Finance Commission (Georgia Student Finance Commission, 2007). All attempted courses would be included and the Georgia Student Finance Commission used an unweighted scale to determine eligibility (Georgia Student Finance Commission, 2007). The high schools were given a list of all students eligible before graduation. The schools used GAcollge411.org to submit all their students' data (Georgia Student Finance Commission, 2007). Students also would see a reduction in how much money they received for books and fees if their university changed their fees from 2004 (Georgia Student Finance Commission, 2007). These changes were the first of several steps by the legislature to reduce the reward amounts given by the HOPE Scholarship in the next 15 years in order to maintain the HOPE Scholarship's original intent.

The next major change came four years after the last change. Again, the state legislature was worried about a rising cost in college expenses and tuition that could have led to either a reduction in HOPE Scholarship benefits or a tax increase to make up the difference in the loss from lottery proceeds. From 2007 to 2011, lottery proceeds stabilized at between 3.4 billion dollars to 3.6 billion dollars with an average pay out to education from 846 to 883 million dollars (GSFC, 2021). Economists were warning the governor and legislature that if something was not done soon that the lottery would not be able to fund all of the commitments to education that

were required of it (Turner, 2011). The most expensive categories of the lottery for education were funding the HOPE Scholarship and funding the Pre-K programs across the state (Turner, 2011). Parents were starting to enroll their children into the lottery funded Pre-K programs and more school districts were starting Pre-K programs, which caused the need for more funding from the lottery to increase (Turner, 2011). The politicians were afraid that one of the most prominent merit-based scholarships in the nation was going to run out of money. The Democratic Party in the Georgia state legislature suggested bringing back an income maximum of \$140,000 per family for eligibility claiming that 94% of Georgians would still receive the scholarship that are eligible (Turner, 2011). The Republican bill would give all who qualify 90% of the tuition benefit unless you had a 3.7 grade point average and at least a 1200 on the SAT (Turner, 2011). As the year 2011 continued, it was obvious that cuts were coming to the HOPE Scholarship recipients in some form, but the cuts would not start to take place until 2015.

In 2015, the house and senate of the Georgia state legislature came out with reports about the changes to the HOPE Scholarship (House Study Committee Report, 2015). The changes made in 2015 have been the most significant reduction in HOPE Scholarship awards since its induction and has been the last recent changes in funding the program as of 2021. One of the items that were dropped, starting in 2015, was paying for books and fees for students (House Study Committee Report, 2015). The HOPE Scholarship was also broken into several parts. Starting in 2015, the HOPE Scholarship was broken into two parts. One part was what students referred to as HOPE “Lite,” which required a 3.0 grade point average under rigorous core requirements and tuition assistance would be based off of lottery revenues (Georgia Student Finance Commission, 2015). The funding for books and fees was also fully retracted (Georgia Student Finance Commission, 2015). The other section of HOPE was the Zell Miller

Scholarship. The Zell Miller Scholarship would pay full tuition with a 3.7 grade point average and SAT score of 1200 reading and math combined or an ACT score of 26 or higher (Georgia Student Finance Commission, 2015). These changes drastically reduced those eligible for the HOPE Scholarship (Butrymowicz & Kolodner, 2017).

The new changes to the HOPE Scholarship were met with criticism from the media and from the public for cutting certain groups of students out (Butrymowicz & Kolodner, 2017). A criticism of the changes was that the reserve fund for HOPE had not been touched and was over 500 million dollars that could be used to supplement some of the deficits in lottery revenues (Butrymowicz & Kolodner, 2017). By 2015, the changes took place, the HOPE Scholarship had become the most popular merit scholarship in the United States and countless Georgians were counting on it for a college education. Families saw the rising cost of a college education as a financial threat that hindered their children from going to school. The average cost, per year, of a college education in Georgia in 2015 was near \$15,000 a year, which was a 77% increase from 2006 (Butrymowicz & Kolodner, 2017). Members of the Georgia state legislature pointed to the fact that the GLC was supposed to give the state 35% of proceeds from education, but had not done that since 1997 (Butrymowicz & Kolodner, 2017). On average the GLC gave the state about 25-28% of its revenues (Butrymowicz & Kolodner, 2017). The governor at the time, Nathan Deal, was worried about fulfilling the promises of HOPE in the event of another recession (Butrymowicz & Kolodner, 2017).

The Georgia state legislature was fearful that the Pre-K funding and HOPE Scholarship funding were in danger and reported to the public that the Georgia Lottery had allowed 1.7 million Georgians go to college and 1.4 million 4-year-olds to enter a Pre-K program and the only way to continue these programs was to reduce costs or financial assistance (Senate Study

Committee, 2015). The fear was a reduction in HOPE funding of over 100 million dollars between the 2015-2016 school years (Butrymowicz & Kolodner, 2017). The entire Georgia state legislature looked at several different ways to continue funding HOPE fully. Some of the ideas were to allow horse track gambling and casinos (Thornton, 2021). Both of these proposals would require another constitutional amendment and were not popular with Georgia voters (Thornton, 2021). This would have also required over two-thirds of each chamber to approve the amendment and this legislation does not have the support even in 2021 (Thornton, 2021). In 2020, the Georgia Lottery made almost five billion dollars and 1.2 billion went to education with 940 million going to the HOPE Scholarship (GALottery.com, 2021). One of the major issues going forward, from the literature that has been examined within the last decade, is that HOPE cannot continue to pay for the benefits it had promised from its inception to the most qualifying Georgians and a reduction in benefits may continue to be needed in the future.

Merit-Based Scholarships in the United States

Merit scholarships have been used by multiple states to enhance the education of qualified students for decades. The HOPE Scholarship of Georgia was not the first merit-based scholarship in the United States, but put Georgia on the map as the number one state for merit scholarship funding (Hyatt, 1997). Multiple amounts of research have been conducted on merit scholarships and whether or not they advance the education of students. Over nine states have merit scholarship programs for state residents that are similar in design to that of Georgia's HOPE Scholarship (Lohman, 2000). Merit scholarships are based on a student's performance while in high school. Some merit-based scholarships examine grade point average and others include SAT or ACT scores. Some legislatures have called for merit scholarships to be based off of financial need, but the Georgia HOPE Scholarship is not one of them (Miller, 1998).

California, Louisiana, Missouri, and South Carolina are examples of states who fund their merit-based scholarships from general state revenues while Georgia, Florida, Kentucky, Tennessee, and New Mexico all use state lotteries (Lohman, 2000). Michigan uses a completely different system than any other state. Michigan uses a trust fund from their tobacco lawsuit settlement (Lohman, 2000).

California has a similar merit-based scholarship program called the Governor's Scholars Program (Lohman, 2000). This unique merit-based scholarship is funded by state revenue and awards \$1,000 to each student for every year that they achieve high scores on statewide achievement test in reading and mathematics (Lohman, 2000). The state uses the Stanford Achievement Test 9th edition to evaluate these scores, and a student must either be in the top 5% in their grade level statewide or top 10% in their grade level in their school to receive this money (Lohman, 2000). Like Georgia, California requires that you attend public school for at least one year to be eligible for this merit scholarship (Lohman, 2000). In 2000, California expected over 100,000 students to be eligible costing over \$100 million dollars (Lohman, 2000).

The other type of merit-based scholarship California offers is called the Governor's Distinguished Math and Science Scholars Program (Lohman, 2000). This program applies to 9th, 10th, and 12th graders who achieve high on Advanced Placement exams in science and math (Lohman, 2000). The Governor's Distinguished Math and Science Program awards \$2,500 a year for every student who achieves any of the following: score a five on both regular AP calculus and one of the three AP science exams, a four or five on the higher-level AP calculus and physical science exams or a six on both the Golden State math exams and one of the four Golden State science exams (Lohman, 2000). The cost of this merit-based scholarship is around six million dollars a year and on average about 2,600 students qualify for it every year (Lohman,

2000). The state of California does something different than the other states with their merit-based scholarships. California awards the money as students journey through their high school experience and puts the money in an account for the student to use later (Lohman, 2000).

Kentucky, just like Georgia, uses a lottery system to fund their merit-based scholarships. The Kentucky Educational Excellence Scholarship awards students with various amounts of money for college depending on their high school grades and their ACT scores (Lohman, 2000). The scholarship ranges \$125 to \$500 dollars for each year of college and up to \$500 to \$2,000 for four years (Lohman, 2000). There is also a supplement available for high ACT scores ranging from \$36 to \$500 dollars with a maximum award balance of \$2,500 dollars a year (Lohman, 2000). Students must score at least a 15 on the ACT to be eligible for the benefits (Lohman, 2000). Each student receives an amount of award based mainly off their grade point average which if a student has a 2.5 grade point average, they start qualifying for the merit-based scholarship (Lohman, 2000).

The Louisiana Tuition (Taylor as of 2008) Opportunity Program for Students [TOPS] is a general revenue funded merit-based scholarship (Lohman, 2000). The student, just like in Georgia, must be a resident and attend a Louisiana high school and have a minimum grade point average of 2.5 to qualify for the award (Lohman, 2000). Louisiana had some of the same financial issues with funding their merit-based scholarship that Georgia did going into the 21st century. In 2003, Louisiana changed their requirements so only certain more rigorous core classes would count towards their grade point average (Lohman, 2000). TOPS has three different levels of awards, which includes the Opportunity Award, Performance Award, and the Honors Award (Lohman, 2000). Each award required a higher-grade point average and ACT score to obtain, which is very close to the way HOPE is designed as of 2021 in Georgia

(Lohman, 2000). Two of the key requirements of using the award were the scholarship had to be used at a Louisiana public or independent college and the award had to be used starting the first semester following the first anniversary of the recipient's high school graduation (Lohman, 2000).

The State of Michigan has the Michigan Merit Award Program, which applies to students in state who achieve high levels on state standardized tests in math, reading, science, and writing (Lohman, 2000). This program is not funded through a lottery system like Georgia, but with a trust from tobacco lawsuits (Lohman, 2000). The class of 2000 was the first class of students to be eligible for this incentive for achievement (Lohman, 2000). To receive the award students must accomplish either scoring in the 75th percentile on the ACT or SAT or achieve a qualifying score on the ACT Work Keys job skills assessment (Lohman, 2000). The Michigan Merit Award Program awarded \$2,500 to deserving students if they graduated between the years of 2000-2006 (Michigan State Government, 2021). This scholarship was replaced with the Michigan Promise Scholarship in 2007 but is discontinued as of 2021 due to a lack of funding (www.michigan.gov, 2021).

Missouri uses state revenues to award deserving students merit scholarships (Lohman, 2000). Missouri has one of the longest surviving state-based merit scholarships in the nation. The Missouri Higher Education Academic Scholarship program began in 1986 and had the same goal as Georgia's HOPE Scholarship, which was to award deserving students and keep them at instate institutions (Lohman, 2000). The award amount has varied over the years due to budget restraints but as of 2021, a student could receive \$2,400 a semester to attend an instate institution for a four-year degree (dhewd.mo.gov, 2021). The requirements for receiving this merit-based scholarship are that you must be a Missouri resident, attend an instate post-secondary school, and

have an ACT or SAT score in the top three percent of Missouri high school seniors (Lohman, 2000). The Missouri legislature added another way to qualify for the merit-based award by allowing students who rank in the top four or five percentiles to receive the award also (dhewd.mo.gov, 2021). One of Missouri's greatest challenges with their merit-based scholarship is that revenues from year to year decide the award amount and poor economic times could cause students who qualify to receive less (Lohman, 2000).

New Mexico uses a lottery system to fund their merit scholarship program called The New Mexico Lottery Success Scholarship (Lohman, 2000). The New Mexico Lottery system was directly based on Georgia's HOPE Scholarship and was put into effect in 1996 after HOPE was established in Georgia (New Mexico Lottery, 2021). The New Mexico Lottery has provided over 130,000 residents with scholarships and over 899 million dollars in education funds (New Mexico Lottery, 2021). The initial scholarship offered up to 100% of tuition costs at a New Mexico public college or university to New Mexico state residents who graduated from either a public or private high school in-state or obtained a GED (Lohman, 2000). New Mexico set up their scholarship program differently than Georgia's HOPE Scholarship. HOPE is obtained according to your high school performance. The New Mexico Lottery Success Scholarship is awarded after a student takes at least 15 semester hours of college courses and has a 2.5 GPA or higher (Lohman, 2000). This greatly limits who can obtain the merit scholarship because a student must finance their first semester of school without support (Lohman, 2000). The aid begins in their second semester of college (NMHED, 2021). The award also does not necessarily pay 100% of tuition like it was originally designed due to budget restraints (NMHED, 2021). The amount of the award depends on the type of institution the student attends and the updates take effect every June 1 (NMHED, 2021).

The South Carolina LIFE Scholarship or the Legislative Incentive for Future Excellence Scholarship is a merit-based scholarship funded by general state revenues (Lohman, 2000). The scholarship was created in 1998, after the founding of Georgia's HOPE Scholarship, to award South Carolina residents with deserving grades in the same concept of the HOPE Scholarship (SCCHE, 2021). Students must be a South Carolina resident and graduate high school with at least a 3.0 GPA and would have received up to \$3,000 a year in merit-based scholarship funding at the time (Lohman, 2000). The graduating class of 2000 had an additional requirement of obtaining a combined SAT score of 1050 or a combined ACT score of 22 (Lohman, 2000). As budget restraints have tightened, the requirements for this merit-based scholarship have changed. As of 2021, the requirements have increased and a student must obtain at least two of the following requirements: a combined SAT score of 1100 or an ACT combined score of 24, a 3.0 GPA in certain core classes in high school, or have graduated in the top 30% of their high school graduating class (SCCHE, 2021). LIFE does offer up to \$4,700 in tuition assistance plus \$300 in book allowances a year to qualifying students as of 2021 (SCCHE, 2021). In response to only a few percent of South Carolina students becoming eligible for LIFE, the South Carolina legislature introduced the HOPE Scholarship for students who could not meet the qualifications of LIFE (SCCHE, 2021). This merit-based scholarship only provided the student with an award of \$2,800 a year and at the end of year one, if the student had a 3.0 GPA and at least 30 semester hours complete they could receive the LIFE Scholarship (SCCHE, 2021).

The Florida Lottery had the biggest influence on Governor Zell Miller developing the HOPE Scholarship by using lottery proceeds to fund education (Miller, 1998). The Florida Lottery first appeared in 1988 and Florida's Bright Futures Program began after the implementation of Georgia's HOPE Scholarship in 1997 (Florida Student Financial Aid, 2021).

Six cents of each lottery dollar are supposed to be designated to funding the Bright Futures Program (Lohman, 2000). As of 2021, the Bright Futures Program had four different awards that could be received for educational purposes. The awards offered were Florida Academic Scholars, Florida Medallion Scholars, Gold Seal Vocational Scholars, and the Gold Seal CAPE Scholars (Florida Student Financial Aid, 2021). The Florida Academic Scholars Award, Florida Gold Seal Vocational Scholars award, and the Florida Merit Scholars Award were the original three merit-based scholarships offered (Lohman, 2000). To receive the Florida Academic Scholars Award, a student must graduate high school with a weighted 3.5 GPA, 75 hours of community service, and a combined SAT score of 1270 or a 28 on the ACT (Lohman, 2000). The Florida Academic Scholars would cover 100% of tuition and fees originally (Lohman, 2000). The Florida Merit Scholars Award covered 75% of tuition and fees and required a student have a 3.0 GPA and a combined SAT score of 970 or ACT score of 20 (Lohman, 2000). The Florida Gold Seal Vocational Scholars Award required a student to have a weighted GPA of 3.0, an unweighted GPA of 3.5 in a minimum of three vocational credits in one vocational program, and the student had to score at certain levels on the College Placement Test, SAT, or the ACT (Lohman, 2000). The Gold Seal Vocational Scholars Award paid for 75% of tuition and for some fees (Lohman, 2000).

Today the Florida Lottery gives over one billion dollars a year in educational funds to the state (Florida Student Financial Aid, 2021). The Florida Bright Futures Program has had to change their qualifications just like Georgia did in order to ensure the revenue produced by the lottery could keep up with rising costs of a college education. The Florida Lottery has assisted, as of 2021, over 880,000 students with merit-based scholarships since the creation of the Bright Futures Program (Florida Lottery, 2021). The qualifications for the merit-based scholarships had

to change with the economic times just like HOPE had to in Georgia. Florida now requires the following scores for specific awards: ACT score of 29 or SAT score of 1330 for the Florida Academic Scholars Award and ACT score of 25 or SAT score of 1210 for the Florida Medallion Scholars Award (Florida Student Financial Aid, 2021). Both of these awards require between 75-100 community service hours also (Florida Student Financial Aid, 2021). The award amount for these two awards has not changed as of 2021, only the requirements to receive them (Florida Student Financial Aid, 2021).

Researchers have spent a great deal of time and effort exploring whether or not merit-based scholarships are effective and what role merit-based scholarships have on college choice. An extensive study was completed by several researchers on Florida's Bright Futures Program, which has been criticized by many media outlets for changing the qualifications for the awards to the detriment of minority students in the state (Zhang, Hu, Sun, & Pu, 2016). A dozen states started implementing merit-based scholarships after Georgia created the HOPE Scholarship and all of these states used different strategies to fund their programs (Zhang, Hu, Sun, & Pu, 2016). The Bright Futures Program created several different levels of consequences for college bound students. The top two awards offered 75-100% of tuition costs to be paid and this caused students to retake the ACT and SAT several times in order to have a better chance of receiving the top merit-based scholarship Florida Academic Scholars (Zhang, Hu, Sun, & Pu, 2016). Students who received 100% tuition assistance had an on-average seven percent higher rate of choosing an in-state college than going out of state (Zhang, Hu, Sun, & Pu, 2016). Those students who received the award at 75% tuition assistance had a small, but insignificant increased chance of staying in state for their college choice (Zhang, Hu, Sun, & Pu, 2016). In their study, the researchers also discovered that a higher number of students were qualifying for

merit-based scholarships through the ACT instead of the SAT and that this should impact policy decision making on establishing future qualifications for both awards (Zhang, Hu, Sun, & Pu, 2016). A negative impact of the Bright Futures Program is that the award itself has changed the choice of colleges for these students and may not serve their educational needs for the profession they want to aspire to (Zhang, Hu, Sun, & Pu, 2016). Students are more worried about funding their education than the benefits of the school they should attend (Zhang, Hu, Sun, & Pu, 2016). The researchers also discovered a large portion of students who were losing eligibility for the merit-based scholarship early in their college career and many of them were not graduating from college (Zhang, Hu, Sun, & Pu, 2016).

Criticism of the HOPE Scholarship

Georgia's HOPE Scholarship has several studies critiquing the impact the scholarship has made on college enrollments, intuitional impact on universities, and the impact of graduating from college. The criticism of the HOPE Scholarship is also directed at who is paying for the program versus who it benefits (Rubenstein & Scafidi, 2002). The legislative changes to the HOPE Scholarship and how the state has changed how to qualify for the merit-based scholarship has also warranted criticisms (Rutner, 2012). The literature on these criticisms of the HOPE Scholarship is extensive and several studies have brought attention to the Georgia state legislature in hopes of changing the HOPE Scholarship to fix these issues.

One of the main goals of the HOPE Scholarship was to increase attendance at Georgia's universities and colleges by giving students an incentive to stay in state instead of going to college out of state (Miller, 1998). Governor Miller hoped that the scholarship would dramatically increase attendance at Georgia's post-secondary schools and cause an economic gain for the state (Miller, 1998). In a comparison between the years of 1988-1997, HOPE is

given credit of increasing enrollment at Georgia universities of 5.9% or about 2,889 students per year (Cornwell, Mustard, & Sridhar, 2006). There also was a significant increase among African American students in historically black colleges and universities in Georgia after the implementation of HOPE of almost 2,000 students a year (Cornwell, Mustard, & Sridhar, 2006). In the first five years of the HOPE Scholarship's existence, eligibility for the award rose from on average 29,000 students a year to 45,000 by year six (Cornwell, Mustard, & Sridhar, 2006). Data collected in the same time period also indicated that about 560 students a year stayed in Georgia instead of going out of state for school (Cornwell, Mustard, & Sridhar, 2006). A report written in 2000 explained that data collected indicated that HOPE Scholarship freshmen recipients increased college attendance by 8% in the 18–19-year-old category (Dynarski, 2000).

Many universities and colleges in Georgia were afraid that HOPE would negatively impact their funding from the state legislature and took measures to increase their financial budgets due to HOPE (Long, 2004). The fear was that the legislature was going to divert existing funds because the HOPE Scholarship was proving funding already for tuition costs (Long, 2004). Research data collected in 2003 revealed that universities who have a large portion of HOPE scholars actually received a 6.6% increase in funding than before HOPE (Long 2004). Since colleges and universities were seeing an influx of freshmen on their campus due to the HOPE Scholarship, many universities with a high percentage of HOPE scholars raised their room and board fees (Long, 2004). Private colleges in Georgia increased their tuition fees while lowering their financial assistance which equated to recouping 30 cents on the dollar for every HOPE dollar they received (Long, 2004).

When the HOPE Scholarship was designed by Governor Miller and his team, the initial goal was to help the lower economic classes get a merit-based scholarship for college and make a

better life for their families (Hyatt, 1997). Researchers in the last two decades have analyzed the HOPE Scholarship to examine if its initial goal was being met. A study conducted in 2002 found that white students were more likely to qualify for the HOPE Scholarship than African American students (McCrary & Pavlak, 2002). A study in 2005 contradicted the previously mentioned study and found that the ratio difference between white students and African Americans was not as significant as McCrary and Pavlak mentioned (Campbell & Finney, 2005). In 2002, a report brought up the fact that the vast majority of participants that played the lottery were lower class non-white households and that they were receiving a significantly lower benefit from the scholarship from what they were spending on lottery games (Rubenstein & Scafidi, 2002).

Grade inflation at public high schools was also a worry for the HOPE Scholarship (Rubenstein & Scafidi, 2002). The Joint Study Commission in 2004 found over 26 different grading scales at high schools across Georgia and was concerned about grade inflation (HSJSC Report, 2004). The Commission was also concerned that schools were not reporting a student's lowest grade in a class and this would alter eligibility for HOPE (HSJSC Report, 2004). Campbell and Finney (2005) also discovered that the vast majority of HOPE recipients were at high achieving schools in Georgia and that the more rural, poorer schools made up less of the total HOPE eligible percentage.

Another issue with the HOPE Scholarship that has been the subject of extensive research is on who actually benefits from the scholarship most and who is funding the scholarship by playing the lottery. The justification for legalizing a lottery in Georgia was to fund education (Miller, 1998). As time has passed since HOPE's conception, the state legislature has had to make substantial changes to the qualifications and benefits for HOPE causing a reduction in tuition assistance and almost zero dollars on infrastructure support for schools as originally

promised (Rubenstein & Scafidi, 2002). Data collected in 2002 revealed about 33% of Georgia residents played the lottery and spent on average about \$250 a year on games (Rubenstein & Scafidi, 2002). Researchers have been challenged with trying to compare the chance of winning versus the expenditure of each family on the lottery because the chance of winning differed from game to game, but most of the lower income spending has been on instant games (Rubenstein & Scafidi, 2002). Researchers also discovered that the major number of expenditures on lottery games has been in the Atlanta metropolitan area (Rubenstein & Scafidi, 2002). The Atlanta metropolitan area tends to be made up of lower income families and has a large minority population (Rubenstein & Scafidi, 2002). The HOPE Scholarship and other lottery funded education expenditures are not based on the percent of an area that play the lottery, but instead designated by the qualifications of the HOPE Scholarship and by the state legislature appropriations and education committees (Miller, 1998). The areas that make up the largest portion of lottery participants are not receiving an equal payout in benefits in lottery education funds (Rubenstein & Scafidi, 2002). Consistent research data up to 2021 labels the Georgia Lottery for Education as regressive and affecting lower income families the most without a significant or proportional share of the education benefits (Rubenstein & Scafidi, 2002).

With the HOPE Scholarship's benefits being greatly reduced in the last two decades, a lot more research and media criticism of the HOPE Scholarship has been published. Almost every state that has created a broad qualification-based merit scholarship has had to make drastic changes to meet their promises. A 2012 media article by Dilonardo brought up several flaws with the changes made to the HOPE Scholarship and warned about potential future funding issues. The Zell Miller Scholarship, which required a student in 2012 to have a high school GPA of 3.7 and a combined SAT score of 1200, paid all of an eligible student's tuition as long as the

student kept at least a 3.3 college GPA (Dilonardo, 2012). The program proved to be more costly than expected since the vast majority of Zell Miller Scholarship recipients chose to enroll at the University of Georgia and Georgia Tech, which are extremely expensive schools (Dilonardo, 2012). Another troubling aspect in 2012 was that almost 100,000 more students became eligible for HOPE than ten years before and lottery proceeds had declined by one percent (Dilonardo, 2012). In 2010, the Student Finance Commission had to dip into the reserve fund and warned that if the economy and lottery proceeds continued as is the reserve fund would be depleted by 2013 (Dilonardo, 2012). In early 2012, a democratic proposal of bringing the family income cap back was rejected by the state legislature (Dilonardo, 2012). The danger for families planning for their kids to go to college in 2012 was that future students would not know exactly how much HOPE would cover because it would depend on lottery revenues (Dilonardo, 2012). One journalist declared that the HOPE Scholarship was well intended, but has now been financially broken (Rutner, 2012).

Even though the HOPE Scholarship has helped more than 1.8 million students receive merit-based scholarship money, many students have lost HOPE in the first two years of their college education and many of those dropped out of school all together (gsfc.georgia.gov, 2021). Minority students have been the largest percentage of students who have lost the HOPE Scholarship in the first year or two of college (Reardon, 2013). Data collected in 2011 revealed that over 70% of HOPE Scholarship recipients did not retain the scholarship through all four years (GSFC, 2015). In the class of 1995, almost two thirds of HOPE Scholarship recipients lost their scholarship before receiving their four-year degree and more than half lost the scholarship after their first year (Rubenstein, 2003). In comparison with non-HOPE Scholarship students,

HOPE Scholars have a better chance of graduating with a four-year degree and having a better GPA than non-HOPE scholars in college (Henry, Rubenstein, & Bugler, 2004).

As of 2021, the HOPE Scholarship has funded over 1.8 million scholarships and has spent over 10 billion dollars in aid for merit-based scholarships (gsfc.georgia.gov, 2021). The reserve for the HOPE Scholarship has rebounded since 2012 and now has \$1.3 billion dollars (gbpi.org, 2021). For fiscal year 2022, 903 million dollars has been put to the side to fund the HOPE Scholarship, but that does not include a tuition benefit increase from the previous year (gbpi.org, 2021). The HOPE Scholarship is one of the most popular incentives Georgia offers and most parents of students can tell you what it is and how to become eligible for its benefits (Rubenstein, 2003). Almost a dozen states have created “HOPE” like scholarships since its induction and Tennessee even calls their scholarship the HOPE Scholarship (Trant, Crabtree, Ciancio, Hart, Watson, & Williams, 2015). The problems that the HOPE Scholarship faces are the same problems that all states are having and that is having the revenue to support the growing demand for the merit-based scholarship (Turner, 2011).

Summary

The literature review discussed how HOPE was created, history of merit-based scholarships, the positive and negative effects of lotteries, and how HOPE has changed since its inception. The literature review pointed to the fact that more information was needed to explain the complete story of the HOPE Scholarship and its impact on post-secondary education. The goal of this study was to design research questions from the literature review and give a full account of the impact of the HOPE Scholarship on post-secondary education and how the changes made to HOPE have changed over time by policies enacted by the Georgia State Legislature.

CHAPTER III: METHODS

The purpose of this section is to explain the research design and data collection procedures (Creswell, 2012). The HOPE Scholarship has had a significant impact on education in Georgia and a clear, precise study is necessary to analyze whether this impact has influenced post-secondary education (Rubenstein, 2003). The goal of the current research design is to establish protocols for deriving results that are credible, transferable, dependable, and ethical (Creswell, 2012). The HOPE Scholarship is not the same as it was when it was created by the state legislature (GSFC, 2021). A document analysis of the journey of the HOPE Scholarship was necessary to further understand its impact and to help lead to further research and possible reform (Bowen, 2009).

Research Questions

The current research study was established to answer the following research questions:

RQ 1: What are the legislative policy changes enacted by the Georgia State Legislature that have impacted eligibility for the HOPE Scholarship?

RQ 2: How have the legislative policies enacted by the Georgia State Legislature changed the HOPE Scholarship's impact on post-secondary education in Georgia?

Research Design

This study used a bounded case study in order to explore and explain the history of the HOPE Scholarship. A case study is a detailed exploration from multiple perspectives of a specific phenomenon (Bloomberg & Volpe, 2019). This dissertation was written to tell the narrative of the HOPE Scholarship by analyzing its history and the multiple changes it has went through in the last 30 years (Creswell, 2012). The current study was a historical case study with a focus on the history and political reforming of the HOPE Scholarship through a document

analysis approach (Bowen, 2009). In order to accurately write a narrative, the story of the HOPE Scholarship through document analysis was necessary because documents were available to the researcher (Bowen, 2009). A qualitative design also gave the researcher flexibility to analyze documents through textual evidence in order to explain the history of the largest merit-based scholarship in the United States (Creswell, 2012).

Based on the literature review, there is limited data that explains and explores the history and political reforms of the HOPE Scholarship from its inception to its present-day form. The current study's purpose was to explore and examine the founding of the HOPE Scholarship and to examine the political reforms it has endured in the last 30 years. In order to write a narrative of the creation and reform of the HOPE Scholarship, a research design must focus on the factors that mattered most towards founding, re-designing, and what impact the scholarship had on education in Georgia (Creswell, 2012). This qualitative study also needed to recognize in its analysis the fact that multiple policy makers have made a lasting impact on the HOPE Scholarship and that their narrative must also be analyzed (Creswell, 2012).

Case studies are likely to be more successful if multiple sources are examined to draw conclusions from such as speeches, studies on the impact of the HOPE Scholarship, and findings by government agencies (Becker et al., 2021). Reflexivity is also essential in case studies because the documents may open up the research to more questions about the phenomenon (Becker et al., 2021). The data collection process and data analysis procedures will help produce an accurate account that will attempt to provide answers for the research questions (Creswell, 2012).

The strength of a case study is that these types of studies allow the research to be flexible and emphasize the content (Becker et al., 2021). Case studies allow the researcher to change

direction or add to their study as the data is collected and analyzed (Becker et al., 2021). Case studies also allow the researcher to focus on thick description with a deep analysis on one or multiple cases (Becker et al., 2021). The emphasis a case study allows can build a bridge between abstract research and concrete practice, which can make the study more reliable and add to its validity (Becker et al., 2021). The current study plans to take the abstract idea that the HOPE Scholarship made significant impact on education and Georgia and explore the concrete details mentioned in archival documents to answer the research questions by analyzing the documents during the coding process (Creswell, 2012).

Case studies also have several weaknesses that can cause validity and reliability to be questioned (Creswell, 2012). For example, case studies are considered a weak form of research by several researchers because of their subjectivity and personal interpretation (Yin, 1989). The current study will use protocols while collecting and analyzing data in order to eliminate and limit subjectivity (Creswell, 2012). Another criticism of case studies is the personal bias of the researcher (Creswell, 2012). The current study used coding techniques that helped create themes and categories for analysis in order to allow the documents to address the research questions instead of the researcher inferring textual evidence alone (Becker et al., 2021).

Description of Documents

Since the HOPE Scholarship was founded, over 1.8 million students have benefited from its tuition assistance program (GSFC, 2021). The HOPE Scholarship was the idea of Governor Zell Miller in 1992, and the Lottery for Education Act of 1992 allowed voters to approve a state level constitutional amendment to allow a lottery to fund education in Georgia (Hyatt, 1997). The HOPE Scholarship has not only affected millions of Georgians, but has also been changed and reformed by the hands of countless others in the state government (GSFC, 2021). The most

accurate method to describe the history and impact of the HOPE Scholarship is through a historical case study where the participants are described through the historical archival documents they crafted and designed (Bloomberg & Volpe, 2019). Through a document content analysis, the participants' stories of their impact can be examined, which will help fill in the gaps left behind by a lack of literature on the development and evolution of the HOPE Scholarship throughout the last 30 years (Hsieh & Shannon, 2005).

Participants for the current research study, which are archival documents, were chosen by using purposive sampling (Creswell, 2012). To accurately write about the history and political reforms of the HOPE Scholarship, documents had to be selected with a purpose in order to answer each research question due to the documents having an impact on its creation, design, and reform over the last three decades (Miles & Huberman, 1994). Purposive sampling was used by the researcher to choose which documents belong in the current study based off of each document's ability to add to the telling of the HOPE Scholarship's history and policy maker's documents that made changes to the way the HOPE Scholarship functions (Lincoln & Guba, 1985). Purposive sampling should always include participants that can add to the current body of research to help policy makers understand the HOPE Scholarship's history and impact on education in Georgia (Creswell, 2012). Purposive sampling is used in content analysis instead of random sample in order to bring better insight to a phenomenon (Bloomberg & Volpe, 2019). The documents that were chosen are significant because they were written during the pivotal years of the life span of the HOPE Scholarship.

Selection of the Documents

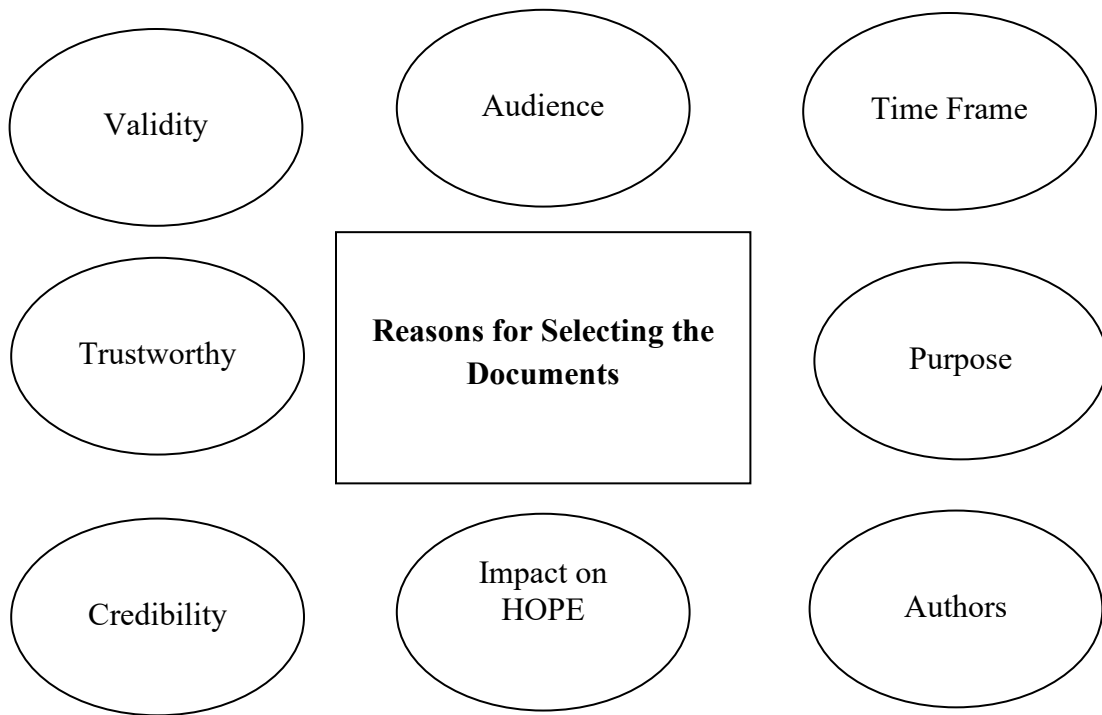
Each document was selected using the following criteria in relation to the HOPE Scholarship: the audience the document addressed, the time frame in which the document was

written, the authors of the document, the purpose of the document, and the impact the document had on the HOPE Scholarship (Rapley, 2007). Each document was selected based off the concept that the document could help answer a research question with valid, trustworthy, and credible data (Creswell, 2012). The documents range in age from 1993, when HOPE was created, to 2019, which was the last year the HOPE Scholarship and its funding issues were evaluated (GSFC, 2021). There is also a document from 2021 that describes the eligibility for the HOPE Scholarship in detail in order to add to the body of research of what the HOPE Scholarship was when it was created to where it stands as of 2021 (GSFC, 2021).

The current study's intent was to tell the story of the HOPE Scholarship through the meanings and finding in the documents chosen using purposive sampling (Bloomberg & Volpe, 2019). The findings from these documents could add to the limited research that has been completed on the HOPE Scholarship and accurately portray how HOPE has impacted education in Georgia (Bloomberg & Volpe, 2019). To achieve the goal of the current study, data was collected directly from the chosen documents to provide a thick description of the journey of the HOPE Scholarship (Bloomberg & Volpe, 2019). Thick description was necessary in the current research study in order to thoroughly describe the setting and impact of how each of the chosen participants played on the HOPE Scholarship (Bloomberg & Volpe, 2019).

Figure 1

Selection of Documents



Instrumentation

Since the current research study is a historical case study using a qualitative design, the researcher will use document content analysis as the main research instrument to gather valid, reliable data (Miles, Huberman, & Saldana, 2020). The researcher was the primary source to select which documents would be analyzed for document content analysis through purposive sampling (Bloomberg & Volpe, 2019). Each document was assessed about whether or not it could contribute to the current research study by the following criteria: the purpose of the document, the impact the document made on the HOPE Scholarship, the key points of the document, and what the document is saying about the HOPE Scholarship (Bloomberg & Volpe, 2019).

Purposive sampling was used for the sampling design to choose the type of document for analysis in order to use archival data for instrumentation (Creswell, 2012). Purposive sampling is used by researchers to specifically choose items of data that the researcher believes can contribute to studying a phenomenon (Creswell, 2012). Purposive sampling was also helpful to determine which documents were relative due to the time frame in which they were written (Creswell, 2012). Only documents that related to the HOPE Scholarship in reference to impact, political reform, or its history were selected by purposive sampling (Creswell, 2012).

Archival documents were the actual instrumentation in this study (Creswell, 2012). Archival documents provided the historical perspective and gave insight to the impact of the HOPE Scholarship in public education over time (Bowen, 2009). The archival data was chosen from the time period from the HOPE Scholarship's inception to 2021 (Creswell, 2012). The archival documents were coded using multiple coding schemes and analyzed for textual evidence (Bloomberg & Volpe, 2019). The current research study used running records as an instrumentation of collecting data (Webb, Campbell, Schwartz, & Sechrest, 2000). These archival documents included documents created by governmental agencies including the Georgia Student Finance Commission, government documents created by the state legislature, and university systems that have analyzed the impact and cost of the HOPE Scholarship (Webb, Campbell, Schwartz, & Sechrest, 2000).

Ethical Assurances

The researcher conducted this study in an ethical way by abiding by researched based protocols and establishing protocols to ensure the results are accurate, credible, and dependable (Creswell, 2012). All archival documents are available to the public so transparency of where the data comes from is accessible to anyone (Creswell, 2012). Multiple steps were taken to

ensure that the intellectual property of the authors of the documents were protected and treated in a fair manner (Creswell, 2012). Permission to access and use documents adhered to the standards of the Columbus State International Review Board.

Confidentiality

Since the data collected in the current study are archival documents, there was no issue of confidentiality since focus groups, surveys, or interviews were not being completed (Creswell, 2012). All of the documents were obtained using Galileo provided by Columbus State University and the Georgia Student Finance Commission website. The documents will be shredded after the study has ended to protect any confidentiality issues (Creswell, 2012).

Beneficence

Beneficence is the idea of treating others fairly through moral obligation (Kinsinger, 2009). The researcher will ensure that each document is treated fairly and is analyzed according to the standards set by traditional document analysis standards from previous researchers (Bowen, 2009). Each document was analyzed using a coding system and textual evidence will be cited to prove inference (Saldana, 2016). No human subjects are being used for the current study and the current study will rely on archival data for content analysis (Bowen, 2009).

Researcher's Role

The role of the researcher was to explore and describe the history of the HOPE Scholarship and to explain the changes that it has endured within the last 30 years (Creswell, 2012). The researcher conducted the current study in an ethical manner. The researcher provided an introduction, literature review, and a methods section to the dissertation proposal (Bloomberg & Volpe, 2019). The researcher was also tasked with ensuring the data that was presented was valid, dependable, and credible to ensure that the research questions are reliably

answered (Bloomberg & Volpe, 2019). The researcher also used an appropriate process to reduce possible bias in data collection and analysis phases (Bloomberg & Volpe, 2019).

Researcher as Instrument

The researcher collected, analyzed, and interpreted data through a document content analysis method to answer the research questions (Creswell, 2012). “The researcher strives to describe the meaning of the findings from the perspective of the research participants, and to achieve this goal, data are gathered directly from the participants” (Bloomberg & Volpe, 2019, p. 46). The researcher must use the four pillars of qualitative research, which includes criticality, collaborating, maintaining rigor, and reflexivity (Ravitch & Carl, 2016).

The researcher critically examined the issues dealing with the history and changes made to the HOPE Scholarship in order to accurately represent the experience of those participants involved (Bloomberg & Volpe, 2019). The current study also used collaboration with the dissertation committee members and the Georgia Student Finance Commission that possessed the documents needed for analysis in order to accurately and fairly analyze the data (Bloomberg & Volpe, 2019). The current study also used rigor to develop and maintain a deliberate research design that acknowledged the complexity and integrity of the research process (Bloomberg & Volpe, 2019). The researcher’s role was also to use reflexivity in order to always be aware of personal or participant bias in order to present a fair, accurate analysis of the data collected (Bloomberg & Volpe, 2019).

Trustworthiness

One of the most challenging aspects about using document content analysis as an instrument to produce data is trustworthiness (Elo, Kaariainen, Kanste, Polkki, Utriainen, & Kyngas, 2014). The data collected from the archival documents used in this study must be able

to be replicated and produce valid, reliable data (Bowen, 2009). The current study used four principles for criteria for evaluating the qualitative data (Lincoln & Guba, 1985). The four criteria to produce trustworthiness of the current study were credibility, dependability, confirmability, and transferability (Lincoln & Guba, 1985). The current study acknowledged any biases of the study, documented all procedures for validity, and conducted a fair, and complete data analysis to ensure the trustworthiness of the study was intact (Leedy & Ormrod, 2019).

Credibility and Reliability

Credibility was also a key factor in data collection because the researcher needed to be self-aware of any biases (Krippendorff, 1994). The findings of the data collection phase were meaningful and easy to understand to the reader in order to provide clarity about the findings and conclusion sections of the current study (Elo et al., 2014). To ensure that the current study was reliable, it is important that the results can be reproduced by another researcher (Krippendorff, 2004). The coding section of the current study provided protocols and multiple coding systems in order to ensure the results can be reproduced (Krippendorff, 2004).

Transferability

The archival documents found in this study are all readily available to the public, so access was not affected for the researcher (Creswell, 2012). The researcher gained the approval of the Institutional Review Board for the use of all documents to be used in the data collection process in order to meet the standards of proper research protocols (Creswell, 2012).

Transferability was also included in this qualitative study in order to help future researchers examine the history and impact of the HOPE Scholarship (Creswell, 2012). The meanings and results of this study are generally transferable to other research settings (Bloomberg & Volpe,

2019). The current study achieved transferability by giving a thick description of the phenomenon and details of the data collection procedures (Bloomberg & Volpe, 2019).

Dependability

Dependability is the concept that the data analysis and data collect methods are appropriate to answer the research questions (Bloomberg & Volpe, 2019). The current study has established protocols in order to choose documents through purposive sampling in order to ensure dependability is met (Bloomberg & Volpe, 2019). The dissertation committee also served as a dependability protocol by analyzing the research methods, how the documents were chosen, and providing feedback to the researcher to ensure that dependability is met (Bloomberg & Volpe, 2019). The researcher has also established protocols in accordance with research models set by research experts (Creswell, 2012).

The coding schemes established also helped determine the dependability of the research findings (Bloomberg & Volpe, 2019). The coding protocols are easily replicated with a high percentage of reliability because several coding schemes were used for the findings (Bloomberg & Volpe, 2019). The coding themes and categories were detailed along with textual evidence collected from content analysis (Bowen, 2009).

Confirmability

Confirmability is the concept that another researcher should be able to interpret the data in the same way and that other researchers could come to the same conclusions (Bloomberg & Volpe, 2019). The organization stage of the current study established strict protocols to ensure that another researcher could corroborate the results of the study (Bloomberg & Volpe, 2019). The interpretations in the study will be evidence and researched based following protocols established in this chapter (Bloomberg & Volpe, 2019). The researcher also used reflexivity

throughout the data collection and analysis process to ensure that research bias was reduced and that the results were valid (Bloomberg & Volpe, 2019).

Data Collection Protocols

Archival data was essential to collect for the current historical case study (Bloomberg & Volpe, 2019). The data collection procedures must be set with protocols in order to produce valid and reliable data to properly answer the research questions (Bloomberg & Volpe, 2019). The literature review supported the method of using archival data with a document content analysis method in order to accurately describe the history of the HOPE Scholarship, the reforms that HOPE went through, and the impact it has had on post-secondary education (Bloomberg & Volpe, 2019). The current study described how data was collected, recorded, and used in accordance with the standards of research protocol (Bloomberg & Volpe, 2019).

The data collection procedures for the current study were a document content analysis of archival data (Creswell, 2012). There are three phases of the data collection procedures that included the preparation phase, organization phase, and the reporting phase (Elo et al., 2014). The preparation phase determined that purposive sampling was the most appropriate form of sampling to use to provide archival documents that could best give accurate data on the HOPE Scholarship (Elo et al., 2014). Using purposive sampling, several archival documents about the HOPE Scholarship from different time periods of the HOPE Scholarship's existence were determined to be best suited for describing the history of the scholarship and also its impact on post-secondary education (Elo et al., 2014). Between seven to ten archival documents were collected for data analysis to complete the findings and conclusion section (Creswell, 2012).

The type of content analysis that was used to analyze data depended on the document and the coding of each document (Hsieh & Shannon, 2005). There are two specific types of content

analysis: conceptual and relational (Hsieh & Shannon, 2005). Conceptual content analysis can be defined as establishing the existence of concepts in a document by examining the frequency of words or phrases (Busch, De Maret, Flynn, Kellum, Meyers, Saunders, White, & Palmquist, 2021). Relational content analysis can be defined as establishing concepts in written texts, but also connecting words and phrases by their meaningful relationships (Busch et al., 2021). Archival documents such as speeches and written documents for political bodies will require that both of these types of content analysis to be used in order to accurately produce data that will answer the researcher's questions (Busch et al., 2021). The current research study used both types of content analysis methods in order to sustain trustworthiness, reliability, and validity (Hsieh & Shannon, 2005).

The current research study used document content analysis as a research tool of instrumentation to corroborate and collect the data necessary to answer the research questions (Bowen, 2009). Qualitative researchers should draw evidence from at least two sources of data, and the current study used multiple sources such as government policy documents, research analysis projects on the HOPE Scholarship, and documents that describe the impact of the HOPE Scholarship in order to tell the narrative of the HOPE Scholarship and also show how its changes over time have impacted post-secondary education (Bowen, 2009). Researchers have described content analysis as an effective way to use textual evidence to give rich descriptions of different phenomenon (Stake, 1995). "Documents of all types can help the researcher uncover meaning, develop understanding, and discover insights relevant to the research problem" (Merriam, 1988, p. 118). Peer-reviewed literature were analyzed prior to designing the content analysis portion in order to use purposive sampling to find credible evidence and data sources to answer both research questions (Bowen, 2009).

Table 1

Archival Data Search Process

Iteration	Instrument Used	Key Words	Research Question
Iteration 1	Galileo	Impact/History/Reform	RQ 1 & 2
Iteration 2	GSFC Website	Study Commissions	RQ 1 & 2
Iteration 3	Galileo	GA Legislature Polices	RQ 2

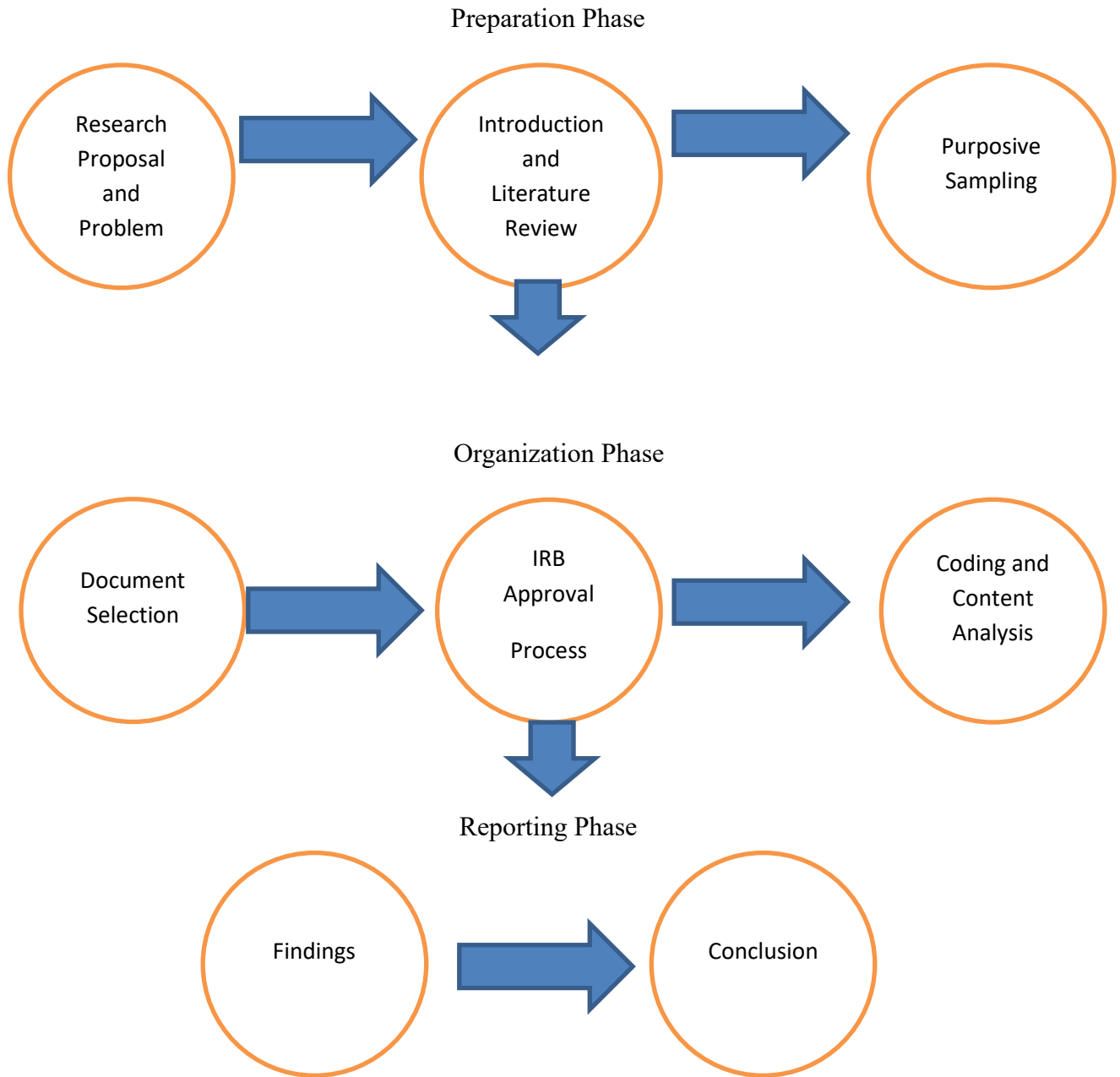
Table 2

Documents Selected for Analysis

Name of Document	Summary	Research Question Answered	Year
Zell Miller's Speech Introducing HOPE	First speech to the legislature introducing the lottery and HOPE Scholarship	RQ1	1992
Evaluation of the Hope Scholarship	Analyzation of the first 3 years of HOPE	RQ 1 and 2	1996
An Evaluation of Georgia's HOPE Scholarship	Analyzation of the first 6 years of HOPE	RQ 1 and 2	1999
Joint Study Commission Report	A study for the legislature and GSFC on proposed changes/situation	RQ 1 and 2	2003
An Overview of Lottery Revenues, Expenditures, and HOPE	Another proposal of changes and analysis of the lottery funding HOPE and benefits	RQ 1 and 2	2010
Summary of the Meetings Held by the State Senate on HOPE	Detailed meeting information about proposed changes to HOPE	RQ 1 and 2	2015
Summary of the Meetings Held by the State House of Rep. on HOPE	Detailed meeting information about proposed changes to HOPE	RQ 1 and 2	2015
HOPE Programs Briefing for Senate Study Committee	Proposed changes to HOPE	RQ 2	2019
HOPE Scholarship Program at Public Institutions	New rules by the GSFC for HOPE	RQ 2	2021

Figure 2

Data Collection Process Phases



Data Analysis

Documents can be an essential part of any research study (Bowen, 2009). The current research study proposed using a document content analysis to extract data that can answer the

research questions (Bowen, 2009). Documents can provide a historical background of events and can help researchers come to conclusions about certain phenomenon (Bowen, 2009). Information from document content analysis can also bring up valid research questions that need to be answered and provide supplementary data to answer research questions (Bowen, 2009). Documents were also useful for the current study because they tracked development and change (Bowen, 2009). For this study the documents tracked the changes to the HOPE Scholarship and its impact on post-secondary education (Bowen, 2009). The textual evidence for each document could also help draw conclusions and inferences from each document used for content analysis (Bowen, 2009).

The current research study proposed analyzing documents using content analysis to extract textual evidence and themes that help answer the research questions (Creswell, 2012). The documents that were proposed to be used were selected by using purposive sampling (Creswell, 2012). Purposive sampling allows the researcher to choose documents that can help the researcher answer the research questions by choosing documents that relate to the topic according to time frame, subject matter, impact, and historical data (Creswell, 2012).

The researcher also used coding in order to synthesize with the research questions and the framework of the current study (Saldana, 2016). There were two stages in the coding process, which included First Cycle and Second Cycle coding (Saldana, 2016). The First Cycle of coding created initial codes from the data using seven different possible broad categories (Saldana, 2016). The Second Cycle coding involved taking the first cycle codes and reorganizing them and reanalyzing their data (Saldana, 2016). The primary goal of Second Cycle coding was to create a categorical or thematic organization system from the First Cycle coding (Saldana, 2016). The goal of the coding cycle was to design categories and themes in order to analyze the textual

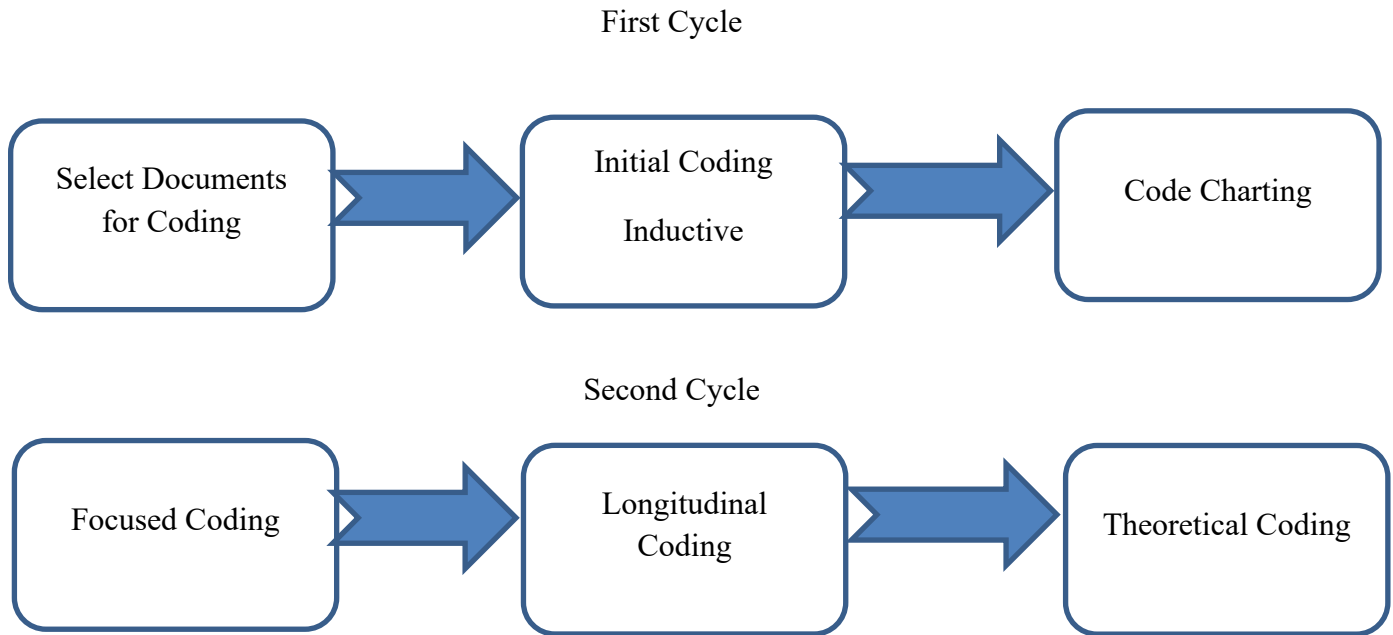
evidence to draw conclusions about the document in regards to the research questions (Saldana, 2016).

The coding cycle was broken down into several stages where inductive coding is used first to draw ideas, then code charting to organize these ideas in order to prepare for Second Cycle coding (Saldana, 2016). Focused coding was then used to focus on the most frequent or significant codes that were developed from initial coding (Saldana, 2016). Focused coding helped the researcher compare and contrast codes and categories from all the selected documents (Saldana, 2016). The next coding step was longitudinal coding in order to reveal the changes the HOPE Scholarship went through and the impact it has made within the last 30 years (Saldana, 2016). Longitudinal coding helped organize the data in a timeline formation in order to produce quality evidence to corroborate the categories and codes in the first and second cycles (Saldana, 2016). The last step of the coding process was theoretical coding (Saldana, 2016). Theoretical coding was used to help integrate the categories and codes in order to produce a theory or theories about the research (Saldana, 2016). Theoretical coding was used to help the researcher come to a final conclusion about the phenomenon in order to answer the research questions (Saldana, 2016).

The proposed coding cycles were not the only types of codes used in the current research study in order to allow the researcher flexibility in drawing data for the findings and conclusion sections (Creswell, 2012). Memos during coding were also helpful in organizing codes and data to help limit the number of codes and categories (Saldana, 2016). The researcher also used timelines and coded each document using a hand coded system to extract categories, codes, and themes to lead to conclusions for each research question (Saldana, 2016).

Figure 3

Coding Cycles



Document Analysis Protocol

The archival documents that were selected for document content analysis was based off of protocol criteria such as their attended audience, time frame when written, subject matter, purpose, and impact on the HOPE Scholarship (Bloomberg & Volpe, 2019). Purposive sampling allows the researcher to specifically choose archival documents that fit the profile criteria necessary to answer the research questions (Bloomberg & Volpe, 2019). Documents should be chosen based off their attended audience because the data discussed in the document will help determine whether or not a reform or change was being proposed for the HOPE Scholarship (Bloomberg & Volpe, 2019). The time frame of the documents chosen was also vital to ensure that it put the data discussed in reference to key points of the HOPE Scholarship's existence in regards to changes and impact (Bloomberg & Volpe, 2019). The subject matter of the document

was also key to selection because the document must contain information that pertains to the HOPE Scholarship in relation to the research questions (Bloomberg & Volpe, 2019). The main purpose of each document was critical in choosing it for data collection (Bloomberg & Volpe, 2019). The document must focus on the subject matter of this research study and give new or updated insight to the HOPE Scholarship in reference to the research questions (Creswell, 2012). Documents were also chosen based on whether or not the document was at a critical point of the HOPE Scholarship or made fundamental changes to the eligibility requirements of the HOPE Scholarship (Bloomberg & Volpe, 2019). Purposive sampling was used to help identify documents for content analysis that were essential to answer the research questions in the current study and could help lead to possible new research on the HOPE Scholarship (Creswell, 2012). Purposive sampling is the process of trusting the researcher to choose which documents would best help answer the research questions (Creswell, 2012).

The organization phase consisted of abstracting concepts and categories from the archival data through coding (Elo et al., 2014). Coding will be an essential portion to helping collect accurate data to answer the research questions in order to obtain textual evidence and categories, and re-occurring themes (Creswell, 2012). Saturation was also a key factor in deciding that the archival documents were trustworthy and credible because they cross referenced each other's data, and helped the current study obtain triangulation by collecting data from different sources (Creswell, 2012). Document saturation also helped ensure enough representation of data was available and appropriate for the current study in order to ensure the data analysis was credible and reliable (Elo et al., 2014). Descriptive data collection was used during the organization phase in order to apply verbal context from archival documents (Elo et al., 2014). Descriptive data collection gave a detailed description of people and events that have impacted the HOPE

Scholarship and gave the current study data to help address the research questions (Creswell, 2012).

After the archival documents were selected, coded, and analyzed for categories and themes, the findings were reported (Elo et al., 2014). During the reporting phase, the documents were evaluated in order to properly answer the research questions and explain the conclusions for each research question (Elo et al., 2014). A narrative timeline of events was described through the language of each document and the impact of the changes made to the HOPE Scholarship were revealed (Elo et al., 2014). A full description of each document was portrayed and discussed for credibility and reliability using textual evidence obtained from coding procedures (Elo et al., 2014). It is the intent of the current study to avoid bias by allowing the textual evidence portrayed in the findings to reflect each document's voice (Elo et al., 2014).

Reporting Data

The data for the current study was collected and written in the findings section of this dissertation. Charts, graphs, and textual evidence were used to make inferences about the archival documents being evaluated to answer the research questions (Creswell, 2012).

Limitations

There were also some limitations to content analysis (Bowen, 2009). There were some documents that were lacking detailed information (Bowen, 2009). The documents chosen for this study were in-depth and related to the research questions (Creswell, 2012). Another limitation was low retrievability (Bowen, 2009). A second limitation was that it was difficult to obtain and it required a great deal of time to discover all of the documents (Bowen, 2009). The literature review provided the documents for the data collection and data analysis section of the current study (Creswell, 2012). Bias selectivity was also a limitation of this research design

(Bowen, 2009). The documents were selected with purposive sampling, and therefore each were purposely selected in order to help explain the researched phenomenon (Bowen, 2009). The data collection methods of this study used protocols to ensure that bias was greatly limited from the study (Creswell, 2012). The last limitation on the current study was the truthfulness of each document because the authors could have had a bias view of the impact of the HOPE Scholarship (Creswell, 2012).

Delimitations

There were also some delimitations to this study. The study was delimited to documents that discussed the history and impact of the HOPE Scholarship (Bowen, 2009). The study was also focused just on the HOPE Scholarship's impact on education in Georgia and not economic factors or how it personally affected those who received its (Creswell, 2012). A further delimitation of this study was that archival documents were the only source of data for data analysis, and the study did not use interviews to get specific data from personnel involved in the creation and reform of the HOPE Scholarship (Creswell, 2012).

Bias

There was also the potential of bias from the researcher that could cause the trustworthiness and credibility of the study to be called into question (Creswell, 2012). The researcher benefited from the HOPE Scholarship, so this may affect the way the HOPE Scholarship is portrayed in the current study (Creswell, 2012). The coding methods established in the current study served as a way to keep personal bias from being portrayed by using textual evidence, codes, and categories to describe the output data (Saldana, 2016). The researcher established procedures and protocols such as identifying personal biases, working with members of the dissertation committee to avoid bias research and using triangulation to confirm results by

using multiple archival documents to ensure bias is limited to make the data collection and data analysis phase of this study as credible and trustworthy as possible in order to produce quality research for future researchers, and to add to the body of work done on the HOPE Scholarship (Creswell, 2012).

Summary

A document content analysis approach was chosen because it gives the researcher the tools and assets to analyze the HOPE Scholarship's history and reforms so future researchers will have a better understanding of its impact on education in Georgia (Creswell, 2012). Content analysis offered many advantages to the current study including efficiency, availability, cost-effectiveness, stability, exactness, and coverage (Bowen, 2009). The most important qualities of the advantages of content analysis for this study was exactness and coverage because this is a historical case study that will share the journey of the HOPE Scholarship and its impact on education in Georgia (Creswell, 2012).

CHAPTER IV: FINDINGS

The purpose of the findings section of the current study was to explore and find data that will answer the research questions (Creswell, 2012). A document content analysis was chosen as the primary method for collecting data for the current study to cite textual evidence from the documents to answer both research questions (Creswell, 2012). Purposive sampling is a form of sampling where the researcher uses their own judgement when choosing members of a study (Bloomberg & Volpe, 2019). Purposive sampling was used to select the documents in order to select archival documents that would clearly answer the research questions (Creswell, 2012). Coding was then conducted on the archival documents with the stages of initial coding, code charting, focused coding, longitudinal coding, and theoretical coding (Saldana, 2016). The multiple coding steps were used to ensure that the data collected for this chapter would be accurate, concise, fair, replicable, and trustworthy (Saldana, 2016). Descriptive data collection was also used in order to provide textual evidence of the HOPE Scholarship's impact and changes it has gone through since its inception (Creswell, 2012). The main purpose of the current study is to tell the narrative of the HOPE Scholarship from its inception in 1993 to 2021 and describe the impact it has had on secondary education.

Archival Documents

The archival documents selected for the study were nine speeches, research documents, presentations, and legislative documents that discussed the HOPE Scholarship's inception to its form in 2021 (Creswell, 2012). These archival documents were chosen using purposive sampling in order to fairly answer each research question. This study's main goal was to tell the story of the HOPE Scholarship from its inception to 2021 by using archival documents to show the

changes it has went through and what impact it has made on post-secondary education in Georgia (Bowen, 2009).

Table 3

Documents Selected Using Purposive Sampling

Archival Documents	Reason for Selection	Year
Zell Miller’s Legislative Biennial Institute Speech (Miller, 1998)	One of the first speeches to discuss the HOPE Scholarship (Inception).	1992
Evaluation of the Hope Scholarship Program (Davis, Hall, & Henry, 1996)	After three years of the program, an analysis was done to analyze its impact.	1996
An Evaluation of Georgia’s HOPE Scholarship Program: Effects of HOPE on Grade Inflation, Academic Performance, and College Enrollment (Bugler, Henry, & Rubenstein, 1999)	After six years of the program, an analysis was done to measure its negative and positive effects including its impact on colleges in Georgia.	1999
HOPE Scholarship Joint Study Commission Report (JSCR, 2003)	The state legislature of Georgia was worried that the lottery would not be able to keep up with the promise of HOPE, so a study was done from top to bottom on the lottery and the HOPE Scholarship.	2003
An Overview of Lottery Revenues, Expenditures, and HOPE (GSFC, 2010)	This document was created as another checkpoint on the HOPE Scholarship because of the dangers of the expense and rising costs of college.	2010
House Study Committee on the Preservation of the HOPE Scholarship Program (HSC, 2015)	The state legislature prepared this study to find ways to continue the HOPE Scholarships and to find new ways to fund it.	2015
Summary of Meetings Held by the Senate Preservation of the HOPE Scholarship Study Committee (SSC, 2015)	The state legislature prepared this study to find ways to continue the HOPE Scholarships and to find new ways to fund it.	2015
HOPE Programs Briefing for Senate Study Committee on Gaming and Pari-Mutuel Wagering on Horse Racing and Growing Georgia’s Equine Industry (GSFC, 2019)	The state legislature was looking at new sources of revenue for the HOPE Scholarship.	2019
HOPE Scholarship at Public Institutions Regulations (GSFC, 2021)	The newest rules and guidelines on the HOPE Scholarship.	2021

Each archival document was selected to tell the story of the HOPE Scholarship in its own words. Textual evidence with thick description was also used to describe the history of the greatest merit-based scholarship in American history to date (Bloomberg & Volpe, 2019). Each archival document played a role in not only establishing the HOPE Scholarship, but shaping and reforming it so future scholars could use its benefits to obtain an education (Creswell, 2012).

Document 1: Zell Miller's Legislative Biennial Institute Speech

Background

Zell Miller became the 79th governor of Georgia in January 1991 (Miller, 1998). Governor Miller wanted to make a historical change to the education system in Georgia (Hyatt, 1997). His speech in December 1992 at the University of Georgia was one of the first times he mentioned the HOPE Scholarship by name and defined its purpose (Miller, 1998). This speech served as its inception (Miller, 1998). He defined the HOPE Scholarship as Helping Outstanding Pupils Educationally (Miller, 1998). He laid out his priorities and how it was going to be funded. The Lottery for Education had just been ratified by the voters in November 1992 (Miller, 1998). This speech served as his introduction for how he was going to specifically use these funds (Miller, 1998).

The governor used this speech to discuss with the audience an array of pressing issues in Georgia at the time (Miller, 1998). He discussed about Georgia's economic recovery and the depletion of reserve funds (Miller, 1998). Miller told the audience the lottery was going to be a strong economic factor for educational spending and thanks to its passage, many priorities would be able to be funded (Miller, 1998). Miller proposed three education priorities for the lottery to fund (Miller, 1998).

The first priority he laid out in his speech was to fund a prekindergarten program for school systems willing to have them (Miller, 1998). He explained he wanted to target at-risk students first (Miller, 1998). The second priority was to fund the HOPE Scholarship (Miller, 1998). The priority for the scholarship was to provide an opportunity for students with a B average to be able to have their tuition paid for the first two years of a post-secondary education at a public university or college in Georgia or partial assistance at a private college (Miller,

1998). He also mentioned several stipulations, such as it only applied to families with an income less than \$66,000 dollars a year, and that the student must attend an accredited school in Georgia (Miller, 1998). The third priority was for the lottery to pay for special equipment and construction needs for high schools, colleges, and technical schools (Miller, 1998).

Governor Miller was unaware of how much money the lottery would make and kept his priorities small. He estimated the HOPE Scholarship would reach up to 90,000 students that year (Miller, 1998). The goal of the speech was to introduce his specific plans for lottery funds and to get public support behind his priorities (Miller, 1998). The speech also served as his plan for economic recovery for the state and also included how the Super Bowl was coming to Georgia in 1994 and the Olympics were coming in 1996 (Miller, 1998).

Coding

Inductive coding was used to draw out ideas from the speech. During the initial coding stage, several ideas were drawn from the speech. Miller breaks his spending and priorities for the lottery into multiple parts for HOPE (Miller, 1998). He kept the priorities very general without mentioning any monetary or percentage amounts for each part (Miller, 1998). His speech also was forward thinking because he mentioned how to recover from the economic downturn and how Georgia was going to host the Super Bowl and the Olympics in the next few years (Miller, 1998). The speech was divided into different areas of improvement also, including tuition for a B average for college, tuition for private schools, helping General Educational Development students with technical school, and providing funds to improve construction and technology (Miller, 1998).

Code charting was used to organize the different ideas drawn from the speech and to prepare for discovery of codes that were frequently used or were significant (Saldana, 2016).

Table 4*Document 1 Frequent and Significant Codes*

Code	Example 1	Example 2
Looking into the Future Theme: Policy Change Frequency: 7	“The labs in Georgia’s high schools, colleges, and technical schools are woefully out of date” (p. 85).	“More of them (Pre-K students) went to college, and they entered the workforce at higher salaries” (p. 84).
Positive Tone Theme: Positive Impact Frequency: 5	“HOPE has the potential to touch the lives of 90,000 students in Georgia beginning in the fall of 1993” (p. 84).	“In other words, it would be possible for a student who holds a steady B average to get free tuition for their first two years of college” (p. 84).
Problems in Georgia Theme: Negative Impact Frequency: 4	“Our failure to keep up the pace in funding for higher education has shifted a greater portion of the cost onto the shoulders of Georgia families, and they are assuming unprecedented levels of debt to handle it” (p. 86).	“The cost of one year at a state college or university will equal 20 percent of median family income” (p. 86).
New Ideas Theme: Policy Change Frequency: 9	“Any high school student with a B average, a 3.0 grade point average, when that student walks across the stage at graduation, they will get a HOPE certificate good for tuition at any institution in the University System of Georgia where they are accepted, if their family income is less than \$66,000 a year” (p. 84).	“The second part of HOPE is that if the student, has a B average in their freshman year, they can get a loan for tuition for their sophomore year. And if they keep a B average for their sophomore year, the loan is forgiven” (p. 84).
Positive Effect Theme: Positive Impact Frequency: 8	On using lottery funds to create Pre-K programs, “More of them went to college and they entered the workforce at higher salaries” (p. 84).	“In other words, it would be possible for a student who holds a B average to get free tuition for their first two years of college. There will be nothing like it in the United States” (p. 84)

Table 4 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 4 were chosen because of their frequent use and their impact on the research questions (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). New ideas was a code used nine times and any sentence that described something new related to HOPE as counted. Positive effect was discovered eight times in the document and related to items mentioned that would have a positive impact on education. Looking into the future was discovered seven times and were extracted from

sentences that described the future of Georgia in education. Positive tone was discovered five times and related to sentences that described a positive message from Governor Miller.

Problems in Georgia was discovered four times and related to specific issues Georgia faced at the time.

Conclusion

Several codes were drawn from the Zell Miller speech which introduced the ways of utilizing lottery funds. Miller laid out his ideas for how to spend the lottery funds and more importantly the qualifications for the HOPE Scholarship (Miller, 1998). The major codes drawn from the speech were looking into the future, positive tone, problems in Georgia, new ideas, and positive effect (Miller, 1998). Miller explained to the audience the issues and problems Georgia faced in 1992 including college debt that was overburdening families and an economy struggling with getting an educated workforce (Miller, 1998). The HOPE Scholarship was proposed by him in this speech to counter the issues Georgia was facing and to be a positive force not only on Georgia's economy, but to keep Georgia's postsecondary students at universities and colleges in Georgia (Miller, 1998).

The importance of the speech is it laid the groundwork for what the HOPE Scholarship would become. The speech laid the groundwork for the spending of future lottery funds on education in Georgia (Miller, 1998). Miller promised in this speech the HOPE Scholarship would be something the country had never seen before and would dramatically alter post-secondary education (Miller, 1998). Almost 30 years later, he would be proven right.

Document Content Analysis

The "Legislative Biennial Institute" speech by Governor Zell Miller in December of 1992 was chosen for document content analysis because it was one of the first times Governor Miller described his HOPE Scholarship program in specific detail (Miller, 1998). The document was

chosen for the audience and the content addressed in the speech (Miller, 1998). The speech was given at the University of Georgia, and his speech was a chance for Miller to lay out his agenda for the state that upcoming year (Miller, 1998).

The speech covered many different priorities Governor Miller wished to get through the state legislature, but the most important was describing the HOPE Scholarship (Miller, 1998). He called it Helping Outstanding Pupils Educationally (Miller, 1998). He promised there would be none like it in the country and he is still correct (Miller, 1998). The beginning of the section on the HOPE Scholarship was prefaced with the idea that Georgia was approaching the 21st Century and a college education was going to be more important than ever (Miller, 1998).

Miller promised that HOPE could touch the lives of 90,000 students in the fall of 1993 (Miller, 1998). He kept his promise very simple and easy to understand. The primary channel to receive the HOPE Scholarship was to get a 3.0 grade point average in school (Miller, 1998). Miller promised if seniors did this and met other criteria, they would receive a certificate good for any institution in the University System of Georgia (Miller, 1998). The student's family could not make more than \$66,000 a year to be eligible for the scholarship (Miller, 1998). The second part of HOPE was that a loan would be given to those who had a B average at the end of their freshman year to pay for their sophomore year, and if at the end of that year they maintained a B average, the loan would be forgiven (Miller, 1998). If the student maintains a B average at the end of their sophomore year, then the loan is forgiven (Miller, 1998). The first two years of college could be paid for if the student maintained a B average (Miller, 1998).

The next section of the document discussed what all the HOPE Scholarship would cover under Miller's plan (Miller, 1998). Miller used his HOPE Scholarship idea to not only support those who wanted a college degree, but to get their General Education Development (GED)

diploma and degrees at technical schools (Miller, 1998). Miller proposed using HOPE funds for those who qualify and seek a diploma granting program at a technical institute in Georgia (Miller, 1998). He thought this was important because not every high school graduate needed a college degree to find a quality job and wanted to give students looking to acquire a skill to be able to have free tuition (Miller, 1998). He also wanted to reach out and support those students who had dropped out of high school or did not finish for various reasons (Miller, 1998). GED graduates could use five- hundred dollars for books, materials, and fees (Miller, 1998).

Miller also supported students who wanted to attend private colleges in Georgia (Miller, 1998). His proposal called to use HOPE funds to bring tuition equalization grants of up to \$1,500 for freshmen and for sophomores (Miller, 1998). The last part of his plan for lottery funds also included capital outlay to repair buildings for educational institutions in Georgia (Miller, 1998). He also requested a 10% reserve fund to ensure HOPE would be funded even in bad economic years ahead (Miller, 1998).

With increasing enrollments at universities and other postsecondary schools in Georgia, Miller felt this was a way to ensure those who could not afford an education could receive one as long as they kept their GPA of a B average (Miller, 1998). Miller's initial concept of HOPE would be changed multiple times over its lifespan. Some of his initial proposals like capital outlay would be taken away because of the costs of rising tuition in Georgia (Hyatt, 1997). The importance of this document is that it was the beginning of the inception of HOPE and how HOPE was initially imagined by Governor Miller (Miller, 1998). "It's the future of Georgia" (Miller, 1998, p. 85). Zell Miller created one of the most important educational acts in Georgia history with the HOPE Scholarship in this 1992 speech (Miller, 1998).

In conclusion, this document helped to answer the research question in relation to how policy changes impacted eligibility for the HOPE Scholarship. This document established the fundamental eligibility requirements for the HOPE Scholarship with a 3.0 GPA (Miller, 1998). This document is the foundation of the HOPE Scholarship, and it gave the researcher information on how HOPE started and what it was envisioned to be with its inception (Miller, 1998). The HOPE Scholarship does not look the same today as it did when Miller proposed it, but the idea of working hard and getting good grades to receive a merit-based scholarship through lottery funds is still intact (GSFC, 2021).

Document 2: 1996 Evaluation of the HOPE Scholarship Program

Background

In 1996, the Council for School Performance wrote a detailed evaluation of the first three years of the HOPE Scholarship (Davis, Hall, & Henry, 1996). The mission of the Council for School Performance was to provide information on accountability in education in order for schools and communities to provide a better education for their students and to help them reach their goals (Davis, Hall, & Henry, 1996). This evaluation was provided by the Applied Research Center at Georgia State University (Davis, Hall, & Henry, 1996).

The report addressed four different areas in order to provide a better picture of where the HOPE Scholarship stood in 1996 (Davis, Hall, & Henry, 1996). The first area was to examine who received the HOPE Scholarship (Davis, Hall, & Henry, 1996). The second area was to look at the impact HOPE recipients would have after raising the standards (Davis, Hall, & Henry, 1996). The third area was to research and examine what would be the impact on HOPE recipients of having a college prep diploma (Davis, Hall, & Henry, 1996). The last area

researched addressed the impact on HOPE recipients who were taking developmental study courses (Davis, Hall, & Henry, 1996).

The Council for School Performance addressed each area through the 16,376 public college HOPE recipients from the 1994-1995 school year (Davis, Hall, & Henry, 1996). One of the many factors analyzed was retention in college and how well the recipients were prepared for college (Davis, Hall, & Henry, 1996). The impact analysis could give public colleges a chance to see how HOPE was impacting their students.

The study described the demographics of students who received the HOPE Scholarship for the 1994-1995 school year. Sixty-one percent of the recipients were female and 39% male (Davis, Hall, & Henry, 1996). Seventy-six percent were white, 20% were black, and three percent were Asian (Davis, Hall, & Henry, 1996). The average high school grade point average of each recipient was 3.6 (Davis, Hall, & Henry, 1996). Eighty-four percent of HOPE recipients stayed in college over a one-year period and 43% of the recipients who earned 45 hours or more retained the HOPE Scholarship (Davis, Hall, & Henry, 1996).

Coding

The initial coding process drew out several ideas from the evaluation of the HOPE Scholarship's impact over three years. The program was already being assessed for changes and it was evident in the data analysis of the document. The main idea that can be drawn from the document was the HOPE Scholarship's impact not only on the recipient, but the colleges they attended (Davis, Hall, & Henry, 1996). The worry was whether or not HOPE recipients were ready for college and could they sustain retention in college after two years (Davis, Hall, & Henry, 1996). Over 31% of HOPE recipients had to or chose to take a learning support class because they did not meet certain criteria set by the public university or college (Davis, Hall, &

Henry, 1996). The last idea that was drawn from the document was what the future areas of research on the impact HOPE has had on postsecondary education (Davis, Hall, & Henry, 1996).

Several of the ideas from the initial coding stage were identified as significant or were frequently used in the document. During the code charting stage, these ideas were organized in order to extract categories and themes for comparison.

Table 5

Document 2 Frequent and Significant Codes

Code	Example 1	Example 2
Possible Impact of Change Theme: Positive or Negative Impact Frequency: 18	“If HOPE had been limited to students who had a Regents’ 3.0 or higher high school GPA in 1994-1995, 44% of students would not have qualified for HOPE” (p. 2).	“If HOPE had been limited to students who graduated from high school with a College Prep endorsement in 1994-1995, 12% of the students would not have qualified for HOPE” (p. 2).
How the Students Could Benefit Theme: Positive Impact Frequency: 17	“One possible benefit of raising academic standards is that it will raise the academic expectations of college-bound high school students” (p. 4).	“If HOPE had been limited to students who had a Regents’ 3.0 or higher high school GPA in 1994-1995, the percentage of students retaining HOPE would have increased by 12%” (p. 2).
Standards Proposed Theme: Policy Change Frequency: 19	“One way to raise standards is to calculate the GPA of HOPE students using only academic courses” (p. 2).	“If HOPE had been limited to students in the 1994-1995 class who did not require Learning Support course work, there would 30.5%, or 4,995, fewer students in the HOPE program” (p. 9).
College Prep Students Theme: Positive Impact Frequency: 8	“88% of HOPE students graduated from high school with a College Prep diploma” (p. 2).	“The average student, regardless of race or gender, is 7% more likely to retain HOPE with a College Prep diploma” (p. 3).
Learning Support Students Theme: Negative Impact Frequency: 7	“31% of HOPE students took at least one Learning Support course” (p. 3).	“Overall students who take Learning Support course work in the freshman year have a 26.6% lower rate of HOPE retention” (p. 10).
Persistence of Students Theme: Positive Impact Frequency: 5	“Students with a Regents high school GPA of 3.0 or higher have a 6% higher persistence rate than students who have a Regents GPA below 3.0” (p. 2).	“However, taking Learning Support courses can help students persist in college” (p. 4).
Retention Issues/Ideas Theme: Policy Change Frequency: 9	“Because so many students already have the College Prep diploma, requiring HOPE recipients to have a College Prep diploma would not result in appreciably higher rates of persistence or retention” (p. 9).	“Having a Regents’ 3.0 or higher GPA improves the performance of every subgroup as well, with all subgroups except Asians showing double digit improvement in retention rate” (p. 9).

Table 5 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 5 were chosen because of their frequent use and significance (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). Standards proposed was found nineteen times in the document and this code was discovered from statements where the document was suggesting a new standard should be applied to HOPE. The possible impact of change was discovered eighteen times in the document and related to sentences that discussed how any new or proposed change would alter or effect the HOPE Scholarship. How the students could benefit code was discovered from sentences that discussed improvements from changes of the HOPE Scholarship. Retention issues/ideas was used nine times and was drawn from the document because several topics in the document dealt with how to get HOPE scholars to keep their scholarship and stay in college. The code college prep students were discovered eight times because the document discussed how having a college prep diploma affected HOPE Scholarship eligibility and retention. Learning support students were discovered seven times because the document discussed how these students play a role in eligibility for the HOPE Scholarship. Persistence of students was also a frequent code used and displayed in Table 5 because it was discussed five times in the document.

Conclusion

During the initial, code charting, and focused code stages, several codes were identified. Several changes were being proposed by the state legislature to tighten up the requirements for the HOPE Scholarship and the document studied this aspect. These changes included making the GPA requirement be Regents based and possibly requiring a college prep diploma to obtain HOPE (Davis, Hall, & Henry, 1996). The impact of change was a code that was extracted from

the document from several sources that attempted to discuss and examine if changes were made to HOPE what affect they would have on the students (Davis, Hall, & Henry, 1996). Another code discovered was how the student(s) could benefit from any change to HOPE (Davis, Hall, & Henry, 1996). The researchers wanted to address possible outcomes that could affect a student's HOPE Scholarship status. Two of the codes dealt with addressing whether or not students should be able to take Learning Support classes and whether a requirement to have a College Prep high school diploma would have a positive or negative effect on recipients (Davis, Hall, & Henry, 1996). The last two codes discovered dealt with retention and persistence to see if proposed changes would improve both (Davis, Hall, & Henry, 1996).

Document Content Analysis

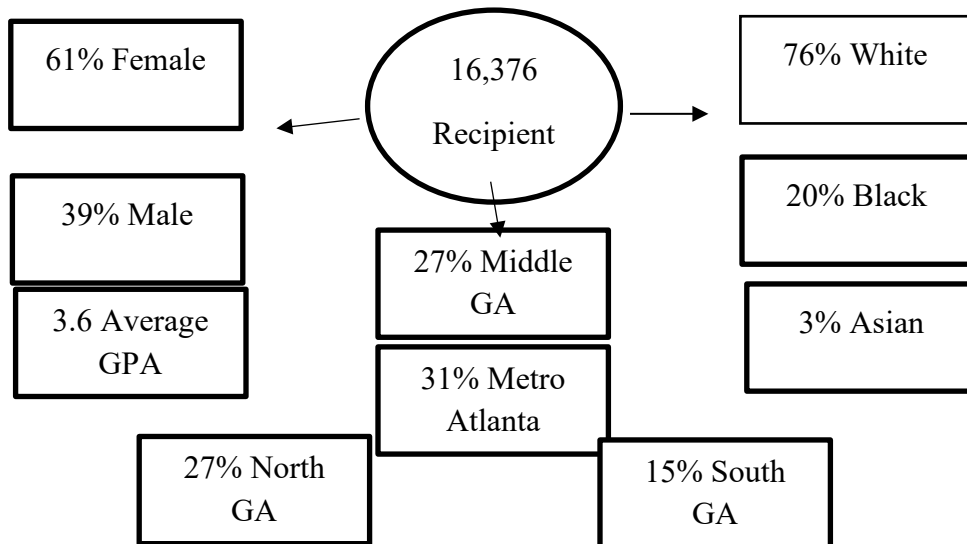
The 1996 Council for School Performance "Evaluation of the HOPE Scholarship Program" was the first real look at the HOPE Scholarship and evaluating who received the HOPE Scholarship and its impact in several different educational arenas (Davis, Hall, & Henry, 1996). The document was established to review who received HOPE, what would be the impact of raising academic standards, the impact on recipients of having a college prep diploma, and the impact on recipients taking Learning Support courses (Davis, Hall, & Henry, 1996). The document researched the data on the 16,376 HOPE public college scholarship recipients in 1994-1995 and how possible changes could have affected their retention and persistence (Davis, Hall, & Henry, 1996).

One of the most important data collection points from the document was who was receiving the HOPE Scholarship during this time period (Davis, Hall, & Henry, 1996). Possible changes were being proposed for the HOPE Scholarship, and the researchers examined the data

on how any changes could affect different demographic groups in relation to retention, loss of HOPE, and persistence in public college (Davis, Hall, & Henry, 1996).

Figure 4

Demographics of 1994-1995 HOPE Recipients Who Received Public College Scholarships



The first issue the document examined was the idea of raising academic standards to receive the HOPE Scholarship (Davis, Hall, & Henry, 1996). The main suggestion was to only examine core academic classes for the 3.0 GPA requirement or in other words, use the Board of Regents scale (Davis, Hall, & Henry, 1996). The argument for using the Regents standard was it was more rigorous and the award of receiving the HOPE Scholarship was merit-based (Davis, Hall, & Henry, 1996). With the proposed changes, there would be some movement in relation to who would have retained HOPE (Davis, Hall, & Henry, 1996). Twenty percent of the students who had a high school Regents GPA below 3.0 would not have retained HOPE and 55% who met the Regents standard would have retained HOPE (Davis, Hall, & Henry, 1996). Early in HOPE's lifespan, the budget was not an issue, but ensuring academic requirements were rigorous was the main debate (Davis, Hall, & Henry, 1996). The positive effect of going to a Regents 3.0

standards was that six percent more students would have a higher persistence rate in college than before (Davis, Hall, & Henry, 1996).

The research data collected in this document also explained the impact of a Regents 3.0 as these students entered public colleges (Davis, Hall, & Henry, 1996). Forty-four percent of the high school students would not have qualified for HOPE (Davis, Hall, & Henry, 1996). The percentage of students retaining HOPE would have increased by 12%, but it also would have led to an increase by seven percent of females and a decrease of Black students eligible by three percent (Davis, Hall, & Henry, 1996). Twenty-two percent would have needed to take Learning Support classes, which was a drop of eight percent from the 30% that needed it (Davis, Hall, & Henry, 1996). This data led to the conclusion fewer students would have qualified for HOPE and probably had been less successful in public college, but the students would have been better prepared for college leading to a higher overall retention and persistence rate overall for HOPE scholars (Davis, Hall, & Henry, 1996).

The researchers also examined the idea of requiring a college prep diploma to receive the HOPE Scholarship (Davis, Hall, & Henry, 1996). The suggestion in the document was that college bound students were better prepared with a college prep diploma (Davis, Hall, & Henry, 1996). This change would have only affected a few students who had qualified since 88% of HOPE Scholars who entered a public college that year already had a college prep diploma (Davis, Hall, & Henry, 1996). This group of students had a six percent higher rate of persistence in public college than other students (Davis, Hall, & Henry, 1996). The researchers also showed that this group of students were seven percent more likely to retain HOPE (Davis, Hall, & Henry, 1996). The conclusion to this section was requiring a college prep diploma would not have greatly altered persistence or retention in a monumental way (Davis, Hall, & Henry, 1996).

The last section of the document discussed the impact of this group of students taking Learning Support coursework (Davis, Hall, & Henry, 1996). Thirty-one percent of the HOPE scholars had taken a Learning Support course in college (Davis, Hall, & Henry, 1996). The only group of students who took these courses and their persistence showed some progress were Black students at a growth of six percent (Davis, Hall, & Henry, 1996). A student who took Learning Support classes was 13% less likely to retain HOPE (Davis, Hall, & Henry, 1996). The average retention rate also reduced among this group on average between 12-13% from those who did not have to take Learning Support courses (Davis, Hall, & Henry, 1996). The conclusion to this part of the document showed those who have to take Learning Support courses were less likely to retain, be eligible for HOPE, and persist in public college than those who did not take these courses (Davis, Hall, & Henry, 1996).

This document was one of the first to look at the impact and proposed changes to the HOPE Scholarship (Davis, Hall, & Henry, 1996). The first of several changes were being proposed and this document explored the proposed changes and how they may have affected issues like retention of not only keeping the HOPE Scholarship, but staying in college (Davis, Hall, & Henry, 1996). The document also laid the groundwork for future studies and suggested a longitudinal study of the HOPE Scholarship (Davis, Hall, & Henry, 1996).

Document 3: 1999 An Evaluation of Georgia's HOPE Scholarship Program: Effects of HOPE on Grade Inflation, Academic Performance, and College Enrollment

Background

Since the HOPE Scholarship began in 1993, several changes had been made to HOPE to change eligibility and the requirements in order to receive the merit-based scholarship (Bugler, Henry, & Rubenstein, 1999). Over 358,000 students had benefited from it and over \$658 million

dollars had been spent by 1999 (Bugler, Henry, & Rubenstein, 1999). The Council for School Performance conducted this analysis of the HOPE Scholarship in 1999 as Governor Miller left the governor's mansion (Bugler, Henry, & Rubenstein, 1999). The primary goal of the document was to research and give quality feedback about the HOPE Scholarship's effect on grade inflation, academic performance, and college enrollment (Bugler, Henry, & Rubenstein, 1999).

The number of students that had become HOPE eligible had increased significantly since its inception and the researchers were tasked with assessing if eligibility was based off of grade inflation or whether not students were legitimately eligible (Bugler, Henry, & Rubenstein, 1999). HOPE eligibility had gone through several changes since its inception and the problems it started to face had changed (Bugler, Henry, & Rubenstein, 1999). In between 1993 and 1998, HOPE eligibility among graduating high school seniors had grown from 46.8% in 1993 to 59.5% in 1998 (Bugler, Henry, & Rubenstein, 1999). This sizeable increase made many researchers and policy makers concerned about being able to fund this scholarship and ensure its guidelines were being carried out (Bugler, Henry, & Rubenstein, 1999). Retention and persistence were also researched in the study as well as whether or not HOPE affected a student's choice for school (Bugler, Henry, & Rubenstein, 1999).

Coding

The Council for School Performance went into extreme detail about several different issues with the HOPE Scholarship. The initial coding of the document led to several different frequent topics that were explored. One of the ideas extracted from the document is whether the HOPE Scholarship motivated high school students to achieve more in academic core classes to become eligible for the scholarship (Bugler, Henry, & Rubenstein, 1999). Grade inflation was

also a common idea mentioned frequently and explored in-depth by the researchers (Bugler, Henry, & Rubenstein, 1999). Retention and persistence were also studied to see if students who were receiving HOPE benefits were staying in college and if they lost the HOPE Scholarship were they still staying in college afterwards (Bugler, Henry, & Rubenstein, 1999). The researchers also examined SAT scores to see if there were improvements since HOPE's inception and also to see if higher SAT scores impacted eligibility (Bugler, Henry, & Rubenstein, 1999).

The code charting stage led to several different codes to be discovered including eligibility issues, grade inflation issues, retention, persistence, impact, criticism of HOPE, and patterns (Bugler, Henry, & Rubenstein, 1999). The previously listed codes were frequently used throughout the study and also were significant because of the data they revealed (Bugler, Henry, & Rubenstein, 1999).

Table 6*Document 3 Frequent and Significant Codes*

Code	Example 1	Example 2
Eligibility Issues Theme: Policy Change Frequency: 17	“The number of high school graduates eligible for HOPE has grown rapidly, increasing from 46.8% to 59.5% in 1998” (p. 1).	“Increasing numbers of eligible students are also enrolling in Georgia’s public colleges or universities. Between fall 1996 and fall 1998 the proportion of HOPE scholars in the entering classes of public colleges and universities in Georgia increased from 74.1% to 81.4%” (p. 4).
Grade Inflation Issues Theme: Negative Impact Frequency: 13	“A primary question investigated in this study is whether, and the extent to which, grade inflation occurred following implementation of the HOPE Scholarship program” (p. 4).	“National data on SAT scores and student grades between 1988 and 1998 suggest that grade inflation may be a national trend that began well before the start of the HOPE Scholarship program” (p. 8).
Retention Theme: Negative Impact Frequency: 16	“From 1993 to 1996, the percentage of students who retained HOPE in their second year and stayed in college for two years has increased from 38.9% to 46.1%” (p. 15).	“Again, because minority and lower-income students may be in financially vulnerable situations they may be disproportionately likely to leave college if their GPA dips below the required 3.0” (p. 17).
Persistence Theme: Positive/Negative Impact Frequency: 11	“After four years of study, over 75% of all HOPE scholars have lost the scholarship, and over 40% of those leave college” (p. 16).	“A large percentage of students do lose HOPE, but the percentage of students keeping HOPE and staying in school is increasing” (p. 15).
Impact of HOPE Theme: Positive Impact Frequency: 13	“Moreover, at the most competitive state institutions, the proportion of African-American and female students in the entering classes have been increasing, though they remain low for African-Americans” (p. 18).	“Since HOPE started, more students enrolling in institutions in the University System of Georgia have college prep diplomas and fewer need remedial work” (p. 1).
Criticism of HOPE Theme: Negative Impact Frequency: 19	“Fewer than 25% of HOPE Scholars retain their scholarships through four years of college” (p. 1).	“Among white students, an average of 44.6% lose HOPE during their first two years of college. Of those who lose HOPE 40.9% leave college” (p. 2).
Patterns Theme: Positive Impact Frequency: 8	“Average SAT scores and high school GPA have risen for college-bound seniors in Georgia since the program began” (p. 1).	“Statistical analysis shows that students close to eligibility cut-off may be better prepared for college than in the past” (p. 1).

Table 6 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 6 were chosen because of their frequent use (Creswell, 2012). Similar and like

statements in the document were counted in each document (Saldana, 2016). The first code to be discovered was criticism of HOPE and was mentioned nineteen times in the document.

Eligibility issues were also extracted from at least seventeen different statements in the document relating to ongoing issues of who qualified for HOPE. Retention was discovered in this document and was discussed sixteen times. Grade inflation issues were discussed thirteen times in the document and was an important topic in education during the time frame in which the document was written. The impact of HOPE was discovered thirteen times also and was used throughout the document. Persistence was used eleven times and has been an ongoing code used in previous documents. The last code discovered were pattern and it was discovered eight times.

Conclusion

Code charting and focused coding led to narrowing down the field of codes used in the current study. Frequency of use and significance were the primary determinants of which codes would be chosen. Again, like the previous documents analyzed, several codes were common which include impact of HOPE, eligibility issues, persistence, and retention (Bugler, Henry, & Rubenstein, 1999). The HOPE Scholarship was only about six years old and consistent issues with the scholarship were researched. As the HOPE Scholarship matured in years, the issues would change, but would all have several codes in common.

Document Content Analysis

The 1999 document explored several different new areas that had not been explored before in HOPE's young life span. One of the problems being researched dealt with grade inflation (Bugler, Henry, & Rubenstein, 1999). In the first five years of HOPE's existence, there had been a large increase of eligible students (Bugler, Henry, & Rubenstein, 1999). By the time the 1999 document was written, over 358,000 students had received benefits from the HOPE

Scholarship (Bugler, Henry, & Rubenstein, 1999). This dramatic increase caused a re-examination of the program (Bugler, Henry, & Rubenstein, 1999). The researchers also examined academic performance and college enrollment in their study (Bugler, Henry, & Rubenstein, 1999).

The requirement for the HOPE Scholarship in 1999 was that a high school student must have maintained a cumulative 3.0 GPA at the time of graduation in order to get full tuition, fees, and an allowance for books at a public college in Georgia (Bugler, Henry, & Rubenstein, 1999). The restriction on income had been lifted in FY 1996 so more students were becoming eligible for the scholarship (Bugler, Henry, & Rubenstein, 1999). In 1998, almost 60% of graduating seniors were eligible for the HOPE Scholarship (Bugler, Henry, & Rubenstein, 1999).

One of the theories in the late 1990's why so many were receiving the HOPE Scholarship because of grade inflation (Bugler, Henry, & Rubenstein, 1999). The researchers studied in detail whether or not there was any evidence to show that schools and teachers were giving students better grades to students to help them obtain HOPE (Bugler, Henry, & Rubenstein, 1999). The researchers examined different ideas that may cause grade inflation (Bugler, Henry, & Rubenstein, 1999). One explanation was maybe parents, students, and the community were putting pressure on teachers to help students get better grades in order for a higher percentage of their children to receive the HOPE Scholarship (Bugler, Henry, & Rubenstein, 1999). The only way this occurred was by either specific students getting better grades in certain classes or a mass raising of grades across the board for all students (Bugler, Henry, & Rubenstein, 1999). The researchers provided data on SAT scores being compared to GPA and there was evidence of grade inflation nationwide before the HOPE Scholarship (Bugler, Henry, & Rubenstein, 1999).

Overall, the researchers concluded that there was no evidence to point to grade inflation because of the creation of the HOPE Scholarship (Bugler, Henry, & Rubenstein, 1999).

The next section of the 1999 document examined whether or not eligibility for the HOPE Scholarship was increasing due to better academic performance or course avoidance (Bugler, Henry, & Rubenstein, 1999). One of the data points in this document to support HOPE's impact on postsecondary education is that on average, students who enrolled in the University System of Georgia schools were better prepared in high school for the college experience than before HOPE's existence (Bugler, Henry, & Rubenstein, 1999). The number of students who took Advanced Placement courses also increased (Bugler, Henry, & Rubenstein, 1999). All of these data points give evidence that HOPE had a positive impact on student achievement in its first few years and it possibly motivated students to work harder to obtain its benefits (Bugler, Henry, & Rubenstein, 1999).

The last part of the 1999 document dealt with whether or not HOPE affected college enrollment (Bugler, Henry, & Rubenstein, 1999). The positive effect has been an increase of 1.4% of Georgia residents stayed at USG institutions that might have gone out of state for school without having HOPE (Bugler, Henry, & Rubenstein, 1999). One of Miller's original goals was to keep the best students in Georgia at USG schools (Miller, 1998). Another positive impact of the HOPE Scholarship was during this time period, there was a 32.8% increase in enrollments of Black students from the Pre-HOPE period to the writing of the 1999 document (Bugler, Henry, & Rubenstein, 1999). The negative impact of the HOPE Scholarship in this document is the fact in just a few years, the percentage of students who retained HOPE and graduated was only 22.7% (Bugler, Henry, & Rubenstein, 1999).

In conclusion, the 1999 document that evaluated the HOPE Scholarship was able to examine several different positive areas for the HOPE Scholarship. In the young lifespan of HOPE, academic achievement in Georgia was increasing with rising SAT scores and GPAs (Bugler, Henry, & Rubenstein, 1999). Students were better prepared for college academically, but at the same time these students were losing HOPE benefits in their first year or two of school (Bugler, Henry, & Rubenstein, 1999). HOPE had not run into financial trouble yet and the lottery was making record profits (GSFC, 2021). In regards to the research questions of this study, the 1999 document showed the impact the scholarship had and also how policy changes affected enrollment and eligibility (Bugler, Henry, & Rubenstein, 1999).

Document 4: 2003 HOPE Scholarship Joint Study Commission Report

Background

In 2003, the HOPE Scholarship had been around for 10 years (JSCR, 2003). Policy makers, including the state legislature and the governor, were worried that lottery expenditures were outpacing proceeds (JSCR, 2003). The Georgia State Senate passed a resolution in 2003 to form a joint study commission to research and provide solutions in order to fully fund the promise of the HOPE Scholarship and other lottery expenditures (JSCR, 2003). The committee was made up of 20 people from both state legislature chambers, appointees of the governor, and several other people identified in the resolution (JSCR, 2003). The Carl Vinson Institute from the University of Georgia was also directed to provide staff support for the commission (JSCR, 2003).

As lottery revenue started to plateau and more Georgia residents became eligible for the HOPE Scholarship, the cost of college increased causing a great strain on lottery revenues (JSCR, 2003). The commission created a historical study of the HOPE Scholarship to help

policy makers understand how changes have impacted expenditures (JSCR, 2003). As of 2003, over 728,088 scholarships had been awarded by the HOPE Scholarship at a cost of over 2 billion dollars (JSCR, 2003). The commission was open to any new ideas for funding or cutting costs (JSCR, 2003). The committee report stated their mission was to recommend any legislation necessary to ensure the funding of the HOPE Scholarship continues (JSCR, 2003).

Coding

The Joint Study Commission Report is a very detailed report that covered multiple areas about the HOPE Scholarship. During the initial coding stage, several different topics were reoccurring. Positive and negative impact reoccurred throughout the study as the commission researched what effects the HOPE Scholarship has had within the last 10 years (JSCR, 2003). Policy recommendations reoccurred because the commission analyzed past decisions and their impact and proposed new policies to ensure HOPE would continue to be funded properly (JSCR, 2003). Several common codes from previous documents and in the JSCR were eligibility and retention. These two codes affected the decisions of the policy makers in reference to HOPE because they have the greatest effect on cost (JSCR, 2003). There were also several new codes introduced in the JSCR document such as revenue and recipients (JSCR, 2003).

Code charting organized the discovered codes into groups and then the codes were analyzed under focused coding for not only frequency, but their significance in the development and life span of the HOPE Scholarship (JSCR, 2003).

Table 7*Document 4 Frequent and Significant Codes*

Code	Example 1	Example 2
Positive/Negative Impact Theme: Positive/ Negative Impact Frequency: 34	“The lottery is attributed with the creation of 8,000 jobs in 1999” (p. 12).	“Although the HOPE Scholarship makes life easier financially for high achievers who have no trouble maintaining the required grade point average, policy analysts are less certain about the impact of HOPE on low academic achievers or students who may barely qualify for HOPE” (p. 13).
Policy Recommendations Theme: Policy Change Frequency: 37	“Elimination of book and fee payments in FY 2005” (p. 21).	“Ensure compliance with the 3.0 requirement” (p. 42).
Eligibility Theme: Policy Change Frequency: 27	“As HOPE benefits increased and eligibility standards became more stringent, the difficulty to obtain and keep a HOPE Scholarship also likely increased” (p. 13).	“Georgians are ambivalent about whether scholarship awards should be based on need (47 percent) or not (49 percent), but a majority (53 percent) support setting a \$100,000 income gap upon eligibility” (p. 23).
Retention Theme: Positive/Negative Impact Frequency: 14	“Half of HOPE recipients decide to stay in Georgia because of HOPE” (p. 14).	“Cornwell and Mustard have found that under current law, HOPE retention criteria create an incentive for students to slow academic progress” (p. 22).
Revenue Theme: Policy Change Frequency: 13	“Given that tuition at these institutions has increased on average between three to six percent per year during this period, some of the more dramatic increases in HOPE expenditures in 2001 and 2002 may be a result of basic tuition increases” (p. 10).	“During the two years after FY 2001, HOPE expenditures continued to climb fairly rapidly, averaging about 15% per year from FY 2001 to FY 2003” (p. 11).
Recipients Theme: Positive/Negative Impact Frequency: 23	“The National Association of State Student Grant and Aid Programs released a study that ranked Georgia as number one among the 50 states in academic-based student financial aid because of the HOPE Scholarship” (p. 12).	“Minorities are slightly less likely than are whites to receive a HOPE Scholarship and are more likely to lose their scholarship while in college” (p. 12).

Table 7 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 7 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). Since the

document discussed policy changes, policy recommendations were discovered as a code thirty-seven times. Positive/negative impact was discovered thirty-four times because each recommendation had some form of possible impact on HOPE and its recipients. Eligibly was also discovered twenty-seven times because the document discussed how eligibility could be affected by their recommendations. Recipients was discovered twenty-three times and this code represented every time the document discussed those receiving or eligible for HOPE. Retention was discussed fourteen times in the document in relation to those staying in college. The last code discovered in the document was revenue and this code pertained to parts of the document that discussed new ways of gaining funding for HOPE.

Conclusion

The Joint Study Commission Report was one of the most in-depth analyses of the HOPE Scholarship. The committee was tasked with saving HOPE by looking at any and all cost saving mechanisms. The initial, code charting, and focused coding stages revealed several common codes for this study. Policy recommendations, eligibility, and positive/negative impact were a main focus of the study (JSCR, 2003). The study also focused on revenue issues and retention (JSCR, 2003). The committee made multiple recommendations for policy, but warned that their suggestions would only be good for about five to six years before another examination would be needed (JSCR, 2003).

Document Content Analysis

Of the nine documents included in the current study, the Joint Study Commission Report of 2003 was the most in-depth examination of the HOPE Scholarship and its future (JSCR, 2003). The document was broken down into five parts (JSCR, 2003). The first two parts dealt with the history of the HOPE Scholarship up to 2003 and the purpose of the committee (JSCR,

2003). Part three dealt with the academic research on HOPE (JSCR, 2003). Part four examined options for HOPE including consideration and part five discussed the commission's recommendations (JSCR, 2003). The overall purpose of the commission was to find ways to save the HOPE Scholarship in order to ensure its availability for future students (JSCR, 2003).

The focus of the document was to try to find ways to financially secure the HOPE Scholarship (JSCR, 2003). One of the driving costs that was draining HOPE funds was tuition increases on average between three and six percent a year at some of Georgia's most prestigious schools such as the University of Georgia and the Georgia Institute of Technology (JSCR, 2003). As of 2003, over 600,000 students received benefits from the HOPE Scholarship at a cost of \$1.5 billion dollars (JSCR, 2003). The main issue was lottery funds would start to either become stagnant or not keep up with the rising costs of the benefits of the HOPE Scholarship (JSCR, 2003).

Part one examined data on the HOPE Scholarship from a positive and negative perspective (JSCR, 2003). As of 2003, the Georgia Lottery was performing well on revenues and was responsible for the creation of 8,000 jobs in 1999 (JSCR, 2003). One of the negative impacts that was examined was the realization that minorities were less likely than whites to receive HOPE and were much more likely to lose HOPE in college (JSCR, 2003). The 2003 document also examined how the lottery was regressive in nature since lower income families were more likely to play the lottery and less likely to receive its equal share of benefits (JSCR, 2003). Another main point brought up in part one of the study was even though many students lost HOPE benefits in their first or second year in college, the scholarship helped motivate the students to go to school and pay for at least part of their postsecondary education (JSCR, 2003).

Part two of the 2003 document discussed the resolution creating the committee and their work progress (JSCR, 2003). The Senate Resolution 220 was created to form a commission to conduct a study of the issues and needs to ensure HOPE's future (JSCR, 2003). The committee agreed to five public meetings starting in July 2003 (JSCR, 2003). Multiple agencies of the state government, researchers from different research universities, parents, and high school principals all participated in the meetings and contributed input (JSCR, 2003). The commission also laid out its core values and principles, which were administrative consistency, budget predictability, and responsible implementation of long-term solutions (JSCR, 2003).

Part three of the 2003 document discussed the academic research on the HOPE Scholarship (JSCR, 2003). In this section, the committee looked at past data that had been collected on the HOPE Scholarship including college enrollment data, retention rates, popularity of different aspects of the scholarship, and several other data points (JSCR, 2003). Another important data point was examining which portion of HOPE recipients were in financial need (JSCR, 2003). The commission reviewed the 2002 data and discovered 27% of the scholars were in financial need according to the federal definition of in need (JSCR, 2003). The commission also compared the HOPE Scholarship to other programs that were similar in other states (JSCR, 2003). The conclusion of this section led the commission to believe the HOPE Scholarship was not only generous, but its criteria for eligibility had a lot of variation and this part needed to be addressed by the legislature (JSCR, 2003).

Part four of the 2003 document discussed the options for HOPE and the commission's considerations (JSCR, 2003). One of the primary considerations for the committee was finding potential cost savings and guiding principles that could help solve HOPE's long-term financial problems, but at the same time keep intact the promise the HOPE Scholarship had guaranteed

since its inception (JSCR, 2003). One of the financial dynamics the commission considered was trying to keep costs near 750 million since this was a projected revenue estimate for HOPE (JSCR, 2003). So, the vision of the commission was to find financial solutions for the next few years without estimating revenue growth for the lottery (JSCR, 2003).

The commission defined savings as the actual cutting or reducing either the number of awards given or the monetary amount awarded (JSCR, 2003). Either cut how many people receive the award or reduce the amount each is given (JSCR, 2003). The solutions being considered required a lasting impact until at least FY 2009 (JSCR, 2003). One of the first options that was discussed was to limit the number of hours for the HOPE Grant and to restrict it to those without a bachelor's degree (JSCR, 2003). For the HOPE Scholarship itself, the committee wanted more information on limiting eligibility to those with a USG GPA, SAT scores, or both of these requirements (JSCR, 2003). The commission also wanted to study the limiting of fee and book payments (JSCR, 2003).

Some popular recommendations were rejected by the commission in this section of the document (JSCR, 2003). In regards to funding of the HOPE Grant, too little money was going to be saved by limiting how many certificates would be awarded (JSCR, 2003). They also rejected the idea of limiting the number of semesters of attendance for the HOPE Scholarship (JSCR, 2003). Either way the commission had to find cost savings somewhere because current projections at the time predicted a negative balance by June of 2007 (JSCR, 2003).

At the end of part four, the commission created several different approved policy options that led to several preliminary recommendations (JSCR, 2003). The first recommendation was to eliminate the book and fee payments as of FY 2005 (JSCR, 2003). In FY 2005, this would save the program an estimated \$125 million dollars and by FY 2009 somewhere near \$210

million dollars (JSCR, 2003). The second recommendation was eliminating those who already have bachelor's degrees from using the HOPE Grant (JSCR, 2003). This was projected to save the program an estimated \$778,000 dollars a year through FY 2009 (JSCR, 2003). The third recommendation was to impose a joint cap of 127 hours on the HOPE Grant and HOPE Scholarship with an embedded cap of 63 semester hours on the HOPE Grant in FY 2005 (JSCR, 2003). This recommendation was estimated to save \$2.2 million dollars a year up to FY 2009 (JSCR, 2003). The last recommendation in part four was to impose a uniform 3.0 GPA standard to be administered by the GSFC starting in FY 2008 (JSCR, 2003). This recommendation would save almost \$43 million in FY 2008 and \$62 million in FY 2009 (JSCR, 2003). These reductions would permit the program to run a positive year-end balance even though the balance would decline after FY 2006 (JSCR, 2003).

The commission also looked at several other issues for the future at their November meeting (JSCR, 2003). Governor Sonny Perdue requested, at the time, for the legislature to consider using the SAT as part of the eligibility process (JSCR, 2003). The commission wanted more information on an integrated SAT standard (JSCR, 2003). The commission looked at how putting an SAT score as a prerequisite for HOPE and its impact financially (JSCR, 2003). What they discovered was the higher the SAT score requirement the larger the impact on eligibility for full benefits (JSCR, 2003). Most of the scenarios they researched such as allowing students to have HOPE for the first semester even if they did not meet the SAT requirement portion could result in 50% of students losing HOPE after one semester and if the legislature imposed it as a requirement to receive HOPE, it could have impacted up to as many as 75% of the students (JSCR, 2003). The three scenarios they reviewed were all based off of the class of 2000 and

were a projection, but the point of researching the idea was to analyze how it would impact eligibility and retention in the future (JSCR, 2003).

Part five of the 2003 document was detailed with the commission's recommendations for the state legislature (JSCR, 2003). The section was divided into three different parts, which included budgetary recommendations, policy recommendations, and contingency options (JSCR, 2003). The first recommendation was to eliminate payment for books for FY 2005, which would save over \$55 million dollars and possibly up to \$362 million over five years (JSCR, 2003). The second recommendation was to eliminate payment for fees starting FY 2005, which could save as much as \$70 million dollars and up to \$465 million within five years (JSCR, 2003). The third recommendation was to cap the hours for HOPE Grant at 63 semester hours and cap participation in both programs at 127 semester hours starting in FY 2005, which could save \$11 million over five years (JSCR, 2003). The fourth recommendation was to eliminate anyone with a bachelor's degree from receiving HOPE Grant funds starting in FY 2005, which would save \$3.8 million over five years (JSCR, 2003). The fifth and last recommendation was to implement a standard 3.0 GPA requirement regulated by the GSFC for HOPE starting in FY 2008, which would save up to \$42 million the first year and up to \$105 million through FY 2009 (JSCR, 2003).

The next section of part five discussed policy recommendations (JSCR, 2003). They recommended eight different policy recommendations (JSCR, 2003). The first recommendation was for the legislature to ensure the merit-based portion of the HOPE Scholarship stays intact (JSCR, 2003). The second recommendation required the state legislature to endorse the GPA proposal from the budgetary recommendations to increase uniformity across the board (JSCR, 2003). The third recommendation was for the GSFC to ensure that the 3.0 GSFC GPA standard

is complied with (JSCR, 2003). The fourth recommendation was to improve the data management system of the GSFC so more data is available for research to consider future policies (JSCR, 2003). The fifth recommendation was for the legislature to create appropriate oversight and coordination of the HOPE Scholarship and programs (JSCR, 2003). They also recommended a commission to study the Pre-K program because of rising costs (JSCR, 2003). They also recommended a uniform grading system in public k-12 in Georgia (JSCR, 2003). The last policy recommendation was to discontinue funding capital outlay projects that were initially proposed by Zell Miller (JSCR, 2003).

The last section of the document discussed contingency options (JSCR, 2003). These were for emergency purposes or to be looked at in the future (JSCR, 2003). One of the more interesting measures proposed for contingency was to grant the GSFC the ability in emergency situations to declare a flat grant payment for short term financial situations for recipients (JSCR, 2003). Another recommendation to review was using the SAT as a measuring device for not only eligibility but for award amount (JSCR, 2003). They also suggested looking at end of course tests as an eligibility factor (JSCR, 2003). Another suggestion was increasing the 3.0 GPA requirement (JSCR, 2003). The last item suggested was examining a flat grant award rate so costs do not exceed revenue (JSCR, 2003).

The Joint Study Commission Report in 2003 was the first real serious look to revamp the HOPE Scholarship (JSCR, 2003). The report answered both research questions because it laid out the fundamental changes to policy for the HOPE Scholarship and explained the purpose and impact of HOPE on postsecondary education. The proposals from the document would end up being widely used if not the following fiscal year, years later and even in the last few years (JSCR, 2003). The importance of this document was that it made a lasting impact on the future

of the HOPE Scholarship by advising the state legislature to make major changes to the HOPE Scholarship in order to ensure the HOPE Scholarship would be around for future postsecondary students (JSCR, 2003).

Document 5: 2010 An Overview of Lottery Revenues, Expenditures, and HOPE

Background

As warned by the Joint Study Commission Report, 2010 would lead to another re-evaluation of the HOPE Scholarship and funding issues (JSCR, 2003). The document was prepared by the Georgia Student Finance Commission for the Georgia State Legislature's Higher Education Committees (GSFC, 2010). The purpose of the report was to research and then provide information to the committees in order for policy makers to make any necessary changes to ensure the HOPE Scholarship would continue to be fully funded (GSFC, 2010). HOPE in 2010 faced financial uncertainty and the state legislature was tasked to find ways to reduce the scholarship's cost (GSFC, 2010).

The main focus of the document was to examine revenue and expenditures and how the future was going to cause issues to fully fund the HOPE Scholarship (GSFC, 2010). The lottery was starting to flatline in profits and the expenditures to pay for HOPE were on the rise (GSFC, 2010). The suggested changes the Joint Study Commission recommended staved off financial decline for a few years, but the 2010 document showed a decline in revenue and that the reserve funds would be depleted (GSFC, 2010). The 2010 document did not offer recommendations only a projection of the dangers the HOPE Scholarship faced at the time (GSFC, 2010).

Coding

The initial coding stage discovered several different ideas for codes. The document refers to several different topics such as expenditures of HOPE and other programs, persistence of

students, retention, revenue shortfalls and increases, achievement, reductions, eligibility of different groups of students, and positive/negative impact of the HOPE Scholarship (GSFC, 2010). These topics were reoccurring and were described in detail using a PowerPoint slideshow and graphs (GSFC, 2010).

Code charting led to organizing the identified codes into different categories of frequency (GSFC, 2010). Each proposed code was then narrowed down by its frequent use and also its significance in the documents (GSFC, 2010). Significance was configured by how the codes related to previous documents and the amount of time and energy the GSFC spent on the topic (GSFC, 2010).

Table 8*Document 5 Frequent and Significant Codes*

Code	Example 1	Example 2
Expenditures Theme: Policy Change Frequency: 6	“Cost of tuition; mandatory fees (capped at the January, 2004 level); book award of \$150/semester or \$100/quarter” (p. 33).	“Projected FY 2012 expenditures= \$1,127,878,000 and the shortfall= \$243,774,261” (p. 67).
Persistence Theme: Positive Impact Frequency: 14	“To increase the postsecondary persistence to credential completion rate by providing continuing support based on student merit expressed in a grade point average threshold” (p. 4).	“HOPE eligible students have better persistence than those not initially eligible, but better preparation is likely a more compelling causative factor than additional resources” (p. 8).
Retention Theme: Policy Change Frequency: 18	“In terms of HOPE Scholarship retention –of the 24,415 HOPE Scholarship students beginning USG colleges in the Fall of 2003, 46.2% were eligible at the end of 30 semester hours...” (p. 36).	“In terms of HOPE Scholarship retention –of the 24,415 HOPE Scholarship students beginning USG colleges in the Fall of 2003, 37.4% were eligible at the end of 90 semester hours-13,257 of the original number...” (p. 36).
Revenue Theme: Policy Change Frequency: 11	“The Georgia for Lottery Education Act provides that the Lottery Corporation deposit net proceeds into the Lottery for Education Account each quarter-target: 35% of net sales” (p. 13).	“Increases in the annual sum of these quarterly deposits have averaged 2.75% since FY 2000, although the percentage increase for FY 2008 over FY 2007 was 1.66% and for FY 2009 over FY 2008 was 0.51%” (p. 13).
Reductions Theme: Negative Impact Frequency: 14	“Current law provides that if the “year-end balance”, which is the same as the unrestricted reserve, falls below 92% of the “highest year-end balance” for any fiscal year beginning with FY 2004 then the book award for students will be halved from \$300 per year to \$150 per year, except for students eligible for the Pell Grant program” (p. 21).	“If thereafter the “year-end balance” falls below 75% of the “highest year-end balance” then mandatory fee payments will be eliminated for all students” (p. 21).
Eligibility Theme: Policy Change Frequency: 16	“Requires a Georgia resident graduating from high school to have a 3.0 grade point average (GPA) at an approved high school in the core academic areas of English, mathematics, science, social studies and foreign language for eligibility in their freshman year of college” (p. 34).	“Besides residency, students may not receive awards if they have defaulted on a student loan or have been convicted of a recent drug offense” (p. 34).
Achievement Theme: Positive Impact Frequency: 13	“To increase student achievement in high school by providing an incentive based on grades- by improving grades students would also be better prepared for college” (p. 4).	While Georgia’s participation rate in FY 1994 was not documented, a recent office of Student Achievement report places Georgia’s participation rate for high school graduates at 65%” (p. 7).
Impact Positive/Negative Theme: Positive/Negative Impact Frequency: 15	“Since HOPE was first created, it has served over 1.2 million students and has provided benefits totaling more than five billion dollars from the HOPE Scholarship, Grant, and GED programs” (p. 3).	“Effects of the new GPA calculation reduce the number of HOPE-eligible graduates” (p. 51).

Table 8 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 8 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). The code retention was discovered eighteen times and again was the focus of who was staying in college even if they lost HOPE. Eligibility was used sixteen times and discussed how anyone can become eligible for HOPE in the document. Impact positive/negative was discovered and used fifteen times in reference to what effect HOPE and the changes made to HOPE have had. Persistence and reduction were discovered fourteen times and referenced students who stayed in college and also cuts in award amounts. Achievement was discovered thirteen times and referenced accomplishments made by HOPE and HOPE scholars. Revenue was discussed as a code eleven times in reference to ways to fund the HOPE Scholarship. The last code discovered was expenditures which was discovered six times and dealt with how funds were spent for HOPE.

Conclusion

Several re-occurring codes appeared in the 2010 document that relate to the previous documents. Impact of the HOPE Scholarship has been a common code in all of them since researchers examined the positive and negative impacts of the scholarship in each research document (GSFC, 2010). Revenue, expenditures, and reductions were the main concepts discussed in the 2010 document because financing the HOPE Scholarship was financially crippling the reserve funds for HOPE (GSFC, 2010). Researchers were no longer researching eligibility or about how to create more benefits because the number of eligible students for the scholarship was endangering the promise of HOPE (GSFC, 2010).

Document Content Analysis

The 2010 document is a presentation using PowerPoint which discussed the HOPE Scholarship in two parts for the House and Senate Higher Education Committee (GSFC, 2010). The first part discussed the history of HOPE and lottery expenditures (GSFC, 2010). By this point in its lifespan, HOPE had provided over \$5 billion dollars in benefits for over 1.2 million students (GSFC, 2010). The three goals of HOPE were to increase student achievement in high school by providing an incentive, increase the postsecondary participation rate in Georgia, and to increase the postsecondary persistence to credential completion rate (GSFC, 2010). The document also discussed the basic structure of HOPE including the public scholarship, private scholarship, grant, and awards for GED students in Georgia (GSFC, 2010).

Another topic that was addressed in the presentation was whether or not HOPE had achieved its goals (GSFC, 2010). One of the main points about student achievement was whether or not the HOPE Scholarship incentive had raised SAT scores (GSFC, 2010). Georgia did see a rise in SAT scores in the 1990's (Bugler, Henry, & Rubenstein, 1999). The document showed SAT scores stayed relatively the same from 2001 to 2009 (GSFC, 2010). In 2001, the average Georgia student scored a 491 verbal and 489 math score on the SAT (GSFC, 2010). By 2009, the average scores were 490 verbal and 491 math (GSFC, 2010). One of the original goals of HOPE was to increase postsecondary participation and an Office of Student Achievement report stated that Georgia's participation rate was near 65% (GSFC, 2010). Retention in college was also a goal (GSFC, 2010). HOPE eligible students have a better persistence rate than those not eligible, but this could be because they are better prepared for a postsecondary education (GSFC, 2010). Another goal Miller had desired was to help those in need and in FY 2004, Pell Grant eligible students received \$117 million dollars in HOPE funds (GSFC, 2010).

Lottery expenditures were a main theme of the document also (GSFC, 2010). HOPE Scholarship expenditures had steadily increased over time and overwhelmed lottery revenues (GSFC, 2010). In FY 2000, postsecondary expenditures were close to \$400 million dollars and by FY 2010 the GSFC predicted postsecondary expenditures to close in on a billion dollars (GSFC, 2010). The fear of revenue not meeting demand was real and expressed in the 2010 document (GSFC, 2010). For FY 2010, deposits for the Lottery for Education Account were up just 1.35%, which was a small increase of \$12 million from the year before (GSFC, 2010). Because the lottery reserve funds were expected to be decreasing rapidly, the 2010 document predicted that beginning in FY 2012 program reductions would start and this would affect major funding areas such as paying fees for students (GSFC, 2010).

Part two of the 2010 document dealt with HOPE projections and prospects (GSFC, 2010). Sixty-nine percent of the overall spending was on postsecondary expenditure at \$772 million dollars (GSFC, 2010). At the time, HOPE was paying the cost tuition for public colleges and universities, mandatory fees capped at the January 2004 level, and book awards of \$150 a semester (GSFC, 2010). Part two also discussed the eligibility requirements for each part of HOPE and other programs (GSFC, 2010). A Georgia resident must obtain an overall 3.0 core GPA in the areas of English, math, science, social studies, and foreign language classes or a 3.2 GPA in a non-college preparatory regular diploma (GSFC, 2010).

Over 200,000 students had received support under HOPE programs in FY 2010 (GSFC, 2010). Almost half of these postsecondary students were attending a public postsecondary educational institution (GSFC, 2010). Retention was explored as in previous documents. In the Fall of 2003, 46.2% of HOPE scholars were still eligible after 30 completed semester hours then

after 90 semester hours it fell to 37.4% (GSFC, 2010). Of the original HOPE class of FY 2003 at USG institutions, 54.3% graduated within six years (GSFC, 2010).

Cost drivers were also explored to give the state legislature an idea of the different type of costs that were draining lottery funds (GSFC, 2010). One of the major cost drivers was rising tuition costs at USG institutions (GSFC, 2010). GSFC reported tuition costs from four different fiscal years, which included FY 2000, FY, 2005, FY 2010 and FY 2011 (GSFC, 2010). An example of this type of cost driver would be the University of Georgia in Athens (GSFC, 2010). In FY 2000, per term tuition was \$1,207, in FY 2005 per term tuition was \$1,684, in FY 2010 per term tuition was \$3,035, and in FY 2011 per term tuition was \$3,535 (GSFC, 2010). Even smaller public colleges such as Georgia College and State University were seeing their tuition costs increases during the same time period (GSFC, 2010). In FY 2000, per term tuition was \$904, in FY 2005 per term tuition was \$1,576, in FY 2010 per term tuition was \$2,842, and in FY 2011 per term tuition was \$3,142 (GSFC, 2010). In between FY 2005 and FY 2011, tuition costs were almost doubling and tripling at some public colleges, which in turn required more money in tuition costs for each HOPE Scholarship recipient (GSFC, 2010).

In conclusion, the 2010 document revealed HOPE was in financial danger (GSFC, 2010). No longer was the focus on who was receiving the HOPE Scholarship and how to get them to retain it and graduate in a timely manner, but the focus was its financial health (GSFC, 2010). The 2010 document does offer suggestions of how to fix HOPE's bleak financial future, but only provided the state legislature an idea of the financial situation it was in (GSFC, 2010). As more and more students became eligible for its benefits and tuition costs rose, HOPE's future became in danger (GSFC, 2010).

Document 6: 2015 House Study Committee on the Preservation of the HOPE Scholarship Program

Background

The 2015 House Study document was created for the state legislature to consider proposing other gambling options in order to preserve the HOPE Scholarship (HSC, 2015). The HOPE Scholarship was running out of money and the state legislature was exploring new ways to fund it (HSC, 2015). The state house and senate both looked at different types of casino gaming and horse race gambling to see if they were politically and financially viable options to fund future HOPE Scholarship programs (HSC, 2015).

Some of the issues the committee dealt with was listening to different groups of people express their reasons for being for or against the new gambling ideas (HSC, 2015). The committee listened to the Georgia Lottery Corporation, Georgia Student Finance Commission, advocates for the gaming industry and horse racing, and groups who are opposed to gambling (HSC, 2015). The committee spent a great deal of time researching and hearing proposals of how to tax each type of gambling and what benefit(s) financially each could bring (HSC, 2015). The committee did not make any recommendations, but only laid the groundwork for consideration of the proposals from the different interest groups (HSC, 2015).

Coding

The initial coding stage led to the discovery of several different topics for codes. Preservation stood out in the initial coding stage because the committee was meeting to find ways to preserve the funding of the HOPE Scholarship (HSC, 2015). The committee evaluated new streams of revenue to be able to fund the HOPE Scholarship (HSC, 2015). Implications was also discovered because the committee had to evaluate the positive or negative side effects to any

approval of gambling in Georgia (HSC, 2015). Positive and negative impact of suggestions were also discovered because an analysis was done on each idea (HSC, 2015). Benefit was discovered due to the fact that different groups were to gain financially from allowing the different types of gambling in Georgia (HSC, 2015). The last two topics that were examined for coding were problems of gambling and opposition to gambling (HSC, 2015).

Code charting organized the topics by frequency and significance in order to evaluate and narrow down, which could have a meaningful impact on the current study (HSC, 2015). Focused coding narrowed down the codes and took the codes chosen for frequency and analyzed them for impact and significance. Since examining new avenues of revenue was the main purpose of the document, the codes are different than most of the previous documents, but the document provides a snapshot of where HOPE Scholarship funding stood in 2015 (HSC, 2015).

Table 9*Document 6 Frequent and Significant Codes*

Code	Example 1	Example 2
Preservation Theme: Policy Change Frequency: 13	“House Resolution 827 created the House Study Committee on the Preservation of the HOPE Scholarship Program” (p. 3).	“Maintaining and expanding lottery funded initiatives such as the HOPE Scholarship Program and Georgia’s Pre-K program for future generations of Georgians is essential to the continued development of a well-educated state workforce and sustained economic growth” (p. 3).
Revenue Ideas Theme: Policy Change Frequency: 12	“Marquette Advisors provided the sole estimate for the total economic impact of casino gambling in Georgia: \$5 billion” (p. 4).	“With annual wagering totaling over \$10 billion in the United States and 90 billion worldwide, the potential of horse racing in Georgia to provide additional revenue for the HOPE Scholarship and Grant Program deserves consideration” (p. 13).
Implications of Policy Theme: Positive/Negative Impact Frequency: 17	“However, while demographics, infrastructure, and existing amenities make Georgia an attractive site, witnesses before the committee cautioned that, should Georgia choose to pursue casino gaming, policymakers should be certain to consider the short and long-term implications of policies setting tax rates, licensure, and the types of gaming permitted” (p. 9).	“Warning of the negative implications of too high a gaming tax rate, representatives of the gaming industry did cite numerous examples, predominately from northeastern states, where tax levels were set prohibitively high-reaching levels near 70%...” (p. 10).
Impact Positive/Negative Theme: Positive/Negative Impact Frequency: 18	“An unprecedented \$8.1 billion in lottery proceeds have been distributed between 1993 and 2015 to provide 1.7 million Georgians an unparalleled opportunity for a higher education” (p. 8).	“Since 2011, there has been a decline in the number of students receiving both HOPE Scholarships and HOPE Grants. While a portion of this decline can be attributed to the 2011 reforms, it should be noted that the improving economy and declining unemployment rate is predominately responsible for the decline in students covered-especially for the HOPE Grant” (p. 9).
Benefit(s) of Policy Theme: Positive Impact Frequency: 9	“According to Marquette Advisors, the Stephens 12% proposal would generate nearly \$300 million per year in gaming tax revenue” (p. 10).	“While projections ranged from several thousands to tens of thousands of jobs, it is of note that the majority, -nearly two-thirds-of casino positions would be in non-gaming positions” (p. 12).
Problems Theme: Negative Impact Frequency: 7	“Due to the success and expansion of these lottery funded programs, significant pressures on the current funding framework exist” (p. 3).	“Specifically, the GLC has witnessed a decrease in profit margins from 36% in FY 1995 to 24.8% in FY 2015 driven predominately by a decline in the popularity of “draw” games and an increase in the popularity of “scratcher” games” (p. 8).
Opposition Theme: Policy Change Frequency: 6	“A common theme among anti-gaming advocates is the expected increase in crime, addiction, bankruptcies, foreclosures and general changes in the character of communities in which gaming facilities are located” (p. 13).	“Opponents also suggested that those with gambling addiction are often at risk for other risky behaviors such as depression, tobacco use, alcohol addictions, drug dependencies/addiction, domestic violence, family neglect and various financial problems” (p. 13).

Table 9 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 9 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). The impact of HOPE positive/negative was discovered eighteen times and referenced statements that discussed its impact. The implications of policy was discovered seventeen times and dealt with data of how HOPE and its funding has led to different types of results. Preservation was discovered thirteen times and referenced ways to save HOPE from negative changes. Revenue ideas was discovered twelve times and referenced any new idea for funding HOPE. Benefits of policy was discovered nine times and referenced any type of new or standing policy that had a meaningful impact on HOPE and the recipients. Problems referred to specific issues with HOPE and the policies that regulate HOPE and was discovered seven times. The code opposition was discovered six times and referenced groups and people who were against any new form of gambling.

Conclusion

The 2015 House Study document revealed how the legislature was looking at other means besides cutting the HOPE Scholarship in order to save it (HSC, 2015). Several new codes were discovered in the 2015 House Study document inducing opposition, implications of policy, revenue ideas, and preservation (HSC, 2015). The legislature was studying new avenues of revenue sources and looking at not only their impact but the negative implications that come with legalizing types of gambling (HSC, 2015). It had been almost five years since the last

significant changes had been made to the HOPE Scholarship, and it still faced an uncertain financial future in 2015 (HSC, 2015).

Document Content Analysis

The 2015 document organized by the House Study Committee on Preservation of the HOPE Scholarship Program was created by House Resolution 827 to find ways to increase the revenue streams that fund the program (HSC, 2015). According to the state legislature, ensuring HOPE continued to provide thousands of Georgia students with a postsecondary education was very important, according to the state legislature, in order to continue to develop an educated workforce and help Georgia's economy grow (HSC, 2015). The committee was to study long term solutions to the stretched lottery revenues that included the legalization and taxation of casino gaming and pari-mutuel wagering on horse racing (HSC, 2015). There were four total meetings held within the year from those who supported or opposed the proposals (HSC, 2015).

The first thing the committee addressed was the state of the lottery and HOPE (HSC, 2015). By 2015, over eight billion dollars in lottery proceeds had been distributed with over 1.7 million recipients (HSC, 2015). Profit margins had decreased for the lottery from 36% in fiscal year 1995 to 24.8% in FY 2014 because the popular draw games were being played less and the scratcher games were being played more (HSC, 2015). In 2011, HOPE underwent some changes that included the elimination of book and fee payments and a seven-year time limit on eligibility (HSC, 2015). HOPE award amounts were also decoupled from tuition amounts and tied to a factor rate or percentage (HSC, 2015). In other words, the state could look at previous year award amounts and decide what percentage to pay out the following year based on lottery revenues (HSC, 2015). It was originally set at 90%, but for several years following the decrease

it would be at 103% (HSC, 2015). HOPE was also broken into six different parts with different criteria and award amounts (HSC, 2015).

Casino gaming was one of the revenue streams the committee researched (HSC, 2015). Georgia was a prime spot for what is referred to as destination, resort style casinos (HSC, 2015). These are casinos that allow people to stay overnight and offer other amenities (HSC, 2015). Atlanta was a prize target for its location, population, and its service as a travel hub for people all over the nation (HSC, 2015). Long- and short-term implications had to be explored by the committee (HSC, 2015). Analysts told the committee the State of Georgia was losing between \$346 to \$470 million dollars to out of state casinos (HSC, 2015).

There were several possible positive and negative implications for the committee to consider for casino gaming (HSC, 2015). Creation of an ideal tax rate was discussed for much of the section on casino gaming (HSC, 2015). Analysts warned that a high tax rate on casinos, like in northeastern states, would lead to less competition and hinder revenue growth over time in Georgia (HSC, 2015). At the same time, the committee had to consider a rate that could help relieve the revenue shortfalls of the lottery for the HOPE Scholarship (HSC, 2015). How licenses would be granted and in what areas of the state was also taken into consideration (HSC, 2015). The committee also heard from analysts about limiting certain types of games such as video gaming and table games (HSC, 2015). The selling point, from the casino gaming proponents, was Georgia could gain thousands of jobs and also approximately near five billion dollars a year to its economy (HSC, 2015).

Pari-mutuel wagering on horse racing was another stream of revenue considered by the committee (HSC, 2015). The equine economy in Georgia was relatively large at the time with over 74,000 horses in Georgia and contributing \$750 million dollars to Georgia's economy every

year (HSC, 2015). Georgia already had horse tracks and hosted it in the Olympics in 1996 (HSC, 2015). Another benefit of horse race wagering is that the betting can come from out of state and analysts estimated 87% of bettors would be placing bets online (HSC, 2015). As of 2015, 43 states had pari-mutuel horse race wagering, which contributed to \$10 billion dollars to the economy (HSC, 2015).

There were also a lot of issues in trying to legalize either source of revenue (HSC, 2015). The opposition to any new forms of gambling was widely opposed by different religious organizations in Georgia (HSC, 2015). Advocacy groups also told the committee that gambling will bring higher crime rates, poverty, drug use, and possible organized crime (HSC, 2015). The committee also worried about whether or not casino gaming would “cannibalize” the lottery, which would lead to less people playing the lottery because casinos were available instead (HSC, 2015).

In conclusion, several committee members recommended the state go forward in looking at legalizing both revenue sources with conditions (HSC, 2015). The issue was it not only had to pass the state legislature, but it had to be approved by the governor and the public had to approve an amendment to the state constitution (HSC, 2015). This would be very challenging to do since public opposition to gambling was still high (HSC, 2015). This document helped answer both research questions. The document gave details of the impact of the HOPE Scholarship and also about proposed policy changes that were considered.

Document 7: 2015 Summary of Meetings Held by the Senate Preservation of the HOPE Scholarship Study Committee

Background

The 2015 Senate Study document was not as in-depth as the 2015 House Study document. The document is a summary of the senate's view of the four meetings on the preservation of the HOPE Scholarship (SSC, 2015). The document described the details of speakers who discussed how casino gaming and horse racing could affect the Georgia economy and impact funding for the HOPE Scholarship (SSC, 2015). The document discussed casino gaming in the aspect of what economic gain it could contribute to funding the HOPE Scholarship, but at the same time the issues and problems that come with its allowance (SSC, 2015). The document also discussed horse racing in the aspect of how it could help bring more financing to the HOPE Scholarship and how Georgia already was known for its equine economy (SSC, 2015). The document also discussed the negative implications of a high tax rate and how crime could occur with more legalized gambling (SSC, 2015).

Coding

The initial coding stage discovered several of the same ideas the House Study document had (SSC, 2015). The topics discussed in the Senate Study document were preservation of the HOPE Scholarship, revenue ideas/proposals, implications of policy, impact, problems facing Georgia, and opposition to legalized gambling (SSC, 2015). These topics were then compared to the House Study document to compare and contrast ideas for differences and similarities (SSC, 2015).

Code charting led to organizing the different ideas as codes by evaluating the frequency in which they were used in the document (SSC, 2015). Focused coding led to the ideas being

chosen for codes by their significance in the document. The codes chosen from the document are preservation, revenue ideas, implications of policy, impact positive/negative, problems, and opposition due to their significance in the Senate Study document (SSC, 2015).

Table 10

Document 7 Frequent and Significant Codes

Code	Example 1	Example 2
Preservation Theme: Policy Change Frequency: 12	“For the purposes of assessing the viability of these legislative proposals and other legislative solutions as a means to preserve and enhance these lottery-funded education programs, the Committee was created under Senate Resolution 4” (p. 1).	“Despite the record profits of the Georgia Lottery Corporation, lottery profits may not be able to satisfy the HOPE Scholarship Program demand due to the increasing student enrollment and rising college tuition and other costs. As mentioned, legislative proposals have been made to preserve these education programs in Georgia by using a percentage of tax revenues from casinos and horse racing tracks to fund the HOPE Scholarship and Georgia Pre-K Programs” (p. 4).
Revenue Ideas Theme: Policy Change Frequency: 17	“As a result, legislation proposing the state taxation of casino gaming and pari-mutuel wagering on horse racing has been introduced in recent years as a source of supplemental funding for these lottery-funded education programs” (p. 1).	“At minimum, 90% of the state’s casino gaming proceeds must be dispensed to education purposes and programs” (p. 7).
Implications of Policy Theme: Positive Impact Frequency: 5	“Mr. Whitaker stated that gaming contributes \$32 billion in tax revenues to local, state, and federal governments each year. This revenue supports a wide range of public works initiatives such as education, infrastructure, public safety, and general treasury funds” (p. 8).	“Funding of state resources for the treatment of problem gaming issues: Maximum 2% of casino gaming proceeds” (p. 7).
Impact Positive/Negative Theme: Positive/Negative Impact Frequency: 19	“Casino gaming would ultimately have a \$5 billion impact in Georgia annually, which is equivalent to hosting the Summer Olympic Games every year” (p. 8).	“Casino gambling and pari-mutuel wagering on horse racing in Georgia could increase gambling addictions in Georgia” (p. 11).
Problems Theme: Negative Impact Frequency: 7	“According to Dr. John Kindt, Professor at the University of Illinois, crime increases approximately 10 percent per year every year around new gambling facilities with electronic gambling machines” (p. 10).	“There is a debate as to whether crime increases in states with casinos and pari-mutuel wagering on horse racing” (p. 10).
Opposition Theme: Policy Change Frequency: 5	“Ms. Cyndy Hartman with the Faith and Freedom Coalition and Conservative Women of NE Georgia testified on her own personal experiences living with casinos near Atlantic City, NJ. She explained how the introduction of casinos in Atlantic City in 1978 eventually ruined the city by increasing crime and prostitution” (p. 10).	Ms. Tanya Ditty, State Director of Concerned Women of America of Georgia, also testified to the potential gambling addictions that casinos and horse racing could promote or encourage if legalized in Georgia” (p. 11).

Table 10 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 10 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). The impact of HOPE positive/negative was discovered nineteen times and referenced statements that discussed its impact. Revenue ideas was discovered seventeen times and referenced any new idea for funding HOPE. Preservation was discovered twelve times and referenced ways to save HOPE from negative changes. Problems referred to specific issues with HOPE and the policies that regulate HOPE and was discovered seven times. The implications of policy was discovered five times and dealt with data of how HOPE and its funding has led to different types of results. The code opposition was discovered five times and referenced groups and people who were against any new form of gambling.

Conclusion

The 2015 Senate Study document had many similarities with the House Study document. The initial coding stage discovered several similar topics as codes. Both documents had the same mission to preserve the HOPE Scholarship and to evaluate casino gaming and horse race gambling (SSC, 2015). Code charting helped organize the codes that were discovered according to frequent use (SSC, 2015). Focused coding helped narrow down the codes by their significance (SSC, 2015). The common focus in the document was not whether Georgia would pass new types of gambling, but whether the HOPE Scholarship could benefit from new forms of gambling and what the implications of allowing gambling would be (SSC, 2015).

Document Content Analysis

The 2015 Senate Study Committee document also looked at the same issues of revenue as the 2015 House Study Committee document did (SSC, 2015). The first part of the document was to discuss the committee's focus, creation, and duties (SSC, 2015). The committee first acknowledged the impact HOPE and the lottery made on Georgia including hundreds of thousands getting support for postsecondary education and Pre-K education (SSC, 2015). The 2015 document also recognized that revenue problems are causing these programs to be in danger (SSC, 2015). Senate Resolution 135 proposed a constitutional amendment to legalize pari-mutuel wagering on horse racing in Georgia (SSC, 2015). Their primary goal was to find ways to preserve these programs for future use (SSC, 2015).

Casino gaming was examined by the committee in the 2015 document (SSC, 2015). The proposal was that 90% of taxes collected from casino gaming would go to education (SSC, 2015). The Senate 2015 document offered more data than the 2015 House document (SSC, 2015). Analysts predicted that 50% of the casino gaming revenue will be from outside the casino such as amenities and tourism sparked by the casino's presence (SSC, 2015). Casino gaming had contributed to \$32 billion dollars in tax revenue in the United States every year to local, state, and the federal government and Georgia could possibly receive \$5 billion in tax revenue alone (SSC, 2015). An analysis for casino gaming also predicted over 30,000 new jobs from supporting casinos for Georgia (SSC, 2015).

The Senate 2015 document went into more detail about how casino gambling would help with tourism in Georgia (SSC, 2015). Casino gaming analysts predicted Georgia could see a spike of 26 million visitors a year because of casino gaming which would provide more revenue (SSC, 2015). In addition, the analysts predicted tourists would spend almost \$2.4 billion dollars

in Georgia (SSC, 2015). The analysts also promoted the idea that the average salary of casino employees was \$43,000 a year (SSC, 2015).

The 2015 document also added some more details to the impact of pari-mutuel wagering on horse racing (SSC, 2015). Unlike the 2015 House document, the Senate predicted horse racing could bring in as much as \$25 million dollars for education a year (SSC, 2015). Analysts spent a lot of the document discussing how horse racing would benefit rural communities by providing them jobs and facilities (SSC, 2015). Horse racing would touch several other industries in Georgia and make a small economic impact (SSC, 2015).

The opposition in the Senate 2015 document echoed many of the sentiments in the House 2015 document (SSC, 2015). According to analysts, one of the negative impacts, according to analysts, is that crime tends to rise 10% near casinos every year with electronic machines (SSC, 2015). A witness went before the committee to discuss how poor life in Atlantic City was like for her after casino gaming was allowed (SSC, 2015). Gambling addiction was also discussed by a religious leader and leader of a women's group (SSC, 2015). The opposition to the new revenue ideas was not about whether they would profit, but at what the social cost would be for Georgians (SSC, 2015).

In conclusion, both documents suggested that opposition to allowing either of the gambling revenues was strong (SSC, 2015). Neither made it out of the legislature that year (SSC, 2015). The opposition to gambling in Georgia was still very strong from a moral perspective (SSC, 2015). Each of the proposals answered both research questions. They both explained the impact HOPE was having on postsecondary education in Georgia, but also showed the proposed policy changes from the state legislature (SSC, 2015). Both of these documents

confirmed the legislature knew that HOPE revenue was running low and something needed to be done to keep the promise of HOPE alive (SSC, 2015).

Document 8: 2019 HOPE Programs Briefing for Senate Study Committee on Gaming and Pari-Mutuel Wagering on Horse Racing and Growing Georgia's Equine Industry

Background

In 2019, the Georgia Student Finance Commission prepared another report for the Senate Study Committee on Gaming and Pari-Mutuel Wagering on Horse Racing and Growing Georgia's Equine Industry to give them a financial picture of where the HOPE Scholarship stood and suggestions for the committee to consider (GSFC, 2019). The document did not support or promote casino gaming or horse racing, but offered the committee a visual of how the HOPE Scholarship's funding was in jeopardy and action was needed (GSFC, 2019). GSFC gave the committee a brief overview of the history of the HOPE Scholarship to put in perspective how massive the merit-based scholarship was (GSFC, 2019).

The overview was divided into several parts (GSFC, 2019). The first part described the HOPE Programs including their structure and history (GSFC, 2019). In addition, the first part discussed the finances and the different types of programs that fell under HOPE and the changes HOPE had endured (GSFC, 2019). The second part covered the HOPE Programs which detailed expenditures and awards to recipients (GSFC, 2019). The third part discussed the cost drivers to the programs; it detailed some of the factors that have led to the cost of the HOPE Scholarship (GSFC, 2019). The fourth part discussed the HOPE award rates to specific schools (GSFC, 2019). The last part discussed upcoming considerations and how these considerations may affect specific schools (GSFC, 2019).

Coding

The initial coding stage led to several topics to be discovered and considered for coding. The document was scanned for topics that were frequently used in order to create codes (GSFC, 2019). The topics that were discovered during the initial coding stage were budget expenditures, reductions of benefits, positive and negative impact, preservation of HOPE, revenue, and cost drivers (GSFC, 2019). These topics were frequently used and made up the main part of the content of the document (GSFC, 2019).

Code charting led to the codes listed from the initial coding stage to be organized into groups by frequency (GSFC, 2019). Focused coding narrowed down and simplified the codes to be analyzed which included the codes expenditures, reductions, impact positive/negative, preservation, revenue, and cost drivers (GSFC, 2019).

Table 11

Document 8 Frequent and Significant Codes

Code	Example 1	Example 2
Expenditures Theme: Policy Change Frequency: 7	“Continually increasing costs and additional program demands may warrant a review of program structure and expenditures within the next few years” (p. 2).	“High concentration of Zell Miller Scholars at highest cost institutions” (p. 18).
Reductions Theme: Negative Impact Frequency: 9	“Triggers were established to further reduce benefits if reserve funds were utilized” (p. 7).	“Book and fee payments completely eliminated” (p. 8).
Impact Positive/Negative Theme: Positive/Negative Impact Frequency: 14	“Over the past 26 years, the HOPE programs have been hugely successful, with over 1.8 million students benefitting from over \$10.8 billion in awards” (p. 2).	“In 2012, 18.73% of Georgia students had an ACT score equal or greater than 26 and by 2018 the percentage was 23.24%” (p. 21).
Preservation Theme: Policy Change Frequency: 6	“HOPE Scholarship award now tied to “Factor Rate” to be adjusted annually, allowing for long term cost controls” (p. 8).	“House Bill 801 from 2016 contains language that resets the HOPE Award amount calculation (Zell Miller unchanged; remains 100% of public tuition)” (p. 37).
Revenue Theme: Policy Change Frequency: 17	“Huge growth in Lottery proceeds during the first few years led to program expansion” (p. 6).	“GSFC recommends limiting any new or additional changes that result in additional costs” (p. 44).
Cost Drivers Theme: Negative Impact Frequency: 9	“Average public college HOPE Scholarship recipient in 2012 received \$3,564.76 and by 2019 the average was \$4,233.62” (p. 26).	“Cost concerns led to reform in 2004 and in 2011” (p. 2).

Table 11 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 11 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). Revenue was discovered a code seventeen times and referenced any statement that dealt with raising money for HOPE. The impact positive/negative was discovered fourteen times and referenced statements that discussed HOPE's positive and negative effects. Reductions was discovered nine times and referenced any statement dealing with reducing any type of benefit for HOPE. Cost drivers related to any factor that increased spending for HOPE in any way and was discovered nine times also. Expenditures referenced money set aside for programs for HOPE and was discovered seven times. Preservation referenced any method that tried to save HOPE from reduction and was discovered six times.

Conclusion

The last few documents analyzed had several codes in common. The following codes were not only frequent, but significant in each of the last few documents: expenditures, revenues, impact positive/negative, revenue, and preservation. The documents show a shift in thinking by the GSFC in trying to preserve and fund the HOPE Scholarship. The only way they could accomplish this was by reducing benefits, changing eligibility requirements, and proposing new ways to collect revenue.

Document Content Analysis

In August 2019, another presentation dealing with casino gaming and pari-mutuel wagering on horse racing was examined (GSFC, 2019). Once again, the state legislature was examining new sources of revenue to ensure HOPE programs could be funded (GSFC, 2019).

GSFC described in their presentation that in the last 26 years over 1.8 million students had benefited from \$10.8 billion dollars in awards (GSFC, 2019). The main point of the presentation was to explain the increase in costs that were jeopardizing HOPE Program awards and to research new revenue resources (GSFC, 2019).

For FY 2020, the lottery collected \$1.2 billion dollars for education in which the GSFC received \$869 million for HOPE and other programs (GSFC, 2019). One of the main points in the first portion of the presentation was that costs for HOPE Programs in FY 2020 were projected to be over \$800 million dollars which would be the highest ever (GSFC, 2019). The 2011 reforms were also examined to show that the reforms did cut costs for the next few years but FY 2014 expenditures started to again increase rapidly (GSFC, 2019). The FY 2021 projection predicted that the public portion of HOPE would need almost \$50 million more additional dollars than the year before to be fully funded (GSFC, 2019). Over all expenditures were projected to increase by 6.74% in FY 2021 (GSFC, 2019).

Cost drivers were also discussed in detail so the committee could have a good idea at what is costing the most (GSFC, 2019). One of the major cost drivers was the Zell Miller Scholarship because it paid full tuition (GSFC, 2019). A larger number of students qualified for this portion of HOPE every year and many went to high tuition cost schools like the University of Georgia and Georgia Tech (GSFC, 2019). Students in high school started to take “higher weighted” courses to increase their eligibility for HOPE programs (GSFC, 2019). The 2019 document also showed that a higher number of graduating seniors were gaining 3.0 GPA than before (GSFC, 2019). In 2007, Georgia had an estimated 75,000 high school graduates and nearly 30,000 of them had a 3.0 GPA (GSFC, 2019). In 2018, Georgia had an estimated 110,000 graduating seniors and approximately 50,000 of them had a 3.0 GPA (GSFC, 2019). One of the

positive impacts that was researched was ACT scores equal or greater than 26 in Georgia had increased from 18.73% in 2012 to 23.24% in 2018 (GSFC, 2019).

Students were finding ways to become eligible for HOPE by taking extra weighted courses (GSFC, 2019). In 2007, Georgia students took about 140,000 extra weighted classes, but by 2018 the number was approaching an estimated 475,000 extra weighted courses (GSFC, 2019). The GSFC also reported that students who were Zell Miller recipients were more likely to retain their scholarship than regular HOPE students (GSFC, 2019). The 2016 Zell Miller cohort only lost about 1,000 out of an estimated number of 6,800 students in four years compared to the HOPE 2016 cohort that started with about 30,000 students and lost 14,000 within four years (GSFC, 2019). Even though Zell Miller recipients make up a small portion of the percentage of HOPE award students, they required almost 40% of the expenditures due to receiving full tuition payments (GSFC, 2019). At the same time, the average cost for a HOPE Scholarship public recipient went up 18.8% since 2012 (GSFC, 2019).

House Bill 801 was passed in 2016 and contained language that allowed the HOPE Award to be calculated differently (GSFC, 2019). A percentage could have been applied to the prior year's tuition amount to determine the award rate for the following year (GSFC, 2019). This could also impact the amount paid out to each institution (GSFC, 2019).

In conclusion, the 2019 document showed the successes of HOPE which included higher rates of retention by the top award recipients, an improvement in ACT scores, and higher GPA averages among seniors who graduated from Georgia public schools (GSFC, 2019). The negative impact is the cost of HOPE and its programs is unsustainable for very much longer (GSFC, 2019). The state legislature made several changes to its eligibility and award amounts, but the costs of HOPE still increased going into 2020 (GSFC, 2019). The 2019 document

answered both research questions by showing the impact HOPE has made in its 36-year life span and also the policy changes and their effects on not only costs but how postsecondary public colleges have benefited from HOPE's benefits (GSFC, 2019).

Document 9:2021 HOPE Scholarship Program at Public Institutions Regulations-100 2021-2022 Award Year

Background

Every year the Georgia Student Finance Commission delivers to the public and school systems across Georgia the regulations for eligibility and other issues in dealing with the HOPE Scholarship (GSFC, 2021). The document covers many areas of eligibility, academic requirements, award requirements, and retention requirements (GSFC, 2021). The document is for the public and schools and is over 50 pages long with details to multiple situations including residency issues, second chances, and other situations a student may get in and lose HOPE (GSFC, 2021).

The 2021 document discussed how a student can meet the requirements of being a Georgia resident, which also included the military personnel who were present in the state (GSFC, 2021). The document also detailed students could lose or have HOPE suspended if incarcerated or found guilty of a drug charge (GSFC, 2021). The program specific eligibility requirements were divided into four tier requirements in order to explain how a student can become eligible for HOPE (GSFC, 2021). The 2021 document also explained in detail the type of coursework that is accepted for eligibility and how certain courses are weighted differently for calculation toward a 3.0 (GSFC, 2021). The last portion described the details of how hours earned/attempted are calculated towards HOPE awards, the different parameters of reconciliation

for those in danger of losing the HOPE Scholarship or how they can get it back, and retention/administrative reviews and exceptions (GSFC, 2021).

Coding

The initial coding stage resulted in discovering several different topics for focus. The document had several different topics that were covered in detail and in-depth (GSFC, 2021). Almost 25% of the document dealt with eligibility issues and this topic was frequent throughout the entire document (GSFC, 2021). Eligibility has also been a common topic among the nine documents of this study. Other common topics included academic requirements and checkpoints (GSFC, 2021). These two topics were discussed in great length in the document. The document also frequently discussed about award requirements and how a student can maintain retention to continue to receive HOPE funds (GSFC, 2021). The last topic discovered in the document was on administrative reviews and exceptions because this section detailed how students could receive an exception to receive HOPE benefits and the circumstances where someone could be eligible for the review (GSFC, 2021).

Code charting organized the topics in order of frequent use in order to narrow down which topics could be used as codes. Focused coding then looked at each code's significance in the documents (GSFC, 2021). The following codes were chosen under focused coding: eligibility, academic requirements, academic checkpoints, coursework, award requirements, retention requirements, and administrative reviews and exceptions (GSFC, 2021).

Table 12

Document 9 Frequent and Significant Codes

Code	Example 1	Example 2
Eligibility Theme: Policy Change Frequency: 39	“A student entering the HOPE Scholarship Program at any Tier and attending a USG or TCSG institution who meets the Georgia Residency requirements of the Board of Regents or the State Board of TCSG at the time of his or her high school graduation, Home Study program completion or successful General Educational Development test date, must also meet such Georgia Residency requirements for 12 consecutive months immediately prior to the first day of classes of the school term for which the HOPE Scholarship is sought” (p. 7).	“A student convicted of committing certain felony offenses involving marijuana, controlled substances, or dangerous drugs, may be ineligible for HOPE Scholarship payment from the date of conviction to the completion of the following school term, in accordance with the Georgia Drug-Free Postsecondary Education Act of 1990” (p. 10).
Academic Requirements Theme: Policy Change Frequency: 31	“For the High School Graduating Class of 2017 and beyond, a student meeting the requirements to be a HOPE Scholar at the time of high school graduation must earn a minimum of four full credits from the academic rigor course categories listed below prior to graduating from high school” (p. 12).	“Beginning with the High School Graduating Class of 2012, students must graduate from an Eligible High School with a minimum of a 3.00 cumulative grade point average on a 4.00 scale, in order to meet the academic requirements as a HOPE Scholar for the HOPE Scholarship at the First-Tier” (p. 13).
Academic Checkpoints Theme: Policy Change Frequency: 27	“A First-Tier student Enrolled Full-Time during at least one term must have a Postsecondary Cumulative Grade Point Average of at least 3.00 at the end of Spring term, (End-of-Spring Checkpoint), in order to continue eligibility beyond Spring term” (p. 16).	“A student is eligible to continue receiving the HOPE Scholarship at the Third-Tier through the school term he or she has accumulated 90 semester or 135 quarter Attempted-Hours, unless such student first reaches an End-of-Spring Checkpoint with less than a Postsecondary Cumulative grade point average of 3.00” (p. 18).
Coursework Theme: Policy Change Frequency: 14	“A student participating in Distance Learning coursework is eligible to receive HOPE Scholarship payment if all other eligibility requirements are met” (p. 27).	“A student seeking a degree, who Enrolls in Learning Support coursework, is ineligible for HOPE Scholarship payment for such coursework” (p. 29).
Award Requirements Theme: Policy Change Frequency: 19	“The HOPE Award Amount is equal to the HOPE Award Rate, multiplied by the number of credit hours (up to a maximum of 15 credit hours) in which a student is enrolled” (p. 32).	“HOPE Scholarship funds can only be applied to Tuition, not other expenses such as room and board” (p. 33).
Retention Requirements Theme: Policy Change Frequency: 7	“An Eligible Postsecondary Institution shall maintain accurate records, books, documents and other evidence concerning the HOPE Scholarship Program, including, but not limited to, individual student files for whichever is longer” (p. 40).	“Documentation contained within an individual student file or record which supports the original determination of a student’s eligibility must be retained by the Eligible Postsecondary Institution and available for review by GSFC on the Eligible Postsecondary Institution’s campus in Georgia, for at least three calendar years after the most recent Award Year for which the student received HOPE funds” (p. 40).
Administrative Reviews and Exceptions Theme: Policy Change Frequency: 5	“If a student believes a HOPE Scholarship rule or regulation was incorrectly applied in his or her case, the student has the right to file a request for an Administrative Review with GSFC using the Administrative Review process as set forth in these regulations” (p. 42).	“Each individual HOPE Scholarship recipient is limited to one Exception, as granted by the Board of Commissioners, and such Exception shall only apply to one school term, during which HOPE Scholarship funds were received” (p. 43).

Table 12 displays the codes retrieved from the document and also lists examples of the codes used in the document. The codes were generated from inductive coding and the codes listed in Table 12 were chosen because of their frequent use (Creswell, 2012). Similar and like statements in the document were counted in each document (Saldana, 2016). Eligibility was discovered thirty-nine times in this document since the primary purpose of the document was to explain eligibility requirements and rules. Academic requirements was a code that was discovered thirty-one times and referenced what standards a student had to obtain to receive or retain HOPE. Academic checkpoints was used twenty-seven times and referred to any type of assessment of where student's grades stood at a given point in time during their post-secondary education. Award requirements as discovered nineteen times and referenced rules and policies to obtain different award amounts. Coursework code was discovered fourteen times and referenced the type of classed students must take to obtain and retain HOPE. Retention requirements were used seven times and explained the policies and regulations for staying in good standing to continue to qualify for HOPE. The last code discovered was administrative reviews and exceptions and was used five times to describe how a student could apply for an appeal to losing HOPE.

Conclusion

The focused coding stage was used to analyze the significance of the codes from table 12. This 2021 document was different than all the other documents since it did not give out the pros and cons of the HOPE Scholarship or any information regarding its future or past. The coding sections analyzed the document for codes that were frequently used and for their significance in the document. This last document for coding will lead to the coding stages of longitudinal coding and theoretical coding (Saldana, 2016).

Document Content Analysis

The 2021 HOPE Scholarship Program at Public Institutions Regulations-100 was a document to cover all the requirements, eligibility, award amounts, and many other items about the HOPE Scholarship for FY 2022 (GSFC, 2021). Every year the GSFC puts out a manual to explain these details so the public is informed (GSFC, 2021). The document is available on their website and there is also a document for private institutions (GSFC, 2021).

The general eligibility requirements were the first important topic of the document (GSFC, 2021). The student must be a Georgia resident and meet the criteria of residency (GSFC, 2021). The student must also be a citizen of the United States or an Eligible Non-Citizen according to federal regulations and the student must also be enrolled at a USG or TCSG eligible postsecondary institution in a matriculated status leading to a degree (GSFC, 2021). Lastly, the student had to be making satisfactory academic progress to be eligible and take approved courses (GSFC, 2021).

The HOPE Scholarship grade point calculation was another important topic discussed in the document (GSFC, 2021). In 2007, Georgia eligible high schools were ordered to provide the GSFC with electronic academic transcripts of graduating seniors (GSFC, 2021). The schools have to provide an academic transcript with the student's 9-12th grade years (GSFC, 2021). The GSFC also provided a standard weight chart that went up to a 4.0 GPA (GSFC, 2021). This part of the document also listed the rigorous core academic requirements and which classes are accepted in each category (GSFC, 2021). The academic requirements are listed into four different tiers where each tier has different criteria for the student to meet (GSFC, 2021).

The document also explains about limitations of the HOPE Scholarship for each student who receives benefit (GSFC, 2021). The attempted hours limit was set for a total of 127

semester hours (GSFC, 2021). This did not include any coursework while a student was dual enrolled in high school (GSFC, 2021). They also limited HOPE and its other components to once a student obtains a bachelor's degree (GSFC, 2021). The last limit that is mentioned is a student only has ten years to use the HOPE Scholarship (GSFC, 2021).

The 2021 document also address award requirements and limitations. Students must maintain a 3.0 GPA and checkpoints must be followed to ensure they are meeting HOPE requirements (GSFC, 2021). HOPE also would not pay for more than 15 credit hours per semester and that included students who went to two colleges at the same time (GSFC, 2021). GSFC also limited awards to tuition only in the document (GSFC, 2021).

The last two important points from the 2021 document are retention requirements and administrative reviews (GSFC, 2021). Students have to maintain an overall 3.0 GPA and have a chance to gain HOPE back if they lose it by recovering a 3.0 GPA (GSFC, 2021). The document also established procedures for administrative reviews (GSFC, 2021). Students have a chance to ask for an exception when it comes to losing HOPE or some of HOPE's benefits (GSFC, 2021). They can only do this once a school term and has to be for reasons such as illness or death in the family (GSFC, 2021).

In conclusion, the 2021 document was essential to give a snapshot of where HOPE stands as of 2022 (GSFC, 2021). The document is 52 pages and is a collection of all the rules and policies that have been added over the years to the HOPE Scholarship (GSFC, 2021). The document is not in line with the original intent Governor Miller established 28 years before, but the spirit of what HOPE stands for was still intact in the document (Miller, 1998). The document did aid this study because it helped answer research question two by describing the policy changes the HOPE Scholarship went through (GSFC, 2021).

Longitudinal and Theoretical Coding Stages

The purpose of the longitudinal coding section of this study was to examine all the codes collected and shift them into a timeline to explain how the data collected answers the research questions (Saldana, 2016). Longitudinal coding is also necessary to help organize the information for the thematic coding process (Saldana, 2016). The categories that were discovered after each document were analyzed are positive impact, negative impact, and policy (Saldana, 2016).

Table 13*Longitudinal Coding*

Name/Year	Policy/Event	Category	Research Question Answered
Zell Miller Speech 1992	Introduction of the HOPE Scholarship with a description of awards/design/policy impact.	Policy	RQ 1
Evaluation of the HOPE Scholarship 1996	Suggesting limitations to eligibility based on classes/learning support.	Policy	RQ 1
Evaluation of the HOPE Scholarship 1996	HOPE scholars tend to have higher retention rates than average college student.	Positive Impact	RQ 2
An Evaluation of Georgia's HOPE Scholarship 1999	The rapid growth of students eligible for the HOPE Scholarship.	Positive Impact	RQ 2
An Evaluation of Georgia's HOPE Scholarship 1999	Retention of the HOPE Scholarship declined after the first year of college.	Negative Impact	RQ 2
An Evaluation of Georgia's HOPE Scholarship 1999	Proposal to go to a standard GPA system.	Policy	RQ 1
Joint Study Commission Report 2003	Eliminate the book and fee payments portion.	Policy	RQ 1
Joint Study Commission Report 2003	Half of HOPE students decide to stay in Georgia to use HOPE.	Positive Impact	RQ 2
Joint Study Commission Report 2003	No data up to 2003 supported the idea that low achievers are being helped by HOPE.	Negative Impact	RQ 2
An Overview of Lottery Revenues, Expenditures, and HOPE 2010	A short fall was projected by FY 2012 between expenditures and revenue.	Negative Impact	RQ 2
An Overview of Lottery Revenues, Expenditures, and HOPE 2010	Since inception 1.2 million have received HOPE benefits.	Positive Impact	RQ 2
An Overview of Lottery Revenues, Expenditures, and HOPE 2010	Limited book awards and capped fees at 2004 levels.	Policy	RQ 1
Summary of the Meetings Held by the State House of Rep. on HOPE 2015	Proposal for casino gaming and pari-mutuel wagering on horse racing.	Policy	RQ 1
Summary of the Meetings Held by the State House of Rep. on HOPE 2015	1.7 million students have received HOPE benefits.	Positive Impact	RQ 2
Summary of the Meetings Held by the State Senate on HOPE 2015	A minimum of 90% of the tax revenue from gambling will go to education.	Policy	RQ 1
Summary of the Meetings Held by the State Senate on HOPE 2015	There is a good chance that crime and poverty will increase.	Negative Impact	RQ 2
HOPE Programs Briefing for Senate Study Committee 2019	A high concentration of Zell Miller HOPE recipients were going to high-cost schools.	Positive and Negative Impact	RQ 2
HOPE Programs Briefing for Senate Study Committee 2019	Book and fee payments are eliminated.	Policy	RQ 1
HOPE Scholarship Program at Public Institutions Regulations 2021	Eligibility limits set at 127 total semester hours and/or completion of a bachelor's degree.	Policy	RQ 1

The thematic coding process led to three final themes for the current study (Saldana, 2016). The three overall dominant themes of the documents were how HOPE made a negative impact on postsecondary education, how HOPE made a positive impact on postsecondary

education, and policy changes proposed and passed throughout its life span (Saldana, 2016). These themes are aligned with both research questions and allow the documents to “tell” the story of the HOPE Scholarship through their pages (Saldana, 2016)

Figure 5

Negative Impact of the HOPE Scholarship Theme

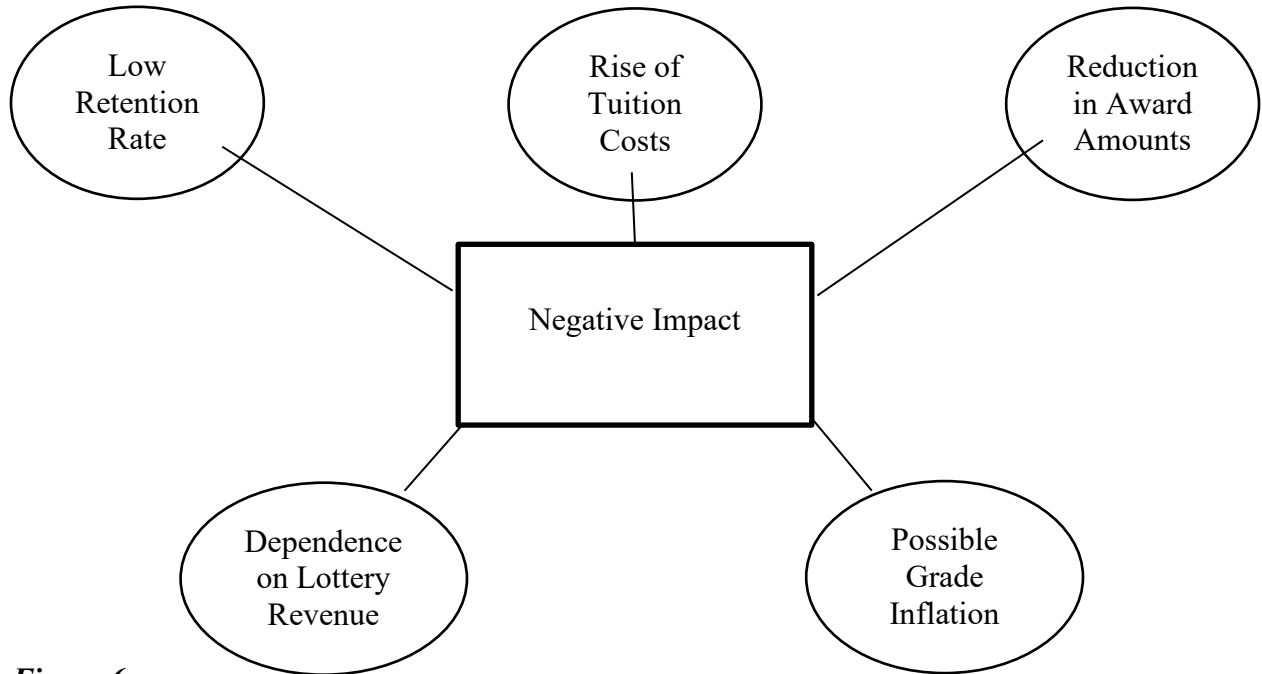


Figure 6

Positive Impact of the HOPE Scholarship Theme

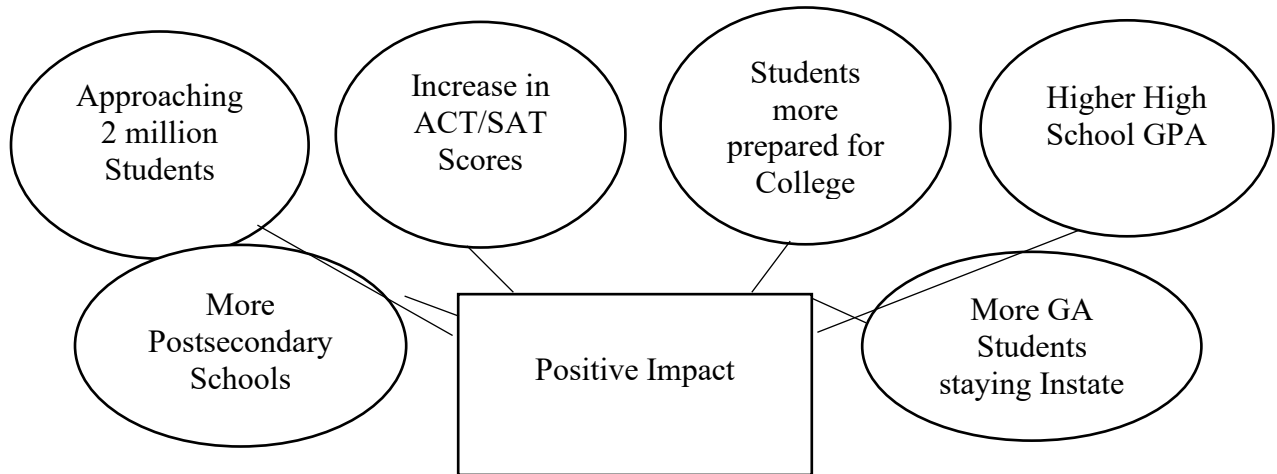


Figure 7

Policy Change Theme

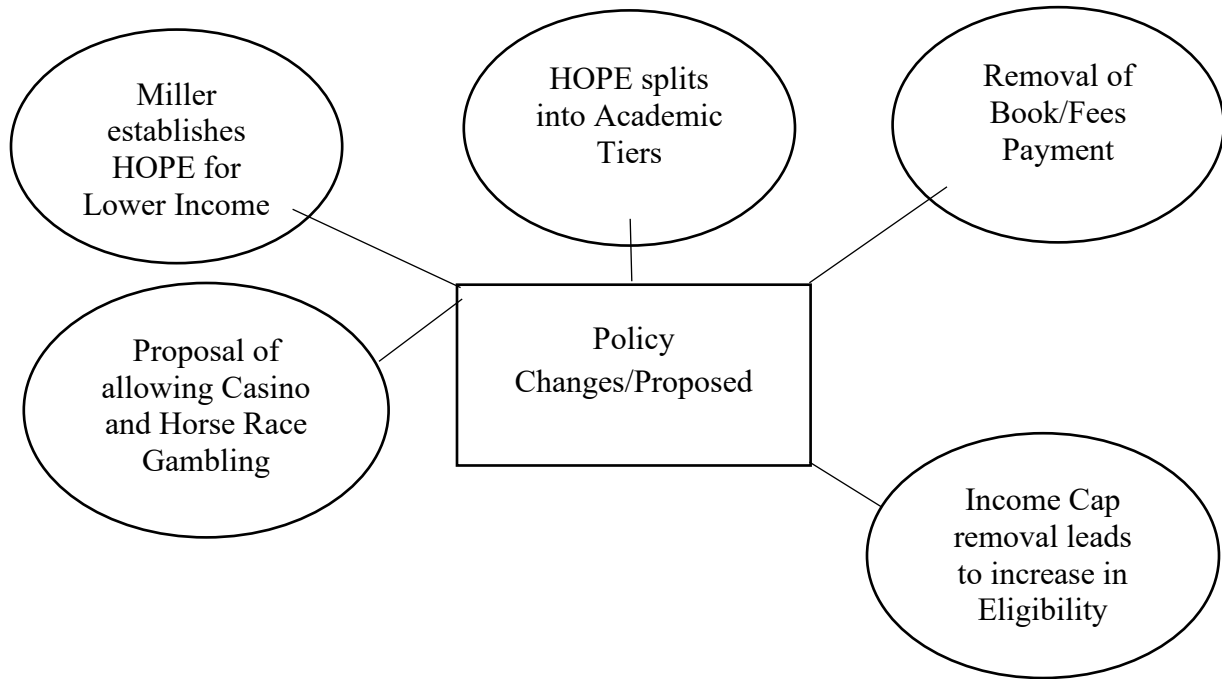


Figure 8

Major Timeline of Events



Conclusion for Findings

With nine total documents, expanding from the inception of the HOPE Scholarship to present day, saturation of data was met by analyzing and gathering data points from multiple documents dealing with the same topics (Saldana, 2016). The limitation of each document was that each only dealt with specific areas dealing with the HOPE Scholarship and not every issue it was facing at the time (Creswell, 2012). The main weakness of each document was each was written with an agenda and purpose in mind even though each document had thorough research data (Creswell, 2012). The findings are clear in that the HOPE Scholarship has made a tremendous impact on postsecondary education and has led to millions receiving benefits to receive a better education.

CHAPTER V: CONCLUSIONS

The goal of the study was to examine nine different documents in order to answer how policy changes impacted eligibility for the HOPE Scholarship and how the policies impacted post-secondary education in Georgia. The nine different documents all played a special part in developing or even changing the HOPE Scholarship. The HOPE Scholarship has been used by over 1.8 million Georgians since 1993 (GSFC, 2021). This study wanted to not only answer the research questions, but allow the documents speak for the HOPE Scholarship and tell its story.

Chapter one explained the purpose of the study, the research questions, and the implications of the study (Creswell, 2012). The research questions laid out the premise of this study, which was to examine and analyze the policy impact of changes to the HOPE Scholarship and to assess its impact on postsecondary education (Creswell, 2012). The research design for this study was a qualitative document content analysis (Creswell, 2012). The main issue is there is not enough research on the impact of the HOPE Scholarship and how policies shaped it over time on postsecondary education (Creswell, 2012).

The literature that is available for academic purposes has not done a recent life span study of the impact of the HOPE Scholarship policies that includes many of the modern policy changes and their effects (Creswell, 2012). For this study, it was very important to research the history of the HOPE Scholarship, the pros and cons of lotteries in the United States, the value of merit-based scholarships in the United States, and criticism of the HOPE Scholarship (Creswell, 2012). The purpose of this historical research was to provide background information on the purpose of the study and to give researchers insights to the issues HOPE faces in the future (Creswell, 2012).

The purpose of chapter three of this study was to explain the methodology present in this dissertation (Creswell, 2012). The current study used a bounded case study to explore, examine, and research the impact of the policies that changed the HOPE Scholarship on postsecondary education (Creswell, 2012). Several coding stages were created in order to accurately extract not only quality codes, but to discover the overall themes in the documents (Saldana, 2016). A case study was chosen so narrate the story of HOPE through historical documents from its inception to modern day. The nine documents that were selected through purposive sampling were chosen because of the topics that addressed the issues related to the HOPE Scholarship (Bloomberg & Volpe, 2019).

The findings from this study helped add to the body of knowledge which exists in the research literature on the HOPE Scholarship (Creswell, 2012). Several coding stages were created in order to accurately extract not only quality codes, but to discover the themes of the documents overall (Saldana, 2016). A content analysis was also conducted in order to let the documents show the impact of not only policy and proposed changes, but its overall impact on students entering postsecondary public colleges (Saldana, 2016). The pros and cons of HOPE's impact was also explored.

Analysis of the Findings

The findings for the current study added more data and ideas for academic research for the future and examined many of the proposed ideas that could help preserve the largest merit-based scholarship in the United States (Creswell, 2012). The coding stages revealed several different codes that were analyzed for themes to come to final conclusions about each research question (Creswell, 2012). The findings clearly answer the research questions and also provide more information about the future of the HOPE Scholarship and the financial dangers it faces.

Document one was a speech given by Governor Zell Miller in December 1992 where he addressed his plan for the Georgia Lottery and the future of the HOPE Scholarship (Miller, 1998). The findings from the speech helped lay out the future of the HOPE Scholarship and also gave the researcher a baseline for how HOPE was set up in the beginning (Miller, 1998). One of the key findings was that HOPE originally was only supposed to be for families with an income cap of \$66,000 a year (Miller, 1998). This did not last past FY 1995 thanks to a huge influx of revenue from the lottery (GSFC, 2010). Miller also said in this speech the GPA requirement should be a “B” average regardless of the type of classes taken (Miller, 1998). The main finding of the speech is Miller wanted the HOPE Scholarship simple. The eligibility requirement for free college was to maintain a B average in college for two years and meet the income criteria (Miller, 1998).

Document two’s findings helped give insight to policy direction that HOPE was facing and also the impact it had made on postsecondary public education up to 1996 (Davis, Hall, & Henry, 1996). The findings from this document revealed the state was looking at ways to make the academic rigor to obtain HOPE more challenging (Davis, Hall, & Henry, 1996). Preparation for public college was a major theme of the document. The focus was more on what was the best way to better prepare students for the postsecondary experience than on financial issues (Davis, Hall, & Henry, 1996). Clearly, these findings indicate that students in high school were taking more rigorous courses in order to receive the HOPE Scholarship (Davis, Hall, & Henry, 1996).

Document three revealed that after more than five years HOPE was popular but increasing eligible students impacted its financing (Bugler, Henry, & Rubenstein, 1999). One of the long-suspected causes of eligibility increase is grade inflation (Bugler, Henry, & Rubenstein, 1999). This document found there was no evidence that HOPE caused grade inflation (Bugler,

Henry, & Rubenstein, 1999). Persistence and retention was also an issue because many students lost HOPE at the end of the first year and some more after their second year in college (Bugler, Henry, & Rubenstein, 1999). The document also revealed more students were staying in Georgia instead of going out of state for public college (Bugler, Henry, & Rubenstein, 1999).

Document four was written when HOPE was facing a financial crisis in 2003 (JSCR, 2003). The lottery revenue stream could not continue to fully fund HOPE within the coming years (JSCR, 2003). The state legislature wanted HOPE to be analyzed and proposed recommendations for policy change to ensure it would continue for years (JSCR, 2003). The document revealed that tuition costs were causing the HOPE Scholarship to go towards financial danger along with rising eligible students (JSCR, 2003). Over 600,000 students had already benefitted from the HOPE Scholarship at a cost of \$1.5 billion dollars (JSCR, 2003). The commission came to the conclusion for the first time that HOPE was going to need either a new revenue source or a reduction in costs (JSCR, 2003). The commission made several recommendations, such as a universal GPA system that the GSFC would regulate, eliminate HOPE for anyone who has already achieved a Bachelor's degree, and eliminate payment for fees and books in FY 2005 (JSCR, 2003). This document had a lasting impact on the HOPE Scholarship and eligibility (JSCR, 2003).

Document five was an overview of revenues from the lottery and the HOPE Scholarship for the Georgia State Legislature's Higher Education Committee (GSFC, 2010). The HOPE Scholarship's revenue was in decline again and could not keep up with costs (GSFC, 2010). The trend from the late 1990's indicated students were losing HOPE at a high rate after a year or two was still increasingly high (GSFC, 2010). The Georgia Lottery was starting to flatline in profits, but rising costs of public college tuition were dramatically increasing especially at the largest

public colleges in Georgia (GSFC, 2010). There was some positive data released in the findings which showed that HOPE Scholars had a higher retention rate in public college than other students (GSFC, 2010). The negative side of the findings was that the revenue being generated was not going to be enough in upcoming years and the program was going to require either stricter eligibility requirements or reductions in benefits (GSFC, 2010).

Document six and seven both dealt with the same issues, which was looking at legalizing casino gaming and pari-mutuel wagering on horse racing (HSC, 2015). By 2015, over 1.7 million students in Georgia had benefited from over eight billion dollars in HOPE funds (GSFC, 2010). The problem was, again, the financial health of the HOPE Scholarship for future years (GSFC, 2010). The state legislature had figured out the Georgia Lottery was not going to be able to keep up with costs even after multiple changes in past years (GSFC, 2010). The only option that could sustain a steady revenue stream to fund HOPE was casino gaming because of the other amenities it provides (GSFC, 2010). Neither of these proposals have been approved because of opposition to more legalized gambling in the state (GSFC, 2010). Neither proposal has been brought to the state voters because the state legislature cannot agree on them due to the negative impacts that come with more legalized gambling such as crime and poverty (GSFC, 2010).

In 2019, the state legislature requested another briefing dealing with the HOPE Scholarship and the idea of casino gaming and pari-mutuel wagering on horse racing (SSC, 2019). One of the major financing issues that had developed in the last few years was students qualifying for the Zell Miller Scholarship portion of HOPE which paid full tuition (SSC, 2019). These students had a high rate of retention of HOPE, but also went to the highest priced public colleges in the state (SSC, 2019). In other words, their success was bankrupting the HOPE Scholarship (SSC, 2019). The presentation showed another bleak prediction for funding the

HOPE Scholarship in future years and that the reserve funds would go below their requirements (SSC, 2019).

Document nine dealt with the regulations for the HOPE Scholarship for public colleges for the 2021-2022 school year (GSFC, 2021). The document is 52 pages long (GSFC, 2021). The HOPE Scholarship went from being a simple earn a “B” average to having rules and policies in 52 pages (GSFC, 2021). The tier system that has been set up for requirements, awards, and checkpoints is extensive (GSFC, 2021). The requirements for retaining HOPE are also extensive and in certain circumstances could be complicated (GSFC, 2021). The findings from this document indicate the HOPE Scholarship and all its components have become quite challenging to understand and the pressure to keep up with all the regulations and policies is on the GSFC, high schools, and public/private colleges in Georgia (GSFC, 2021).

Limitations

Even though the current study is extensive in its research over nine documents dealing with the HOPE Scholarship, it still has research limitations (Creswell, 2012). One of the limitations of the current study is that there is too much data to analyze in order to provide a full account of the impact of the HOPE Scholarship (Creswell, 2012). The Georgia Student Finance Commission has many documents on the HOPE Scholarship. Research and analysis of each document would be overwhelming for one doctoral dissertation (Creswell, 2012). There are also many academic research documents dealing with HOPE on minor topics that are helpful, but do not go into the amount of depth needed to analyze the true impact of policy changes on the HOPE Scholarship.

Another limitation of the current study is that interviews were not conducted for personal accounts of creating, changing, or receiving the HOPE Scholarship (Creswell, 2012). Personal

accounts could have given more insight to the founding of the HOPE Scholarship and the political pressures that came along with the changes made. Not including this type of material for analysis limited the study to just documents, which required a document content analysis (Bloomberg & Volpe, 2019). This also limited the perspective to just documents and the perspective of the authors who wrote them (Bloomberg & Volpe, 2019). These limitations did not affect the quality of the data collected or the data analysis protocols because the process was credible, transparent, and saturated by overwhelming information from each document (Creswell, 2012).

Recommendations for Further Study

One of the things that stood out during the current research study was retention of college students on HOPE Scholarship. Consistently mentioned in most of the documents used in the current study was the issue of retention. Research on persistence rates could add more academic data on the effectiveness of the HOPE Scholarship. In the current study, retention rates for HOPE Scholars dropped significantly after the first year or two of college (GSFC, 2010). The first few years of HOPE may be difficult to track but there is definitely enough information with the GSFC in the last two decades to conduct an academic research study on retention and the HOPE Scholarship.

Another area researchers should consider is looking at the economic impact the HOPE Scholarship has had on Georgia's economy. Since millions of Georgia's students have received the HOPE Scholarship, it is prudent to evaluate what type of economic impact this has had on the economy. Researchers should observe not only how much money was paid in tuition and other fees, but how many HOPE Scholars received a job in Georgia after graduation thanks to HOPE. This also would impact the cities where the colleges are located that HOPE scholars went to.

These cities would have seen a financial impact having more college students renting apartments, purchasing meals, accessing healthcare, using transportation, and taking part time jobs while in school. The overall economic contribution could be significant and serve as an example of the positive impact HOPE has had on Georgia.

There also should be a further study on the recipients of the HOPE Scholarship. There have been a few empirical studies that looked at how Pell Grant recipients have been impacted by also receiving the HOPE Scholarship. There should be a longitudinal study that examines year-to-year what the income average of HOPE Scholars is in order to see if HOPE recipients are in real need, which was the initial purpose that Zell Miller proposed it for (Miller, 1998). Income stability should be reviewed and studied in order to look at ways to cut future costs or to change eligibility requirements.

The last further study suggestion is for researchers to look at a comparison of rising tuition costs and HOPE funding. In the findings of the current study, there has been an increase in tuition costs across all of Georgia's public colleges which has led to financial hardships for funding HOPE. The impact on colleges needs to be explored. It is necessary to research if colleges took advantage of HOPE funding in order to increase tuition costs and other fees for financial gain.

Implications

This study has brought a lot of information on how HOPE has affected not only eligibility through policy changes, but how HOPE has impacted postsecondary public education in Georgia. Several ideas can be extracted from the current study. One idea is that HOPE is the largest merit-based scholarship in the United States and has impacted the lives of possibly millions of Georgians (Miller, 1998). From the current study it can be derived that millions of

Georgians at least had an opportunity to go to public colleges in Georgia by obtaining a 3.0 GPA who otherwise might not have been able to afford it (GSFC, 2019).

Grade point inflation was a concern earlier on, but the current study found no evidence of it in connection with HOPE (Bugler, Henry, & Rubenstein, 1999). The current study also showed that it appears students in Georgia are working harder in class and feeling pressured from their parents and teachers to do well so they can go to college on HOPE (Bugler, Henry, & Rubenstein, 1999). The current study also discovered that the students have done better in public colleges than non-HOPE students, but this does not always equate to graduating or retaining HOPE for four years (Bugler, Henry, & Rubenstein, 1999).

This study also revealed that the state legislature is very concerned about not only the eligibility requirements for HOPE, but also about its financial health and safety (JSCR, 2003). The state legislature in 2003 had to take a serious look at either reducing benefit for the HOPE Scholarship or changing eligibility requirements in order to meet its funding requirements (JSCR, 2003). The committee made recommendations that reduced benefits for students in order to continue funding the program to students with a 3.0 GPA (JSCR, 2003). The focus of the priorities for HOPE changed from making eligibility and academic requirements more rigorous to worrying about the revenue source to continue to fund it.

This study showed through multiple documents that even though the HOPE Scholarship is extremely popular with Georgians, its funding and eligibility requirements are in question because of the lack of revenue to fund it. The documents chosen from December 1992 all the way to 2021 revealed that this scholarship program has not only impacted millions, but that the impact it has had on postsecondary education has been extensive in multiple ways. Public colleges in the State of Georgia have more students than ever thanks to the HOPE Scholarship.

Conclusion

No one study can make a final summation of the HOPE Scholarship. The current study tried to give more insight on the inception of the HOPE Scholarship and its impact on postsecondary education in Georgia. The HOPE Scholarship is one of the greatest education feats composed by a political body in United States history. A multitude of states have tried to copy its success with minimal success. The scholarship is so popular, the state legislature is worried about restricting eligibility without a political consequence.

Hope faces a daunting future with many issues to resolve. The concern is not in the sense of students not being able to handle the rigor to obtain the 3.0 or even higher GPA for the Zell Miller Scholarship, but funding the most popular scholarship to its fullest. The proposals sitting before the state legislature today are legalizing casino gaming and pari-mutuel wagering on horse racing (GSFC, 2019). The problem with these proposals is they are not supported enough to get the required votes and would still face the general public for a vote. Even if either one or both of these proposals pass, it will be years before the economic revenue is felt for HOPE Scholarship funding. Both of the proposals come to Georgia with a price which also includes an increase in crime and poverty.

As this study comes to a close, there are several issues that must be addressed with the HOPE Scholarship. One is the legislature may need to consider an income gap on eligibility if the scholarship does not gain a new source of revenue. Another idea to consider is to make the HOPE policies like they were in its early years. HOPE policies are too long and detailed for the common parent to understand and it needs to be simplified. Lastly, the state legislature needs to consider the reason for the HOPE Scholarship when determining how to finance it. Georgia needs to continue to be a state where if a resident can maintain a B average in high school, they

can have a chance to attend a postsecondary institution in Georgia. As a HOPE recipient myself, the whole state wants to see this program continue and thrive. Zell Miller would be proud of the scholarship he helped create and would lobby the state legislature to find a way to continue promising HOPE for all of Georgia.

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