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# Marketing Merit Aid: The Response of Flagship Campuses to State Merit Aid Programs

By Erik C. Ness and Adam J.A. Lips

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*This study examines the differences in the portfolio of institutional scholarships and the marketing of these awards between flagship campuses with and without state merit aid programs. Using content analysis techniques to analyze institutional websites of the 16 Southern Regional Education Board (SREB) flagship campuses, three thematic responses emerge that characterize and illustrate the ways in which flagship campuses have shaped their own aid programs to take advantage of state merit scholarships and to advance enrollment goals. These responses can be seen through the reach of the institutional scholarships, the transparency of the university merit aid programs, and the marketing aims of the scholarship efforts.*

The proliferation of merit-based scholarship programs represents one of the most striking trends in state-level financial aid over the last 15 years. As one of the first merit aid programs, the Georgia HOPE (Helping Outstanding Pupils Educationally) Scholarship program has received the greatest attention from researchers and policy analysts studying institution- and state-level program effects. Despite the “negative social consequences” of disproportionate eligibility rates for under-represented students (Heller & Marin, 2002, 2004), state merit aid programs, such as the Georgia HOPE Scholarship, successfully meet their aim to reduce “brain drain” from the state (Cornwell, Mustard, & Sridhar, 2006; Dynarski, 2004; Zhang & Ness, 2010). At the institution-level, anecdotal accounts suggest that the University of Georgia has benefited from the state program by attracting the “best and brightest” students, thereby improving its institutional reputation and ranking (Fischer, 2006).

There has also been an emerging emphasis on the marketing of higher education. Recent and popular books by Bok (2003), Kirp (2003), and Zemsky, Wegner, and Massey (2005) emphasize careful attention to the marketplace, specifically through “branding” and other strategies aimed to help colleges more effectively compete for students. When such marketing infuses institutional financial aid practice, the tendency is to base awards more heavily on academic qualifications as opposed to financial need. As a result, market-based strategies can have adverse effects on students underrepresented in higher education (Davis, 2001; Heller, 1997, 2002a; McPherson & Shapiro, 1998). However, despite likely ill effects, states continue to adopt merit aid programs as a means to reduce the migration of the best and brightest students to out-of-state colleges. Thus, the primary aims of our study are to examine the differences in the portfolio of institutional scholarships and the marketing of these awards between flagship campuses with and without state merit aid programs.

## **Marketing of Higher Education**

Higher education market influences and the market-like behavior of colleges and universities are not new phenomena. However, the roles of the “marketplace” (Bok, 2003), “marketing” (Kirp, 2003), and “branding” (Toma, Dubrow, & Hartley, 2005) have recently received greater attention from higher education researchers and leaders. For instance, Kirp (2003) argues that institutions are more directly connected to the economy today than ever before. Furthermore, capitalizing on colleges’ primary asset—their institutional culture—is seen as a means of “building brand equity” (Toma et al., 2005). This attention to the marketing of higher education spans institution-type (public and private, research and liberal arts) and topic (from curriculum and faculty research to student admissions and institutional advancement).

In addition to these broader trends, Christopher Morphew and Matthew Hartley have examined the roles of institutional mission statements and college viewbooks in marketing efforts. These two studies reach surprisingly different conclusions. While the thematic analysis of mission statements (Morphew & Hartley, 2006) finds little evidence of institutions using aggrandizing aspirational language, their study of college viewbooks (Hartley & Morphew, 2008) points to “callous marketing” that minimizes academic rigor and accentuates co-curricular activities, especially athletics. While mission statements serve as “signals” and “reflect distinctive values” of institutions, college viewbooks offer variations on a theme of well-manicured quads, smiling faces, mascots, and bold buildings and increasingly convey messages intended to make the prospective student feel important. As one viewbook declared, “it’s all about you,” Kane (1999) argues that this individualized marketing has also permeated the financial aid awarding practices at colleges and universities.

Despite the rich literature considering the effects of institutional financial aid on college access and affordability (Heller, 1997; Hossler, Schmidt, & Vesper, 1999; McPherson & Shapiro, 1998; Paulsen & St. John, 2002), institutional financial aid marketing remains under-studied. Laura Perna (2005) calls attention to this “gap in the literature” by emphasizing the importance of financial aid opportunity awareness and understanding, especially for under-represented students. Perna suggests additional research given the variability in sources of information that students and families consider. For instance, Venegas (2006) responds and argues that although low-income students have access to computers and the internet, they lack the capital and resources to successfully navigate the financial aid process. Indeed, increasing calls for “college knowledge” aim to provide useful information to supplement the information supplied directly by colleges and universities (Vargas, 2004).

## **State Merit Aid**

The impact of state merit scholarship programs has primarily been explored at the state-level, although institution-level analysis is increasing. Studies examining state-level merit aid investigate its effect on college access (Heller & Marin, 2002, 2004; Ness & Noland, 2007), on increasing enrollment (Cornwell, Mustard, & Sridhar, 2006; Dynarski, 2004), and on educational quality (Henry & Rubenstein, 2002; Henry, Rubenstein, & Bulger, 2004). These studies consider the extent to which state merit aid programs meet intended objectives and address statewide postsecondary

funding priorities. By contrast, institution-level studies emphasize the campus response to this state policy.

The primary responses of higher education institutions to state merit aid relate to college costs and admissions. Two empirical studies find that colleges and universities increase prices following state adoption of a merit scholarship program. Using the Georgia HOPE Scholarship program as a natural experiment, Long's (2004) examination of in-state institutions' responses finds that, on average, all institutions increased college pricing. The finding included evidence of a "substitution effect" at private institutions, which decreased institutional aid by 13 percent in response to HOPE. Similarly, McLendon, Hearn, and Hammond (2006) find that among flagship campuses a rise in state merit aid is associated with a five percent tuition increase. Consistent with the tuition-related responses, Binder and Ganderton (2002) uncover an institutional reaction related to access. The authors observe that at the University of New Mexico the proportion of low-income students decreased and the number of marginal academically qualified students increased following the introduction of New Mexico's Lottery Success Scholarship. Their findings suggest that the state's flagship campus responded to the adoption of a state merit aid program by appealing to students' hopes that they would earn a Lottery Success Scholarship, which is awarded to students earning a 2.5 GPA after 12 credit hours. The authors posit that many of these students would have otherwise attended a regional university or community college. The evidence from New Mexico and Georgia suggests that flagship campuses in states with merit aid programs have responded to these aid initiatives by redirecting resources and providing incentives for the "best and brightest" students to remain in-state.

## Methods

Following the research design employed to examine higher education marketing through college viewbooks (Hartley & Morphew, 2008) and mission statements (Morphew & Hartley, 2006), we conduct a content analysis on the Undergraduate Admissions and Financial Aid websites of selected institutions. We systematically analyze these websites' text, images, and design by following Krippendorff's (2004) steps of sampling, unitizing, reduction, and, ultimately, making inferences about emergent themes and messages. Content analysis has often been applied to examine symbolic messages and channels of communication and to classify large bodies of information, such as national newspaper coverage of a particular issue. Accordingly, this method is appropriate for our study of institutions' marketing of financial aid.

To examine the campus response of state merit aid programs, we draw a "cluster sample" (Krippendorff, 2004) consisting of the 16 member states of the Southern Regional Education Board (SREB). We do this for two reasons. First, broad-based state merit scholarship programs are concentrated in the southeast – 8 of the 14 programs identified by Heller (2004) are in this region. Second, this cluster sample conveniently yields 8 states with merit aid programs and 8 states without such programs, and allows for direct comparisons between institutions in the SREB states. Within these 16 states, we analyze the marketing of financial aid to prospective

students in a single public “flagship” campus. This narrow definition, while imperfect, allows us to compare an equal number of relatively similar institutions. In many SREB states, multiple institutions can rightly claim flagship-status. However, the number of potential flagship institutions per state varies widely. As a result, our sample simply includes the “University of [SREB state]” in all cases with the exceptions of West Virginia University and Louisiana State University.

Prior to analyzing marketing approaches, we describe the financial aid portfolios of these campuses by classifying award types based on eligibility criteria and selectivity (Table 1). We then identify themes through both inductive and deductive strategies. We analyze and code websites to inductively identify common elements. To examine institutional response to state goals, we also deduce themes from three primary state merit aid program goals: to increase college access and attainment, to encourage academic achievement in high school, and to “stanch the brain drain” (Heller, 2002b). Both strategies yield five primary themes, which we ultimately reduce to two award marketing themes reflecting the closely related underlying elements. We merged “promoting access” and “improving affordability” to “access & affordability.” We also merged “reducing the brain drain,” “attracting the high achieving students,” and “rewarding academic achievement” to “best & brightest.” These two themes capture the broader messages marketed through institutional websites and provide a sharp contrast between these two approaches.

Table 1 summarizes the institutional merit scholarship programs available to incoming freshmen at each of the 16 SREB state flagships. Universities are grouped together based on the presence of a state-sponsored merit-based scholarship program. The four separate columns falling under the “award type” heading characterize the institutional scholarship portfolio. The two categories provided under the “award marketing” heading point to different strategies used by the individual flagship institutions to promote their scholarship programs.

Merit awards falling in the “prestigious” category provide funding equal to or greater than the institution’s total cost of attendance. “Guaranteed” awards are those with clear eligibility requirements (or “cutoffs”), meaning that students know the required academic credentials necessary to obtain a published scholarship amount. Flagships that offer “defined levels” of scholarships provide bands of awards of varying prestige and dollar amounts. The number of these levels is provided in the final “Award Types” column. Under the “award marketing” heading, flagships marked in the “best & brightest” column are those endorsing the role of institutional scholarships in attracting high-achieving applicants. Universities promoting “access & affordability” highlight the utility of their scholarship programs in reducing the cost of attendance and promoting attendance of a wider population of students.

**Table 1: Elements of Flagship Financial Aid Portfolios**

Institution	State Merit Aid	Award Types				Award Marketing	
		Prestigious	Guaranteed	Defined “Levels”	Number of “Levels”	Access & Affordability	Best & Brightest
Louisiana State University	X	X	X	X	9	X	
University of Florida	X						
University of Georgia	X	X		X	3	X	
University of Kentucky	X	X	X	X	5	X	X
University of Mississippi	X		X	X	2		X
University of South Carolina	X			X	5	X	X
University of Tennessee - Knoxville	X		X	X	3	X	X
West Virginia University	X	X	X	X	6	X	
University of Alabama		X	X	X	3		
University of Arkansas		X		X	5		X
University of Delaware		X				X	
University of Maryland - College Park		X		X	3		
University of North Carolina - Chapel Hill		X		X	2		
University of Oklahoma			X			X	
University of Texas - Austin						X	X
University of Virginia		X					X

**Findings**

This section reports the differences between Merit Aid State Flagship (MASF) campuses and Non-Merit Aid State Flagships (non-MASF) with regard to the type of institutional scholarships offered and the marketing of the awards.

***Award Types***

*Prestigious Scholarship Awards.* Six of the 8 non-MASF universities offer prestigious programs compared to four of the MASFs. While a difference of two institutions is not substantial, the varied presentation of prestigious awards at merit and non-merit flagships seems noteworthy. For example, the scholarship programs at four non-MASFs – University of Arkansas, University of Maryland - College Park, University of North Carolina - Chapel Hill, and University of Virginia – make their prestigious scholarships a prominent centerpiece of their institutional merit aid programs. In each of the four cases, scholarships are characterized as highly-competitive and promoted as offering social and academic benefits beyond financial

assistance. Additionally, non-MASF prestigious awards are more commonly marketed as their own “brand” with separate websites and their own logos (e.g., the University of Virginia’s *Jefferson Scholars Program*) or touted as central components in university honors programs (e.g., the University of Arkansas’ *Prestigious Fellowships*).

The prestigious award presentation at the four participating MASFs contrasts the practice at the non-MASFs. With the exception of the University of Georgia’s *UGA Foundation Fellowship*, MASF prestigious awards are listed and described alongside other merit-based scholarships and not promoted on their own websites. The marketing of the prestigious scholarships at MASFs such as Louisiana State University and the University of Kentucky more closely resemble the award presentation at flagships that *do not* offer prestigious awards including the University of Mississippi and the University of Tennessee – Knoxville. Instead, MASFs – both those with prestigious awards and those without – build their institutional scholarship programs around clearly presented scholarship levels.

While differences in the *number* of MASFs and non-MASFs offering prestigious awards are evident, more telling are the differences in the *presentation* of the scholarships for public consumption. The distinctions suggest that in constructing their scholarship programs, MASFs rely on the state merit program as a complementary funding source. Because the state-sponsored awards can be added to smaller scholarships to reach the cost of attendance, the merit flagships appear to be widening the scope of their institutional merit programs and capture a larger number of “talented” students.

*Guaranteed Scholarship Awards.* Five of the 8 MASFs offer some variety of a guaranteed scholarship, compared to two of the flagship institutions in the non-merit aid states. As with the prestigious awards, the differing strategy of MASFs and non-MASFs in awarding scholarships is evidenced by varied treatment of guaranteed awards. The dissimilar approaches of the two groups are illustrated in the examples of two flagships in proximate states – the University of Kentucky and the University of Arkansas.

The University of Kentucky (UK) offers five different levels of merit-based scholarships for incoming freshmen. The first two award levels contain scholarships that require no separate application beyond the admission application and have transparent eligibility requirements. Potential applicants know the minimum amount of merit-based aid they will receive from the institution even before they apply for admission. For example, the requirements for UK’s *Provost Scholarship* are stated as such:

Incoming freshmen whose minimum ACT (American College Testing) score is 28 or combined Math and Critical Reading SAT (Scholastic Aptitude Test) score is 1250, and achieve a 3.30 unweighted high school GPA (Grade Point Average), will automatically be offered a Provost Scholarship. The Provost Scholarship provides \$1,500 per year, for up to four years of undergraduate study. No application is required. (UK, 2008a)

The approach taken by UK suggests an institutional intent to straightforwardly explain the scholarship-related benefits to its academically talented applicants.

Conversely, the five award levels provided through the merit scholarship program at the University of Arkansas, a non-MASF, do not carry clear eligibility requirements or cut-offs. Instead, the institution states that “scholarship recipients are in the top 5% of students nationally” and “candidates typically have a minimum 3.75 GPA and 28 ACT/1240 SAT” (University of Arkansas, 2008). The award presentation is well organized, but emphasizes that the scholarships, requiring an additional application, are extremely prestigious and competitive.

The difference in the number of MASFs and non-MASFs that offer guaranteed awards suggests a varying approach to institutional merit aid between the two groups. The unambiguous eligibility requirements that characterize guaranteed scholarship awards make clear to state merit scholars the amount of aid they will receive above and beyond the state money. Non-MASFs, on the other hand, may not benefit as much from guaranteed awards and thus appear to seek out other options in their effort to attract gifted and talented students.

*Scholarship Levels.* With the exception of the University of Florida, 7 of the 8 MASFs publicize distinct levels of scholarship awards. Among non-MASFs, four universities have designed their institutional merit programs into award tiers. Differences between MASFs and non-MASFs along this “award type” dimension are exemplified in the cases of the University of South Carolina, a MASF, and the University of Oklahoma, a non-MASF.

The seven different levels of scholarship awards at the University of South Carolina (USC) range from \$2,000 per year up to \$10,000 per year. Higher-level scholarship recipients are selected from among Honors College applicants who “have excellent grades on a strong high-school curriculum and present average SAT scores over 1300 on critical reading and math sections combined (or ACT composite score of 29)” (USC, 2008). For the smaller awards, students with a 1200 SAT/28 ACT and “excellent grades in high school” are eligible for the award. Applicants not selected for one of the higher level awards are likely to receive one of the several lesser award amounts.

The University of Oklahoma (OU) offers smaller merit-based awards (typically \$1500 or less). The institution provides “general academic criteria” for the awards – a 27 ACT or 1220 SAT score – but does not have a structured multi-tiered scholarship program. Students are prompted to enter demographic and academic information on the scholarship page search engine to find individual scholarships which are funded by donor gifts. Unlike the multi-level merit aid program at USC, there is not a comprehensive university-wide program at OU. Instead, each scholarship is described as its own “program,” with details contained in a 192 page guidebook on the institution’s financial aid website (OU, 2008).



The organization and presentation of scholarships at the University of Oklahoma and other non-MASFs stand in stark contrast to those at many MASFs. At non-MASFs, award descriptions can be difficult to locate and challenging to decipher. For example, the University of Texas at Austin and the University of Delaware offer few specifics attached to their scholarship awards and do not clearly present specific levels of scholarships. The approach differs from that of MASFs including Louisiana State University and West Virginia University, which present awards in a user-friendly grid that details eligibility requirements and amounts. One notable non-MASF exception is the University of Alabama, which offers a scholarship program with multiple scholarship levels, and clearly stated scholarship requirements.

### ***Award Marketing***

*Access and affordability.* A commonly presented goal of state merit aid programs is to make college education more accessible by decreasing costs for families. Flagship institutions in merit aid states are more likely to promote the promise of access and affordability inherent in their institutional scholarship. Six MASFs highlight their scholarships as making attendance more affordable and accessible, compared to three of the eight non-MASFs. Examples of MASFs marketing their scholarship programs as effectively improving access and affordability include the University of Georgia and the University of Kentucky.

The University of Georgia (UGA) frames its institutional merit award program as one that seeks to make the institution accessible by addressing issues of affordability. In describing its merit aid offerings, the university writes that “a UGA education continues to be one of the most affordable in the country. That’s why respected sources such as *MoneyMagazine*, *Kiplinger’s*, and *U.S. News & World Report* agree that UGA is one of the best educational investments you can make” (UGA, 2008). The merit aid website includes quotations from these sources, drawing a direct link between the UGA scholarship program and affordability.

The University of Kentucky is another MASF that consciously markets its institutional merit aid awards with attention to access and affordability. The university has made an effort to brand its multi-tiered merit scholarship program as the *2020 Scholars* program, which is described as “a broad-based scholarships initiative designed to increase access to higher education among Kentuckians while pushing more students to take rigorous math and science courses in their junior and senior year of high school” (UK, 2008b).

The approach taken by the MASFs is different from that taken at the institutions in non-merit aid states. While MASFs commonly use access and affordability language in describing their institutional scholarship programs, the non-MASFs more commonly (and perhaps more appropriately) use it to describe their need-based programs. Institutional merit offerings are more regularly discussed in a straightforward manner. Examples include the University of Alabama and the University of Maryland – College Park, where there is no promotion of the potential utility of scholarships in making college affordable or accessible.

*Best and brightest.* In laying out goals for merit based financial aid programs, adopting states commonly point to the initiatives' ability to attract the "best and brightest" students to attend public institutions (Heller, 2002b). A total of four MASFs and three non-MASFs employ a "best and brightest" rationale in the marketing of their institutional scholarship programs. The small difference between the two groups is a surprising result, as is the fact that only four MASFs utilized "best and brightest" rationale. It was expected that a greater proportion of MASFs would aggressively promote their programs' abilities to attract "best and brightest" students. Examples from the University of Florida and West Virginia University, two MASFs that *do not* directly market "best and brightest" aims offer some insight into MASF response to the goals of the state merit programs.

The University of Florida's (UF) Office of Student Financial Assistance website offers very little information on institutional merit-based scholarships. Instead, visitors are provided with a detailed explanation of the state's merit program - the Florida Bright Futures Scholarship (UF, 2008). The Bright Futures description is one of the most in-depth and comprehensive descriptions of any financial aid program, and the university does not attractively market scholarships above and beyond Bright Futures in an effort to attract best and brightest students.

West Virginia University (WVU) is another MASF that does not directly market its institutional aid program as one aimed to attract "best and brightest" student. However, the institution clearly links its scholarship program to the PROMISE scholarship – West Virginia's merit aid program. On its Undergraduate Scholarship Office Website, WVU states that "West Virginia high school students may also be eligible for the PROMISE Scholarship, which is awarded by the State of West Virginia. 1300 students in the current freshman class are PROMISE Scholars" (WVU, 2008).

The examples in Florida and West Virginia illustrate that even in MASFs that do not directly market "best and brightest" goals there is an institutional response to the state merit programs. Both cases point to universities relying on the state-run programs to attract strong students to their campuses. The practice appears to supplement the merit aid response of offering larger numbers of smaller transparent scholarships, which also points to some dependence on the state funds to help achieve enrollment goals.

## Discussion and Implications

Based upon our review of the institutional scholarship programs at the 16 SREB state flagship institutions, there is evidence that MASFs have crafted institutional aid programs that respond to their state's merit program. More specifically, there are three responses that characterize and illustrate the way in which MASFs have shaped their own aid programs to take advantage of state merit scholarships and to advance enrollment goals. This response can be seen through the *reach* of the institutional scholarships, the *transparency* of the university merit aid programs, and the *marketing aims* of the scholarship efforts.

*Scholarship reach.* With a few exceptions, flagships in non-merit aid states tend to make their prestigious awards the hallmark of their institutional merit programs. Conversely, the scholarship programs at MASFs tend to be constructed in a way that benefits a wider range of students with various academic credentials. Such award type variations are an example of MASFs responding to the state-run merit programs in their states. While non-MASFs seek to attract academically talented applicants through sizable awards, the MASFs benefit from portable state merit scholarship money obtained by incoming students. The smaller awards at MASFs have a wider reach because they “top off” the state merit scholarships and provide scholarship offerings to a wide range of talented students. The expanded reach of the MASF scholarships suggests an effort by the institutions to attract more and better quality students. Similar to mission statements serving as signals of distinctions between universities (Morphew & Hartley, 2006), the wider reach MASF merit aid serves as a distinguishing institutional characteristic.

*Transparency.* When compared to non-MASF scholarships, the awards at MASFs are far more likely to be presented with transparent eligibility requirements. The presence of guaranteed scholarships and well-defined award levels make it simple for prospective applicants to definitively determine their potential scholarship eligibility and, in many cases, the specific amount of financial support they will receive. The expanded *scholarship reach* at MASFs appears to be enhanced by the transparency of their institutional merit programs – not only are more students eligible, but they also know the amount they will qualify for. Additionally, state merit aid eligibility requirements are commonly transparent, and the response of the MASFs toward transparency aligns closely with the state approach. Transparent merit aid criteria and consistent messages between states and institutions seem to enhance awareness and understanding of financial aid opportunities and “college knowledge” (Perna, 2005; Vargas, 2004).

*Marketing aims.* With the exception of the University of Florida, every MASF uses either “best and brightest” or “access and affordability” rationale to market institutional scholarship programs and half of the MASFs use both concepts. While Long (2004) and McLendon et al. (2006) empirically find that campuses respond to state merit aid by increasing tuition, our study suggests that six of the eight MASFs market their financial aid portfolios by highlighting “access and affordability.” Indeed, this approach differs from our expectation that MASFs would market scholarships to the “best and brightest” students, which would be more consistent with the aims of state merit aid programs (Heller & Marin, 2002, 2004). Notwithstanding the unexpected marketing approach of MASFs, our study also shows MASFs to be more engaged in marketing institutional aid than flagships institutions in non-merit aid states.

Despite this difference in marketing themes between MASFs and state merit aid programs, flagship campus response is best summarized by the observation that MASFs have constructed programs that act as complements to the state program. Through both the structure and marketing of institutional awards, the flagships attempt to expand their ability to attract academically strong students with an emphasis on improving affordability. Compared to the considerable variance in award types and marketing

efforts of non-MASFs, there appears to be a consistent flagship campus response to state merit aid programs that leverages state-funded scholarships with varying levels of transparent institutional aid offerings and actively markets these resources.

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