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## ABSTRACT

The LifeLong Learning (L3) Scholarship Program was developed for Johnson County, North Carolina in 1992 and was expected to continue until July 2003. An evaluation was conducted of the program, using data from various sources. The L3 program depended on private donations to guarantee students in Johnson County the opportunity for higher education. All students in the school system were eligible, regardless of family income or financial circumstances. The L3 program specified that the county would provide each high school graduate with a scholarship share to use for tuition and books for each year they were in high school. Students were required to explore regular financial aid avenues, with outside monies received decreasing the L3 grants. Students and their parents had to agree to certain conditions, including parent-supervised study and some volunteer community service. The program also had a mentorship component, with community members recruited as mentors. The first L3 class enrolled 753 of 1,149 ninth graders, and it was projected that in 1996, the first year L3 students would graduate, \$150,000 would be needed. By 2000, there were 845 shares left, belonging to students who did not intend to continue their education. Over the L3 period, an increase of 12% to 18% was seen for postsecondary attendance for graduates of small high schools, and the graduates from the large high schools who attended college increased by 15%. In the end, the L3 program may have fallen victim to its own success. So many students participated that the program was difficult to fund. Planners did not expect the degree of participation of students and parents that occurred. (SLD)

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# LifeLong Learning Scholarship Program (L 3)

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Director of L3 Scholarship Program

## **LifeLong Learning Program (L3)**

### **ABSTRACT**

This report documents the LifeLong Learning Scholarship Program that was presented to the public of Johnston County on February 13, 1992, and adopted by the Johnston County School Board on September 29, 1992. The program still continues to this day but will cease to exist on July 30, 2003. The report documents the extremely successful educational results of the program and the finances that were involved. All of the major components of the program are covered, conclusions are drawn, and tables and graphs are presented to support the data.

## LIFELONG LEARNING SCHOLARSHIP PROGRAM (L3)

The L3 program - LifeLong Learning - was created in 1992 to serve the students and communities of Johnston County, North Carolina. A revolutionary concept at the time, this same type of program is now being replicated in such states as Georgia (Hope Scholarship) and is under consideration by numerous states and the federal government. All have the same two-fold purposes in mind. First, to provide students with access to post-secondary education, and second, to raise student/community expectations regarding life long learning.

L3 is an inclusive program that depends upon private donations to guarantee students in Johnston County schools the opportunity for higher education and a chance for a better and more rewarding future. All students in the school system were eligible, regardless of family income or financial circumstances. Students, parents, business leaders, mentors, and the entire Johnston County community were envisioned as a part of the concept, with each group contributing to the overall success.

L3 was initiated primarily because of the demographics of the county and the existing low level of expectations for student post-secondary education. The statistics in 1992 were quite revealing;

- o In a state (North Carolina) with a low level of high school graduation (36%), Johnston County ranked 37th out of 100 counties.

- o In percentage of college graduates, Johnston County ranked well below the national average.

- o Per pupil spending in the school system labeled the system a “low wealth” categorization, meaning the average per pupil expenditure was far below the statewide average.

- o Post-secondary education was stagnant for high school graduates and well below the state average.

Johnston County students faced increasingly fierce competition. The county was in growth, partially in response to the research triangle recruitment of knowledge industries such as pharmaceuticals, computers, and software. These require higher-level workers and caused influxes of well trained employees into the county. This growth provided opportunities and rising standards, a positive occurrence for those residents and new-comers with education, but a movement that might leave Johnston County students unable to compete and participate in this changing job market.

This, plus a combination of other factors, prompted the creation of the L3 program. L3 was designed to incorporate the community in each student's climb toward education, employment, and citizenship. Students often lacked family inspiration, positive family social values, supportive attitudes, capabilities, and money. Poverty and race were also crucial factors. To many, their plight seemed hopeless, and students settled often for a fate far less than their potential offered. All of these factors were addressed by L3.

The basic premises of the L3 proposal were as follows:

The Johnston County Schools would provide each student, who graduated from high school, a scholarship share to use for tuition and books. One scholarship

share would be earned for each year that they were in high school. To qualify for this scholarship there would be a written contractual agreement between parents, students, and the County Board of Education.

Also, those students planning on going directly into the work force upon graduation would be encouraged to enter into the cooperative agreement also and use their scholarship share to seek technical skills at the community college while working. In addition, a quality business apprenticeship program for everyone during the high school years would be provided through the participation of local businesses.

Students would be expected to complete appropriate financial aid forms, external to the L3 program, during their senior year in high school. Outside funds awarded due to academic scholarships and/or grant monies would decrease the amount of the L3 scholarship share. The students would have five years from the date of their graduation to use their shares.

The key to the success of this scholarship program would be the agreement between home, school, and the community. Each party to the agreement had to meet all requirements for the tuition offer to be fulfilled. Failure to meet the requirements would cancel the agreement.

Funds to pay for this program came from a variety of sources. The money was given by business, industry, foundations, individuals, government, the county court system through fines and forfeitures and many others. Interest earned from these funds would then be used on a perpetual basis to fund the program.

The L3 program required a formal contract with the participating students as they progressed from class to class; and, if the contract was fulfilled, they were given

L3 Scholarship financial assistance to pursue their education through college or in a formal life-long learning process. The contract called for performance against stated criteria in several areas. These included academics, attendance, citizenship, drug and alcohol abstinence, parental involvement in critical school activities, family pursuit of scholarship and assistance funding outside L3, and student community service. All of these are critical for a student's success. The key components of this contract were:

1. The student and parents agreed to follow the contract, and the parent agreed to review the student's work at school with the students's teachers a minimum of twice per year.
2. The parent agreed to provide the student with a good study area at home and to monitor that the student agreed not to work over 20 hours per week at an outside job or later than 10:00 pm on the eve of a school night.
3. The student would have a minimum of a 95% attendance rate.
4. The student would make continuous improvement towards graduation each year.
5. The student would do a minimum of 15 hours of preapproved volunteer community service each year.
6. The student and parent would agree to complete a Free Application for Federal Aid their Senior year between January 1 and March 15.
7. The student would abide by the Student Code of Conduct and would stay free of alcohol and drugs.

The program was partially sponsored by the Johnston County school system and currently operates under an L3 Board of Directors. Original projections were that 35% of the graduating classes would qualify for financial assistance which would decrease the amount of the L3 share. In addition to L3 funding, a major L3 activity

would be to raise higher educational expectations for students and parents. Also one of the successes of the program would be the help that students received in finding and obtaining not-L3 funding such as scholarships and grants.

The projections were that \$150,000 in L3 funding would be required in 1996 to fund the first L3 shares. This would increase to \$300,000 in 1997, \$450,000 in 1998, and \$600,000 in 1999, the first year of the mature program. Six hundred thousand dollars per year would be required thereafter. An endowment of about \$8,000,000 was therefore required assuming a 7% rate of interest. Actual expenditures were quite a bit below these figures.

Each participating student was given one share each year. Each share when earned through successfully fulfilling the contract at high school graduation was given a value of about \$500 to \$1,000, depending on cash available. The value of the scholarship was determined in July each year by the L3 Board of Directors.

An L3 Coordinator was hired for each high school. These coordinators also served as vocational counselors and were responsible for signing up L3 students and collecting data on them.

A ten minute video, highlighting the L3 initiative was produced in 1995 to show parents, students, staff, and community members the founding principles of the program. The video was sponsored by Northern Telecom, Inc., and Johnson and Johnson (Chicopee). This video was shared with many local civic groups, businesses, and potential donors as a means of soliciting financial contributions for the funding of the L3 Program. A copy of this video was also placed in each of the five high schools.

One of the components of the L3 contract that needed to be in place before the first class of L3 students signed their contracts was the monitoring and tutoring



program. The contract defined an L3 Mentor as a business, industry, or community person who had a desire to help students reach their full potential by being:

A link between parent and student

A positive role model to offer students a chance to explore career options

An advocate for the student

A friend who would help enhance personal self esteem

A person who could help with schoolwork if the student was having problems

Mentors were recruited in a number of ways. A copy of a job description and an application were circulated at PTA meetings, civic organizations, industry meetings, teacher meetings, and churches. A mailing also went out that included a trifold with a card to mail back if interested in participating as a mentor.

Some industries set up programs so that employees could be released from work to serve as mentors in the schools during the school day. By the beginning of the school year in 1992, 75 community members had been trained by the 'Cities in Schools' trainers. The Cities in Schools was a national government-funded, non profit, non-partisan organization addressing the multiple needs of youth at highest risk of educational, social, and economic failure. Its target group was the potential dropout. This organization had been operating in Raleigh, NC for six years. By the end of the first year of L3, there were over 100 community members who had been trained.

In the late spring of 1992, a letter was mailed to the homes of all 8th grade parents introducing them to the concept of L3. The material explained the program and provided details about how the program would work and when the first set of contracts would be signed. Each of the five high schools in Johnston County provided a follow-up Parents Night for the school to introduce them to the project. In October

and November of 1992, the first ever L3 Signing Nights were held at the high schools. Orientation sessions were also held for all eligible 9th graders, and their parents, to inform them of the contract details and the rationale behind the program.

During the summer of 1993, a curriculum institute was held. Attending this meeting were five teachers and one principal from each of the five high schools in the county. Also in attendance was a team of educators from the University of North Carolina system, Johnston Community College, representatives from the Independent Private Schools in North Carolina, and local educators and business leaders. This meeting was felt to be a key step in the effort to make Project L3 a success. It resulted in a great many changes in the curriculums of the high schools in the county.

This institute also addressed another objective of the L3 project, which was to provide opportunities for students to strive for continuous academic and personal achievement. All attending the institute agreed that a full assessment of each student was needed in the areas of interest, aptitude, learning styles, and vocational inclination. The institute addressed this problem because of the lack of knowledge that young people seemed to have at the college level about their major field of study and jobs that were available to them. This test would be followed by ongoing monitoring of academic progress and personal development through small group meetings, conferences, reviews of report cards, and parent-teacher conferences. This would create an increased awareness of self and the future educational opportunities. Also, the assessment should result in better course selection and self-direction for planning in high school. The test would be given at the end of the eighth grade: and the name of the test selected was 'COPS and CAPES'. The test was published by Edits Publishing Company. The results of the tests were to become a part of the student's

personal folder. One of the disadvantages of this test was the cost of scoring. The scoring could not be done in-house, and the committee was instructed to continue searching for a more appropriate test.

A computer program was developed so that each L3 student could explore their eligibility for a scholarship matching his or her personal data file. The scholarship database contained all of the available local and national scholarships. The program was developed in conjunction with Northern Telecom which was located in the Research Triangle Park. Northern Telecom volunteered this service to the L3 program.

The program developed was named "Scholar Base" and it was completed by the end of the summer of 1994. All of the L3 coordinators were trained to administer the program; and when school started in the fall a computer room was ready for the L3 students in each school to run the program. The program allowed the student to enter information like grade-point average, SAT score, possible majors, possible schools they wanted to attend, extracurricular activities, and parents' jobs. The computer program would do the rest. It would match all of the information that the student entered with over 800 scholarship sources. At the simple touch of a button, the students could have names and addresses of scholarships that were designed specifically for them.

This computer program was the answer to one of the requirements of the L3 contract that at first seemed impossible to monitor. It read, "The student agrees to pursue all suggested avenues for scholarships and grants and to accept all offered scholarships and grant monies pursuant to his/her choice of post-secondary education. The student further understands that the L3 scholarship may be decreased in relationship to any other scholarship and/or grant monies that the student may

receive." The computer program also had a built-in accountability factor. At the end of the student's session on the computer, a printout of scholarship names and addresses were available. The L3 Coordinators could sign each student off on the computer printout from the program, help them write for letters requesting the applications for the scholarships that matched their profile, and prepare a verification sheet for the L3 student's folder. A letter was sent home to the parents notifying them of the scholarships that the student would be applying for. The database for this program was updated each year until 1998.

The first L3 class in 1992-1993 enrolled 753 of the 1149 ninth graders, 66% of the class. Seventy three percent of these L3 students donated 8,850 hours to community services that improved their citizenship and enriched their neighborhoods. Six hundred and eighty six parents of the 753 L3 students participated in parent-teacher activities at the schools (91%). They also monitored student behavior and reported back to the school as required by the contract. About 120 parents participated in these activities before L3 , so this was a dramatic increase. Attendance for the L3 students resulted in 88% meeting the 95% L3 attendance criterion which was considered by the teachers to be a major achievement since the average attendance rate for the whole student body was 86%. In citizenship, only 6.9% L3 students were lost because of failure to meet one or more disciplinary provisions of the contract.

The L3 Second Class of 1993-1994 enrolled 645 of 1060 students (61%). Community service donations for both classes were 17,000 hours to 160 different agencies, organizations, schools, churches, clubs, businesses, and individuals in need. Forty percent of the students volunteered for more than their contracted amount. Parent participation rose to 1265 involved in parent/teacher activities. Attendance rose to 90% meeting the 95% L3 criterion. Only 6% failed to meet the Rules and

Regulations clause of the contract.

The L3 Third Class of 1994-1995 enrolled 627 of 1266 ninth graders (50%). Attendance rose to 95% meeting the 95% L3 criterion. Only 1% failed to meet the Rules and Regulations clause of the contract.

The third class of L3 students was enrolled in the program in August of 1995. In the same month, the County Board of Education turned over \$200,000 in court Fines and Forfeitures to the LifeLong Learning Inc.; and along with interest accrued, the total in hand was up to \$887,613 with \$46,000 outstanding in pledges. A report from all five high schools was secured that indicated that there were 1676 students enrolled in the L3 program and that they had earned a total of 3,003 shares.

In late August of 1995, the County Board of Directors of the L3 Program met to determine the value of the L3 share for the graduating class of 1996 and to determine the feasibility of continuing the program in view of the lack of money needed for the funding of the program. It was decided that an excess of \$2 million would be needed to fully fund the shares that were outstanding. This turned out not to be true but only time would prove that. The Chairman of the L3 Foundation, met with the Johnston County Board of Education and requested, that in light of the potential liability, no more students should be allowed to sign contracts with the school system. He informed them that he doubted that there would be sufficient funds even for scholarships already earned. The Board agreed to enroll no more students in the underfunded program. The LifeLong Learning Scholarship program died that afternoon of financial starvation.

At this time the class of 1996 had earned three shares. The class of 1997 had earned two shares and the class of 1998 had earned one share. Because of these shares, work was not over. A method had to be set up to make the payoffs when the

first students graduated in 1996 with the first L3 shares. Actually, the process ended up being very simple. Contact was made with every university and college in the state of North Carolina, and they each made suggestions about the procedure. A "Free Application for Federal Student Aid," or FAFSA, had to be completed and mailed to the Federal Student Aid Program. The student and parent were required to co-sign an "Authorization to Release Grades" form and an "Authorization to Release Financial Aid Award and Scholarship Information" form. When the student received an award letter from the college's financial aid office that they were planning to attend, it would state how the cost to attend the school would be shared as well as a report on scholarships that the student would receive. A copy of this had to be sent to the L3 office. They would only receive this information if a FAFSA had been filled out. About three weeks after filling out the FAFSA, the student would receive a Student Aid Report and a copy of the first page of this report also had to be sent to the L3 office. This page would indicate how much grant money the student would receive using an Expected Family Contribution Number (EFC). Actually this copy would not have been needed unless the student was attending a community college but it was decided that the same information should be requested for all students. These three pages of information were all that were needed to release the money to the schools for the L3 shares. For record keeping purposes, a check-off form was included in each L3 student's folder in all of the high schools. The coordinators checked each piece of information off as it was turned in and tried to keep the parents informed of what was needed. When the folder was transferred to the L3 office at the end of the senior year, 90% of the needed information was already present.

Letters were written to every private school in North Carolina requesting that the school be a "participating school" to meet the requirement of the L3 contract. The

contract covered the 16 university campuses in the UNC system and read "or any other participating institution of higher learning or toward the services of a business or industry in an approved apprenticeship program" This clause in the contract was interpreted to mean matching the scholarship money that L3 paid for the student.

Every private school in North Carolina with the exception of Wake Forest and Duke agreed to match our L3 Scholarship money up to \$1500. This afforded a tremendous advantage for our students. We had a large number of students attending private schools out of the state also, and we never found one that refused to match our scholarship money. Some of the schools included The Citadel, Freewill Baptist Bible College, New England School of Broadcasting, Boston College, Wellesley College, and ECPI.

To accommodate the community colleges, different procedures were used depending on the preference of the business office at each school. Johnston Community College used a third party billing procedure. In that instance, the students were certified before they registered and allowed to charge their books and tuition to the L3 Scholarship Program. The Community College billed our office for all of the students at one time. We sent checks for the value of the L3 share to some of the community colleges before school started, and the schools reimbursed our office for the amount that the student did not use.

Our contact people in each school were wonderful. Any request was granted, and all of them would bend over backward to accommodate our office. We were all in the same business of trying to make it easier for the student, and each of us knew it. Most of the larger schools had Scholarship Coordinators, and those that did not provided a contact in their Financial Aid office. Our office knew a registrar in every school, and our checks were mailed to them for all of the students who were attending



that school.

The Financial Aid Director of the L3 program conducted Financial Aid Workshops twice during the year at each of the five high schools. The L3 Coordinators set up individual sessions with the Financial Aid Director and every parent of L3 students to help them fill out the FAFSA. It was a very complicated form, and there were not many parents who could complete it correctly. Appointments were set up in the L3 office for the parents who missed their appointments. Letters were also sent out to remind the parents of the information that was needed to be sure that they were in compliance by the decline.

The data indicated that in 1996, the first year of L3 students graduating from high school, \$150,000 would be needed to fund the L3 shares used, in 1997 \$300,000 would be needed because two graduating class would be calling in their shares. In 1998 about \$450,00 and in 1999, \$600,000 because four classes would be involved. See Table #1 in back of this paper.

Table 1. 1992 Projection and Actual L3 Scholarship Expenditures.

<u>Year</u>	<u>Projected</u>	<u>Actual</u>
1996 (First L3 Class)	\$ 150,000	\$84,168
1997	300,000	\$272,688
1998	450,000	\$423,399
1999	600,000	\$30,264
2000	600,000	\$36,706

Note: Projected \$ 600,000 per year after 2000

Projected endowment required of \$ 8,000,000

This data also indicated that even though there were over 1000 shares left in 1999 and 845 in 2000, these students had no plans to continue their education. As of July, 2002 about 20% of the students who earned shares while they were in high school have never contacted the L3 office or requested to activate their shares. This is



the reason that we still have over \$180,000 in our L3 account.

A dramatic increase was also seen in the low interest rate loans the students received. These loans are made based on the FAFSA information that parents send to the universities and colleges. The amount of these loans for L3 students rose from \$117,577 in 1993-1994 to \$192,173 in 1994-1995, from \$192,173 to \$1,011,444 in 1995-1996, from \$1,011,444 to \$1,093,429 in 1996-1997 and from \$1,093,429 to \$1,900,444 in 1997-1998. This increase is attributed mainly to the assistance provided to L3 students and their parents regarding financial aid information and the help preparing applications. See Table # 2

Table 2. L3 Scholarships Given and Non-L3 Assistance Provided with L3 Help to Students and Parents

<u>Year</u>	<u>L3 Scholarships</u>	<u>Non-L3 Financial Aid</u>
1994	None	\$ 117,577 (without L3 help)
1995	None	\$ 192,173
1996 (1st L3 Class)	\$84,000	\$1,011,444 (with L3 help)
1997 (2nd L3 Class)	\$272,000	\$1,093,429
1998 (3rd L3 Class)	\$423,399	\$1,900,444
1999	\$473,393 Est.	(not available)
2000	\$473,393 Est.	(not available)

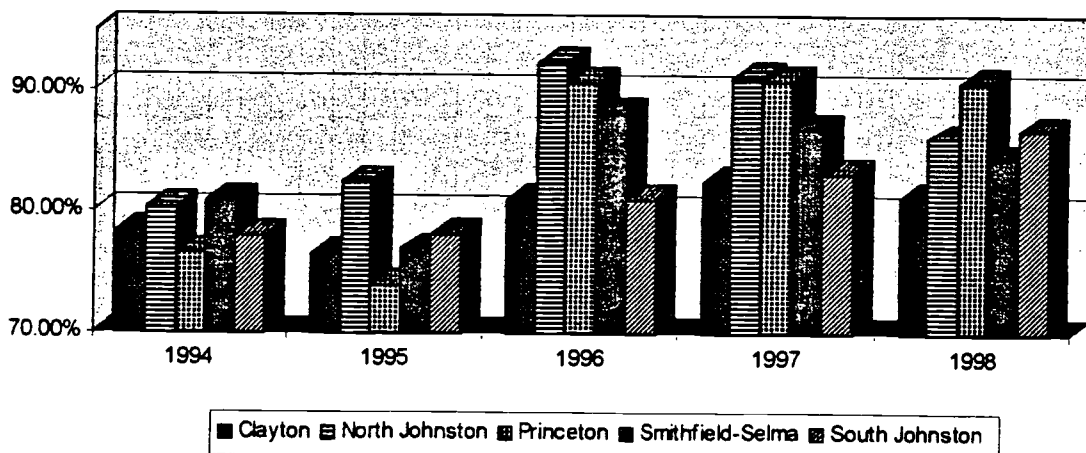
Table 3 was compiled to show the increase in the number of parents who were incorporated into the students school life. This data was almost beyond belief. Before the L3 Program, an average of 183 parents attended the financial aid meetings held by the school at night. At the height of the L3 program in 1996, over 1600 parents were present at the financial aid meetings. In 1999, when the L3 program had been discontinued, the county wide financial aid meetings were attended by only 250 parents.

**Table 3. Parents Attending Financial Aid Workshops**

Year	Clayton	North Johnston	Princeton	Smithfield-Selma	South Johnston	Total	Shares Outstanding
<b>Before L3 Program Introduction</b>							
1991	45	30	10	38	60	183	0
<b>After L3 Program Introduction</b>							
1992	25	40	15	48	92	220	436
1993	195	96	58	160	170	679	1012
1994	290	1782	115	308	370	1265	1359
1995	296	200	130	398	400	1424	2560
1996	403	240	147	405	410	1605	2560
<b>First Class of L3 Students Graduates</b>							
1997	300	175	160	358	390	1383	1549
1998	140	94	50	165	210	659	661
1999	30	45	25	50	100	250	0

Figure #1 shows the increase in the number of students who attended post-secondary schools from the five high schools. An increase of 12% to 18% was seen at the small high schools and 15% at the large high schools.

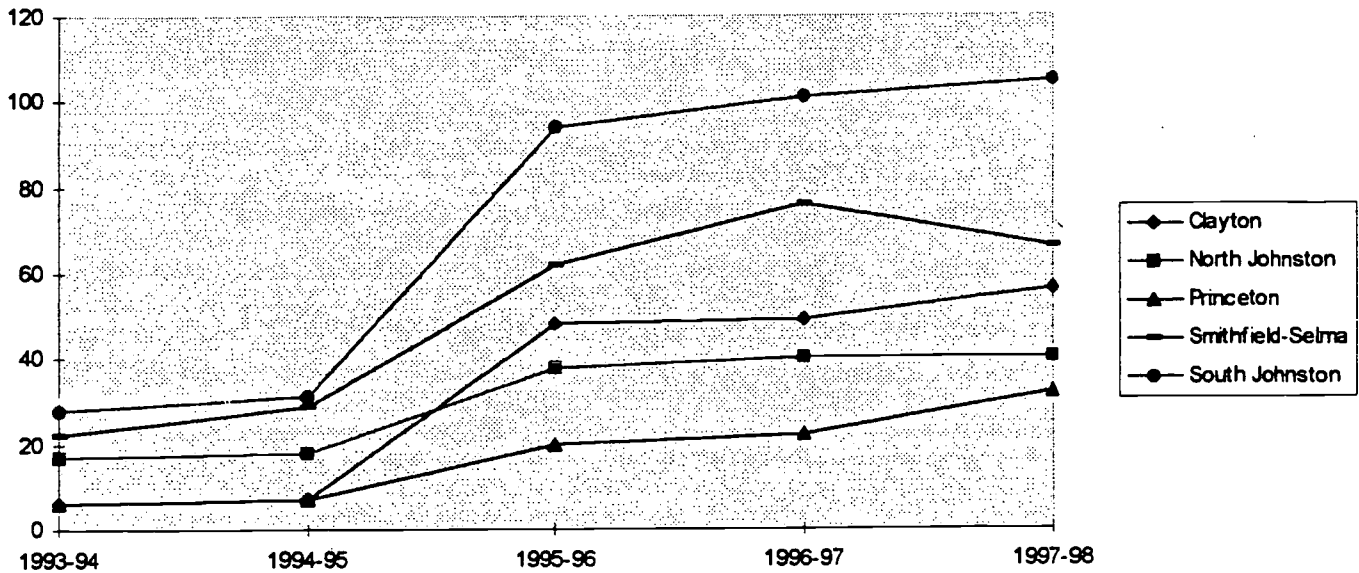
**Figure 1 Percentages of Students Attending Post-Secondary Schools**



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Figure #2 depicts the number of L3 Students receiving Financial Aid from 1993 to 1998. The increase is dramatic and in some schools the final number was 25 times the original. An example was Clayton High School who increased from 5 students to 59 students or Smithfield-Selma who increased from 21 students to 65.

Figure 2 Number of L3 Students Receiving Financial Aid



As of July 31, 2002 there is approximately \$175,474 left in the LifeLong Learning investment account and there are only 308 shares left outstanding. Two Hundred and twenty seven of these shares belong to the class of 1997 and 81 shares belong to the class of 1998. In September of 2002, if they are not used, the 227 shares will revert back to the L3 Foundation because the five years will be up for the class of 1997. It appears, that if the program could have raised \$4.5 million instead of the original projection of \$8 million, it could have run indefinitely. This is assuming that the same interest rate of 8.0% could have been maintained.

In the end, L3 probably fell victim to its own success. The program architects did not know how successful the program would be and that so many

students would elect to join. All the members of the school board agreed L3 was so appealing because it made no distinction in class or culture. It was not designed for low-income students, the wealthy, or the middle class, but encompassed those of all income levels.

All of the data collected support the premise that the L3 program was a phenomenal success. Over 4,000 people in this small community were involved in the program, all striving for one goal. That goal was to help young people succeed. The most tremendous success may have occurred in areas that could not be measured

such as students' and parents' pride in their school, parental involvement in every phase of high school life, students' excitement about the opportunities that would be open to them, and the encouragement that the students received from the community. The list could go on and on.

Everyone in the community was involved. Everyone was excited, and the excitement carried over to the students. One of the beauties of the concept was rather than something being given to the student for free, the student had to work for the guarantee, the guarantee of a better life through education. The insurance was that if they met their responsibilities, they would be able to work in a more meaningful job. Thereby, the life and experiences that they and their families could enjoy would be significantly enriched.

To say that L3 was the panacea for all of the problems in the public schools would be ludicrous. To say that it would make a radical difference is a true statement.



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