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DATE: April 2, 2001

**HOUSE OF REPRESENTATIVES
AS REVISED BY THE COMMITTEE ON
EDUCATION APPROPRIATIONS
ANALYSIS**

BILL #: CS/HB 517
RELATING TO: Student Financial Aid
SPONSOR(S): Committee on Education Innovation and Representative(s) Henriquez
TIED BILL(S): None

ORIGINATING COMMITTEE(S)/COUNCIL(S)/COMMITTEE(S) OF REFERENCE:

- (1) EDUCATION INNOVATION YEAS 13 NAYS 0
 - (2) EDUCATION APPROPRIATIONS
 - (3) COUNCIL FOR LIFELONG LEARNING
 - (4)
 - (5)
-

I. SUMMARY:

CS/HB 517 establishes the Instructional Paraprofessional Tuition Reimbursement Program for the purpose of encouraging instructional paraprofessionals to become certified to teach in subject areas that have a critical teacher shortage and requires the Department of Education to administer the program.

Eligible program participants are to receive a tuition reimbursement for up to nine (9) credit hours per semester or the equivalent. In order to be eligible for a tuition reimbursement, a participant must be employed by a district school board or a charter school as an instructional paraprofessional for at least one year, be enrolled in a program of study leading to certification in an area of critical teacher shortage, and earn a minimum grade of 3.0 or its equivalent on each approved course.

The fiscal impact of this bill is subject to the extent the Instructional Paraprofessional Tuition Reimbursement Program is specifically funded by the Legislature in the General Appropriations Act. If the funds appropriated are not adequate to provide the maximum allowable reimbursement to each eligible applicant, awards are to be reduced by a prorated amount. On average, the current cost of tuition and fees at a state university is \$78.25 per semester credit hour.

This bill becomes effective July 1, 2001.

II. SUBSTANTIVE ANALYSIS:

A. DOES THE BILL SUPPORT THE FOLLOWING PRINCIPLES:

- | | | | |
|-----------------------------------|---|--|---|
| 1. <u>Less Government</u> | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> | N/A <input type="checkbox"/> |
| 2. <u>Lower Taxes</u> | Yes <input type="checkbox"/> | No <input type="checkbox"/> | N/A <input checked="" type="checkbox"/> |
| 3. <u>Individual Freedom</u> | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4. <u>Personal Responsibility</u> | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 5. <u>Family Empowerment</u> | Yes <input type="checkbox"/> | No <input type="checkbox"/> | N/A <input checked="" type="checkbox"/> |

The Department of Education is required to administer the Instructional Paraprofessional Tuition Reimbursement Program; therefore, this bill may not support the principle of less government.

B. PRESENT SITUATION:

INSTRUCTIONAL PARAPROFESSIONALS

Instructional paraprofessionals, as defined in s. 228.041(9)(d), F.S., are individuals who are under the direct supervision of an instructional staff member and aid the instructional process. Included in this classification are classroom paraprofessionals in regular instruction, exceptional education paraprofessionals, career education paraprofessionals, adult education paraprofessionals, library paraprofessionals, physical education and playground paraprofessionals, and other school-level paraprofessionals.

IDENTIFICATION OF CRITICAL TEACHER SHORTAGE AREAS

Current law, s. 231.62, F.S., identifies math, science, career education, and high priority location areas as "critical teacher shortage areas" when implementing certain critical teacher shortage scholarship and loan programs. Additionally, s. 231.62, F.S., requires the State Board of Education to adopt rules necessary to annually identify other critical teacher shortage areas and high priority location areas.

Rule 6A-20.0131(2), F.A.C., requires that a list of critical teacher shortage areas be prepared based on the consideration of current supply and demand information related to Florida public school instructional personnel, including but not limited to, the following:

- The number and percentage of vacant positions in each teaching discipline;
- The number and percentage of positions filled by out-of-field teachers in each discipline;
- The projected annual supply of graduates of state approved Florida teacher education programs for each discipline;
- The projected annual supply of teachers from out-of-state in each discipline; and
- Critical teacher shortage areas which may be identified pursuant to rules adopted by the district school boards.

Based on the information outlined above, the State Board of Education adopted the following subject fields as critical teacher shortage areas for 2001-2002:

- Middle and high school level mathematics;
- Middle and high school level science;

- Exceptional student education programs serving students with disabilities including emotionally handicapped, mentally handicapped, physically handicapped, speech and language impaired, hearing impaired, visually impaired, specific learning disabled, and varying exceptionalities;
- English for speakers of other languages;
- Foreign languages;
- Technology education; and
- For the Tuition Reimbursement Program, endorsement areas in profoundly handicapped, orientation/mobility, prekindergarten handicapped, and gifted.

INSTRUCTIONAL AIDE SCHOLARSHIP PROGRAM

Within the General Appropriations Act (GAA), the 2000 Legislature created the Instructional Aide Scholarship Program to encourage instructional aides to become certified as teachers in areas of critical state concern. The GAA identifies the following areas of critical state concern: foreign language, science, math, computer science, and exceptional student education. The program provides a tuition reimbursement of up to \$3,000 per year to instructional aides who are employed by a public school district for at least one year.

According to the Department of Education, eligible instructional aides must successfully complete one or more undergraduate or graduate courses in a program leading to certification in an area of critical state concern. Additionally, instructional aides must earn a minimum grade of 2.0 on a 4.0 scale on all approved courses.

The Legislature appropriated \$150,000 in order to fund the Instructional Aide Scholarship Program for the 2000-2001 fiscal year.

STUDENT FELLOWSHIP PROGRAM

The 2000 Legislature created the Student Fellowship Program (s. 231.6215, F.S.) to identify and recruit educational paraprofessional learning guides or rising juniors in state community colleges, public universities, or certain independent postsecondary institutions into the teaching profession.

A student fellowship recipient must receive intensive preparation in a subject area combined with ongoing experience with school children through internships or working with a master teacher identified as a mentor.

A student fellowship recipient may receive an annual loan of \$6,500 for two years. The Department of Education will forgive the loan if, within five years after graduation, the recipient teaches full time for three years at a Florida public school, or for two years at a Florida public school graded "D" or "F." If a recipient does not graduate within two years, or does not fulfill the employment requirements, the recipient must repay the total amount plus annual interest of eight percent.

The 2000 Legislature did not appropriate funds for this program.

PROGRAMS THAT ADDRESS CRITICAL TEACHER SHORTAGES

CRITICAL TEACHER SHORTAGE STUDENT LOAN FORGIVENESS PROGRAM

The Critical Teacher Shortage Student Loan Forgiveness Program (s. 231.621, F.S.) provides financial assistance to teachers who are certified in a critical teacher shortage subject area. The financial assistance is provided to students in the form of a repayment of student loans that were incurred while students pursued certification.

In order to be eligible to participate in the Critical Teacher Shortage Student Loan Forgiveness Program, a candidate must meet the following general eligibility criteria:

- Graduate from an undergraduate or graduate teacher preparation program and be certified to teach;
- Possess certification in a critical teacher shortage subject area designated by the State Board of Education;
- Serve as a full-time teacher in a critical teacher shortage subject area in a Florida public or developmental research school;
- Teach for the first time in a critical teacher shortage subject area if he or she is an initial applicant;
- Complete a full year of teaching service in order to be eligible for a full award;
- Complete at least 90 days of teaching service in order to be eligible for one half of a full award; and
- Not participate in certain similar programs.

Student loans that were incurred while students pursued certification are eligible for forgiveness. The annual payment must not exceed \$2,500 (for a maximum of four years) for teachers who graduated from an undergraduate postsecondary teacher preparation program, while the annual payment must not exceed \$5,000 (for a maximum of two years) for teachers who graduated from a graduate postsecondary teacher preparation program.

The Legislature appropriated \$5.2 million in order to fund the Critical Teacher Shortage Student Loan Forgiveness Program and the Critical Teacher Shortage Tuition Reimbursement Program for the 2000-2001 fiscal year.

CRITICAL TEACHER SHORTAGE TUITION REIMBURSEMENT PROGRAM

The Critical Teacher Shortage Tuition Reimbursement Program (s. 240.4064, F.S.) provides financial assistance to full-time Florida public school employees who are certified to teach in Florida and who are teaching or preparing to teach in critical teacher shortage subject areas. Eligible participants may receive reimbursements for tuition that was paid for certain courses in critical teacher shortage areas.

In order to be eligible to participate in the Critical Teacher Shortage Tuition Reimbursement Program, a candidate must be certified to teach in a critical teacher shortage area in Florida and maintain at least a 3.0 grade point average in certain courses in critical teacher shortage areas.

Participants may annually receive tuition reimbursement payments for a maximum of nine (9) semester hours at a rate not to exceed \$78 per semester credit hour. Participants are not eligible to receive tuition reimbursements beyond 36 semester hours.

The Legislature appropriated \$5.2 million in order to fund the Critical Teacher Shortage Student Loan Forgiveness Program and the Critical Teacher Shortage Tuition Reimbursement Program for the 2000-2001 fiscal year.

FLORIDA TEACHER SCHOLARSHIP AND FORGIVABLE LOAN PROGRAM

The Florida Teacher Scholarship and Forgivable Loan Program (s. 240.4063, F.S.), via financial assistance, is designed to attract capable and promising students to the teaching profession, attract teachers to projected or current critical teacher shortage areas, attract liberal arts and science graduates to the teaching profession, and provide opportunities for individuals deciding to enter the teaching profession in the middle of their careers. The program is comprised of a scholarship program that is commonly called the "Chappie" James Most Promising Teacher Scholarship and a loan program that is commonly called the Florida Critical Teacher Shortage Forgivable Loan Program.

In order to be eligible for the "Chappie" James Most Promising Teacher Scholarship, a student must be ranked in the top 25% of his or her senior class; be an active member of a high school future teacher organization, if such organization exists in the student's school; earn a 3.0 unweighted grade point average in high school; comply with the State of Florida's general eligibility requirements for financial aid; be nominated by the high school principal and a committee of teachers; and attend a public college or university or an eligible private college or university.

The annual award amount of the "Chappie" James Most Promising Teacher Scholarship is \$1,500. Fifteen percent of the scholarships awarded must be awarded to minority students. In order to renew the scholarship, a student must earn at least a 2.5 cumulative grade point average and complete at least twelve (12) credit hours per term.

In order to be eligible for the Florida Critical Teacher Shortage Forgivable Loan Program, a student must be enrolled in a certifiable teacher-training program that is in a critical teacher shortage subject area; be classified as a full-time upper-division or graduate student; agree to teach in a critical teacher shortage area at a public school; and comply with the State of Florida's general eligibility requirements for financial aid. In order to renew the forgivable loan, an undergraduate student must earn at least a 2.5 cumulative grade point average and complete at least twelve (12) credit hours per term, while a graduate student must earn at least a 3.0 cumulative grade point average and complete at least nine (9) credit hours per term.

The annual amount of the forgivable loan must not exceed \$4,000 for undergraduate students and must not exceed \$8,000 for graduate students. Students receiving the loan, who fail to teach a critical teacher shortage subject area at a public school must repay the loan plus an annual interest rate of eight percent.

The Legislature appropriated \$1.9 million in order to fund the Florida Teacher Scholarship and Forgivable Loan Program for the 2000-2001 fiscal year.

C. EFFECT OF PROPOSED CHANGES:

CS/HB 517 establishes the Instructional Paraprofessional Tuition Reimbursement Program for the purpose of encouraging instructional paraprofessionals to become certified to teach in subject areas that have a critical teacher shortage. The bill requires the Department of Education to administer the program.

Eligible program participants are to receive a tuition reimbursement for up to nine (9) credit hours per semester or the equivalent. In order to be eligible for a tuition reimbursement, a participant must be employed by a district school board or a charter school as an instructional paraprofessional for at least one year, be enrolled in a program of study leading to certification in an area of critical teacher shortage, and earn a minimum grade of 3.0 or its equivalent on each approved course.

The Instructional Paraprofessional Tuition Reimbursement Program must be implemented only to the extent specifically funded by the Legislature in the General Appropriations Act. If the funds appropriated are not adequate to provide the maximum allowable reimbursement to each eligible applicant, awards are to be reduced by a prorated amount.

CRITICAL TEACHER SHORTAGE

This bill appears to provide an incentive for instructional paraprofessionals who are employed by a district school board or a charter school to pursue a career as a teacher in a subject area that has a critical teacher shortage and could possibly help alleviate Florida's teacher shortage in subject areas that have a critical teacher shortage.

POSTSECONDARY INSTITUTIONS AND TUITION REIMBURSEMENTS

This bill does not specify whether an eligible instructional paraprofessional must attend a public or private postsecondary institution, nor does it limit the tuition reimbursement to a fixed amount. Since the cost of tuition tends to be higher at a private postsecondary institution than at a public postsecondary institution, it is possible that tuition reimbursements awarded to participants might vary greatly. Should the state award tuition reimbursements that are not limited to a fixed amount to program participants attending a public or private postsecondary institution, the state will probably generate fewer teachers certified to teach in subject areas that have a critical teacher shortage.

REQUIREMENTS FOR RECIPIENTS

This bill does not require participants to teach in a subject area that has a critical teacher shortage. Since the bill does not require a recipient of a tuition reimbursement to teach in Florida for a specified period of time in a subject area that has a critical teacher shortage, it is possible that the state may incur the cost of providing tuition reimbursements without reaping the benefit of increasing the number of teachers actually teaching in Florida in subject areas that have a critical teacher shortage.

D. SECTION-BY-SECTION ANALYSIS:

Section 1: Creates s. 240.40645, F.S., to establish the Instructional Paraprofessional Tuition Reimbursement Program; to require the Department of Education to administer the program, to provide tuition reimbursements for eligible program participants; to encourage instructional paraprofessionals to teach in subject areas that have a critical teacher shortage; to provide limitations on the amount, the number of semester hours or equivalent quarter hours, and the award of reimbursements; to provide eligibility requirements; to limit implementation to the amount funded in the General Appropriations Act; and to require funds appropriated to be deposited in the State Student Financial Assistance Trust Fund.

Section 2: Provides an effective date of July 1, 2001.

III. FISCAL ANALYSIS & ECONOMIC IMPACT STATEMENT:

A. FISCAL IMPACT ON STATE GOVERNMENT:

1. Revenues:

This bill does not appear to have a fiscal impact on state revenues.

2. Expenditures:

Please see Fiscal Comments.

B. FISCAL IMPACT ON LOCAL GOVERNMENTS:

1. Revenues:

This bill does not appear to have a fiscal impact on local revenues.

2. Expenditures:

This bill does not appear to have a fiscal impact on local expenditures.

C. DIRECT ECONOMIC IMPACT ON PRIVATE SECTOR:

This bill would appear to allow funding for tuition reimbursement to individuals enrolled in private colleges and universities if they are pursuing a teaching certificate in subject areas that have a critical teacher shortage.

D. FISCAL COMMENTS:

The fiscal impact of this bill is subject to the extent the Instructional Paraprofessional Tuition Reimbursement Program is specifically funded by the Legislature in the General Appropriations Act. If the funds appropriated are not adequate to provide the maximum allowable reimbursement to each eligible applicant, awards are to be reduced by a prorated amount. On average, the current cost of tuition and fees at a state university is \$78.25 per semester credit hour.

IV. CONSEQUENCES OF ARTICLE VII, SECTION 18 OF THE FLORIDA CONSTITUTION:

A. APPLICABILITY OF THE MANDATES PROVISION:

This bill does not require counties or municipalities to expend funds.

B. REDUCTION OF REVENUE RAISING AUTHORITY:

This bill does not reduce the authority of counties or municipalities to raise revenues.

C. REDUCTION OF STATE TAX SHARED WITH COUNTIES AND MUNICIPALITIES:

This bill does not reduce the percentage of a state tax shared with counties and municipalities.

V. COMMENTS:

A. CONSTITUTIONAL ISSUES:

This bill does not appear to violate any constitutional issues.

B. RULE-MAKING AUTHORITY:

This bill does not appear to necessitate additional rule-making authority.

C. OTHER COMMENTS:

None

VI. AMENDMENTS OR COMMITTEE SUBSTITUTE CHANGES:

On March 19, 2001, the Committee on Education Innovation adopted the following two amendments:

- The first amendment changes the name of the program from the "Instructional Paraprofessional Scholarship Program" to the "Instructional Paraprofessional Tuition Reimbursement Program."
- The second amendment requires the Department of Education to administer the Instructional Paraprofessional Tuition Reimbursement Program.

The Committee on Education Innovation reported the bill favorably as a committee substitute.

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VII. SIGNATURES:

COMMITTEE ON EDUCATION INNOVATION:

Prepared by:

Elsie J. Rogers

Staff Director:

Daniel Furman

AS REVISED BY THE COMMITTEE ON EDUCATION APPROPRIATIONS:

Prepared by:

Robert Cox

Staff Director:

John Newman
