

# FLORIDA

Overall Market Rating: **Growth Ready**

Florida continues to be the strongest of the prospective markets for private school creation. It combines a streamlined regulatory structure with adequate per pupil funding and significant need and demand.

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## Market Overview:

The Florida private school choice ecosystem is strong and well developed. Florida recently consolidated five private school choice programs into three: the Florida Tax Credit Scholarship (FTC), the Family Empowerment Scholarship (FES) and the Hope Scholarship Program. Scholarship amounts are uniform across the three programs. Corporate tax credits fund the first, while the latter two are funded directly out of the state budget. The FES offers scholarships for both general students and those with unique abilities (UA). The smaller Hope program provides scholarships for students who have been bullied. Two previous programs, the McKay Scholarships for Students With Disabilities and the Gardiner Scholarship program, have been consolidated into the broader FES program.

Each of the existing school choice programs is anchored by a strong set of laws and regulations that guides its implementation. Funding across all programs remains steady and increasing. Private schools that participate in these programs are subject to very few regulations other than those that govern all private schools. There is an ample eligible student population for all school choice programs, and scholarship funding has steadily increased over time.

The consolidation of programs and expansion of eligibility have improved an already strong private school growth market. The permissible annual growth in the number of students participating creates an environment with virtually no cap on the number of students who can participate in publicly funded private school choice.

Given the relative strength of the market and the clear student demand, Florida would benefit from creating more ecosystem supports and services—for example, facilities supports that are present in well-developed charter school markets. The private school sector could lead the way in new school recruitment, development and growth.

# Demographic Analysis:

## ENROLLMENT FIGURES BY SECTOR

Florida (2019-20)	
Total Public School Enrollment (including Charter Schools)	2,789,745
K-12 Private School Enrollment	395,043
Charter School Enrollment	329,226

## ELIGIBILITY BY PROGRAM

Program	% Eligible Students	Current Enrollment (2020-21)	Eligibility Requirements
FTC (Tax Credit Scholarship)	62% of families with children income-eligible statewide	106,112 participating students  1,945 participating schools	<ul style="list-style-type: none"> <li>• Students under 200% of federal poverty level (FPL) receive full scholarship amount.</li> <li>• Priority is given to renewing students and new students eligible for free and reduced lunch.</li> <li>• Partial scholarships (50%-88%) are available to students at 200%-260% of FPL.</li> <li>• Partial (less than 50%) scholarships are available to households with incomes up to 400% of FPL.</li> <li>• No requirement that new students must be previously enrolled in public school.</li> <li>• Siblings in the same household, children in foster care, and children of active-duty military personnel are eligible.</li> </ul>

Program	% Eligible Students	Current Enrollment (2020-21)	Eligibility Requirements
Family Empowerment Scholarship for Educational Options (FES-EO) and for Unique Abilities (FES-UA)	52% of students eligible statewide	74,418 participating students  1,978 participating schools	<ul style="list-style-type: none"> <li>• Students are initially eligible for FES-EO if they (a) qualify for food assistance, TANF benefits or the Food Distribution Program on Indian Reservations, (b) are in families whose income does not exceed 400% of the federal poverty level, or (c) are in foster care.</li> <li>• Eligible students must also have been enrolled in a traditional Florida public school during the previous school year. Children whose parent(s) are members of the armed forces or are moving to Florida due to military orders do not need to meet the prior public schooling requirement.</li> <li>• Priority is given to students whose household income does not exceed 185% of FPL.</li> <li>• All students previously eligible for Gardiner and McKay programs are now eligible for the FES-UA.</li> </ul>
HOPE Scholarship	85% of students eligible statewide	249 participating students  1,425 eligible schools	<ul style="list-style-type: none"> <li>• Students in grades K–12 who are victims of bullying or violence in public district schools are eligible.</li> <li>• Students attending public charter schools are not eligible. Students must be Florida residents. Students who receive scholarships from one of the other programs are not eligible for Hope Scholarships.</li> </ul>

Program	% Eligible Students	Current Enrollment (2020-21)	Eligibility Requirements
McKay Scholarship	Repealed 2021; Transitioned to FES-UA	28,065 participating students  1,565 participating schools	FES-UA guidelines apply
Gardiner Scholarship	Repealed 2021/Transitioned to FES-UA	18,585 participating students	All students are now eligible under the FES-UA.

## Funding:

Assessment: Acceptable to strong, and improving

Assets:

- Funding in all programs is consistent and increasing over time.
- Schools are not responsible for raising funds for student scholarships. This is all handled by scholarship organizations.
- Payments are made directly to the schools in clear, quarterly installments.
- While funding caps exist, they are structured in a way to allow for growth in the programs and to meet parent demand.

Challenges:

- The FES-UA is only available to students with certain special needs.

## TAX CREDIT SCHOLARSHIP PROGRAM

Maximum 2022-23	Average 2020-21	Program Cap 2021-22	Disbursement
\$10,373 (varies by county; most county max. rates fall between \$7,700-\$8,400)	\$6,239	\$873.6M with a 25% increase if 90% of the cap is reached	Scholarship Funding Organizations disburse funds: <ul style="list-style-type: none"> <li>- Parents apply &amp; receive an award letter.</li> <li>- Parents take award letter to eligible school and enroll.</li> </ul>

			<ul style="list-style-type: none"> <li>- Schools must complete a verification report 4 times a year – deadlines are detailed in the award letters.</li> <li>- Scholarships paid in 4 installments during the academic year.</li> </ul>
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**Trend:** The scholarship tiering and significant increases are all positive shifts. Scholarship funds are raised by the scholarship organizations.

#### FAMILY EMPOWERMENT SCHOLARSHIP

Maximum	Average 2021-2022	Program Cap	Disbursement
\$10,373 (varies by county; most county max. rates fall between \$7,700-\$8,400)	\$7,300	<p>FES-EO: 75,573 students (2021-22)</p> <p>Allowed to grow by 1% of total public school enrollment/year</p> <p>FES-UA: 26,500 students (2022-23)</p>	<ul style="list-style-type: none"> <li>- Payments are transferred quarterly from the state’s general revenue fund for parents to use at participating private schools.</li> <li>- Students can apply for a transportation voucher (greater of \$750 or local district’s per-pupil transportation cost)</li> </ul>

**Trend:** This program continues to grow and be funded increasingly well. This can and will support the growth of new schools in Florida.

#### HOPE SCHOLARSHIP

Maximum	Average 2019-20	Program Cap	Disbursement
\$10,373 (varies by county; most county max. rates fall between \$7,700-\$8,400)	\$7,300	None	<ul style="list-style-type: none"> <li>- Payments to parents or qualified private schools must be made at least quarterly.</li> </ul>

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## Policy & Regulatory Environment:

Assessment: Strong; largely consistent or improving

### Assets:

- Participating private schools are subject to the same regulations and requirements as other private schools.
- School eligibility to participate in a choice program can be demonstrated by three years of school operations or by securing a surety bond equal to one quarter's scholarship payments.
- Private school teachers are required to hold a bachelor's degree or higher, but they do not need to be licensed or credentialed.
- Participating schools must administer national norm-referenced assessments but have a number of assessments to choose from, and can request additional flexibility.
- There is no statewide accountability or sanction for low-performing private schools.

### Considerations:

- Schools with more than 30 students with test scores in consecutive years in grades 3-10 will have their test gain scores reported publicly.
- Schools must offer a 180-day instructional calendar, OR a 170-day instructional calendar that includes the hour equivalent of 180 days.
- Beginning in 2018-19, schools that accept more than \$250,000 annually across all state scholarship programs must secure an independent auditor to report on a series of financial controls and report those findings to a scholarship funding organization annually.

**Summary:** With very few exceptions, private schools that elect to participate in Florida school choice programs maintain their independence and autonomy. There are no governance or organizational limitations on schools other than those in place for all private schools operating in Florida. Schools do not have to offer any specific curricular programs, and there are no specific course requirements or exclusions. They must adhere to federal standards of non-discrimination and state and local standards for health and safety and building occupancy, but no other restrictions exist.

Schools must administer assessments for scholarship recipients in grades 3-10 and make those results available to parents and the public, depending on the number of scholarship recipients served. There is no accountability system for private schools, so there are no sanctions or consequences tied to academic performance.

The market is reasonably hospitable to new schools, as schools do not have to be in operation prior to accepting scholarship recipients. Schools that have been operating in Florida for three or more years may accept scholarship students immediately, while new

entrants must first secure a surety bond equal to one quarter's scholarship payments. By a rule established in 2018-19, the Department of Education must conduct site visits to private schools entering a scholarship program for the first time. New participating schools must complete a satisfactory site visit from the DOE and be in compliance before becoming eligible to receive funding. The site visits are intended to be scheduled and completed in time to allow first-year schools to accept scholarship students and receive funding in their first year of operation. Also, payments in all programs flow quickly to the participating schools, with the first installment made in early September of each school year.

Private schools are not subject to restrictive requirements for teacher and staff hiring. Teachers must hold a bachelor's degree or higher and have either: a) three years of teaching experience, or b) special skills that qualify them to teach the subject or material for which they are responsible. All school staff must complete required background checks. Teachers who hold a teaching license are deemed to satisfy these requirements. School owners and operators, prior to employment or engagement to provide services, and at least every five years, must undergo Level 2 background screening.

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## Human Capital:

Assessment: Acceptable and consistent

Assets:

- Flexibility for staff hiring and placement in private schools.
- 700+ Teach for America alumni across three markets (Miami-Dade, Jacksonville, Orlando).
- Step Up For Students, the largest scholarship organization, provides free professional development services to more than 400 scholarship schools.

Considerations:

- Private school talent development is not a part of the school choice ecosystem.
- TFA corps members are only engaged with district schools.
- There is little or no conversation about developing private school talent.
- Rapid population growth across the state has led to increased hiring needs and made the market for teachers highly competitive.
- Schools will have to import staff or recruit from traditional teacher providers or other schools.

**Summary:** In general, human capital strategies are missing from the Florida private school choice landscape. There is little systemic development of talent, and while there are multiple TFA regions in Florida, this may not translate into available teaching talent. While schools enjoy a great deal of flexibility and freedom in hiring and placing instructional talent, there is no conversation about the quality of that talent or how new schools entering the market can source talent locally.

The TFA alumni presence in three of the major markets may bolster recruitment efforts, but the work of TFA in Florida is focused on traditional public schools, so private school partnerships are non-existent.

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## Local Champions & Climate:

Assessment: Strong and consistent

Assets:

- Coordinated advocacy, including civic, political, and grassroots leadership
- Multiple state organizations (Step Up for Students, American Federation for Children) are focused on shared objectives, with clear roles and responsibilities
- Strong political support and leadership from elected officials
- Proven ability to mobilize parents and supporters
- Well-funded political and issue advocacy capacities to pass, improve, and protect choice programs

Considerations:

- All current advocacy is directed at parent choice and ensuring parent and student opportunity
- Advocacy does not seek to create a private school choice ecosystem that values and supports operator and ecosystem growth

**Summary:** The school choice advocacy community is strong, well-organized and well-funded. Several local organizations have aligned their efforts to political, community and grassroots support for the preservation and expansion of school choice opportunities in Florida. Political support remains strongly bipartisan, although choice opponents have been successful in using litigation strategy to defeat some choice initiatives.

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## Facilities:

Assessment: Not adequate to meet the needs of new entrants to the market; steady

Assets:

- Local champions have indicated that more attention is being paid to facilities issues, and schools may be able to approach local philanthropists for capital support, but it is unclear when and how this will materialize.
- There is not significant demand from existing school operators for new or additional real estate.

Considerations:

- No provision to make surplus facilities available to private schools.
- No public source of facilities funding, and any additional mechanism to move public money into private schools would likely be challenged in court.



- There is not adequate capital support for facilities in either the charter or private school market at this time.
- No meaningful advocacy alignment exists currently to create more facility options for private school growth.

**Summary:** Much like human capital, facilities availability and financing and its impact on school growth has not been a focus of the expansion of Florida’s private school market. Local experts estimate that roughly 80% of existing schools share space with a church or other similar organization and do not think much about facilities issues. They estimate that most schools allocate roughly 25% of their operating budgets to facilities acquisition and maintenance, but this percentage is likely rising in the face of overall inflation and escalating Florida property values.