

EXPLORING FLORIDA'S PRIVATE EDUCATION SECTOR

February 2019

OVERVIEW

In November 2018, EdChoice and ExcelinEd administered a first-of-its-kind survey of Florida private school leaders.

The survey results demonstrate three things: (1) private schools in Florida are affordable; (2) they have the capacity to serve many more students; and (3) capacity could be further expanded if more tuition assistance was made available to families. Schools reported that the **largest barrier to expanding capacity is the inability of families to pay tuition**. This is despite the fact that half of private schools in the state charge less than \$8,000 per year in combined tuition and fees (far less than is spent per student in Florida public schools), while more than three in four schools provide families with private financial assistance. The survey results show private schools would welcome expanded choice programs in the state, that they typically accept students with special needs, and that most schools administer nationally norm-referenced tests to monitor student learning.

Key Findings

Capacity	The survey identifies 33,000+ empty K-12 seats in Florida's private schools. By 2024, a conservative estimate suggests there could be more than 125,000 available seats.
	49 percent of private schools plan to substantially expand capacity over the next five years—totaling more than 30,000 additional seats.
	66 percent of private schools would or probably would participate in a new, broader education scholarship account (ESA) program.
Financial	Half of private schools for which combined tuition and fee data are available charge \$7,100 or less for elementary school, \$7,500 or less for middle school and \$8,000 or less for high school.
	76 percent of private schools provide some form of financial assistance.
	42 percent of private schools are already familiar with ESA programs.
Student Profile	75 percent of private schools serve students with special needs.
Accountability	86 percent of private schools administer a nationally norm-referenced test to students.

Methodology

The *Exploring Florida's Private Education Sector* survey had a 30 percent school-level response rate for contact information and equal or lower response rates for the other data points. Complete responses were received from 576 private schools, which equates to a 20 percent complete response rate.

For more on methodology, please see [Appendix I](#) and the [survey questionnaire](#).

Background

Nationally, private school enrollment remains stubbornly out of reach for low-income families, and access has declined for middle-income families who are finding it increasingly difficult to afford tuition.¹ Better understanding the characteristics of Florida's private school sector can inform policymakers in the Sunshine State, who have shown continued interest in expanding access to programs that empower families with educational opportunity. Currently, Florida has four private educational choice programs—two tax-credit scholarships, one voucher and one education scholarship account (ESA) program.

The number of schools participating in at least one of Florida's four current educational choice programs who responded to the survey enroll a total of 43,271 voucher, tax-credit scholarship or ESA students. Based on most recent data available at the time of writing, the respondent schools represent nearly one-third of Florida's educational choice students (31%; 43,271 of 140,898 participating students).²

The following chart illustrates the representation of these programs in the survey responses.

Educational Choice Program Represented in the Survey

Program Name (Year Enacted)	Program Type	Eligibility	Statewide Student Enrollment	Survey Respondent Student Enrollment	% of Student Enrollment Represented by Survey Respondents
John M. McKay Scholarships for Students with Disabilities Program (1999)	Voucher	Students with disabilities	29,462	9,136	31%
Florida Tax Credit Scholarship Program (2001)	Tax-Credit Scholarship	Means-tested	99,453	32,052	32%
Gardiner Scholarship Program (2014)	ESA	Students with disabilities	11,917	2,036	17%
Hope Scholarship Program (2018)	Tax-Credit Scholarship	Students who are bullied or victims of assault	66	47	71%

Number of respondent schools = varies by item with overall of 573; item response rate = 20%
 Source: *EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.*

¹ Richard J. Murnane, Sean F. Reardon, Preeya P. Mbekeani and Anne Lamb (2018), *Who Goes to Private School? Long-Term Enrollment Trends by Family Income*, EducationNext, 18(4), pp. 56-66, retrieved from https://www.educationnext.org/files/ednext_xviii_4_murnane_et_al.pdf

² Authors' calculations; EdChoice (2019), *The ABCs of School Choice: The Comprehensive Guide to Every Private School Choice Program in America*, 2019 edition, pp. 17, 33, 95 and 97, retrieved from <https://www.edchoice.org/wp-content/uploads/2019/01/The-ABCs-of-School-Choice-2019-Edition.pdf>

SURVEY FINDINGS

Private School Capacity & Growth

Do Florida's Private Schools Have Available Seats for New Students?

Of the schools taking part in the survey, estimates show the state's private schools have at least 33,490 open seats across PreK-12. This is an estimate provided directly by the 711 private schools in this survey that responded to enrollment and capacity questions. Considering that respondent schools represent slightly more than one-third of the state's private school students, the projected estimate for Florida's total private school sector could be closer to 96,300 open seats if schools that did not respond to the survey have similar rates of open seats.

Known Available Seats in Respondent Florida Private Schools	
Private School Grade Level	Number of Available Seats
Prekindergarten	3,612
Kindergarten	3,968
Elementary School	11,597
Middle School	7,172
High School	9,739
Ungraded ³	1,022
K-12 Total	33,490

Number of respondent schools = 711; item response rate = 25%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

³ Ungraded schools refer to Montessori schools, Waldorf schools, mastery-based schools, or other schools that either group students of differing ages in the same environment or advance students based on meeting competencies, not seat time.

Are Schools Looking to Expand Capacity in the Next Five Years?

Florida private school leaders were asked if they are planning to substantially expand capacity over the next five years, and roughly half (49%; 348 of 708 schools) said they were. The total number of planned seats is 30,393, with an average of 50 seats per respondent school and a median of 88 seats. Combined with current projected capacity and not accounting for any enrollment changes, this means that there could be more than 125,000 available seats for K-12 students in Florida private schools by 2024. This is a conservative estimate and does not reflect potential enrollment growth from policy changes that could inject more investment in the state's private school sector.

Planned Capacity Increases in Respondent Florida Private Schools	
Number of Seats	
Average	88
Median	50
Total	30,393

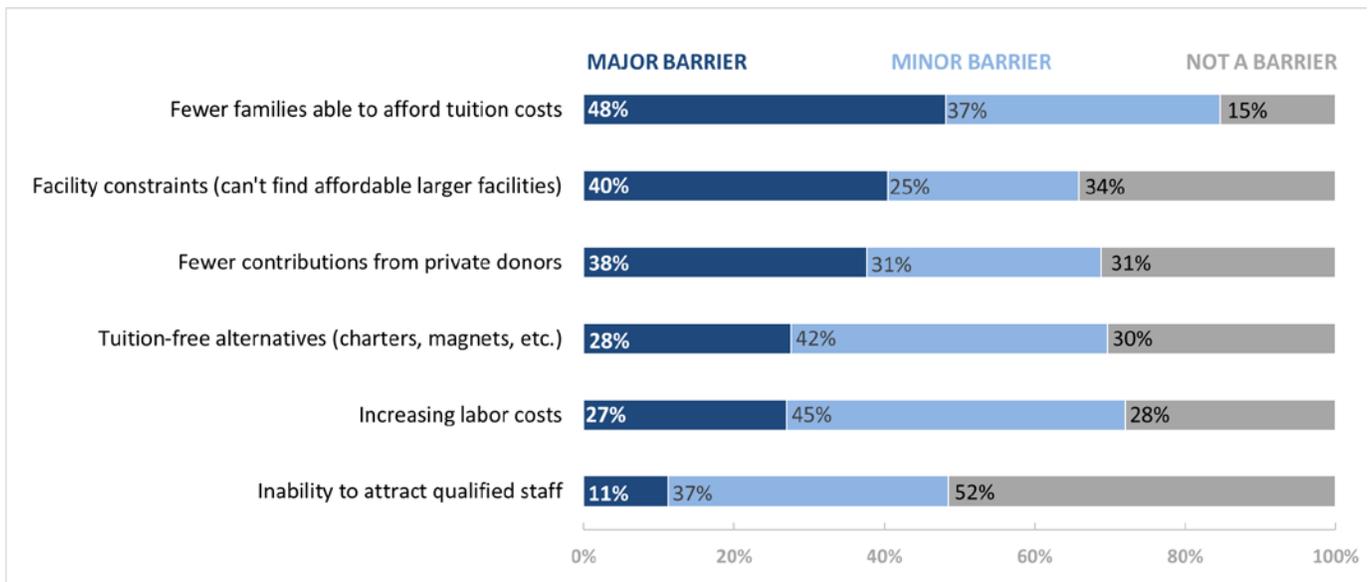
Number of respondent schools = 348; item response rate = 12%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

What Do Schools See as Barriers to Growth?

Leaders of Florida private schools were asked whether they saw six items as a major barrier, a minor barrier or not a barrier when it came to enrolling more students in their school. More than four out of five respondents (85%; 584 of 690 schools) said fewer families able to afford tuition costs is a barrier, with nearly half of respondents (48%; 332 of 690 schools) saying that this is a major barrier to growth. Two out of five respondents see facility constraints (can't find affordable larger facilities) as a major barrier to growth (40%; 279 of 690 schools). More than two-thirds of respondents also said the following are barriers to growth: increasing labor costs (72%; 494 of 686 schools), tuition-free alternatives such as charters and magnets (70%; 477 of 685 schools) and fewer contributions from private donors (69%; 471 of 685 schools).

Barriers to Growth for Respondent Florida Private Schools (2018-19)



Number of respondent schools = varies by item with overall of 693; item response rate = 25%
 Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Education Scholarship Account Awareness & Interest

Florida private schools were asked how familiar they are with the concept of education scholarship accounts (ESAs) for K-12 education. ESAs are the newest form of private educational choice that allow parents to receive a deposit of public funds into government-authorized accounts with restricted, multiple uses.⁴ Funds can cover private school tuition and fees, online learning programs, private tutoring, community college costs, higher education expenses and other approved customized learning services and materials. In Florida, ESAs are currently restricted to students with certain special needs.

Are Schools Familiar with the Concept of ESAs?

Only two out of five private schools (42%; 281 of 677 schools) indicated they were already familiar with ESAs. Notably, 51 percent of schools reported enrolling students through the Gardiner Scholarship Program, which started in 2014 and is Florida's current ESA program. The discrepancy may be due to private school leaders not realizing that the Gardiner Scholarship is, in fact, a multi-use ESA program. Nearly two-fifths of Florida private schools (38%; 259 of 677 schools) said they were "not at all familiar" with ESAs, meaning they may not have heard of such programs prior to taking the survey.

Respondent Florida Private Schools' Familiarity with ESAs	
Response	Percent of Private Schools
Very Familiar	17%
Somewhat Familiar	25%
Not Too Familiar	20%
Not at All Familiar	38%

Number of respondent schools = 677; item response rate = 24%

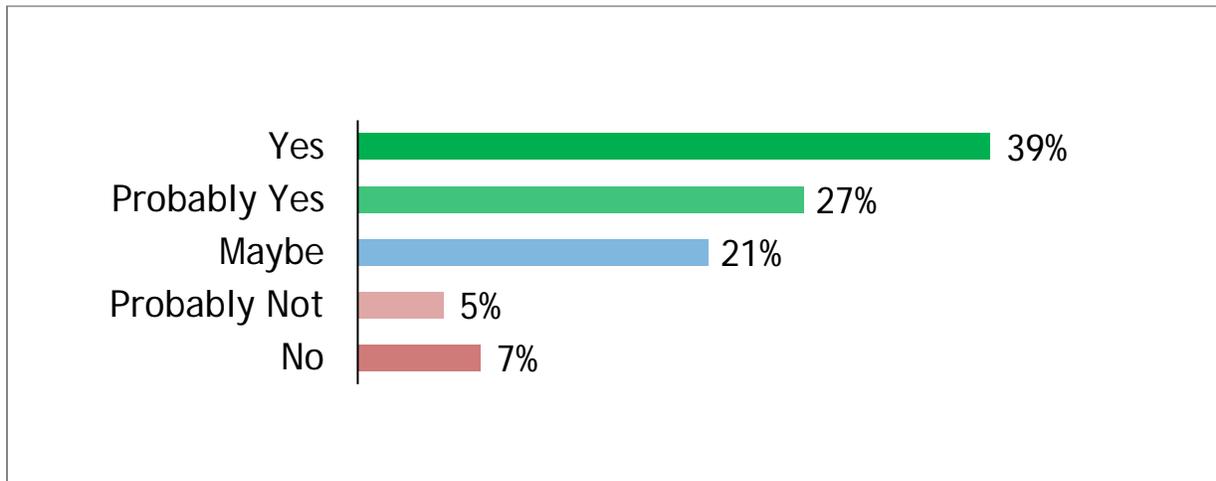
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

If Enacted, Would Schools Participate in a Broader ESA Program?

When asked if they would participate in an ESA program open to all (or most) of the state's students, two out of three respondent private schools (66%; 440 of 668 schools) said "yes" or "probably yes." Another 21 percent of schools (143 of 668 schools) said "maybe." Thirty-five schools (5%) said they probably would not participate, and 50 schools (7%) said they would not participate.

⁴ EdChoice (2019), What Is an Education Savings Account? [Web page], accessed January 3, 2019, retrieved from <https://www.edchoice.org/school-choice/types-of-school-choice/education-savings-account>

Florida Private School Responses to Potential ESA Program Participation



Number of respondent schools = 668; item response rate = 24%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Would Schools Be More Likely to Expand Their Current/Planned Capacity to Serve More Students if a New ESA Program Were Enacted by the Legislature?

If a new ESA program were enacted, three out of five respondent private schools (60%; 349 of 578 schools) would or probably would expand their current/planned capacity. This would be in addition to the estimated 96,000 seats currently available and the more than 125,000 seats available by 2024.

Florida Private Schools' Responses to Expanding Capacity of Potential ESA Program Enacted	
Response	Percent of Private Schools
Yes	29%
Probably Yes	31%
Maybe	29%
Probably Not	8%
No	3%

Number of respondent schools = 578; item response rate = 21%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Tuition & Fees

What Is the Cost of Combined Tuition and Fees Among Private Schools?

Half of respondent private schools for which combined tuition and fee data are available charge \$7,100 or less for elementary school grades, \$7,500 or less for middle school grades and \$8,000 or less for high school grades.

At all levels there are some relatively expensive schools that create gaps between “average” and “median” private school tuition and fee rates. Focusing on the median amounts may offer a more representative picture of Florida private schools while minimizing outlier effects.

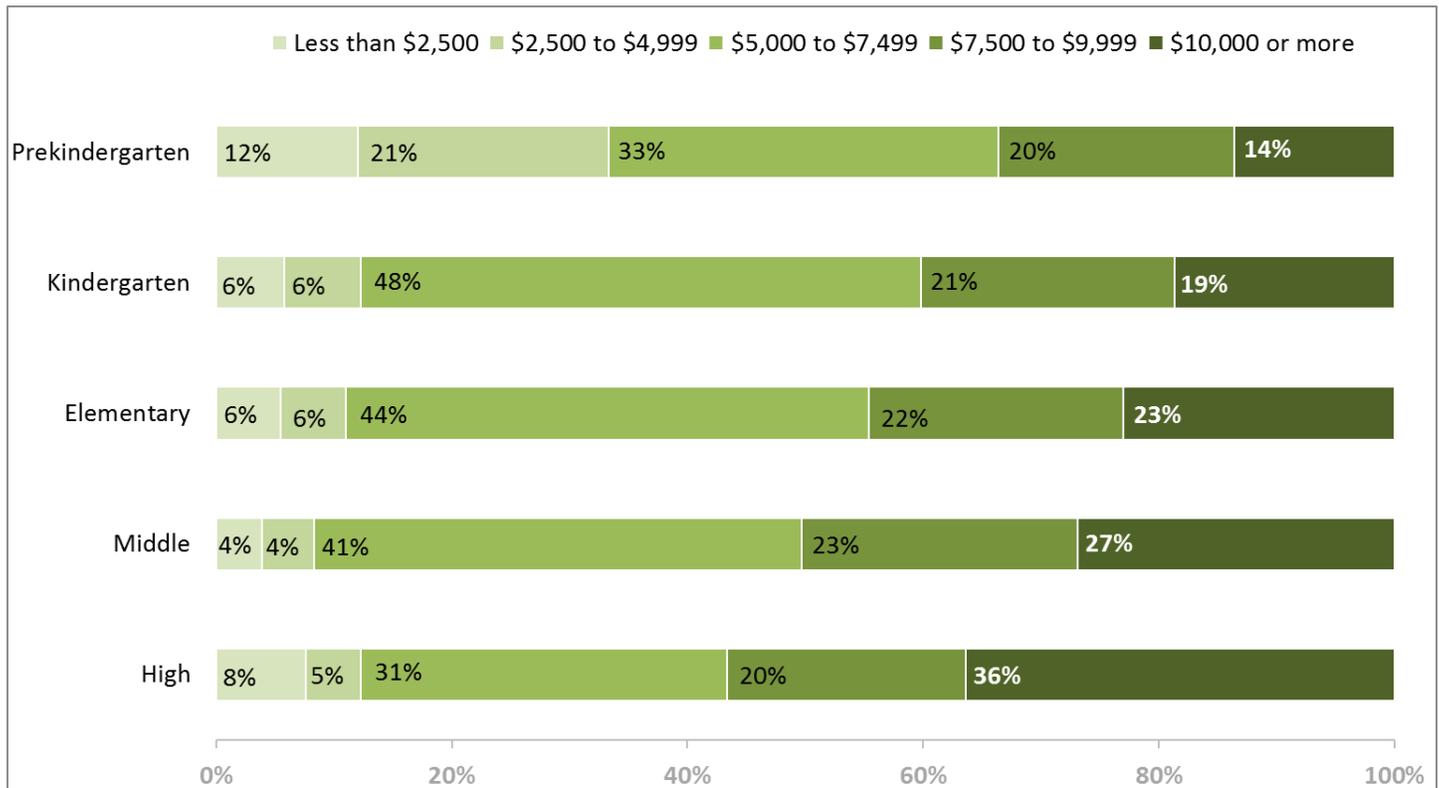
More than four out of five Florida private schools charge less than \$10,000 for prekindergarten (86%) or kindergarten (81%), while closer to three out of four charge less than \$10,000 for elementary school grades (77%) and middle school grades (73%) and nearly two-thirds charge the same for high school grades (64%). For comparison purposes, Florida spent an average of \$10,856 per student in public schools in 2017-18, which accounts for state funds, federal funds, debt service and capital projects.⁵ This amount exceeds the average and median tuition charged by respondent K-12 private schools.

Combined Tuition and Fees Amounts for Respondent Florida Private Schools		
Grade(s)	Average	Median
K-12	\$9,583	\$7,500
Prekindergarten	\$6,948	\$6,140
Kindergarten	\$8,128	\$7,000
Elementary School	\$8,664	\$7,100
Middle School	\$9,510	\$7,500
High School	\$10,448	\$8,000

Number of respondent schools = varies by item with overall of 607; item response rate = 22%
 Source: *EdChoice and ExcelinEd Survey of Florida private schools, for 2018-2019 school year.*

⁵ Florida Department of Education. “Annual Financial Report Expenditures Per Unweighted Full Time Equivalent General Fund, Special Revenue Funds, Debt Service Funds and Capital Projects Funds FY 2017-18,” accessed February 13, 2019: <http://www.fldoe.org/core/fileparse.php/7507/urll/1718ExpendituresFTE.pdf>

Respondent Florida Private Schools' Combined Tuition and Fees Ranges by Grade (2018-19)



Number of respondent schools = varies by item with overall of 607; item response rate = 22%
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

What Do Respondent Private Schools Charge in Fees?

Half of schools for which fee data were collected charge \$575 or less. Those fees, which could be for school uniforms, books, technology, etc., are in addition to the tuition that schools charge students. The fee category in which Florida schools charge the most, on average, is fees for registration and application. Fees related to uniforms were, on average, the least-expensive fee category of Florida private schools.

Fee Amounts for Respondent Florida Private Schools		
Fee Category	Average Fee	Median Fee
Registration/Application	\$255	\$200
Textbooks	\$397	\$300
Technology	\$413	\$165
Transportation	\$1,436	\$925
Uniforms	\$210	\$150
Other	\$730	\$200

Number of respondent schools = varies by item with overall of 511; item response rate = 18%
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

What Proportion of Florida Private Schools Offer Some Form of Financial Assistance, and How Much Do They Offer?

More than three-fourths of the state's private schools that responded to the question (76%; 453 of 595 schools) provide some form of tuition assistance. Half of the schools provide financial assistance to at least three out of 10 students (30%), and half of the schools provide a median of \$2,000 or more in financial assistance per student. This includes discounts but not any dollars tied to vouchers, tax-credit scholarships or ESAs.

Tuition Assistance Provided by Respondent Florida Private Schools		
	Average	Median
Percentage of Students Receiving Financial Assistance (Including Discounts)	41%	30%
Tuition Assistance Per Student	\$5,993	\$2,000

Number of respondent schools = varies by item with overall of 595; item response rate = 21%
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Student Profile

What Proportion of Florida's Private Schools' Students Have Special Needs?

For the schools that responded to this question, estimates show, on average, more than one out of four students who attend Florida private schools (29%) were considered to have special needs in 2017-18.⁶ This number should be viewed with caution as there are no state requirements for the identification of these students by private schools. For public schools, the percent of students identified as having a disability, as defined by federal and state laws, was 14% (approximately 370,000 Florida students) in 2015-16.⁷

The discrepancy is most likely due to 56 respondent schools saying they exclusively enroll students with special needs while only six respondent schools say they typically serve students with special needs but do not have any currently enrolled. As such, it is important to note that the median proportion of students (11%) may be more useful. A median of that data point could not be found for Florida public school students.

Respondent Florida Private Schools' Percentage of Students with Special Needs		
Student Profile	Average Percent of Private Schools' Students	Median Percent of Private School's Students
With Special Needs	29%	11%
Without Special Needs	71%	89%

Number of respondent schools= 437; item response rate = 16%
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

⁶ Students with special needs were defined on the survey as those having autism, deaf-blindness, developmental delay, hearing impairment, intellectual disability, multiple disabilities, orthopedic impairment, serious emotional disturbance, specific learning disability, speech or language impairment, traumatic brain injury, visual impairment or other health impairments.

⁷ Authors' calculations; U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Local Education Agency (School District) Universe Survey Special ED Data", 2015-16 v.1a; "Public Elementary/Secondary School Universe Survey Membership Data", 2015-16 v.1a; "State Nonfiscal Public Elementary/Secondary Education Survey Directory Data", 2015-16 v.1a., accessed January 7, 2018 via EIS/ tableGenerator, <http://nces.ed.gov/ccd/elsi/tableGenerator.aspx>

What Proportion of the State's Private Schools Enroll Students with Special Needs?

Of those schools that responded to the question, three out of four (75%; 441 of 589 schools) enrolled at least one student considered to have special needs in 2018-19.

Respondent Florida Private Schools Enrolling Students with Special Needs		
Enrolled Student(s) with Special Needs	Number of Private Schools	Percent of State's Private Schools
Yes	441	75%
No	148	25%

Number of respondent schools = 589; item response rate = 21%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Other Relevant Findings

Which Private School Choice Program Rules and Regulations Concern Schools Most?

Nearly three out of four schools that responded to the survey (73%; 628 of 864 schools) shared their concerns about current or potential rules and regulations from state government related to educational choice programs for at least one of the categories listed. On average, respondent schools were most concerned with rules pertaining to the following.

Respondent Florida Private Schools' Average Concern Level for Specific Rules and Regulations (1 = Very Low, 5 = Very High)	
Rule/Regulation	Average Concern Level
Tuition and Fees	2.9
Accommodations for Students with Special Needs	2.8
Amount of Paperwork and Reporting	2.8
State Curriculum and Instruction Mandates	2.8
Teacher/Staff Certification and Licensure	2.6
Building Safety and Security	2.5
School Admissions and Enrollment Guidelines	2.5
Standardized Testing Requirements	2.4
Financial Reporting and Disclosure	2.4
School Eligibility for Program (e.g., register with state)	2.3

Number of respondent schools = varies by item with overall of 628; item response rate = 22%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

Do Florida Private Schools Test Their Students Annually?

More than four out of five Florida private schools (86%; 549 of 638 schools) require their students to take a nationally norm-referenced test to measure student academic performance. Of those schools, more than one-fourth reported they administered the NWEA Measures of Academic Progress, or MAP (26%; 145 of 459 schools), and the same proportion said they administered the Stanford Achievement Test, Tenth Edition or Stanford 10 (26%; 140 of 459 schools). Only 14 private schools (3%) said they administer the Florida State Assessment (state test).

Top 10 Tests Administered by Respondent Florida Private Schools

Tests Administered	Number of Testing Schools	Percentage of State's Testing Schools
NWEA Measures of Academic Progress (MAP)	145	26%
Stanford Achievement Test, Tenth Edition (Stanford 10)	140	26%
TerraNova, Third Edition (TerraNova 3)	99	18%
Iowa Assessments (any form)	87	16%
PSAT/NMSQT	79	14%
ACT Aspire	31	6%
Basic Achievement Skills Inventory-Comprehensive Version	29	5%
STAR (Math Enterprise, Reading Enterprise)	29	5%
Florida State Assessment (state test)	14	3%
Curriculum Associates - i-Ready Assessments (approved for grades 3-12 only)	13	2%

Number of respondent schools = 549; item response rate = 20%

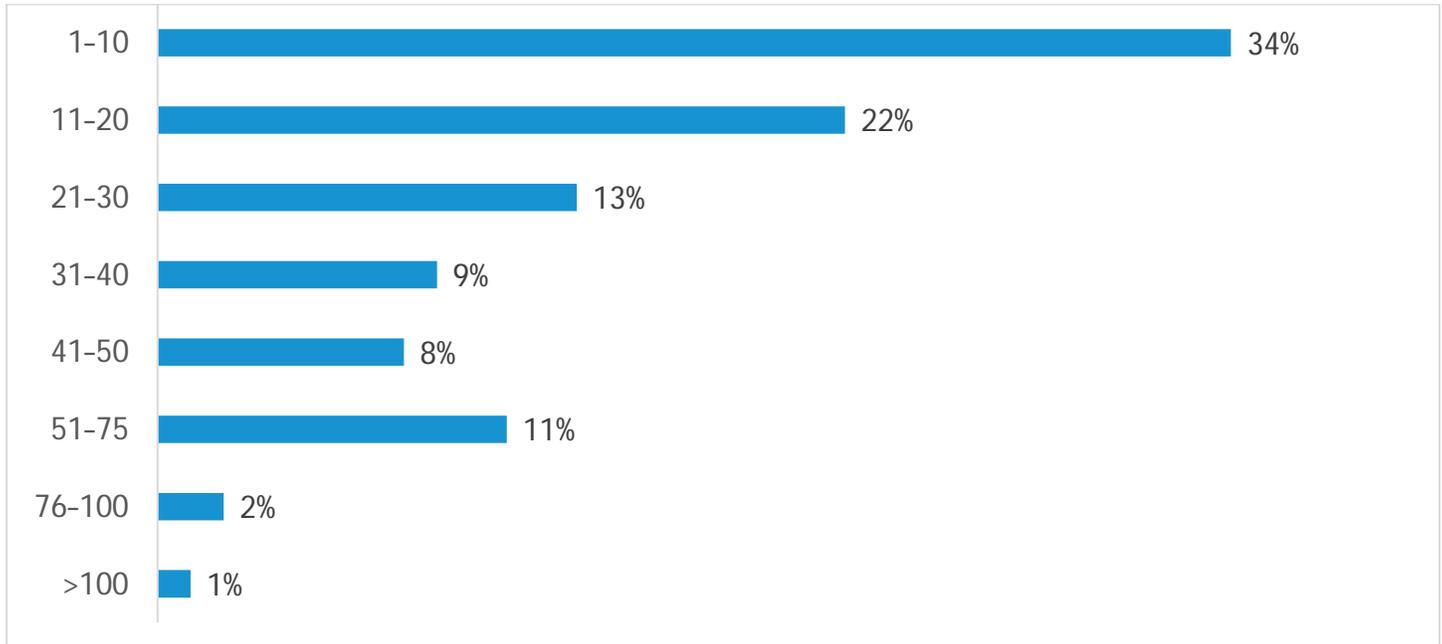
Note: Percentages total more than 100 because some schools administer multiple tests
Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.

How Many Years Have the Private Schools Been Operating?

Based on survey responses, Florida private schools have been operating for an average of 25 years, with a median operating length of 18 years. The newest school that responded is opening its doors in 2019-20, while the oldest school responding has been operating for more than 150 years.

More than two-fifths of schools (41%; 352 of 858 schools) have been operating between 21 and 75 years. More than one-third of schools (34%; 292 of 858 schools) have been operating for 10 years or fewer.

Number of Years Respondent Florida Private Schools Have Been Operating



Number of respondent schools = 858; item response rate = 31%

Source: EdChoice and ExcelinEd Florida Private School Survey, for 2018-2019 school year.