

Pending Federal Legislation Related to the
Alliance's Teacher and Principal Quality
Initiative: Helping Communities Recruit and
Retain Qualified Teachers

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Helping Communities Recruit and Retain Highly Qualified Teachers

A highly qualified teacher in every classroom is a critical element in helping students meet high standards and graduate from high school prepared for college, especially in schools that serve the neediest students. The Alliance for Excellent Education's Teacher and Principal Quality Initiative addresses the shortage of highly qualified teachers and principals in schools with the largest numbers of low-performing students. It also recognizes the increasing problem of many qualified teachers and principals leaving the profession because of low pay, lack of support, and limited opportunities for professional growth.

The Teacher and Principal Quality Initiative builds on Title II of the No Child Left Behind Act (NCLB) and Title II of the Higher Education Act (HEA) (Please see Appendix for a summaries of both these titles). Under the initiative, new funding would provide incentives—such as federal tax credits, loan forgiveness, and scholarships—to attract and retain high-quality teachers in hard-to-staff schools. In turn, the schools would offer a high-quality two year induction program for all new teachers and ongoing professional development for all teachers and principals. Several legislative proposals, many of which have bipartisan support, address each of the components of the Alliance's Teacher and Principal Quality Initiative.

Alliance Recommendation: A \$4,000 Annual Federal Income Tax Credit for Highly Qualified Professionals

The Alliance suggests the federal government provide a powerful incentive—a \$4,000 annual income tax credit—to encourage America's best teachers and principals to work in high-needs schools. States and school districts, in partnership with the federal government, would use the tax credit as a bonus to recruit and retain teachers where they are most needed.

Proposed Legislation

- H.R. 1643 (Wilson, R-NM; Frost, D-TX; Boehner, R-OH), the LEARN (Low-Income Educator Assistance and Relief Now) Act, was introduced in April 2003. Currently, the bill had 58 cosponsors. Under this proposal, highly qualified teachers, assistant teachers, principals, and assistant principals who work in an elementary or secondary Title I school could claim up to a \$2,000 federal income tax credit each year.

- The Bush administration supports tax benefits targeted specifically to teachers, as evidenced by the inclusion of an expanded tax deduction for teachers in the president's FY 2004 budget. Representative Dave Camp (R-MI) introduced the Teacher Tax Relief Act of 2003 H.R. 785, which amends the Internal Revenue Code to increase the maximum deduction allowed for teachers purchasing classroom-supplies from \$250 to \$500 and to expand such deductions to include qualified professional development expenses. This bill has 163 cosponsors. An identical bill, S. 695 (Collins, R-ME), was introduced in the Senate and has 8 cosponsors.
- On February 5, 2003, Representative Ron Paul (R-TX) introduced H.R. 614, the Professional Educators Tax Relief Act of 2003. This bill would provide a \$1,000 tax credit to all educators.
- H.R. 613 (Paul, R-TX), Teacher Tax Cut of 2003, would provide a tax credit of \$1,000 for elementary and secondary school teachers.
- H.R. 2811 (Thompson, D-MS), the bill would all the Secretary of Education to award up to \$5,000 in grant money to every teacher teaching in either a high-need or rural school.
- H.R. 213 (Towns, D-NY): Would amend the Internal Revenue Code of 1986 to designate educational empowerment zones in certain low-income areas and to give a tax incentive to attract teachers to work in such areas.
- S. 857 (Rockefeller, D-WV), the Incentives to Educate American Children (I Teach) Act, was introduced April 2003. Teachers who work in rural or high-poverty schools would be able to claim a \$1,000 annual, refundable federal income tax credit. Any teacher, in any school, who achieved National Board certification would also be eligible to claim an addition \$1,000 tax credit, making the total maximum grant \$2,000. Rep. Pomeroy (D-ND) introduced a similar bill in the House of Representatives (H.R. 3338).

Alliance Recommendation: Loan Forgiveness for Teachers

The Alliance recommends up to \$17,500 in student-loan forgiveness for highly qualified teachers in exchange for a commitment to teach in high-needs schools for at least four years.

Legislation on the Books

The federal government offers several types of loan forgiveness to teachers who serve in low-income schools or who teach subjects in which there is a teacher shortage.

- Up to 100 percent of federal Perkins loans can be canceled by teaching in a low-income school for five years.
- Repayment of federal Stafford loans may be reduced by up to \$5,000 if teachers work full time for five consecutive years in a low-income school. Stafford loan recipients may also be eligible to defer repayment of their loans for up to three years by teaching full time in a federally designated area in which there is a teacher shortage.



Expanding student-loan forgiveness became increasingly popular in the 107th and 108th Congresses, as lawmakers tried to help states meet NCLB requirements to place highly qualified teachers in the classroom by the end of the 2005–06 school year. President Bush proposed to forgive up to \$17,500 in federal loans per prospective teacher in his budget request for FY 2003, and several bills were introduced to meet this goal.

Proposed Legislation

- Representative Joe Wilson (R-SC) sponsored the Teacher Recruitment and Retention Act of 2003 (H.R. 438). This bill would amend the Higher Education Act by increasing the amount of student loans that may be forgiven for teachers in math, science, and special education from \$5,000 to up to \$17,500. The bill passed the House in July 2003 with one amendment offered by Representative George Miller (D-CA) that extended loan forgiveness to teachers of reading. The bill was then referred to the Senate Health, Education, Labor, and Pensions Committee.
- Senator Lindsey Graham (R-SC) sponsored the Quality Teacher Recruitment and Retention Act of 2003 (S. 291). It is similar to the bill passed by the House, except it does not include loan forgiveness for teachers of reading.
- H.R. 789 (Christensen, D-VI), the Teacher Recruitment Act of 2003, would expand the eligibility of teachers to qualify for loan forgiveness, in order to provide additional incentives for teachers currently employed or seeking employment in the Territories, on Indian reservations, or in economically depressed rural areas.
- H.R. 1751 (Moore, D-KS), the Teacher Recruitment and Retention Act, would increase the maximum loan forgiveness to \$17,500 and expands eligibility to all fields where the state educational agency determines there is a shortage of high-quality teachers.
- H.R. 934 (McCarthy, D-NY), the Teacher and Nurse Support Act of 2003, would increase the maximum loan forgiveness to \$17,500 for teachers who agree to teach in high-poverty schools for five years and nurses who serve in a clinical setting or as a member of the nursing faculty at an accredited school of nursing.
- Senator Dianne Feinstein (D-CA) has sponsored S. 227, the Loan Forgiveness for Certified Teachers Act of 2003, which would extend loan forgiveness from \$5,000 to \$10,000 certified or licensed teachers who teach for five years at low-income elementary or secondary schools. It also provides for certain loans to certified or licensed teachers and provide for grants that promote teacher certification and licensing.
- The following members have introduced legislation that would expand loan forgiveness to other high-priority public service careers including librarians (Becerra D-CA, Stupak D-MI), Head Start teachers (Feinstein D-CA, DeLauro D-CT), early childhood educators (Miller, D-CA), nurses (Miller, D-CA), child welfare workers (Miller, D-CA), nutrition professionals (Miller, D-CA), and infant and toddler specialists (Miller, D-CA).



Alliance Recommendation: New-Teacher Induction Programs and Professional Development

The Alliance recommends that federal funding under Title II of NCLB be used to support a two-year induction program for new teachers and a high-quality professional development program for all teachers. To promote principals as instructional leaders, school districts should develop and manage academies and mentorship programs, new federal dollars and matched by local and state funds.

Legislation on the Books

The federal government already plays a strong role in supporting induction and professional development for teachers and principals. Title II of NCLB was created to promote teacher training and recruitment.

States may also use funds to develop merit pay systems and other strategies as incentives for teachers in high-need academic subjects such as reading, math, and science, and for teachers in high-poverty schools and districts. Title II funds can support teacher and principal professional development such as mentoring and intensive new-teacher training. Programs for principals would help them develop effective leadership skills.

Under Title II of the Higher Education Act, grants are available to recruit teachers and provide ongoing professional development opportunities for both teachers and administrators. Ten percent of the total authorized funds are available for Teacher Recruitment Grants, which can be used by states to award scholarships to students who are training to become teachers. These grants can also fund training for principals and superintendents, helping to provide them with effective managerial and leadership skills that result in increased student achievement.

Proposed Legislation

- H.R. 2211, (Gingrey, R-GA), the Ready to Teach Act, passed by the House and referred to the Senate, would hold teacher-training programs accountable for the teachers they produce and ensure that they possess the necessary skills to be highly qualified and ready to teach when they enter the classroom. It would also ensure that states only allow highly qualified individuals to teach in their schools. The bill also contains a provision which allows the Secretary of Education to award grants to historically minority serving institutions of higher education to create "Centers of Excellence". The grants would be used to increase the number of highly qualified minority teachers, as well as provide ongoing professional development for teachers already in the profession.
- H.R. 3064 (Ehlers, R-MI), the National Science Education Incentive Act of 2003, amends the Internal Revenue Code to permit an eligible science, engineering, math, or technology teacher to receive a tax credit of up to 10% of their undergraduate tuition with a maximum of \$1,000 each year for up to ten years. In addition, it allows for people to make tax deductible donations to property or services to qualified elementary or secondary school that would directly benefit the science, mathematics, engineering, or technology instruction of those schools.



- H.R. 329 (Wilson, R-NM), introduced in 2003, would improve math and science instruction in elementary and secondary schools by authorizing grants for regional workshops designed to permit math and science teachers to share successful teaching strategies.
- H.R. 1240 (Lowey, D-NY), the Investment in Quality School Leadership Act, introduced in 2003, would provide grants to eligible consortia for professional development for current and prospective superintendents and principals.
- H.R. 1611, (Honda, D-CA), the Teacher Mentoring Act, introduced in 2003, citing the difficulty in retaining highly qualified younger teachers in high needs schools, this bill would authorize the Secretary of Education to award grants to Local Education Agencies to establish or implement teacher mentoring programs. The grants would be targeted to those schools which the localities deem to be failing to meet adequately yearly progress and 50% of the grants must be awarded to low-income localities.
- H.R. 1805, (Price, D-NC), the Teaching Fellows Act of 2003, would amend the Higher Education Act to allow the Secretary of Education to award competitive grants to States for teaching and partnership fellows programs for prospective public school teachers. It would provide scholarships to high school seniors and to second-year college students to encourage them to become a teacher. Scholarships may also go to others in the education field to complete a bachelor's degree with a state license or certification in education.
- S. 504, (Alexander, R-TN), the American History and Civics Education Act of 2003, directs the National Endowment for the Humanities (NEH) to award competitive grants to educational institutions to establish both the Presidential Academies for Teaching of American History and Civics, which would provide professional development for history teachers, and the Congressional Academies for Students of American History and Civics, which would offer summer workshops for outstanding students of American history and civics. It also directs the NEH to award a grant to an organization for the creation of a national alliance of elementary and secondary school teachers of American history. Rep. Wicker (R-MS) introduced a companion bill in the House of Representatives (H.R. 1078).

Alliance Recommendation: Strengthen Definition of "Highly Qualified" Secondary School Teacher

The Alliance recommends that NCLB's definition of a "highly qualified" secondary school teacher require that all such teachers have the equivalent of a college academic major in their subject area. This tougher definition would force many current teachers to upgrade their content knowledge and teaching skills. The federal government would help states offer teachers advanced training through colleges and universities; distance-learning programs; and state-, district-, or union-run workshops that provide intensive summer and weekend study.

Legislation on the Books



Title IX of NCLB sets broad federal parameters for the definition of a “highly qualified” teacher, explicitly leaving to the states the task of ensuring that teachers have a rigorous academic background, and of testing teacher knowledge and skills. Specifically:

- When the term “highly qualified” is used with respect to any public school teacher, it means that the teacher has obtained full state certification (including certification obtained through alternative routes) or passed the state teacher licensing examination, and holds a license to teach in the state.
- When the term is used with respect to a secondary school teacher who is new to the profession, it means that the teacher holds at least a bachelor’s degree and demonstrates a high level of competency in each of the subjects that he or she teaches. Successful completion of an academic major, a graduate degree, coursework equivalent to an undergraduate academic major, or advanced certification or credentialing may also demonstrate that the teacher is considered highly qualified.
- With respect to veteran teachers, the term means that the teacher holds at least a bachelor’s degree and has either met the applicable standard for a new teacher or demonstrates competence in all academic subjects that he or she teaches, based on a high objective and uniform state standard of evaluation.

Alliance Recommendation: Financial Incentives for National Board Certification

The federal government should increase its support for the National Board for Professional Teaching Standards. Teachers become National Board certified by passing a series of rigorous assessments. The process not only helps good teachers become better, but also encourages them to stay and grow in the profession. The federal government would share some of the costs school districts incur if they raise salaries for teachers who achieve National Board certification and teach in high-needs schools. The federal government would also support other models for developing teacher career ladders that can help produce the next generation of urban school leaders.

Proposed Legislation

- Representative Susan Davis (D-CA) introduced H.R. 1390, the National Board–Certified Teachers in Low-Performing Schools Act of 2003, to increase the numbers of National Board–certified teachers in high-poverty, low-performing schools. The proposed legislation would provide \$5,000 a year (for up to four years) for as many as 100 National Board–certified teachers to work in these schools and help other teachers become National Board certified. The 100 teachers would receive an additional stipend of \$1,000 for each teacher in their school who completed the process for becoming National Board certified.



Appendix A

Title II of the No Child Left Behind Act provides grants to states, school districts, state agencies for higher education, and eligible partnerships to support and strengthen educator and principal quality. Funds may also be used to hire, retain, and recruit teachers, establish mentoring programs, reform teacher and principal certification procedures, improve early childhood teaching and literacy development, and enhance teacher subject mastery and technology programs. The funds are provided on a needs based formula.

Title II authorizes a number of national programs to help improve teacher quality, including a national teaching and principal recruitment campaign, a clearinghouse, and advance certification grants for teachers. Support for mentoring programs that bring veteran and new teachers together will also help address the teacher shortage.

In addition, Title II funds support programs to recruit and retain teachers. These programs include Troops-to-Teachers, which assists eligible members of the armed forces to obtain certification or a license to teach, and the Transition to Teaching program, which brings highly qualified mid-career professional, paraprofessionals, and recent graduates of higher education institutions to high-need schools. The program also encourages and expands alternate routes to certification under state approved programs.

Title II also authorizes funds for state and local partnerships to improve mathematics and science instruction. The funding total for Fiscal Year 2003 was \$2.93 billion.¹

Title II of the Higher Education Act contains three components that are designed to improve student academic achievement, improve the quality of the current and future teacher force, and hold institutions of higher education accountable for preparing highly qualified teachers. The first two components, state grants and partnership grants, are used to reform teacher preparation requirements, coordinate state activities, and ensure current and future teachers are highly qualified. According to the legislation, 45 percent of available funding will go toward state grants, 45 percent will go to partnership grants, and only 10 percent will go toward teacher recruitment grants.

The teacher recruitment grants may be expanded if the Ready to Teach Act of 2003, which was passed by the House and referred to the Senate, is signed into law. The bill contains a provision which allows the Secretary of Education to award grants to historically minority serving institutions of higher education to create "Centers of Excellence". The grants would be used to increase the number of highly qualified minority teachers, as well as provide ongoing professional development for teachers already in the profession.

¹ Committee for Education Funding, "Education Budget Alert for Fiscal Year 2004", 2003.

