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**A report of the Santa Clara County Teacher Workforce Study**

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**Overview of the Issue**

Teacher shortages are costly in many ways, undermining student achievement and school improvement efforts. This is especially true for the most disadvantaged schools and school systems, which often struggle to find qualified, experienced educators. A result of both declines in enrollment in teacher training programs and high rates of teacher turnover, educators and policy makers need a better understanding of why teachers enter and leave the profession, and what might encourage them to stay or return.

After years of teacher layoffs during the recent economic retrenchment, school districts in California are struggling to recruit and retain quality teachers. From 2008-2009 the national teacher workforce declined by 3.5 percent, while in California the stock of all teachers declined by 7 percent. Meanwhile, the nation issued 17 percent fewer teacher credentials, while California credentials issued dropped by 36 percent. The problem is most acute in special education, followed by mathematics, science and ELD/Bilingual Education, and disproportionately affects schools serving low-income, non-white, bilingual, and EL students (Darling-Hammond & Shields, 2016). Like the latter report, many analyses of teacher workforce issues address national and state-wide trends in the teacher workforce, but trends in teacher supply and demand vary widely by region, and even within districts, and no study to date has addressed the Santa Clara county region specifically. This study adopted a descriptive research approach to the issue, utilizing both qualitative and quantitative survey, interview, and exit data provided by district administrators, and current and former district teachers over the course of the 2016-2018 school year.

The school districts in Santa Clara County are facing a particularly dire teacher shortage. On March 15, 2017, Edjoin listed 774 postings for a total of 1305 certificated job openings. Admittedly, many of these postings are for substitute teachers (although the need for substitutes is acute in the region), private

schools, and specialized positions (e.g., Speech Language Pathologists), the number is quite large, especially considering that number of credentialing programs in the region will produce, at best, approximately 500 new teachers. It is also important to point out that this figure was collected before schools generally know many new teachers they will need. Thus, these figures are likely to rise significantly.

### **Previous Research and Policy Analysis on Teacher Supply and Demand**

Recruiting and retaining a high-quality teacher workforce is an extremely complex and challenging enterprise. Historically, supply and demand for and of teachers have shifted in response to interrelated political, economic, and demographic trends, and staffing schools with quality educators has been a challenge since Horace Mann, and other reformers fought for a more democratic, universal, and nonsectarian system of public education in the Northeast in the 1820s and 30s. As numbers of new, public “common schools” grew rapidly in the period between 1830 and 1950, so did demand not just for a greater number of teachers, but also for more highly educated teachers. (Labaree, 2008) With more young, educated men employed in new industry or venturing West, communities turned to women to staff the schools. Not only were women interested in the salary, however low, they also welcomed the independence and sense of purpose teaching gave them. Many women assumed they would teach only a few years until they married, and high turnover was a characteristic of the profession in this era. Normal Schools were originally established for the systematic training of teachers for work in the emerging Common Schools at a level beyond the simple grammar-school education many teachers previously brought to the classroom. They would provide a norm for all teachers (hence the term Normal School) that would assure a level of quality generally unavailable previously. While many states set up their own Normal Schools, around the turn of the twentieth century, as reformers sought to professionalize teaching to a greater degree, education courses increasingly moved into regular colleges and universities. Nonetheless, the impact of Normal Schools on the concept of teacher training was enormous, as states recognized the need to provide teachers with stimulating and demanding preparation courses. (<http://www.pbs.org/onlyateacher/timeline.html>)

The expansion of schools at the secondary level, led to a demand for more highly educated (often male) teachers, who were increasingly recruited into teaching after 1920, through higher salaries, improved benefits, relaxed codes of conduct, the promise of career advancement into administration, and expanded access to relatively inexpensive public higher education. However, during the Great Depression, teacher salaries dropped sharply, and males and secondary teachers were the most affected by budget cuts, and left the profession at higher rates. Although salaries rebounded quickly after 1935, teacher shortages were dire during World War II, when over 65,000 teachers served in the armed forces, and an additional 50,000 left teaching for higher paying jobs in wartime industry. (Studebaker, 1944)

At the turn of the twentieth century, public schools were a new phenomenon for Black students in the South. During this era of segregation, Black teachers taught Black students, creating demand for teachers throughout the South, especially since 90% of Blacks lived in the U.S. South in 1910. Despite poor working conditions and unequal pay, teaching was a highly respected career in Black communities, and often there was a multi-generational tradition of entering the teaching profession in families. Black teachers trained at normal schools or teachers colleges at traditionally Black universities, which also employed Black instructors, and by 1950 nearly half of Black professionals in the U.S. worked as teachers. Following the landmark decision of *Brown v. Board of Education Topeka, Kansas* (1954), and the ensuing desegregation of schools, nearly 39,000 Black teachers in 17 states lost their jobs from 1954 to 1965. (Mondale & Tyack, 2001)

For white teachers in the post-World War II era, the Baby Boom further increased demand for teachers, and districts increased salaries and other incentives, and carried out expansion campaigns and building

projects in response. These enticements, combined with the departure from K-12 education and entrance into the workforce of the aforementioned Baby Boom generation, created a teacher surplus of almost 2,000,000 teachers in the 70s. (Lightfoot, 1972, Sedlak & Schlossman, 1986) However, during this decade, factors including a decline in the purchasing power of teacher salaries, deteriorating working conditions, loss of professional prestige, and expansion of professional opportunities outside of teaching for women and nonwhite professionals once again swung the pendulum back towards teacher shortage in the 80s, especially in the areas of secondary science and math, and in urban and rural schools with high populations of low income and nonwhite students. (Sykes, 1983) While teacher supply and demand have fluctuated considerably in the decades since, teacher shortages in science and math, have persisted, a possible explanation for which is that average non-teacher wages for individuals with mathematics and science degrees are so high relative to teaching, (Sutcher, Darling-Hammond, & Carver-Thomas, 2016) a pattern of relevance to our study in the technology dominated labor market of Santa Clara County.

Estimates place the current national teacher shortage at approximately 64,000 teachers in the 2015–16 school year, increasing to 112,000 by 2018, and to 316,000 by 2025, unless major changes in teacher supply or a reduction in demand for additional teachers occurs. Shortages were found to be most severe across all states in Special Education, Math, Science, and Bilingual/ESL teachers/teachers of students classified as English Learners. The shortage is more severe in the Southern states, and in urban and rural areas, as opposed to suburban. Like other states, after years of layoffs, California’s teacher supply has not kept pace with increased demand. The supply of new teachers is at a 12-year low; enrollment in teacher preparation programs has dropped by more than 70 percent over the last decade; the number of provisional and short term permits issued by the state *tripled*, comprising a third of all credentials issued in 2014-2015, and the number of teachers with provisional and short term permits nearly doubled; Estimated hires for 2015-16 increased by 25% from the previous year, while preliminary credentials issued to fully prepared new teachers increased by less than one percent from the previous year, and enrollment in comprehensive teacher education programs across the state increased only two percent. As with the national shortage, California’s shortage is most acute in the areas of Special Education, math, and science. Analysis of California data reveals the reduction of student-teacher ratios to be the most important factor for increased demand, although California’s current 24:1 ratio is currently the highest in the US, compared to a national average of 16:1. Substantial regional variability is projected California enrollments and retirements, still less significant influences on demand than non-retirement attrition. (Darling-Hammond, Furger, Shields, & Sutcher, 2016)

While geographical variation is attributed to different policies and contexts which affect teacher labor markets, including funding levels and allocations, salary levels, teaching conditions, licensure and accreditation policies, concentration of teacher preparation institutions, demographics of teaching force, concentration of population, and topography. However, the largest discrepancies in teacher shortages were found, regardless of state or region, between schools across and within districts. Overwhelmingly, and in keeping with historical trends, high poverty, high minority schools were found more likely to be taught by underprepared, inexperienced, out of field teachers, a result of inadequate funding, fewer resources, lower salaries, and less desirable working conditions. (Sutcher, Darling-Hammond, & Carver-Thomas, 2016)

As the linguistic and cultural diversity of the school age population has increased significantly since the 80s, the teacher workforce has done the opposite. Inequitable educational access and outcomes at the K-12 and college levels, standardized tests biased against nonwhite teacher candidates, and increased career opportunities for nonwhite teachers outside of teaching have been common explanations for the lack of nonwhite teachers, and increasing teacher production and recruitment has long been the dominant strategy for diversifying the teaching force and addressing the minority teacher shortage. Numerous programs targeted at the recruitment of nonwhite teachers into the workforce since the 80s, including future educator programs in high schools, partnerships between 4 community colleges with higher minority

student enrollments and four-year colleges with teacher education programs, career ladders for paraprofessionals already in the school system, and alternative certification programs have targeted the recruitment of nonwhite teachers. These programs have, in fact, been largely successful at recruiting nonwhite teachers into the profession, outpacing both white teachers and nonwhite students and more than doubling in numbers between 1987 and 2013. Furthermore, nonwhite teachers are more than twice as likely as white teachers to work in hard to staff schools in urban or rural areas with high numbers of nonwhite and low income students. However, while nonwhite teachers have entered teaching at higher rates, they have also transferred between schools and districts, and exited the profession at higher rates than white teachers. These high levels of turnover for nonwhite teachers are largely attributed to less desirable working conditions, more commonly found at hard to staff schools that frequently employ nonwhite teachers. (Ingersoll & May 2011/2016)

While the emerging teacher shortage across and within states is to some degree a function of recent changes- decline in teacher preparation enrollments, an effort to return to pre-recession course offerings and student-teacher ratios, increasing student enrollments, the more constant and significant factor is the high rate of teacher attrition. Since the 80s, predictions of a dramatic increase in demand for teachers resulting from increasing student enrollments, and increasing teacher retirements has been the focus of considerable national attention. The foreseen shortages prompted a wide range of policy targeted at increasing entrants into the profession, many targeted at underrepresented groups of teachers and hard to staff fields and school placements, including financial incentives, such as signing bonuses, student loan forgiveness, housing assistance, and tuition recruitment, programs designed to transition professionals from other fields into teaching, others recruit high achieving college students into teaching, and a wide range of alternative licensing programs designed to ease entry into teaching. (Ingersoll, 2001; Hirsch, Koppich, & Knapp, 2001). Nonetheless, research has shown attrition to be a critical factor, perhaps *the* critical factor, underscoring that recruitment programs alone will not solve school staffing problems if they do not also address the problem of teacher retention. Teacher turnover has been responsible for 66-100% of demand each year since 1989, and greatly impacts both school climate and academic achievement. In general, it is estimated that 30% of teachers leave the profession during their first 2 years in the classroom. Significantly, approximately half of teacher turnover can be attributed to transfers between schools, associated with the same fiscal and academic costs as attrition from the profession. Both teachers who exit the profession and those who transfer are more likely to come from high-poverty schools, and more likely to be younger, less experienced, and teaching out of field than their counterparts who stayed. (NCES, 2005) In addition to teacher characteristics, school characteristics and organizational conditions, inadequate support from the school administration, student discipline problems, limited faculty input into school-decision making, and to a lesser extent, low salaries, are associated with higher rates of turnover. The data suggest that retirement related turnover is *less* of a factor in attrition than commonly believed and that pre-retirement attrition is commonly connected to family reasons (including parenting), lack of administrative support, low salaries, and poor working conditions, including instruction leadership, school culture, collegial relationships, time for collaboration and planning, teachers; decision-making power, experiences with professional development, facilities, lack of involvement, lack of resources, and more recently the threat of firing, displacement, and school closures associated with NCLB accountability measures. Sadly, as previously noted, working conditions (most significantly, perceptions of support from administrators, collegial relations, and school culture) suffer in under-resourced, high-poverty, high minority schools and working conditions, more than teacher or student characteristics, account for the high attrition and difficulty in staffing these schools experience. (Ingersoll, 200; Ingersoll & May, 2011; Sutchter, Darling-Hammond, & Carver-Thomas, 2016)

The literature underscores that the current teacher shortage will require a comprehensive and systematic set of long-term strategies for meeting teacher demand with an equitably distributed supply of high quality teachers. Short-term strategies, such as lowering certification requirements, filling vacancies with underprepared and out of field teachers, raising class sizes, and reducing course offerings can exacerbate

teacher shortages, along with their associated fiscal, academic, and social costs, over the long term. The research suggests that interventions and policies should focus on: 1) Leveraging competitive, equitable compensation packages so districts serving high-need students are able to recruit and retain teachers, and creating incentives such as housing and child care supports, and opportunities to teach or mentor after retirement to make living as a teacher more affordable; 2) Enhancing the supply of qualified teachers for high-needs fields and locations through targeted training, subsidies, and high retention pathways such as forgivable loans to attract and retain teachers in high-needs fields and locations, “grow your own” programs for urban and rural school districts, and teacher residency models that prepare talented and diverse candidates for the challenges they will face in high needs districts; 3) Improving teacher retention, especially in hard-to-staff schools through strong, universally available mentoring and induction programs, the creation of productive school environments with supportive working conditions, administrative supports, collaborative planning, and professional development, and improved principal training programs to develop district leaders who can create productive working environments and influence teacher turnover decisions; and 4) Developing a “national teacher supply market” by removing unnecessary interstate barriers so that regional teacher surpluses in particular fields can address corresponding shortages across state lines.

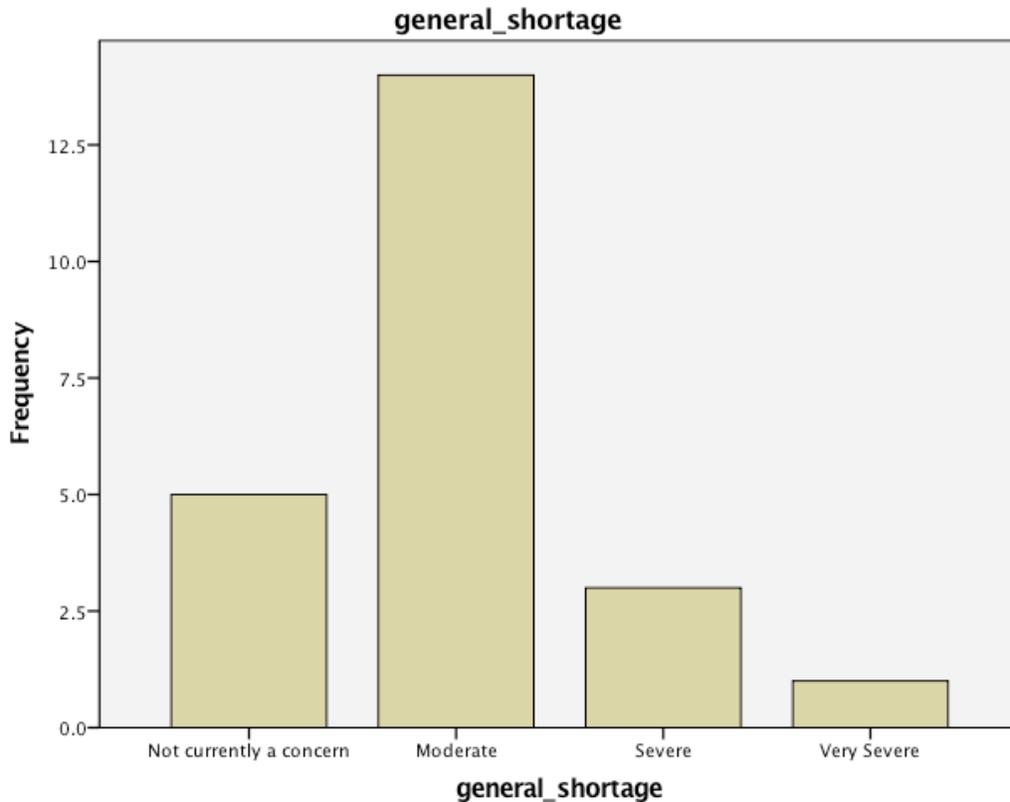
### **Santa Clara County Teacher Workforce Study**

In the fall of 2015, Santa Clara County Office of Education (SCCOE) Superintendent Jon Gundry formed a committee to examine the state of teacher recruitment and retention in the region. Known as the Teacher Pipeline Working Group, membership in the group has changed and grown over time. As reports on the statewide teacher shortage emerged, the Pipeline group decided that a regional study should be undertaken to better understand local conditions for teacher recruitment and retention. SCCOE released a Request for Proposals for the study and selected the Center for Research on Equity and Collaborative Evaluation (CRECE) at the University of California, Santa Cruz, to conduct the study. The first phase surveyed the county’s HR Directors/Assistant Superintendents (22 out of 33 total completed the survey) using a customized survey developed by CRECE. (All project surveys and protocols are shared in appendices.) The results indicated that districts with better pay schedules are experiencing only moderate shortages in the general teacher category. Salary was not associated with hard-to-staff positions, suggesting that the pool of Special Education teachers, for instance, is so small that larger salaries do not currently influence recruitment. Five HR directors were also interviewed. Each reported that the cost of housing was making recruitment and retention a challenge. They reported a general aversion for hiring incentives for teachers, noting that such schemes do not grow the number of teachers but rather force districts to compete with one another.

We also interviewed several teachers who left area districts voluntarily (i.e., not non-reelects). Each reported moving to other areas of the state owing to the high cost of housing, specifically their inability to purchase a home. CRECE also worked with county staff and a several HR directors to develop a common teacher exit survey, which was presented to all HR directors in March 2017. We are hoping that enough of the districts will choose to use the survey and that we can summarize and analyze the data to be submitted in a report in the August of 2107. Given that each of the HR directors and voluntary teacher leavers noted the cost of housing, our report includes an overview of recent local attempts to make housing more affordable for educators in Santa Clara county. We also explore other strategies to increase the number of teachers prepared and retained in the region. **Findings**

The first phase of the study was the development of a survey for county HR directors. The survey is included in Appendix A. Twenty-three of 33 the HR directors responded to the survey. They averaged 5.7 years of experience in their current position, and 25.4 years of experience in public education overall. A majority of respondents (60%) rated the current rate of teacher shortage “moderate”, while an overwhelming majority (86%) rated the shortage “severe” or “very severe” in hard to staff (HTS) areas,

especially in Special Education, Math, and Science, and in Speech and Language Pathologists, Psychologist, BCLAD (Bilingual Authorization), Kindergarten; Career and Technical Education, Nurses, Middle School Single Subject, and Substitutes. On a four point scale, with one being, “not an issue at this time” and 4 being “extremely severe,” the mean of ratings of the general teacher shortage was 2.00, or moderate. On the same scale, the mean of ratings of the teacher shortage in hard-to-staff areas was 3.22, severe-very severe. The following table shows the results of survey with respect to general teacher shortage. The number of HR director responses are on the Frequency axis.



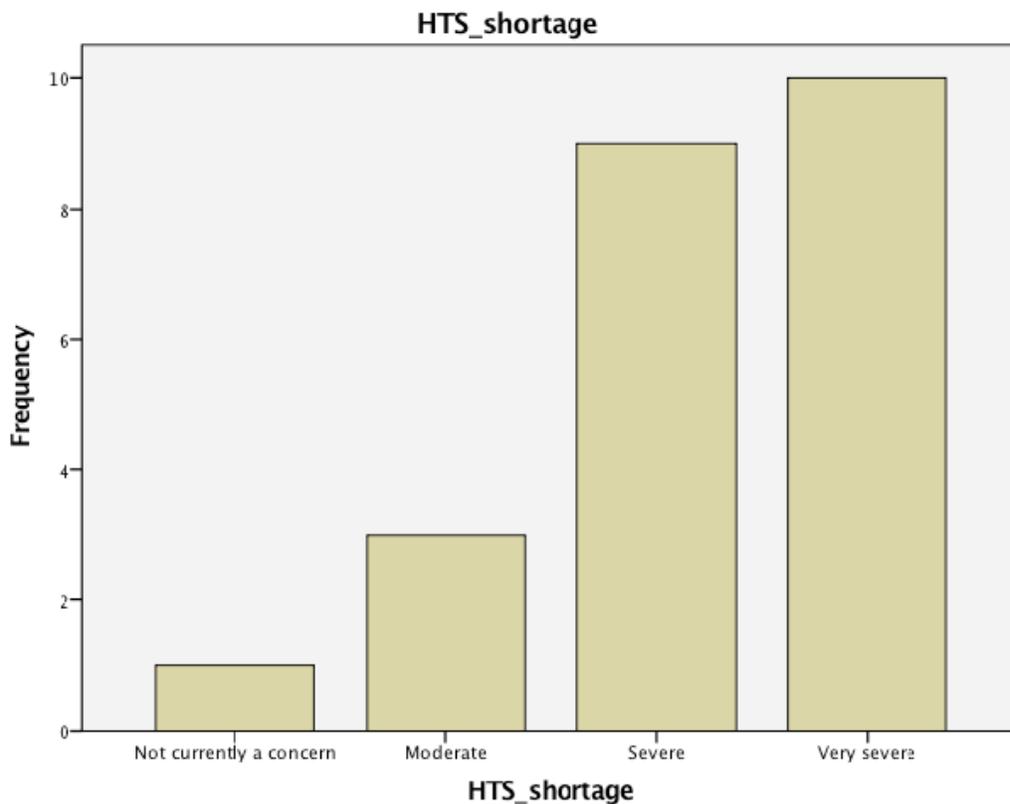
The HR directors reported the following areas as Hard-to-Staff (HTS):

- Special Education staff of all types: Mild/Mod, Mod/Sev, SLP, Psychs, BCLAD
- Math, Science, Special Education and Bilingual Education Credentials.
- Special Education (Mild/Moderate & Moderate/Severe)
- Psychologists and Special Education MM
- Ed Specialist Mild to Moderate and Mod to Severe. Middle School Single Subjects
- SpEd mild/mod, SpEd mod/sev, SLP, math single subject, science single subject math, special education, bilingual, science
- special education, math and science could be a problem in the future.
- special education mild and moderate to severe, SLPs, Psychologists, Math
- math, special education
- Speech Pathologist/Assistant
- Special Education, Single Subject Math, Science
- Psychologists, Speech Language Pathologists, Special Education Teachers, both mild/moderate and moderate severe, science, math
- math

- Career and Technical Education Teachers
- Special Education
- SPED- Mild/Mod and Mod/Severe; Math; Science
- special ed-moderate/severe, speech therapy, math and science
- BCLAD, SpEd of any kind, Kindergarten
- Special Education--all areas, math, science, CTE, speech/Language
- special ed, mathematics
- Special Education Teachers (moderate to severe); SLPs; nurses
- special education-mild/moderate and school psychologist.

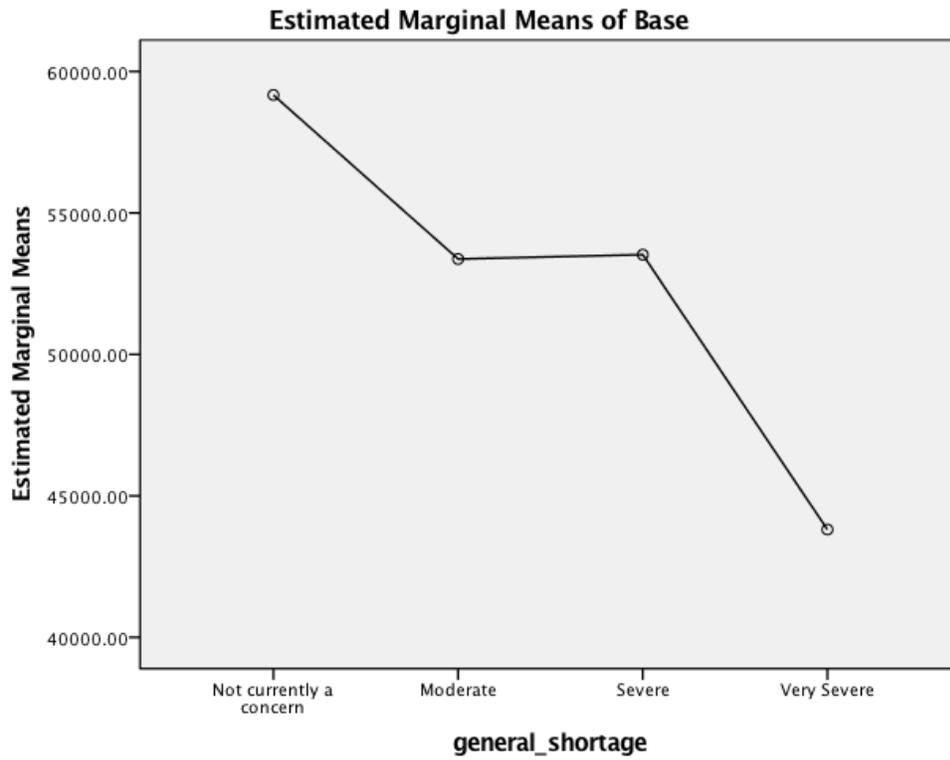
The following table shows the results of survey with respect to hard to staff (HTS) teacher shortages, which

The following graph shows the HR directors' ratings of the severity of shortages in the above areas:



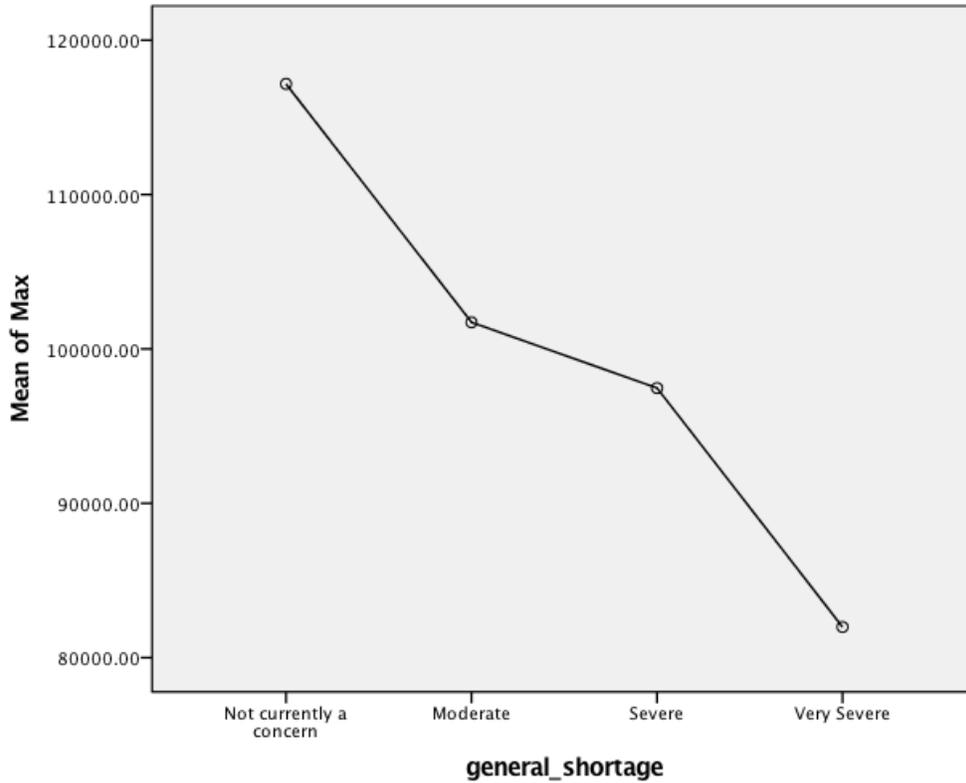
We also collected salary data from publicly available salary schedules for certificated employees (2016-2017 school year) for each of the 33 districts. We found considerable variation between districts, with base salaries ranging from \$43,810 to \$73, 858, with a mean of \$54,197.80, and maximum salary ranging from \$81,988 to \$141,451, with a mean of \$102,617.17. We then analyzed the HR director responses to the previous questions by mean salary.

The following graph shows the ratings HR ratings of the general teacher shortage by salary level of beginning teachers. The mean salary is listed on the vertical axis; the HR director rating of severity of shortage is represented on the horizontal axis.



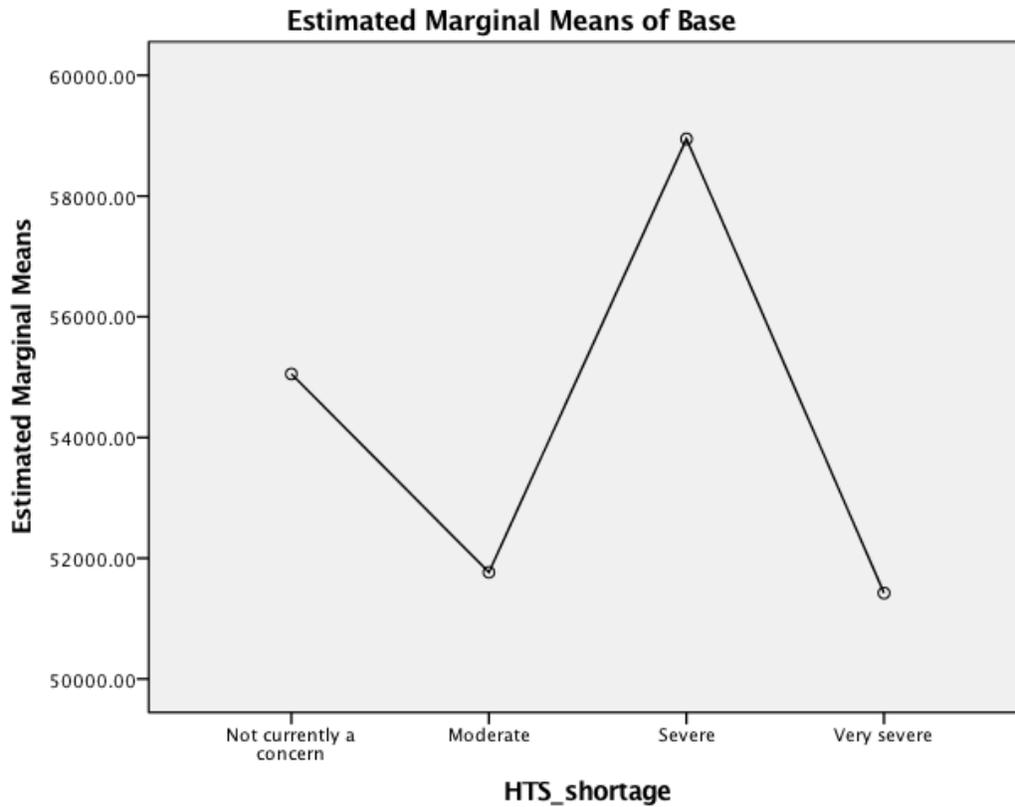
The difference in salaries between those districts reporting “Not currently a concern” and “very severe” was statistically significant ( $F_{3,22}=2.38, p < .05$ ). This finding suggests that districts offering a more competitive salary lessens the shortage for general education teachers.

The following graph shows the ratings HR ratings of the general teacher shortage by the maximum salary level for teachers. The mean high salary is listed on the vertical axis; the HR director rating of severity of shortage is represented on the horizontal axis



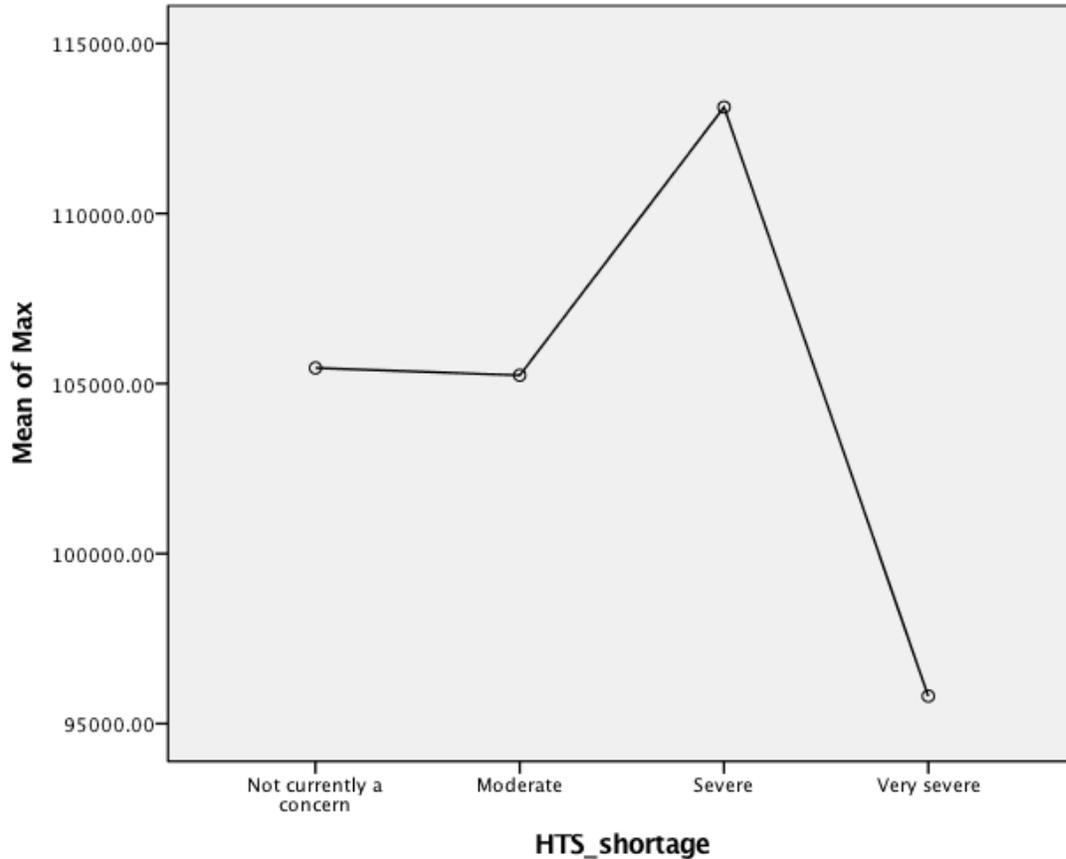
Again, we find that the difference in top salaries between those districts reporting “Not currently a concern” and “very severe” was statistically significant. This finding suggests that districts offering a more competitive top salary lessens the shortage for general education teachers.

The following graph shows the ratings HR ratings of the HTS teacher shortage by salary level (“base”) of beginning teachers.



The following graph shows the ratings HR ratings of the HTS teacher shortage by salary level (“Max”) of the highest paid teachers.

We would first point out that only one district HR director rated hard-to-staff teacher shortage as “Not currently a concern.” Of the remaining districts, salary is not a statistically significant factor in mitigating shortages for hard-to-staff positions. One interpretation of these data is that the pool of HTS teachers is so small that offering higher salaries does not appear to mitigate the shortages in teaching areas such as special education.



This graph suggests that those districts paying top salaries for teachers are generally experiencing moderate to severe shortages in HTS areas, while those districts paying less to their most veteran teachers report the shortages as very severe. These differences are statistically significant.

Taken together, these data do suggest that paying teachers more can mitigate teacher shortages, especially for general education teachers. We also used the district salary schedules and recorded the figure for teachers with 5 years of experience and 60 credit hours beyond the BA degree (see table below).

District	5 years
Gilroy Unified School District	\$52,474.00
Loma Prieta Joint Union School District	\$55,183.00
Lakeside Joint School District	\$59,233.00
Orchard School District	\$60,118.00
San Jose Unified School District	\$61,000.00 *
Morgan Hill Unified School District	\$61,277.00
Los Gatos Union School District	\$61,466.00
Mountain View Whisman School District	\$62,001.00
Berryessa Union School District	\$62,861.00
Los Altos School District	\$63,209.00
Campbell Union School District	\$63,452.00

Mount Pleasant School District	\$64,435.00
Milpitas Unified School District	\$64,820.00
Moreland School District	\$64,842.00
Cambrian School District	\$65,450.00
Campbell Union High School District	\$65,582.00
Metropolitan Education District	\$66,151.00
Oak Grove School District	\$66,348.00
Union Elementary School District	\$66,764.00
Sunnyvale School District	\$67,594.00
Evergreen School District	\$67,653.00
Alum Rock Union Elementary	\$67,839.00
Luther Burbank School District	\$69,066.00
Cupertino Union School District	\$70,238.00
Franklin-McKinley School District	\$71,277.00
East Side Union High School District	\$73,209.00
Saratoga Union School District	\$73,716.00
Fremont Union High School District	\$75,950.00
Santa Clara Unified School District	\$78,046.00
Los Gatos-Saratoga Joint Union H.S. District	\$84,437.00
Palo Alto Unified School District	\$84,862.00
Mountain View-Los Altos Union HS Dist.	\$97,614.00

- Estimate only. SJUSD uses a merit-based pay system which makes calculating averages a challenge.

As might be expected, Elementary and Unified districts had lower salaries than secondary districts (Saratoga Union is a notable exception to this generalization). Interestingly, we do not find that 5 year salary rates correspond with the poverty rate of students in that district. For example, using data from the Education Data Partnership, we find that Los Gatos Union School District (6% of students received Free/Reduced Price Lunch or FRPL) pays closer to the lower end of the scale, while Alum Rock Union (86% FRPL) is near the top of the elementary districts. We are unsure whether altering salaries in varying districts will enhance recruitment or retention efforts. We also recognize that these salary figures do not include the district’s contribution to benefits, which may account for substantial differences in compensation among districts.

The next section of the survey invited HR directors to report on new recruitment strategies. They responded with the following:

- Five reported no new strategies (“1.No, 2.None at this time, 3.No, not as yet, 4.We attend as many recruitment fairs as possible, but nothing new, 5.No new initiatives. We do offer stipends (on going) for those teachers with the hard to staff credentials.” )
- Connecting with Universities inside and outside California.
- Yes, hiring & retention bonuses, more intensive partnering with Universities, training programs for current classified staff to obtain credential.

- Petition legislators for tax incentives for purchasing in the area where educators work.
- Contracting with agencies for teachers for the first time
- This year we are having some brown bag lunches of new employees to keep in touch on how we could improve our onboarding during the course of the year
- Partnering with local universities
- Expanding our connections to business and industry
- Considering sign-on bonuses for Special Ed; we've added coaches at each site; PD options for summer training instead of being pulled from their classrooms
- Attending more fairs; working on housing initiatives with the City/District
- Part of our strategic plan for onboarding, anecdotal evidence
- SCCOE recruitment fair and salary changes for Special Education.
- Sponsoring 20 non-teaching employees in our (EPIC) credentialing program; Annual Teacher Recruitment Fair; "Step into Teaching" event
- Signing Stipends for Special Education Positions, Active w/ social media and trying new approaches with LinkedIn
- We're considering all options to change the compensation and working conditions for Special Ed teachers

With regard to teacher turnover, the reason most often cited was cost of living, followed by better salary/benefits/opportunities in other districts, a desire to reduce commute time, career advancement, family, retirement, spouse's employment, and work/life balance.

Themes identified in the interviews with five HR directors broadly support trends identified in the survey and the existing literature, including:

1. Dire shortage of Special Education teachers (along with Psychologists and SLPs);
2. Shortage of teachers in the areas of Math, Science, and Bilingual Education;
3. The relation of teacher recruitment and retention to broader, national, state, and regional economic, political, and policy shifts (including the Great Recession, Tech boom, Standardized Testing, "Highly Qualified" credentialing requirements, class size reduction, the Common Core State Standards, mandates for inclusion of students on IEPs, contract negotiations, and LCFF); new federal incentives for the privatization of education!)
4. Challenges in recruiting and retaining ethnically and linguistically diverse teachers who reflect the diversity of local student populations. Male teachers are also in short supply.
5. Wide variation in successes and challenges between school sites within a district related to school climate, student population (student population shift), and school leadership.

Additional, regionally specific themes that have emerged include:

1. The relationship between the teacher labor market and the technology industry.
2. Dynamics of the housing market, at a regional and neighborhood level (in connection with teacher salary and commute time);
3. Turnover related to variability of negotiated certificated teacher salaries and stipends between districts.
4. The relationship between commute time, neighborhood specific job markets, and teacher turnover;
5. The relationship between demographic shifts and teacher turnover at a school site level;
6. An emphasis on finding teachers that "fit";
7. Conflict between credential retirements and teachers that "fit";
8. Middle school sites as particularly challenging to staff (came up in all three interviews, and often glossed over in research because of non-specific credentialing and limited sites. Also,

- specialized sites such as bilingual, continuation, college prep track, even less research, even more limited sites);
9. Wide variation in recruitment strategies and hiring practices
  10. Appreciation for support of SCCOE job fair and credentialing;
  11. Limited and inconsistent collection of exit data by Districts;

One last point to be made with regard to the HR interviews, we found that these district leaders emphatically do not want to enter into “bidding” wars for teachers, competing for same limited pool by offering fiscal incentives that do not, in the end, grow the overall number of teachers.

### **Interviews with Teacher Leavers**

We obtained the names of seven teachers who have voluntarily left a Santa Clara County School district. Using the interview protocol in Appendix C, we conducted brief telephone interviews which revealed that every single teacher interviewed had left their position owing to their inability to purchase a home in the Santa Clara region. Two had left the state to teach in areas where teacher salaries were sufficient to purchase a home. In some instances, married couples both chose to leave the region, even if only one taught. We did not find that any of the teacher leavers would have stayed if offered temporary housing or rent assistance: they wished to own a home, accruing the tax deduction from a home loan and the appreciation in value common to many regions of the country.

### **Summary**

Noting the political, emotional, and urgent nature of teacher workforce concerns, we highlight the importance of a data driven, long-term approach to workforce interventions. Preliminary suggestions based on findings for focus strategies for the county to improve recruitment and retention of quality teachers for high needs fields and locations

### **Next Steps and Suggestions**

#### *1. Data Collection and Analysis of Regional Retention Efforts*

As previously reported, CRECE has developed a common teacher leaver exit survey (Appendix D), to be administered uniformly by Santa Clara County districts. We anticipate the data generated will be very useful in leveraging county efforts to help solve recruitment and retention challenges. Without a coordinated effort, districts may resort to a counterproductive competition for teachers, especially in the hard-to-staff categories. Our data confirm that HR directors do not want to enter into “bidding wars” for teachers. Nor does it make any sense for teachers to move from one district to another as each tries to out recruit the other with ever costly incentives.

Furthermore, it is worthwhile to monitor the efficacy and impact of those regional and district efforts to recruit and retain teachers have already been initiated in the county. For instance, the Pipeline group designed and held two *Step Into Teaching* events hosted at the SCCOE, with a third planned for June, 2017. These events are designed to encourage those living in the region who have already earned the bachelors degrees to pursue teaching as a career. Both events thus far have been well attended and received. The SCCOE will be collecting data on the number of attendees who eventually enter the profession. The SCCOE already hosts a spring teacher recruitment fair for those who are already or will soon be credentialed. The county districts report strong satisfaction with this yearly event. The Classified Employee Teacher Credentialing Grant has identified 50 classified employees from 16 school districts to take part in this interested in Special Education to take part in this promising program. Additional projects underway within the districts merit further consideration.

## 2. “Grow Your Own Teachers” programs

School districts themselves can increase the number of new teachers in the region by promoting “Grow Your Own Teachers” programs. One such long established program is the **Stephen F. Austin High School’s** (Houston, TX) magnet program for Teaching Professions. Although pre-collegiate teacher preparation programs require staff to administer, as well as the expected six year delay between program participation and a teacher candidate, districts can offer incentives for students to complete their bachelors degree and credential with offers of employment upon completion (Hunt, Gardner & Hood, 2011).

In fact, a nascent project at the county SCCOE is designed to increase the number of teachers by offering a Career & Technical Education (CTE) program. In our view, this pilot program deserves attention. It is the first such program to offer coursework in the Education Pathway. The project is being partially funded by a CTE grant through the California Department of Education (CDE) for Specialized Secondary Programs. The project seeks to:

- Create a pipeline for students to enter the education field and address the shortage issues affecting schools across the county.
- Prepare students for jobs in education, including careers as teachers (elementary, secondary, bilingual, or special education), substitute teachers, early childhood professionals, teaching assistants, counselors, and recreational youth program staff.

The program is divided into two courses, entitled Career Pathways in Education I (11th grade) and Career Pathways in Education II (12th grade). The curriculum is intended to be used in courses meeting five days per week, for 50-80 minutes each day, over the course of a full academic year. Each year, students will engage in a professional book study in the field of education to cultivate a sense of purpose and develop practical and instructional strategies they can use in the classroom. Additionally, students will develop a professional portfolio over the course of the two-year program.

If this program can be “scaled up to a dozen or more local high schools, we believe that it would yield 50-100 new teachers in 5-7 years.

## 3. Mortgage Assistance

This strategy is based on two findings from our study. First, HR directors mentioned cost of living as a primary reason teachers are voluntarily leaving their districts. Second, in our interviews with teacher leavers (using our admittedly small sample), each reported that they were motivated to purchase a home, which was not possible by staying their previous district. Lack of affordable housing is one reason teachers leave the profession or leave districts with high costs of living. In the most recent nationally representative Teacher Follow-up Survey, nearly one in four public school teachers who had left the classroom and said they would consider returning cited housing incentives as a factor that would be extremely or very important in their decision to return. In the most populous counties, only 17% of homes are affordable on the average teacher salary, down from 30% in 2012. (<https://www.redfin.com/blog/2016/09/california-housing-affordability-for-teachers.html>) Recruitment and retention are directly impacted by housing costs for many districts and regions – nowhere more so than in Silicon Valley (Santa Clara and San Mateo Counties), where *zero percent of the homes for sale were found to be affordable on the average teacher salary*. San Francisco came close behind, where a only 0.2 percent (1 out of 571

homes for sale in September) were found affordable. In the Bay Area, it takes four full teacher salaries to buy a typical home, a whole salary more than in 2012. To this end, we have assembled a comprehensive list of Teacher Affordable Housing initiatives in California. (Appendx E)

## Summary

Historically, educators and policymakers have struggled with challenging cycles of staffing difficulties in U.S. public schools in response to larger social, political, and economic contexts.. Common and shortsighted approaches to recruitment and retention in times of teacher shortages have shortchanged nonwhite and poor students, communities, and teachers disproportionately. Research suggests that the complex work of managing teacher supply and demand in our current national, state, and regional teacher shortage requires a multifaceted, regionally specific approach. Our study examines mixed data, drawing on surveys and interviews of Human Resource Directors and Teacher Leavers, as well as publicly available salary and demographic data, to investigate the nature and sources of teacher shortages in Santa Clara County, finding the crucial role of salary variation and competition between districts, with lower paying districts experiencing a considerably more severe shortage in all areas, and higher paying districts only experiencing severe shortage in hard to staff fields such as Special Education, Bilingual, Math, and Science. We find site leadership, student demographic shift, teacher preparation, commute time, and most critically *cost of home ownership* to be significant factors impacting teacher retention in Santa Clara county. As noted in previous research on teacher supply and demand, efforts to improve teacher workforce quality and stability must take a systematic, multifaceted, and farsighted approach to *regionally specific* workforce reform. Based on findings, next steps in our study include the implementation and analysis of a common teacher exit interview across districts in Santa Clara County, as well as 10-15 additional teacher interviews of teacher leavers. Furthermore, we recommend systematic documentation and analysis of recruitment and retention efforts made by the districts, County office, and similar regions. Finally, we suggest two targeted focus strategies to address themes which have emerged from our study: “grow your own” programs, and mortgage assistance. and Additional suggestions for future research include examining the effects of current recruitment and retention initiatives implemented by Santa Clara County districts, identification and study of districts with similar workforce supply and demand trends, and effects of current recruitment and retention initiatives employed by those districts.

APPENDIX A: HR Director Survey (including solicitation email)

September 9, 2016

Dear \_\_\_\_\_,

Hope you are having a great day. You may recall that we visited the June 1 meeting of the Santa Clara County Office of Education HR Director Meeting. At that meeting, we shared that the county office is sponsoring our organization, the *Center for Research on Equity and Collaborative Evaluation* at UC Santa Cruz, to study teacherworkforce issues in the region..

We are beginning our study with a survey of you and your counterparts, and ask that you click on this [Google forms link](#) (or by copying and pasting the URL at the bottom of this letter into your browser address bar) and answer several questions. The survey should take you approximately 5 minutes. We are hoping to receive your responses by September 16. We will, of course, keep your answers confidential. If you have questions, please do not hesitate to contact us.

Thanks!

Kip Téllez

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Eduardo Mosqueda

Associate Professor and Co-Director, Center for Research on Equity and Collaborative Evaluation  
[mosqueda@ucsc.edu](mailto:mosqueda@ucsc.edu) V. 617.480.5239

URL for survey:

[https://docs.google.com/a/ucsc.edu/forms/d/e/1FAIpQLSe-pSAPELkPnzNgaqkVBE0\\_9O-VWeO2VE6lZNFHJ8ySjZg13Q/viewform](https://docs.google.com/a/ucsc.edu/forms/d/e/1FAIpQLSe-pSAPELkPnzNgaqkVBE0_9O-VWeO2VE6lZNFHJ8ySjZg13Q/viewform)

Survey: Santa Clara County Workforce Study Survey

1. Your name:
2. Your district:
3. How many years have you served in your current position?
4. How many years have you served in public education?
5. How would you rate the general teacher (e.g., multiple subject teachers, social studies single subject teachers) shortage in your district at this time?
  - a. Very severe
  - b. Severe
  - c. Moderate
  - d. Not currently a concern
6. What are the hard-to-staff credential areas (e.g., special education-mild/moderate) in your district?
7. How severe would you rate the teacher shortage in the hard-to-staff areas you listed above?
  - a. Very severe
  - b. Severe
  - c. Moderate

- d. Not currently a concern
- 
- 8. About what percent of teachers (excluding retirees) leave your district per year?
  - 9. Based on your experience, what are the most common reasons (in the past five years) teachers voluntarily leave your district?
  - 10. Is your district undertaking any new initiatives to recruit and retain teachers? If so, please briefly describe them.
  - 11. Do you collect exit data (e.g., surveys, interviews) from teachers who leave your district?
  - 12. Do you have any other information you'd like to share at this time?

APPENDIX B: HR Director Interview Protocol

Date: \_\_\_\_\_ Researcher/Interviewer Name: \_\_\_\_\_

HR Director/Subject Name: \_\_\_\_\_ Location: \_\_\_\_\_

Opening:

*“Thank you for your survey responses and your time today. I know you’re very busy and I hope to take only 30-45 minutes of your time. As you know, we are conducting a study of teacher workforce issues in Santa Clara County, and your interview responses today will provide depth to our study. Your responses, along with others, will be shared without using your name, with the Teacher Pipeline Working Group at the Santa Clara County Office of Education. With your permission I will be recording this conversation, in addition to making a few notes while we talk.”*

Interview questions

1. In your survey responses you indicated you are taking \_\_\_\_\_ initiatives for recruitment and retention, what success or challenges are you experiencing with those strategies?
2. Are you noticing trends in the characteristics of new teachers? (further prompt, community of origin, university or intern preparation?)
3. Are you noticing trends in the characteristics of teachers who leave the district or profession? (Additional prompts: new teachers, preparation, experience, ethnicity, gender, age, subject area, placement in subject area or school site)
4. Are you noticing trends in characteristics of schools that teachers are leaving? (working conditions, student demographics,
5. your survey responses you indicated that your district (Oak Grove, Sunnyvale, Santa Clara, Campbell, Los Gatos Union) does collect exit data on teachers who leave schools and districts. Would you be willing to share that redacted data with us?
6. Are there any teachers you could connect me with who have transferred or left the district or profession?
7. Are there any teachers you could connect me with who are currently living in the region and NOT working in county public schools (e.g.: someone who has remained in the region and changed careers, someone who retired, or someone who has been unemployed for family or personal reasons such as medical or family leave)

## APPENDIX C: Teacher Leaver Interview Protocol

Date: \_\_\_\_\_ Researcher/Interviewer Name: \_\_\_\_\_

Former Teacher/Subject Name: \_\_\_\_\_

Contact phone/email: \_\_\_\_\_

1. Which Santa Clara district/school site did you work in?
  - a. For how long?
  - b. Grade?
  - c. Content?
2. When did you leave the district?
3. Are you currently working? Where?
4. What was/were the primary reason(s) you left? Explore. If mention Cost of Living (COL), ask for details. Rent too high? Wanted to buy home but couldn't? Other costs?
5. What could the district have done to keep you?
6. What policy initiatives at the county, state level could you envision that would have kept you in SC [district]?
7. Is there anything you would like to add?

APPENDIX D: Santa Clara County School Districts Teacher Exit Survey

**DRAFT**

District to enter after survey is completed (Respondents will not see this entry).

- Non-reelect
- Voluntary separation

Note that we do not intend to survey retirees. Of course districts can do so, but we have no section for them, assuming that they are leaving teaching. Districts might wish to inquire if their retirees are interested in returning to substitute teach or offer the district their services.

Items for all:

1. Name: (Optional)\_\_\_\_\_
2. Gender:
3. Year born:
4. Ethnicity (mark all that apply):
  - a.  African-American
  - b.  Asian American
  - c.  European-American
  - d.  Latino (e.g., Mexican-American)
  - e.  Pacific Islands/Hawaiian
5. Languages spoken/proficiency: \_\_\_\_\_
6. I taught for \_\_\_\_ year(s) in the district.
7. I taught for \_\_\_\_ year(s) at my last school.
8. Grades/Subjects taught in district:
9. Credential (mark all that apply):
  - a.  Preliminary Multiple Subject
  - b.  Clear Multiple Subject
  - c.  Preliminary Single Subject (specify):
  - d.  Clear Single Subject (specify):
  - e.  Specialist(specify):
  - f.  Additional (e.g., board certification, Bilingual Authorization [BCLAD]):
10. Teacher preparation:
  - I attended a university credential-only program
  - I attended a university masters/credential program
  - I attended an internship or other “alternative” credential program
  - I did not undergo formal teacher preparation
- I underwent a BTSA/Induction Program through:\_\_\_\_\_
11. Were/Are any of your parents or siblings teachers? If so, which of the following?
  - Mother
  - Father
  - Sibling(s)
  - Other:\_\_\_\_\_

12. Do you currently live within the boundaries of the district you are leaving? Y N  
 13. Approximately, how many miles away from your prior school do (did) you live? \_\_\_\_\_  
 14. When you were a K-12 student, did you attend school in the district you are leaving?  
 Y N If so, for which grades?

Please indicate the primary reason you are leaving your position:

- a. I am leaving the district but will be teaching elsewhere.  
 New district and location: \_\_\_\_\_ Takes respondent to I below.
- b. I am leaving the district to take a non-teaching position in education (e.g., school administration, instructional coach, curriculum coordinator) elsewhere in a different district.  
 New district and location: \_\_\_\_\_ Takes respondent to II below.
- c. I am leaving teaching for now because of changes to my family situation (e.g., maternity). Takes respondent to II below
- d. I am leaving the education profession to work in a new field.  
 New profession: \_\_\_\_\_ Takes respondent to IV below.
- e. I'm leaving teaching/education but not certain what job I'll have in the future. Takes respondent to V below

Based on response above, respondent is sent to one of five sets of items:

***1. If you're leaving the district but still planning to teach elsewhere, please rate the importance of each of the following on your decision:***

1. Want to teach closer to my home to reduce commute time.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
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2. Rent is too expensive in or near the district I'm leaving.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

3. Could not afford to purchase a home in region.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

4. Seeking a higher salary in new school district.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

5. Seeking a better benefits package in new school district.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

6. Lack of opportunities for leadership roles or professional advancement in this school/district

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

7. Dissatisfaction with my job description or assignment (e.g., responsibilities, grade level, or subject area).

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

8. Lack of autonomy over classroom and instructional decisions in this school/district

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

9. Dissatisfaction with the high student/teacher ratio in this school/district

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

10. Too many student discipline problems in this school/district.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

11. Dissatisfaction with the school/district administration in this school/district

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

12. Desire new teaching colleagues

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

13. Was invited to join a new school/district

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

14. My spouse/partner accepted a job in a region outside this region.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
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15. Other: \_\_\_\_\_

16. Of all of the above reasons, which one is the **primary reason** for your leaving the district?

17. Please indicate if the following factors might have kept you in the district:

a. If my teacher salary had been \_\_\_\_\_ % higher, I would have remained teaching in the district.

b. If I had had better employment benefits, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

c. If my district (or some other institution) offered me a rent subsidy, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

d. If my district (or some other institution) offered me a special home-purchase mortgage program, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

**II. If you're leaving the district and taking on (or seeking) a non-teaching, but still, education related, position, please rate the importance of each of the following on your decision:**

1. Knew all along that I'd leave the classroom for other education work at some point

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

2. Wanted to make a broader difference in education.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

3. Desired more autonomy or authority in my daily work

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

4. Was invited into a new educational role elsewhere

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

5. Had plateaued as a teacher (i.e., looking for new professional challenges)

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

6. Burned out from working with children/youth.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
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7. Burned out from having little control over schedule, work duties, instructional decisions

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

8. Desired a higher income

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

9. Left to pursue graduate study

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

10. Felt isolated or receive insufficient guidance/support

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

11. Desired a higher-status professional role

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

12. Burned out because of the student-testing/accountability pressures

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

Other: \_\_\_\_\_

13. Of all of the above reasons, which one is the **primary reason** for your leaving the teaching profession but remaining in education? \_\_\_\_\_

14. Please indicate if the following factors might have kept you in the district:

a. If my teacher salary had been \_\_\_\_\_ % higher, I would have remained teaching in the district.

b. If I had had better employment benefits, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

c. If my district (or some other institution) offered me a rent subsidy, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

- d. If my district (or some other institution) offered me a special home-purchase mortgage program, I would:

have still left the district	have considered remaining in the district	still be teaching in the district
------------------------------	---	-----------------------------------

**III. If you are leaving the district because of changes to your family life, which of the following best explains your departure (mark all that apply):**

- Maternity Leave
- Household/childcare demands
- Recently married/new partner
- Need to care for parents or relatives
- Other: \_\_\_\_\_

How likely is it that you will return to teaching or other educational work at some point in the future?

- I am very confident I WILL NOT return to education or teaching
- I am somewhat confident I WILL NOT return to education or teaching
- I am somewhat confident I WILL return to education or teaching
- I am very confident I WILL return to education or teaching

If you plan to return to teaching, will you seek a position in the district you are leaving? Y N

**IV. If you're leaving the district AND leaving education altogether, and have accepted a position in another field, please rate the importance of each of the following on your decision:**

1. I no longer believe that a career in education is worth my time and effort.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
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1. The pay is too low.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
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2. The working conditions are unsatisfactory

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

3. I'm seeking better colleagues

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

4. Please indicate if the following factors might have kept you in the profession:

e. If my teacher salary had been \_\_\_\_\_ % higher, I would have remained teaching.

f. If I had had better employment benefits, I would:

have still left teaching	have considered remaining a teacher	still be teaching
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g. If my district (or some other institution) offered me a rent subsidy, I would:

have still left teaching	have considered remaining a teacher	still be teaching
--------------------------	-------------------------------------	-------------------

h. If my district (or some other institution) offered me a special home-purchase mortgage program, I would:

have still left teaching	have considered remaining a teacher	still be teaching
--------------------------	-------------------------------------	-------------------

5. Of all of the above reasons, which one is the **primary reason** for your leaving education altogether? \_\_\_\_\_

*V. If you're leaving the district AND leaving education altogether but are not sure what line of work you will pursue, please rate the importance of each of the following on your decision:*

1. I no longer believe that a career in education is worth my time and effort.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

2. The pay is too low.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

3. The working conditions are unsatisfactory.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

4. I'm seeking better colleagues.

Not at all important	Slightly important	Somewhat important	Very important	Extremely important
----------------------	--------------------	--------------------	----------------	---------------------

5. Please indicate if the following factors might have kept you in the profession:

a. If my teacher salary had been \_\_\_\_\_ % higher, I would have remained teaching.

b. If I had had better employment benefits, I would:

have still left teaching	have considered remaining a teacher	still be teaching
--------------------------	-------------------------------------	-------------------

c. If my district (or some other institution) offered me a rent subsidy, I would:

have still left teaching	have considered remaining a teacher	still be teaching
-----------------------------	--	-------------------

d. If my district (or some other institution) offered me a special home-purchase mortgage program, I would:

have still left teaching	have considered remaining a teacher	still be teaching
-----------------------------	--	-------------------

6. Of all of the above reasons, which one is the **primary reason** for your leaving education altogether? \_\_\_\_\_

#### VI. ADDITIONAL QUESTIONS:

1. Would you recommend employment with the district to others?

Yes. Reason(s) why \_\_\_\_\_

No. Reason(s) why \_\_\_\_\_

2. What was the most satisfying thing about your job?

3. What was the most unsatisfying thing about your job?

4. What could your immediate supervisor do to improve his or her management style?

5. Do you have any other comments you would like to share with us?

6. May one of our independent researchers contact you to set up a short phone interview to learn more about your decision? Any information you provide will be confidential and shared only with your permission. If so, please include phone number and email address here:

\_\_\_\_\_

Appendix E

Program	Administrator	Location	Incentive/Description	Eligibility & Terms
<b>Homes for Heroes:</b>	Homes for Heroes Inc is a licensed real estate company in Minnesota.	US (Restricted in Alaska, Kansas, Louisiana and Mississippi)	-Discounts 25% of your Realtor fee (US average savings \$1,500) when buying and selling  -Applicants also receive reduced closing and home inspection fees.	-Eligibility pool includes Firefighters, Law Enforcement, Military, Healthcare Professionals, and EMS, as well as teachers.  -Must use a Realtor or broker who has signed up as a program affiliate.
<b>AFT Lending Programs Educators</b>	Through partnership with the United Federation of Teachers, educators may receive a loan from the Union Assist Program at ICC Mortgage or the Union Plus program through Wells Fargo.	US	Zero, or reduced, fees for processing or underwriting, as well as financing discounts, and a	This program is available to union members, their parents and children.
<b>Educator Mortgage Program</b>	Mortgage bank and lender Supreme Lending	US	-Up to \$800 in discounts on closing costs and Realtor® fees for home purchase, sale, or refinance  -Speedy loan turnaround and a \$400 donation to chosen school program.  -FHA loans for teachers through HUD with low downpayments, low closing costs, and easy credit qualifying.	Discounts available for all teachers and school district employees.  The FHA loan program has no income limits, requires a minimum credit score of 620, and rules for debt-to-income ratios, bankruptcy, foreclosure, and short sales are more lenient than Fannie Mae or Freddie Mac loans.
<b>HomeReady Mortgage Program</b>	Fannie Mae	US	-Gives CA teachers access to a 3% or 5% downpayment home loan with more flexible underwriting guidelines and discounted PMI.  -an alternative for those who cannot met CalPATH criteria.  -Can also combine the CalHFA down payment assistance program (CHDAP) with the MCTM.	-Qualifying income limit cannot exceed cannot exceed 100% of the county Area Median Income (AMI)  -Requires potential home buyers to complete an online class called <a href="#">Framework</a> prior to the home purchase

<b>Teacher Next Door</b>	US Dept of Housing and Urban Development (HUD)	US	connects educators to a wide variety of grants and housing programs—including Good Neighbors Next Door—helping applicants find local programs and organizations that reduce mortgage rates and costs and provide <a href="#">down payment</a> rebates.	Housing in this program isn't restricted to federally designated revitalization areas, and there are no residency requirements.
<b>Good Neighbor Next Door</b>	U.S. Dept of Housing and Urban Development (HUD)	U.S.	50% discount on HUD-owned homes located in “revitalization areas”—regions with high foreclosure rates and low homeownership—nationwide.	Teachers and other civil servants, including firefighters, law enforcement officers, and emergency medical technicians  Applicants must not currently own a home and must commit to using their new house as a primary residence for three years
<b>NHF Sapphire Grant</b>	National Homebuyer's Fund (NHF)	Multiple States	-Non repayable grant for up to 5% of HFA, VA, or USDA mortgage.	- Qualifying income limit cannot exceed cannot exceed 115% of the county Area Median Income (AMI)  - Generous FICO/DTI requirements.
<b>Extra Credit Teacher Home Purchase Program</b>	Offered through the California Housing Finance Agency (CalHFA)	CA	-ECTP junior loans range from \$7,500 to \$15,000 depending on <a href="#">the area</a> in which the home is being purchased  -subordinate loans can only be used for down payment assistance and/or closing costs.	-teachers, support staff, administrators, food service, and janitors employed by a K-12 public school, Charter School, or by a school district.  - can only be combined with an eligible CalHFA first mortgage loan  -applies to first time homebuyers who meet HFA eligibility requirements  -Requires homebuyer education course  -Can only be used for a single-family, one unit, primary residence.  -Sales price of the home cannot exceed CalHFA's <a href="#">sales price limits</a> established for the county in which the property is located
<b>CAL Plus Conventional Loan Program</b>	CalHFA	CA	-Conventional first mortgage with a slightly higher fixed interest rate than standard  -Loan is fully amortized for a 30-year term	-applies to first time homebuyers who meet HFA income limits for this program*  -Requires homebuyer education course  -Can only be used for a single-family, one unit, primary residence.

			-combined with the CalHFA Zero Interest Program (ZIP) for closing costs.	
<b>Cal-EEM + Grant Program</b>	CalHFA	CA	<p>-Combines an FHA-insured Energy Efficient Mortgage first mortgage loan with an additional Cal-EEM Grant.</p> <p>-The interest rate on the Cal-EEM is fixed throughout the 30-year term.</p> <p>-Can be combined with the Extra Credit Teacher Program (ECTP) for down payment assistance.</p>	<p>-Homebuyers must meet HFA income limits for this program*.</p> <p>-Requires homebuyer education course</p> <p>-Can only be used for a single-family, one unit, primary residence.</p> <p>-Sale price cannot exceed HFA sales price limits for this program*</p>
<b>CalHero</b>	Participating Lenders	CA	<p>-A financing alternative to the suspended CalSTRS 80/17 Teacher loan, and discontinued CalPERS® public employee home loan program.</p> <p>-Discounted interest rates or lender credit to pay closing costs, reduced lender fees, free 1 year Home Warranty for buyers</p> <p>-Can be combined with an approved 2nd lien down payment assistance program</p>	<p>-Current, or past, Police, Firefighters, Veterans, Nurses, and Teachers when they buy, sell, or refinance a primary residence.</p> <p>- Income limits and additional guidelines may apply if combining with a down payment assistance or HOMEReady or MyCommunity Mortgage program.</p>
<b>CalHFA FHA Loan Program</b>	CalHFA,FHA	CA	<p>-First mortgage loan insured by the Federal Housing Administration.</p> <p>-Fixed interest rate for 30 year term</p> <p>-Can be combined with the Extra Credit Teacher Program (ECTP) for down payment assistance.</p>	<p>-Homebuyers must meet HFA income limits for this program*.</p> <p>-Requires homebuyer education course</p> <p>-Can only be used for a single-family, one unit, primary residence.</p> <p>-Sale price cannot exceed HFA sales price limits for this program*</p>
<b>CalHFA Mortgage Credit Certificate (MCC) program</b>	CalHFA, County Partnering Organizations	CA	-a federal credit which can reduce potential federal income tax liability, creating additional net spendable income which borrowers may use toward their monthly mortgage payment	<p>-Applies to first time homebuyers (exception for homes located in federally designated target areas, and Qualified veterans pursuant to the Heroes Earning Assistance and Relief Tax Act of 2008)</p> <p>-Applies to U.S. citizens, permanent residents or other qualified aliens.</p>

			<p>-may enable first-time homebuyers to convert a portion of their annual mortgage interest into a direct dollar for dollar tax credit on their U.S. individual income tax returns.</p>	<p>-Must meet credit, <a href="#">income limits</a>* and loan requirements of the lender, insurer, &amp; CalHFA.</p> <p>-Must live in the home you are purchasing for the entire term of the loan, or until the home is sold or refinanced.</p> <p>--Can only be used for a single-family, one unit, primary residence.</p> <p>-Sale price cannot exceed HFA sales price limits for this program*</p>
<b>CalHOME</b>	<b>CalHUD</b>	CA*	<p>-A downpayment and mortgage Assistance Program offers a 10% (minimum loan amount \$10,000) silent second mortgage (due upon sale or transfer of property, or loan maturity) for first time home buyers.</p>	<p>-Must meet CalHome income limits (80% of AMI), underwriting guidelines for credit, and have a monthly housing debt ratio of not less than 28% and not more than 38%</p> <p>-Homebuyer education requirement</p> <p>-Can only be used for a single-family, one unit, primary residence.</p>
<b>CalPLUS FHA Loan Program</b>	CalHFA, HFA	CA	<p>- First mortgage loan insured by the Federal Housing Administration with a slightly higher interest rate than.</p> <p>-Loan is fully amortized for a 30-year term and is combined with the CalHFA Zero Interest Program (ZIP) for closing costs.</p>	<p>-Homebuyers must meet HFA income limits for this program*.</p> <p>-Requires homebuyer education course</p> <p>-Can only be used for a single-family, one unit, primary residence.</p> <p>-Sale price cannot exceed HFA sales price limits for this program*</p>
<b>GSFA Platinum Grant</b>	Golden State Finance Authority	CA	<p>-Non-repayable grant for up to 5% of HFA, VA, or USDA mortgage.</p>	<p>- Qualifying income limit cannot exceed cannot exceed 115% of the county Area Median Income (AMI)</p> <p>- Minimum FICO 640; maximum DTI 45%.</p>
<b>MyHome Assistance Program</b>	CalHFA	CA	<p>-A deferred-payment junior loan of an amount up to the lesser of three and half percent (3.5%) of the purchase price or appraised value to assist with down payment and/or closing costs.</p>	<p>-Applies to first time homebuyers who meet HFA income limits for this program*</p> <p>-Requires homebuyer education course</p> <p>-Can only be used for a single-family, one unit, primary residence.</p>

				-Sale price cannot exceed HFA sales price limits for this program*
<b>CityLIFT</b>	<b>NHSIE</b> (Neighborhood Housing Services of the Inland Empire)	Riverside and San Bernadino Counties	-A 'soft second' mortgage - forgiven after the borrower has occupied the home for 5 years as their primary residence at a rate of 20% per year (if buyer moves out, transfer ownership, or sells before the 5 year period)	- Homebuyer <a href="#">education requirement</a> - Loan limits must meet FHA & Conventional limits -Total Household income cannot exceed 100% AMI -Borrower cannot own or be on title of another home at time of closing
<i>*varies by county</i>				

*In addition, school districts, counties, and cities, sometimes with support from the U.S. Department of Housing and Urban Development, have offered money for housing-related expenses (e.g., rent, relocation expenses, down payments) targeted to teachers in high-need fields, as well as down payment assistance, discounted homes, and subsidized teacher housing. (Table 2).*

<b>Casa Del Maestro (2002)</b>	Santa Clara Unified & Thompson Dorfman Partners (a residential development firm that specializes in teacher housing and works with school districts at a lower cost)	Santa Clara	-California's first subsidized teacher housing site, developed on a former school site in 2002 and expanded in 2009 providing 70 units of subsidized housing in an apartment complex.  -
<b>City of Carlsbad Affordable Housing Neighborhoods</b>	City of Carlsbad, Taylor Morrison	Carlsbad	-Three MBR, income restricted neighborhoods made possible by the Inclusionary Housing Ordinance: Mulberry at Bressi Ranch, Rose Bay at Bay Collection, and Seagrove in the Village.  - Buyers must be from low-income households and be able to show that they will not be paying more than 35% of their income on housing costs for their new home.
City of Santa Clara BMR Purchase Program	Housing Trust of Silicon Valley	City of Santa Clara	-Offers new condominiums, single family and townhouse style homes for sale at lower than market rate price for low to moderate-income households.  -Subject to a 20-year City loan, minimum 3% downpayment. Sale restrictions apply for first 20 years of residence.  -Gross household income not to exceed 120% AMI, assets not to exceed \$100,000.  -Homeowner education requirement.
<b>City Second Loan Program</b>	Mayor's Office of Housing and Community Development (MOHCD), SFUSD	San Francisco	Loans of up to 15% of the purchase price of a home to eligible, first-time homebuyers with no interest and deferred payment.  The repayment amount will be the principal balance plus a share of appreciation in the value of the property at the time of resale.  The City loan is in second position on title after the first mortgage and can be repaid at any time without penalty.
<b>Contra Costa Community Housing Development Corporation (CDHC)</b>	Contra Costa County CDHC, in partnership with local developers	Contra Costa	-Provides a broad range of affordable housing opportunities and services to enable low/moderate income residents gain better housing and financial stability. First Time Homebuyer Programs ensure that residents of the neighborhoods where affordable homes have been developed are able to purchase.  -CHDC has assisted more than 600 households purchase homes. Nearly half of these homes are properties that CHDC either developed or assisted other affordable housing developers by qualifying eligible buyers for their developments.
<b>Emeryville Affordable Housing Program</b>	City of Emeryville Economic Development and Housing Division.	Emeryville	-The City of Emeryville adopted the Affordable Housing Set-Aside (AHSA) Ordinance in 1990 to address a shortage of affordable housing to moderate, low, and very low income households.

			-In 2014 the Ordinance was adopted and renamed the Affordable Housing Program (AHP), which requires a set-aside of Below Market Rate (BMR) units in new ownership developments of 10 or more units and an impact fee on all new rental housing projects or an in-lieu BMR unit production.
<b>First Time Home Buyers Program</b>	Varies between cities	Chula Vista, Clovis, Corcoran, El Cajon, Escondido, Oakland, Modesto, Porterville, Redding, Cities in Santa Clara County, San Pablo, Sunnyvale, Vallejo, Turlock	-Offers gap financing for first-time low-income homebuyers to purchase eligible properties in the form of a deferred loan with no interest that carries shared equity for the first 15 years.  -The gap financing is up to \$70,000, with a cap of 30% of the purchase price for properties that do not need rehabilitation assistance.  -The gap financing with properties that need rehabilitation, up to \$50,000 is available with an additional \$10,000 for Health and Safety related improvements and up to \$10,000 for energy efficiency improvements.
<b>HEART/ Meriwest Home Loan and Down payment Assistance Program</b>	Housing Endowment and Regional Trust (HEART) of San Mateo County & Meriwest Credit Union	San Mateo	The program helps first time homebuyers with a loan of up to \$625,000, a 15 year BMR second lien downpayment loan of \$117,281, 5% downpayment and no PMI.  -Eligibility restricted to residents and employees in San Mateo county, with a household income under \$150,000, FICO score of 680 or higher, who have not owned a home in 36 months OR selling a primary residence to purchase a home near public transportation.
Hello Housing	-Hello Housing  -Financial and Development Partners vary by city	Alameda, Concord, Livermore, Menlo Park, Novato, Pleasanton, Los Gatos	-A nonprofit, San Francisco – based organization that develops affordable housing and services for underserved communities, and offers a variety of housing development, management, and administration services to help local governments achieve their housing goals.  -Purchase Assistance Loan (PAL), Emergency Repair Loan (ERL) or Rehab loan (RL)  -BRM rentals and homes for sale  -Eligibility pool income limits 110% AMI
Housing Trust of Silicon Valley GAP loan	Housing Trust of Silicon Valley, CalHOME	Santa Clara County	Deferred second loan up to a maximum 20% of the purchase price up to \$57,500 to help with the purchase of homes in Santa Clara County. The GAP is a 30-year loan with an interest rate of 3%. Payment is deferred until the expiration of the term, sale of the home, or refinance of

			<p>the first mortgage. There are no monthly payments on a GAP loan.</p> <p>-Subject to terms of CalHOME loans</p>
<b>Inclusionary Housing Regulations</b>	City of San Jose, City of Carlsbad, , City of San DiegoCalHUD	San Jose, Carlsbad, San Diego	<p>Requires developers to set aside 10-20 percent of units as “affordable for low and moderate income households (up to 110% of AMI) for projects larger than 20 units. Alternatively, developers can pay an in-lieu fee or build affordable units off-site.</p> <p>-In San Jose, stalled in courts 2010-105</p> <p>-In San Diego, developers must set aside 20% of units for affordable housing in “The Future Urbanizing Area”</p>
<b>LAUSD Affordable Housing developments</b>	LAUSD in partnership with Abode Communities (NonProfit)	Los Angeles	<p>-156 affordable units in Gardena &amp; Hollywood (plus Norwood under development) for LAUSD staff.</p> <p>-A new LAUSD teacher can expect to start at just over \$50,000 a year, but in the income-restricted apartments, a single resident wanting to rent a one-bedroom apartment can’t make more than \$34,860. For this reason, not a single teacher resides in the affordable housing complexes, which are occupied by LAUSD service workers.</p>
<b>Merced County Home Rehabilitation</b>	CalHUD, HOME grants, Block grants	Merced County	<p>Merced County’s Home Rehabilitation Program is an opportunity for low-income families to rehabilitate their owner-occupied homes with loans of up to \$70,000 for rehabilitation and \$100,000 for reconstruction, deferred payment for 30 years</p>
Modesto Homebuyer’s Assistance Program	HUD	Modesto	<p>The Modesto HAP provides a second mortgage loan up to \$10,000 for mortgage assistance and closing costs. The loan is a second mortgage for.</p> <p>Eligibility is restricted to Modesto residents, with a median credit score above 610, with a total household income limit at 80%AMI.</p>
<b>Patterson Housing Assistance Program</b>	Patterson Unified School District (PUSD)	Patterson	<p>-Rental Property With Mortgage Assistance: For residents of the district-owned townhouses in the Ivy Terrace Community, \$500 of each \$1,200 monthly rent payment will be deposited into a savings account that the employee may withdraw for the purchase of a home in the Patterson Unified School District boundaries.</p> <p>-Downpayment Assistance Savings: The district will match up to \$10,800 which the employee deposits in a downpayment savings account upon purchas of a home in the Patterson, Westley, Grayson, Crows-Landing, or Diablo Grande communities.</p>

<b>Roaring Fork Unified School District Housing</b>	Roaring Fork School District (RFSD)	Roaring Fork, CO	-\$15 million in bond money will go to affordable housing owned by the school district. 15-20 units of rental housing in each of three communities, Glenwood Springs, Carbondale and Basalt will be rented at reduced rates, intended to provide short-term housing options for staff as they work to develop savings and get established in the valley.
San Diego Multifamily Bond Program	SDHC, Development Partners	San Diego	-Provides BMR financing for developers who set aside a portion of rental units as affordable housing  -Bonds require a minimum "A" rating, achieved by obtaining credit enhancement through participating financial institutions that underwrite project loans and guarantee bond repayment.
<b>San Francisco Teacher Next Door Program</b>	Mayor's Office of Housing and Community Development (MOHCD), SFUSD	San Francisco	The Mayor's Office of Housing and Community Development (MOHCD) administers the Teacher Next Door (TND) Program to assist educators employed with the San Francisco Unified School District (SFUSD) with the purchase of their first home in San Francisco, through interest-free loans of up to \$20K forgiven at a 20% rate after year 5 of employment
<b>San Francisco Teacher Residency</b>	SFUSD, Stanford University, & Americorps	San Francisco	A more affordable pathway into teaching for many prospective teachers while providing intensive preparation for the challenges of teaching in a high-needs school. In exchange for a commitment to teach for at least three years in SFUSD, residents receive a 50 percent tuition remission at USF and significant scholarship support and loan forgiveness at Stanford. Residents also receive more than \$17,000 in stipends (in part from AmeriCorps), \$15,000 in housing grants, and free health care benefits.
<b>SFUSD plans for Affordable Teacher Housing</b>	SFUSD, SF Mayor's Office, AFT	San Francisco	With the help of the Mayor's Office and the local teachers union, the district plans to help 500 educators through the construction of new housing by 2020, rent subsidies, counseling on housing issues and down payment or mortgage loans for educators.
<b>SMUHSD Workforce Housing: Exploration of Employee Housing</b>	San Mateo Union High School District (SMUHSD)	San Mateo	-SMUHSD staff is exploring the idea of providing workforce housing at the Mills High campus and using the sale proceeds of the Crestmoor site to finance that project as a way to attract and retain the best teachers and staff possible.
<b>Sunnyvale BMR Homebuyer Program</b>	Sunnyvale Housing Division, Participating financial and development partners.	Sunnyvale	-Eligibility limited to first time home buyers who are permanent US residents, live or work in the City of Sunnyvale, Permanent Residents of the US, with credit score at or above 620, with no record of bankruptcy, foreclosure, or felony.

			-Limited to low and moderate income households (household income does not exceed 120% AMI), first time home buyers.  -Homebuyer education requirement.
<b>The Community Housing Improvement Program (CHIP)</b>	City of Chula Vista Housing Division	Chula Vista	-Home improvement forgivable loan funds of up to \$8,500 to income qualified (below 50% ami) mobilehome owners for accessibility and/or health and safety related repairs.  -Loans must be repaid in full if transferred prior to the fifth year of occupancy.
<b>Western Chula Vista Rehabilitation Program</b>	City of Chula Vista Housing Division	Chula Vista	Offers 0% or 3% deferred loans, dependent on income, for up to \$25,000 to single-family homeowners, below 80% of the area median income, for home improvements and energy efficiency upgrades. Priority is given to homes located within targeted "low income" census tracts.

This past August, state legislators passed Senate Bill 1413, authorizing school districts to establish programs aimed at helping teachers and school district employees secure affordable housing. Authored by state Senator Mark Leno, whose district includes San Francisco, the purpose of SB 1413, known as the “Teacher Housing Act of 2016,” is to “facilitate the acquisition, construction, rehabilitation, and preservation of affordable rental housing for teachers and school district employees to allow teachers or school district employees to access and maintain housing stability.” SB 1413 does so by permitting school districts to build rental housing on district-owned property and restricting occupancy in these projects to teachers and school district employees ([https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=201520160SB1413](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201520160SB1413)) Under prior law, projects that make use of these low-income housing subsidies had to be open to all tenants who met the income guidelines, to prevent public funds from subsidizing housing discrimination. The new law makes an exception for teachers and district employees. A similar story is playing out in other expensive metro areas across the nation. Several districts in high-cost parts of Colorado, such as Aspen, have experimented with subsidized housing for staff. In New York City, teachers often lean on organizations like TeacherSpaceNY, a real estate agency focused on finding teachers budget-friendly city pads. And in Washington D.C., a former college is being converted into an apartment complex that will offer lower-rent housing for city teachers. Plans are also underway in Chicago to transform a former elementary school in Humboldt Park into a “teachers village,” with housing, shopping and continuing education centers. (<https://www.citylab.com/housing/2017/03/in-pricey-silicon-valley-teachers-scramble-for-housing/519360/>)

However, not everyone, agrees that teachers should be the focal point of affordable housing policy. In areas where the supply of housing is constrained, providing special access to teachers necessarily comes at the expense of others who are just as inconvenienced by high rents and long commutes, if not more so. In Cupertino, plans to convert a former elementary school into teacher housing in 2015, were dropped in the face of fierce opposition from local residents who opposed giving up school land for residential development, and questioned whether new housing would actually retain teachers. The Oakland Unified

School District announced its own teacher workforce housing initiative in 2014, only to see the plan stall for lack of a developer. Furthermore, it's clear that low-income housing tax credits are insufficient to fill the need for affordable teacher housing. In 2016, the State Treasurer's office had the resources to fund only 82 of 163 qualifying applications. Moreover, it's unlikely that a hundred or so designated units in a district employing 6,000+ teachers would make the desired impact on teacher recruitment and retention. Equally unlikely is that most teachers would qualify for subsidized units, as the rents charged at complexes constructed or renovated with low-income tax credit support range from 30 percent to 60 percent of an area's median income. In a city like San Francisco, the upper threshold to qualify is at \$45,250 for one person, while the district's average salary is \$67,537.

[\(http://www.mercurynews.com/2017/03/06/to-attract-teachers-pricey-bay-area-school-districts-are-becoming-their-landlords/\)](http://www.mercurynews.com/2017/03/06/to-attract-teachers-pricey-bay-area-school-districts-are-becoming-their-landlords/) And although the Los Angeles Unified School District has successfully developed more affordable housing projects than any other district in the state, of the three housing complexes on district land, none houses even one district teacher, because the projects were financed in part with state and federal affordable housing tax credits, and consequently the units have gone to lower-earning district employees, such as cafeteria workers and teacher assistants.

Worth consideration along with other housing incentives are programs in place at California Community Colleges and UCs, which may offer a model for K-12 Districts to follow (Table 3)

<b>Program</b>	<b>ADMINISTRATOR/Partners</b>	<b>Location</b>	<b>Description</b>
<b>Community College District Teacher Housing</b>	Community College District & HUD	San Mateo, Redwood City, San Bruno	<p>-104 apartments for employees at Cañada College in Redwood City and College of San Mateo, with more planned in San Bruno</p> <p>- Applicants, who must not own another home, can stay for seven years and then, if desired, apply for a \$50,000 low-cost home loan</p>
<b>California State University (CSU) Teacher Housing</b>	CSU with Private Development Partners	Fullerton, Monterey Bay, Ventura, Sacramento,	-Seven of the 23 California State University campuses have built housing communities on or near campus, and sell those homes to employees at discounted prices.
<b>UC Faculty Housing</b>	UC Regents with Private Development Partners	Irvine, Berkeley, Davis, Los Angeles, Santa Barbara, Santa Cruz	<p>-Six UC campuses offer rental units for faculty. Eligibility for these units is determined by each campus. Funding that has been available to develop and build these rental units has enabled the campuses to provide rental housing at a moderate price often below the market rate of housing in the surrounding area.</p> <p>-Seven UC campuses have developed for-sale housing on land owned by the University. In most cases the land will be leased to the purchaser of the unit. Ground rent payments for the land and purchase prices are established at a level to cover all costs of the developments and to assist in keeping the monthly housing costs lower than those for conventional projects.</p> <p>-The houses in university projects appreciate at a lower rate-about 3 percent annually-than homes in other California communities.</p>
<b>UC Mortgage Origination and Supplemental Home Loan Program</b>	UC Regents	Berkeley, Los Angeles, San Diego, Santa Barbara, Santa Cruz, Davis, Merced	<p>-The Mortgage Origination Program provides fully amortized, 30 year variable and fixed first mortgages for a primary residence to eligible UC faculty members and Senior Management Group. Loan amounts vary between UC campuses. Monthly payment is made through payroll deduction</p> <p>-The Supplemental Home Loan Program (SHLP) provides BMR secondary financing to assist eligible faculty members and members of the Senior Management Group in the acquisition of a principal place of residence. This Program may be used in conjunction with the University's Mortgage Origination Program (MOP) loans. These loans can't exceed 5% of the purchase price or appraised value whichever is lower.</p>

As school districts, policymakers, and communities continue to address teacher workforce concerns in the coming years, we can anticipate that housing incentives, whether in the form of home loan and down payment assistance, rental and sale offerings, or grants, will be a crucial strategy.

## Appendix E

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