

1995-96 SESSION
COMMITTEE HEARING
RECORDS

Committee Name:

Joint Committee on
Finance (JC-Fi)

Sample:

Record of Comm. Proceedings ... RCP

- 05hrAC-EdR_RCP_pt01a
- 05hrAC-EdR_RCP_pt01b
- 05hrAC-EdR_RCP_pt02

➤ Appointments ... Appt

➤ **

➤ Clearinghouse Rules ... CRule

➤ **

➤ Committee Hearings ... CH

➤ **

➤ Committee Reports ... CR

➤ **

➤ Executive Sessions ... ES

➤ **

➤ Hearing Records ... HR

➤ **

➤ Miscellaneous ... Misc

➤ 95hrJC-Fi_Misc_pt106

➤ Record of Comm. Proceedings ... RCP

➤ **



TOMMY G. THOMPSON
GOVERNOR
JAMES R. KLAUSER
SECRETARY

June 20, 1995

✓ Honorable Joseph Leean, Co-Chair
Senate Committee on Finance
115 South, State Capitol
Madison, WI 53702

Honorable Ben Brancel, Co-Chair
Assembly Committee on Finance
317 North, State Capitol
Madison, WI 53702

Dear Senator Leean and Representative Brancel:

I am writing in regard to the organization of the Wisconsin Advanced Telecommunications Foundation ("Foundation"), and the related implementation of the state funding contribution under s. 14.28(4) of the Wisconsin Statutes. Joint Committee on Finance ("JCOF") approval is required to release certain funds for the Foundation.

The Foundation was created by 1993 Act 496. As required, it will soon be organized as a Chapter 181 nonprofit corporation, and will be operated with the participation of both the state and at least five telecommunications providers doing business in Wisconsin. The purpose of the Foundation is to fund advanced telecommunications technology application projects and efforts to educate telecommunications users about advanced telecommunications services. The benefactors of the Foundation will be local units of government, educational institutions and libraries, and local school districts.

Section 14.28(4), Stats., provides for an initial state funding contribution of \$500,000 to be released from the appropriation under s. 20.855(4)(d), subject to the approval of the Joint Committee on Finance. The JCOF may not release this contribution until it determines that the Foundation has received direct contributions to its endowment fund from telecommunications providers totaling at least \$1 million dollars. If the JCOF does not release the state funding contributions by June 30, 1995, that money will lapse.

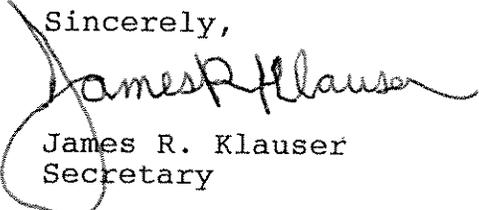
Honorable Joseph LEEAN
Honorable Ben BRANCEL
June 20, 1995
Page 2

The Foundation's directors, which were nominated by the Governor in May, recently appeared before Senator Cowles' Committee on Environment and Energy, which took executive action on Monday, June 12, 1995, to send the nominations to the full Senate. Confirmation by the Senate is scheduled for June 20, 1995. Articles of Incorporation will then be filed, a checking account established, and the telecommunication providers will make their pledged contributions. This first Foundation Board meeting will be held on June 27, at which time all prior actions taken on its behalf will be ratified.

Therefore, by June 27, 1995, all necessary conditions for release of the state funding contribution will be met. Accordingly, on behalf of the Governor's Office, the Department of Administration, and the Wisconsin Advanced Telecommunications Foundation, I would like to request a meeting of the Joint Committee on Finance before June 30, 1995, in order to approve the release of the state contribution to the Foundation.

Please contact me or Deputy Legal Counsel Mark Saunders (266-9810) with any questions you may have. Thank you for your cooperation in this matter.

Sincerely,



James R. Klauser
Secretary

cc: Robert Lang
James Wigdale
Mark Saunders

MAY 10 1994



Mailing address:
P. O. Box 7871
Madison, WI 53707-7871

Cathy S. Zeuske
State Treasurer of Wisconsin

Phone: 608/266-1714
FAX: 608/266-2647

101 E. Wilson Street, Floor 5 • Madison, WI

May 5, 1994

The Honorable Joseph Leraan
The Honorable Barbara Linton
Joint Committee on Finance
Room 115 South, State Capitol
Madison, WI 53702

Dear Senator Leraan and Representative Linton,

On March 25, the State Treasurer's Office received a donation from Mr. Michael T. Sheedy in the amount of \$736.75.

These funds have been deposited pending approval and designation as provided in sec.20.907, Wis. Stats.

Please place this item on the next Finance Committee agenda under Sec.13.10, Wis. Stats., for the required approvals.

My office will need to be notified of the Committee's action in order to properly disperse the funds.

Sincerely,

A handwritten signature in cursive script that reads "Cathy Zeuske".

Cathy S. Zeuske
State Treasurer

cc: Mr. Michael T. Sheedy

Law Offices of
JACK G. WISNIEWSKI, J.D., CPA

815 North Cass Street
Milwaukee, Wisconsin 53202
(414) 276-9976 / FAX (414) 291-9560

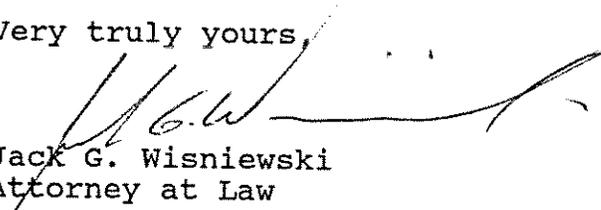
March 29, 1994

Wisconsin State Treasurer
P.O. Box 2114
Madison, WI 53701

Dear Sir/Madam:

Enclosed please find a check made payable to the Wisconsin State Public School Fund in the amount of \$736.73. Said check is submitted herein on behalf of Attorney Michael T. Sheedy and reflects his voluntary contribution to the State Public School Fund to be applied for any fund purpose as determined by the proper authority.

Very truly yours,


Jack G. Wisniewski
Attorney at Law

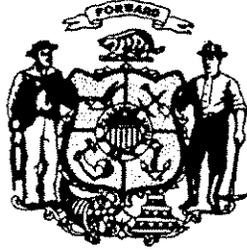
JGW/wsw
Enclosure

Date received 3-31-94
Amount received \$ 736.73
Office of State Treasurer
by: W

State of Wisconsin

SENATE CHAIR
JOE LEEAN

Room 119 South, State Capitol
P.O. Bo 7882
Madison, WI 53707-7882
Phone: 266-0751



ASSEMBLY CHAIR
BARBARA J. LINTON

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JOINT COMMITTEE ON FINANCE

August 18, 1994

Secretary James R. Klauser
Department of Administration
101 East Wilson, 10th Floor
Madison, WI 53702

Dear Secretary Klauser:

We have received the request dated July 8, 1994, under s. 36.46 from the University of Wisconsin System. We have no objection to this request, however, we have indicated several concerns in the attached letter to President Lyall.

Sincerely,


JOE LEEAN
Senate Chair


BARBARA J. LINTON
Assembly Chair

JL/BJL/ns
Attachment

cc: Members, Joint Committee on Finance

State of Wisconsin

SENATE CHAIR
JOE LEEAN

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ASSEMBLY CHAIR
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JOINT COMMITTEE ON FINANCE

August 18, 1994

President Katharine Lyall
University of Wisconsin System
1220 Linden Drive, Room 1720
Madison, WI 53706

Dear President Lyall:

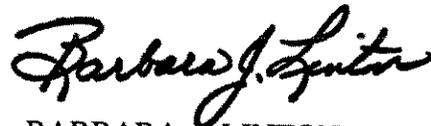
The purpose of this letter is to acknowledge receipt of your July 8, 1994, request to increase student fee-funded reserves under s. 36.46.

While we have no objection to this request, we, as does the Secretary of Administration, have concerns regarding the University's ability to accurately predict its auxiliary reserve levels. In particular, we are concerned with the continued revisions of previous years' requests, especially those resulting from efficiencies or conservative fund administration.

These savings should be returned to the students, rather than be part of reserve accumulations. Consequently, in future reports we would request that you indicate these savings and their impact on student fees.

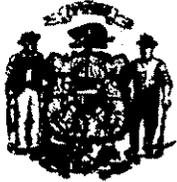
Sincerely,


JOE LEEAN
Senate Chair


BARBARA J. LINTON
Assembly Chair

JL/BJL/ns

cc: Members, Joint Committee on Finance



Legislative Fiscal Bureau

One East Main, Suite 301 • Madison, WI 53703 • (608) 266-3847

August 12, 1994

TO: Members
Joint Committee on Finance

FROM: Bob Lang, Director

SUBJECT: Letter and Report on Auxiliaries from University of Wisconsin System

In a letter dated July 20, 1994, which you received on July 29, 1994, the Department of Administration recommended approval of a July 8, 1994, request from the UW System to increase student fee-funded reserves (copies of both the DOA recommendation and the UW request are attached).

Under s. 36.46 of the statutes, in order for the Board of Regents to accumulate any auxiliary reserve funds from student fees, the Board must request approval from the Secretary of Administration and the Joint Committee on Finance no later than July 10 preceding the academic year.

The Secretary of Administration has 14 working days to notify the Co-Chairs of the Committee in writing whether the Secretary proposes to approve the requested fees or reserve fund accumulation. A letter and report from the University, dated July 8, 1994, requests approval from the Secretary of DOA to change the level of fee-funded reserves from an estimated \$44.7 million on June 30, 1994, to \$39.6 million on June 30, 1995; the request would increase fee-funded reserves at selected campuses by \$2.2 million in 1994-95, with offsetting decreases at other campuses of \$7.3 million. It should be noted that increases in individual reserves, by campus, must be approved even if the net reserve balance for all campuses decreases. In addition, approval is also sought for unplanned increases in auxiliary reserves of \$5.0 million in 1992-93 and \$1.9 million in 1993-94.

The Committee has 14 working days, after which it was notified of the Secretary's recommendation, to schedule a meeting to review the request. Therefore, if no meeting is scheduled by August 18, 1994, the request is approved.

As in previous years, while approving the request, the Secretary of DOA expressed concerns regarding the UW's ability to accurately predict its auxiliary reserve levels. The letter further indicates that DOA intends to closely monitor future fund balances.

As part of its operations, University of Wisconsin campuses administer auxiliary enterprises which are noninstructional facilities providing services to students. Resident halls, student union and food service activities comprise the largest auxiliary operations. Except for athletic programs which receive some general purpose revenues, auxiliary enterprises are self-supporting: that is, they are funded by charges to student users. Some of these charges are direct, such as dormitory and food service, while others are funded through student segregated fees. In 1994-95, UW System campuses will budget \$288.6 million under the auxiliary enterprises appropriation, representing 11.3% of all funds budgeted for the University.

To ensure that funds are available to support future auxiliary operations and capital costs, UW institutions maintain reserves (estimated at \$44.7 million as of June 30, 1994). Reserves are generated as a matter of policy to support operating, debt service, new capital and deferred maintenance expenditures. The current reporting requirement was instituted in response to a February, 1985, Legislative Audit Bureau report which concluded that "many campuses have accumulated large cash reserves based on imprecise formulas and without relating income needs to expenditure projections." The report advised that the University establish policies to prevent similar accumulations of reserves and suggested guidelines to determine levels of future funding. At the time of the audit, \$79.1 million had been accumulated in reserve funds, of which \$22.5 million was identified as surplus by the Audit Bureau. The Legislature, in response to the Audit Bureau report, in 1985 Wisconsin Act 29 (the 1985-87 biennial budget) applied these surplus funds to support library acquisitions and to temporarily reduce tuition increases for resident undergraduates. In addition, Act 29 created the provision requiring the approval of reserve accumulations.

The Regents have established reserve maxima using a methodology developed in consultation with the Audit Bureau, by campus and activity, which have served as an upper limit for a campus' reserves. These maxima, which are adjusted periodically, are based on: 2.5% of deferred maintenance costs, two years of debt service, two months of operating costs plus immediate needs and an allowance for planned major remodelling or new facilities. The current aggregate maximum is \$81.4 million, compared to the proposed reserve level of \$39.6 million as of June 30, 1995.

It should be noted that the Regents approved a segregated fee schedule as well as room and board charges on June 10, 1994 (see Attachment), which assume approval of this request. This request was not submitted for approval until the statutory deadline (July 10). Because of the time delay, any objection to the request could cause uncertainty in these fee levels after the fall semester has begun. If the Committee were to revise the amount of auxiliary reserve levels, adjustments to the room and board charges or segregated fees would most likely have to be made in the second semester, rather than as a refund of fall fees.

A concern of the current request, as well as with previous auxiliary reserve requests, is with the continued revisions of previous year's requests rather than with the specific request for the upcoming year. These revisions, which are often of greater magnitude than the original request, may warrant legislative review of the current approval process. For example, for 1992-93, the original request contained a projected net decrease in reserves of \$6.2 million; the following year, the approval of an unplanned increase of \$1.5 million was requested for 1992-93 and the approval of an additional \$5.0 million in unplanned increases for 1992-93 is contained in the current request. According to the DOA analysis, the average difference in final reserve balances from their original estimate has been over 46% for the past five years.

The reasons for these differences is twofold: some are caused by deferrals of projects or unexpected revenues (such as Madison intercollegiate athletics), while others are the result of efficiencies or conservative fund administration at the campus level. Examples of the latter are salary, debt service or utility savings which amounted to \$3.9 million of the \$5.0 million increase requested for 1992-93, and \$1.3 million of the \$1.9 million requested for 1993-94. If it is felt that these savings should not be part of reserve accumulations, but be returned to the students, the Committee could either require the UW to reduce the appropriate fees or indicate that such reductions should be University policy in the future. UW System Administration has also indicated that it intends to monitor campus budgets more closely in the coming year.

I hope this information meets your needs. If you have questions, please call.

BL/dls
Attachment

ATTACHMENT

UW System Auxiliary Operations Room and Board Charges and Segregated Fees 1993-94 and 1994-95 Academic Years

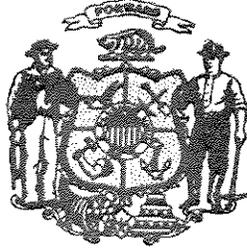
	Residence Halls			Meal Plans			Segregated Fees		
	1993-94	1994-95	Percent Change	1993-94	1994-95	Percent Change	1993-94	1994-95	Percent Change
Madison	\$1,960	\$2,025	3.3%	\$1,650	\$1,732	5.0%	\$311.00	\$320.00	2.9%
Milwaukee	1,888	1,964	4.0	1,100	1,156	5.1	339.20	411.90	21.4
Eau Claire	1,505	1,565	4.0	1,070	1,140	6.5	280.00	292.00	4.3
Green Bay	1,481	1,540	4.0	900	900	0.0	310.00	367.50	18.5
La Crosse	1,280	1,280	0.0	970	970	0.0	333.50	361.50	8.4
Oshkosh	1,366	1,396	2.2	840	860	2.4	244.00	244.00	0.0
Parkside	2,170	2,246	3.5	1,140	1,170	2.6	320.00	364.00	13.8
Platteville	1,200	1,250	4.2	1,422	1,478	3.9	315.50	325.50	3.2
River Falls	1,312	1,376	4.9	1,070	1,124	5.0	281.84	311.59	10.6
Stevens Point	1,620	1,726	6.5	1,280	1,280	0.0	355.10	364.80	2.7
Stout	1,364	1,404	2.9	1,180	1,214	2.9	300.48	314.88	4.8
Superior	1,408	1,408	0.0	1,196	1,316	10.0	242.50	264.50	9.1
Whitewater	1,420	1,460	2.8	1,006	1,036	3.0	317.28	334.32	5.4
Centers									
Baraboo							\$107.50	\$138.30	28.7%
Barron							142.50	143.00	0.4
Fond du Lac							171.50	178.90	4.3
Fox Valley							172.50	186.10	7.9
Manitowoc							119.50	120.00	0.4
Marathon							141.60	156.00	10.2
Marinette							117.70	118.20	0.4
Marshfield							135.70	141.00	3.9
Richland							159.80	170.00	6.4
Rock							129.40	141.80	9.6
Sheboygan							135.50	142.40	5.1
Washington							184.40	160.60	-12.9
Waukesha							125.00	122.60	-1.9

NOTE: Residence Hall rate is for double room (other options exist at some campuses). Meal Plan rate is for most popular meal plan or represents average spending per student for meals.

State of Wisconsin

SENATE CHAIR
JOE LEEAN

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ASSEMBLY CHAIR
BARBARA J. LINTON

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Madison, WI 53708-8952
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JOINT COMMITTEE ON FINANCE

August 1, 1994

TO: JOINT COMMITTEE ON FINANCE MEMBERS

FROM: Senator Joe Leean
Representative Barbara J. Linton
Co-Chair, Joint Committee on Finance

Attached is a copy of a request from the Department of Administration dated July 20, 1994 which was received in Senator Leean's office on July 29, 1994 pertaining to a request from the University of Wisconsin.

Please review this item and notify Senator Leean's office not later than Monday, August 15, 1994 if you have any concerns about the request or would like the Committee to meet formally to consider it.

Also, please contact us if you need additional information.

JL:BJL:ns

Attachments

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
101 East Wilson Street, Madison, Wisconsin



Mailing address:
Post Office Box 7864
Madison, WI 53707-7864

TOMMY G. THOMPSON
GOVERNOR
JAMES R. KLAUSER
SECRETARY

JUL 29 1994

July 20, 1994

The Honorable Joseph LEEAN, Co-Chair
The Honorable Barbara J. LINTON, Co-Chair
Joint Committee on Finance
113 South, State Capitol
Madison, WI 53702

Dear Senator LEEAN and Representative LINTON:

Enclosed is a request from the University of Wisconsin under s. 36.46 to increase student fee-funded reserves by \$2.2 million in fiscal year 1994-95. In addition, the UW requests approval of increases above the previously approved reserve amounts in 1992-93 (\$5.0 million increase) and in 1993-94 (\$1.9 million increase). Prior year increases are due to delayed or deferred capital projects and unanticipated cost savings or other revenues which increase the reserves balance.

In adopting s. 36.46, it was the Legislature's intent to ensure that the UW maintain prudent reserve funds to operate its auxiliary programs without collecting excessive student fees. The statute specifies that the Board of Regents may not accumulate any student fee-funded auxiliary reserves unless the fees and funds are approved by the Secretary of Administration and the Committee. This requirement took effect July 1, 1986.

Following new Regent policy and UW System Administration guidelines, student fee-funded auxiliary reserves were reduced from \$53.0 million at the end of fiscal year 1985-86 to \$37.6 million at fiscal year end 1987-88. However, reserves balances increased in FY91 and have grown to \$44.7 million since that time. This 18.9% increase is below the inflation rate of 24% for the time period, and the reserves balance is well below the \$81.4 million maximum as determined by Regent policy.

Fiscal Year 1994-95

For fiscal year 1994-95, the UW plans to increase certain reserves by \$2.2 million. The plan will *reduce* other reserves by \$7.3 million, but the statutes as historically interpreted require approval of all reserves increases, by campus and by program, regardless of the total net result. Consequently, the plan focuses on increases rather than net effects to the reserves balance.

Major increases from the following table include: (1) UW-LaCrosse segregated fees--accumulation of funds for construction of a new \$8.5 million student life building in 1996 [\$768,700]; (2) UW-Oshkosh housing--increased occupancy and a \$30 per student fee increase will accumulate reserves to address future year construction and remodeling work [\$223,800], and (3) UW-Platteville--staff reorganization and greater student participation in dorm/food service plans [\$228,100].

Reserves Increases for 1994-95

<u>Campus</u>	<u>94-95 Increase</u>	<u>Est. Reserve Bal 7/1/95</u>	<u>Program</u>
Madison	197,100	\$4,873,600	Seg Fees
Eau Claire	84,800	1,039,400	Housing
	144,500	1,891,000	Seg Fees
LaCrosse	768,700	4,340,000	Seg Fees
Oshkosh	223,800	1,137,700	Housing
Parkside	14,900	778,600	Housing
Platteville	228,100	1,168,800	Seg Fees
River Falls	163,500	723,200	Seg Fees
Stevens Point	109,300	1,021,800	Food Serv
Superior	8,000	360,000	Housing
Whitewater	100,300	515,100	Housing
	94,300	237,200	Food Serv
	37,400	1,112,200	Seg Fees
TOTAL	\$2,174,600	NA	

Fiscal Year 1993-94

The UW requests approval of a \$1.9 million increase in student fee-funded reserves above the amount approved by DOA and the Committee last July. Major increases include: (1) UW-Madison, where programs supported by segregated fees generated a \$454,000 surplus, largely due to intercollegiate athletics success and lower spending in the absence of a student government; (2) UW-Milwaukee housing, which increased reserves \$237,000 through deferral of capital projects and salary savings, \$214,300 from food service cost savings and \$255,600 from student union project deferrals, and (3) UW-Parkside, where an increase of \$227,100 came from student center salary and debt service savings, increased sales and summer football camp revenues.

Fiscal Year 1992-93

The UW requests approval of a \$5.0 million increase in reserves over the amounts approved by DOA and the Committee in its last two s. 36.46 requests. Major increases include: (1) UW-Madison, which increased intercollegiate reserves by \$903,600 eventually applied towards the accumulated operating deficit. Student union receipts and savings brought the net total to \$1,077,000; (2) UW-Milwaukee, where segregated fees reserves increased \$550,000 due to student union project deferrals, position vacancies, and increased sales. Health center interest income, salary savings and user charges added another \$150,000. Housing and food service generated \$354,600 largely through salary and utility savings; (3) UW-LaCrosse increases totaled \$708,000 through a combination of debt service savings, interest earnings, salary and cost savings, purchase deferrals and gate receipts; (4) UW-Stevens Point produced \$823,800 through food service and student center operations savings and fundraising to reduce an athletics deficit balance; and (5) UW-Eau Claire, where several deferred capital projects increased reserves by \$513,300.

Reserves Balances

In several instances, the 7/1/94 reserve balances exceed the maximum levels set by the Board of Regents. Some of the UW-Milwaukee, UW-Oshkosh and UW-Stevens Point accounts fall into this category. According to the UW plan, however, the high balances are temporary and projected balances for 7/1/95 are within the Regent maximums. [UW-LaCrosse housing is an exception, with accumulated reserves to be used for a new Student Life building. Construction is expected to begin in fall 1996. At UW-Oshkosh, students have requested maintaining a \$300,000 contingency fund in segregated fee reserves, which puts the overall balance near the Regent maximum.]

As noted previously, total student fee-funded auxiliary reserves have increased since fiscal year 1988-89 despite planned reductions. In the last six fiscal years reserves have held an average 46% more revenue than initial UW estimates in s. 36.46 requests. The reason for these differences appears to be a combination of: (1) legitimate planned as well as unanticipated project deferrals and program savings, and (2) conservative fund administration at the campus level, where intent is to avoid any deficit situations which may necessitate emergency action.

<u>Fiscal Year</u>	<u>Original Est Reserve Balance</u>	<u>Final Actual Reserve Balance</u>	<u>% Difference</u>
1988-89		36,863,200	
1989-90	26,516,100	37,569,800	41.7%
1990-91	27,417,600	39,491,300	44.0%
1991-92	26,090,000	43,430,000	66.5%
1992-93	30,921,800	46,931,500	51.8%
1993-94	35,348,000	**44,744,600	26.6%
1994-95	*39,596,300	---	

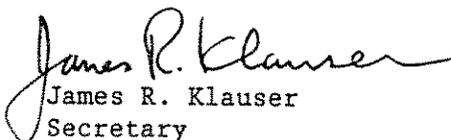
*current request

**updated estimate; not final until 7/95

Excess fee revenues collected can be used either to reduce student fees in future years or, if it can be shown that present balances are inadequate, campuses may retain the funds to increase reserves. Generally, the latter action is taken. As noted above, most balances are within the Regent maximums. The Department of Administration has some concerns regarding the UW's ability to accurately predict its auxiliary reserve levels and will closely monitor future fund balances.

The UW's current request for reserve increases of \$9.1 million appears reasonable and should be approved.

Sincerely,


James R. Klauser
Secretary



State of Wisconsin
Department of Public Instruction

Mailing Address: P.O. Box 7841, Madison, WI 53707-7841
125 South Webster Street, Madison, WI 53702 (608)266-3390/(608)267-2427 TDD

John T. Benson
State Superintendent

Steven B. Dold
Deputy State Superintendent

March 1, 1997

To: Senator Brian Burke
Representative Scott Jensen

From: John T. Benson
State Superintendent of Public Instruction

Subject: **Annual Report on the Status of the Preschool to Grade 5
(P-5) Program**

This annual report for the 1995-96 school year on the status of the Preschool to Grade 5 Program is submitted to the Joint Committee on Finance, and the chief clerk of each house of the legislature, as required under s.115.45(6)(b) and (c), Wisconsin statutes. During the 1995-96 school year, 39 elementary schools from four districts participated in this program. This included 21 schools in Milwaukee, seven schools in Kenosha, six schools in Racine, and five schools in Beloit. Schools received grants for a three-year period. Per s.115.45(10), Wisconsin statutes, a grant may not be renewed unless the state superintendent determines that the project met its objectives. Seven of the 39 schools have completed their three-year cycle in 1995-96, and this report will contain recommendations for their continued funding. This was the second year of a three-year cycle for six schools and the first year for 26 schools.

Specific testing is required under s.115.45(4)(b), Wisconsin statutes, in each school, each year. This report will review the performance of the schools on these tests. In addition, will discuss other program elements, including staff inservice, parent involvement and mobility reduction efforts implemented in the P-5 districts, and a report of the funding the districts received in 1996-97 pending completion of the 1997-98 grants. The evaluation report from each P-5 district is attached.

Milwaukee Public School District

Three-Year Evaluation

Two schools in the Milwaukee Public School (MPS) District, Charles Whitcomb Riley and Vieau, completed their three-year funding cycles in 1995-96. The longitudinal review involved evaluation of 13 separate outcome measures by school, from 1993-94 to 1995-96, compared to the P-5 and district-wide average. This included test results on the Wisconsin Reading Comprehension Test for third graders, the reading and math test results of the Iowa Test of Basic Skills (ITBS) for fifth graders, the P-5 Writing Sample Assessments for second and fifth graders, MPS Writing Sample Student Assessment for fifth graders, and reading, math and writing results from the Wisconsin Student Assessment System (WSAS) test for fourth graders. Also reviewed were pupil attendance and suspension rates by school and the level of parent and staff involvement activities at both schools.

Charles Whitcomb Riley School had a student enrollment of 658 students last school year, an increase of 3.6% from the previous year. It has a highly diversified student enrollment. Student poverty rose slightly in 1995-96 to 88%, but student mobility dropped from 38% to 30%.

Riley school met or exceeded the P-5 and district-wide average in nine of ten test results over the three year period, and showed performance gains in eight of ten in 1995-96 over the previous year. Particularly noteworthy is that 93% of third graders scored above the objective of having 80% of students scoring above the standard on the Third Grade Reading Test in 1995-96, compared to 77% district-wide. There were also strong performance gains in fifth grade ITBS reading and all of the writing sample assessments in 1995-96 over the previous two years. Riley met five of the six district accountability measures for elementary schools in 1995-96 and was classified as one of the "high achieving" elementary schools.

Vieau School is one of the district's eight K-8 schools. Its student enrollment in 1995-96 was 640, 2.4% more than the previous year. Its student poverty level rose to 93%, ranking it in the top 20% of all MPS elementary schools in terms of poverty. However, student mobility rate of 17% is among the lowest of all elementary schools.

Vieau School exceeded both the P-5 and district-wide performance levels in seven of the ten test results used in this evaluation. Particularly noteworthy is math performance on

the fifth grade ITBS test and math and writing performance on the fourth grade WSAS test. There was a slight decline over the last year in the school's performance in the second and fifth grade writing sample, although there was an increase in the performance level for fourth grade students.

Both Riley and Vieau had consistently high rates of student attendance, with 93% for 1995-96, exceeding the district-wide average. Both schools have very low levels of pupils suspended, and both experienced a significant increase in the number of parent involvements in school activities over the last three years. Riley experienced an increase in the number of staff inservice involvement over the last three years. Vieau had an increase in the number of parent involvement participants compared to the previous year.

James Whitcomb Riley and Vieau schools are recommended for continuation in the P-5 program.

Annual Evaluation

There are 21 P-5 schools in Milwaukee. These schools integrate a wide range of project components to create comprehensive programs for meeting the social and educational needs of disadvantaged students. Components such as parental involvement strategies, enrichment activities, reduced class size, innovative teaching techniques, and frequent monitoring of student progress are interwoven into holistic school programs. The evaluation measuring student achievement was based on the entire program of individual schools rather than on the separate program components.

Measures used to evaluate the P-5 schools included norm-referenced test scores in reading and math, performance on the Wisconsin Third Grade Reading Test, and writing samples that are holistically scored. An objective-referenced language test is also administered at the beginning and end of the year in third grade so that gains in achievement can be demonstrated.

Comparisons from 1994-95 to 1995-96 show that 11 schools demonstrated more gains than losses on test scores; eight schools remained at approximately the same level, and two schools experienced more losses than gains. P-5 schools have narrowed the gap in many student achievement measures between them and all MPS elementary schools and, in some cases, have exceeded the district-wide performance level. As a group, P-5 schools made remarkable progress in the percentage of students scoring above the standard in the Third Grade Reading Test in 1995-96. P-5 schools had an equal

percentage of third graders score above the standard as did MPS elementary schools district-wide.

The collective attendance rate for P-5 schools now mirrors the attendance rate for all MPS elementary schools, with an average attendance of 91% in 1994-95 and 92% in 1995-96.

Parent involvement is an important component of the P-5 Program. The number of parents participating in school events increased 3% from last school year, an increase of over 1000 parent participants. Planned activities were intended to enhance the quality and increase the quantity of parental involvement in the P-5 schools. A wide variety of activities were conducted, including advisory committee meetings, parent volunteer efforts, and field trips. In addition, parents were trained and encouraged to make special efforts at home to support their child's education with respect to homework, school attendance, and achievement.

Beloit Public Schools

Three-Year Evaluation

Two Beloit elementary schools, Burdge and Merrill, completed the third year of their grant cycle in 1995-96. The longitudinal review involved the evaluation of results on the Wisconsin Third Grade Reading Test, the California Achievement Test (CAT), and Computer Curriculum Corporation reports.

Burdge School students exceeded the objective of having 80% of students score above the standard on the Third Grade Reading Test, with 94% scoring above the performance standard. In 1995-96, Burdge met its California Achievement Test objective of increasing student achievement by two percentage points from the previous year in reading comprehension, with 43% of students scoring above the 50th percentile. In 1994-95, 41% of the students were achieving above the 50th percentile. By contrast, when students are ranked in stanines on the CAT, i.e., categories of high, average and low, the overall average for the three years was that 80% of students taking the test ranked in the average-high category in reading.

Merrill's objective on the CAT was to have 80% of the students score in the average-high category in math each year. Merrill exceeded its objective all three years. In 1995-96, 88% of the students scored in the average-high category in math; in 1994-95, 81%; and

in 1993-94, 88%. The overall average for the three years was 86%. Utilizing the Computer Curriculum Corporation reports, Merrill reached and exceeded its goal of having a nine month gain in reading levels for all three years and all grade levels. The gains ranged from one year to nine months for reading . The students also reached and exceeded the goal in math for all years except second grade math in 1993-94. The gains ranged from two years in first grade for 1995-96 to seven months in second grade in 1993-94.

Burdge and Merrill schools are recommended for continuation in the P-5 program.

Annual Evaluation

There are five P-5 elementary schools in Beloit. All schools had at least 69% of their students score in the average-high category in language, 70% in reading, and 79% in the average-high category in math on the CAT. The composite average of these three performance areas for all schools was 76% of the students scoring in the average-high category. On the 1995-96 Third Grade Reading Test, four of the five P-5 schools had 94% or better of the students scoring above the standard compared to 90% district-wide. Two schools, Hackett and McLenegan, had 100% of their students score above the standard.

The attendance rate for all P-5 schools increased in 1995-96 from the previous year. The attendance rate ranges from 94% to 95%. The suspension rate experienced an overall decrease. Less than half of one percent of students were suspended from any P-5 school during the 1995-96 school year. Two schools had no students suspended.

Four of the five schools have a P-5 home school coordinator. The home school coordinators are important to the process of involving the parents and maintaining communication with them. A variety of activities have taken place in the P-5 schools to involve families. Beloit staff realize that parents support their children's education in many ways, and that all parents are not able to come to school. Beloit P-5 schools have set a goal for more two-way communication with families, inviting participation on an idea level, if not a physical level.

Several P-5 schools reported a variety of in-school staff development as well as outside opportunities. Staff development activities designed by each school reflect concern with improved instruction in reading and written language, math, science, multicultural curriculum, and designed assessments to improve student performance. These staff development opportunities enable the schools to further prepare and enhance their ability to teach all children to the highest standards.

Of the five P-5 elementary schools in Beloit, three have demonstrated more gains than losses on annual testing; one has remained about the same, and one had more losses than gains. Four of the five schools had remarkable gains on the Third Grade Reading Test. Two schools had 100% of the students exceed the performance standard.

Kenosha Unified School District

Three-Year Evaluation

Two schools in Kenosha, Curtis Strange and Jefferson, completed their three-year cycles in 1995-96. The Third Grade Reading Test and the Iowa Test of Basic Skills were used to measure student achievement.

Curtis Strange School exceeded the Third Grade Reading Test objective of having 80% of students scoring above the standard, with over 90% of students scoring above the standard for all three years. During the 1994-95 school year, Jefferson increased the percent of students who scored above the standard on the Third Grade Reading Test to nearly meet the objective. On the Iowa Test of Basic Skills, the objective was that 45% or more of the students score above the 50th percentile. For the three-year period, both Curtis Strange and Jefferson elementary schools exceeded this standard in reading, language, and math combined, with 63% and 60%, respectively, meeting the objective. While the percent of students in need at Jefferson School has risen consistently during the last three years, the average daily attendance has improved, with both schools' attendance exceeding 94% in 1995-96.

Of the students who remained at Curtis Strange and Jefferson for the entire three-year period, 52% and 57%, respectively, had a three-year growth in math.

Curtis Strange and Jefferson schools are recommended for continuation in the P-5 program.

Annual Evaluation

There are seven P-5 elementary schools in Kenosha. The percent of poverty increased in three of the seven schools in 1995-96.

On the Iowa Tests of Basic Skills in language, five out of the seven schools had at least 45% of students score in the 50th percentile or above. In math, four out of the seven schools had at least 45% of the students score in the 50th percentile or above. In reading, one school had at least 45% of students score in the 50th percentile or above. In addition, 32% of the students in the P-5 schools scored at or above the district in language and math, and 30% scored at or above the district average in reading. Furthermore, P-5 students met or exceeded the national average grade equivalents on 51% of all language tests, 37% of all reading tests, and 43% of all math tests. On the Third Grade Reading Test, 80% or more of the students in three of the seven P-5 Schools scored above the performance standard.

Four of the seven schools continue to have an average daily attendance above 94%. Three of the schools also saw a decrease in the percent of students suspended. Many of the schools have employed parent liaisons or coordinators to provide communication between school and home. Getting parents actively involved in P-5 planning and school activities has had a major impact on attendance.

While all teachers in the P-5 schools attended in-school staff development, 76% participated in off-site conferences and workshops. These consisted of computers, software, portfolios, creating books for kids, dimensions of learning, academic workshops and conferences, conflict resolution, Reading Recovery, parenting skills, effective discipline, time management, integrating curriculum, inclusion, DARE, mentor program, self-esteem, holistic assessment, plus many other areas.

Racine Unified School District

Three-Year Evaluation

One school in Racine, Johnson, completed the three-year funding cycle in 1995-96. The Wisconsin Third Grade Reading Test and the California Achievement Test were used to measure student attainment of objectives.

Johnson Elementary School students met the objective of having 80% scoring at or above the standard in all three years, with over 92% scoring above the standard for the 1995 school year, compared to 86% district-wide. On the California Achievement Test, the objective was that 45% of students or more score above the 50th percentile. Johnson school students exceeded the performance standard on all 22 subtests.

Johnson school average daily attendance was 94.5% for the 1995 school year, an increase from 93% in 1994-95.

One of Johnson's goals was to provide programs that promote awareness, respect, and value of their students' cultural richness and diversity. Five school-wide multicultural events were conducted during the school year.

Johnson school is recommended for continuation in the P-5 program.

Annual Evaluation

Each of the six Racine P-5 schools set academic goals for student achievement. A total of 47 specific objectives were identified. Fifty-five percent of the objectives were met. Three of the six schools met the 80% goal for the Third Grade Reading Test, and two other schools had over 76% of their students scoring above the standard, almost meeting the objective. On the P-5 Writing Sample Assessment, both second and fifth graders scored higher than the program-wide average mean. Student average daily attendance was above 93% at all six schools. The out-of-school suspension goal was met by one of the two schools that listed that goal. Staff development activities were conducted at five of the six schools. Parent involvement activities were conducted at all six schools.

An intensive four-year-old program was provided to "improve pupil readiness for kindergarten." A total of 157 youngsters in three sites completed all or part of the program year. The combination of the developmental preschool program for the children and cooperative teacher-parent involvement resulted in the achievement of significant growth rates for the 119 students whose end-of-year progress in work habits, social and emotional development, language/cognitive development, and music/art was available.

Staff development and parent involvement are important components of the P-5 program. A wide range of staff inservice opportunities were provided with a variety of topics related to the goals of the P-5 program. A total of 825 staff members at the six P-5 schools attended 81 inservice sessions which covered topics such as reading/writing workshop, CAT training, how to best meet student needs, portfolio workshop, math workshop, computer inservice, and writing assessment training. In addition, teachers and assistants attend district inservice sessions.

A total of 455 parents attended 27 workshops and inservice sessions at five P-5 schools during 1995-96. These sessions covered topics such as homework choices, stress

management, anger management, FAST (Family and School Together), primary tutoring, gang workshops, and computer inservice.

A total of 232 parent activities were reported for the six P-5 schools during 1995-96. A total of 17,566 parents attended these events. These activities were intended to improve the quality and quantity of parent participation in the P-5 schools. A wide variety of activities were conducted, including PTA meetings, parent/teacher conferences, P-5 Advisory School Council meetings, bilingual advisory meetings, positive action activities, Special Persons Day, many social events, and field trips.

Evaluation Summary

Three-Year Evaluations

Seven schools completed three-year grant cycles. All seven schools are recommended to continue in the P-5 program. They all demonstrated a pattern of improved achievement reflected on at least two measures determined by the school and approved by the P-5 Advisory Council.

Annual Evaluations

Examination of assessment results showed growth in some areas for all P-5 schools:

1. Sixteen schools showed overall achievement gains when compared to prior year's testing;
2. Sixteen schools maintained about the same levels of student achievement;
3. Seven schools did not show improved achievement overall, although they each had some areas of achievement gain.

The Milwaukee Office of Urban Education has taken on the P-5 program responsibilities and has continued to work closely with the P-5 districts and schools to improve the achievement of low-income, urban children. All administrative and statute requirements of the P-5 program are being met.

For the first time, in 1996, the Annual P-5, Title I Programs Sharing Conference was joined with the PreCollege Program Conference. This collaboration, designed to serve

the same students at different stages of their education, links these programs' services giving school staff, students, and parents a better understanding of the interrelationship among P-5, Title I, and PreCollege programs and offers some continuity and continuum of services from preschool through twelfth grade. This highly successful sharing conference, with more than 1,500 attendees, will be repeated in 1997.

The staff at P-5 schools are developing their knowledge of portfolios as a method of demonstrating student learning. They have attended workshops and devoted after-school time and Saturdays to define rubrics and standards for portfolios. Ideally, portfolio assessment involves student reflection on their own achievements, selecting items to be included in the portfolio, and explaining why each piece is important to them and what they have learned. Carrying out this process is an example of active student participation in their own learning and an accurate reflection of what is being learned. It places the student in the center of the learning process. The analysis of progress helps the student to set new goals for future learning.

Mobility Reduction

According to s.115.45, Wisconsin statutes, school districts may allocate up to 8% of their P-5 grant for mobility reduction. Whenever possible, parents have the option of accepting P-5 bussing back to the school of original enrollment for the year if they changed their address to another attendance area in the city during the school year. The intent is to slow mobility by providing school stability for these students. Dramatic increases in achievement due to mobility reduction efforts have not been documented, although each district documents slightly higher achievement scores for stable students.

P-5 school staff members have improved the learning environment and instruction. These factors, in addition to increased stability, influence the general improved achievement. Another factor is whether there are differences in families that choose to maintain school continuity for their children, both social and economic, that would contribute to increased achievement. Harder to measure are the effects of stronger home/school bonds nurtured by ongoing connections between families and school staff. The number of students transported decreased in the 1995-96 school year due to rising costs in transportation and exhausted funding allocated for this purpose.

Future Funding

The P-5 budget for the past six years has been \$6,670,000, an average of \$171,000 per school. Schools have been forced to reduce personnel because the P-5 budget has not increased along with the salary raises in personnel contracts.

The district's grants for the 1997-98 school year have not yet been calculated pending finalization of enrollment figures. An amendment will be forthcoming when completed information is available. In 1996-97, the districts received the following amounts:

Beloit School District	\$ 486,907
Kenosha Unified School District	\$ 875,998
Racine Unified School District	\$ 1,013,618
Milwaukee Public Schools	\$ 4,285,822

Individual schools within the target school districts are selected on a number of criteria, including percentage of low-income, at-risk students, achievement scores, and other factors that signal a school is in need of special support.

Funds are expended to enable schools to implement educational goals and objectives determined by the schools' needs assessment process. Such funds may be used to hire approved staff, reduce pupil/teacher ratio, provide curricular or instructional expertise not currently available support staff development and joint planning activities, promote family involvement activities, and/or purchase supplies, staff training, or equipment directly related to specified educational objectives. P-5 funds are supplementary to funds expended by the districts and are not used to fund basic items that the school district provides for all schools.

P-5 funds have been a strong strand in the safety net schools have constructed for their students. P-5 promoted site-based decision making to meet children's needs and has supported the flexibility to design and implement appropriate programs. P-5 has funded programs to strengthen teaching strategies, build family and community involvement in the schools, and strengthen children's academic achievement.

This report responds to the informational needs of the Joint Committee on Finance related to the P-5 program. The parents and children of the P-5 recipient schools appreciate legislative support of this program.

Readers of this report might find the following case studies of interest. Schools from two of the P-5 districts submitted the following illustrations of the benefits of P-5 program to their students:

This fourth-grade Beloit district student has eight different addresses listed on his cardex located in various parts of the city of Beloit. He has continued at his original P-5 school since kindergarten by taking advantage of the P-5 mobility reduction option. He has consistently scored above the 50th percentile in reading, language arts, and math on the CAT test. He scored 56 out of 60 on the Wisconsin Third Grade Comprehension Test. He is a typical fourth-grade student, with behavior referrals included in his folder for misbehavior from time to time. We believe that because of P-5 he has been able to learn and grow in a consistent environment and achieve to his potential.

Samuel was a student at Johnson Elementary in Racine. He had the potential to be a very successful student, but his tardiness and truancy habits were interfering with his grades. The P-5 home school worker immediately started to make home visits to this family. She helped Samuel's parents see the importance of his being on time and not missing any school. She shared parenting books, videos, and other information to help them help their son be successful. She also purchased an alarm clock for the family, so they would get Samuel up in time to get ready for school.

After a few weeks, Samuel's grades really started to improve. He wasn't missing that important instructional time at the beginning of the morning when he had usually been tardy. Also, he was attending school on a regular basis, so his truancy problem completely vanished. Soon Samuel was on the honor roll and was given leadership positions in clubs and other activities. Without the intervention of the home school worker, who is employed through the P-5 program, this student may not be where he is today.