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☞ Details: Audit requests, 2006

(FORM UPDATED: 08/11/2010)

WISCONSIN STATE LEGISLATURE ... PUBLIC HEARING - COMMITTEE RECORDS

2005-06

(session year)

Joint

(Assembly, Senate or Joint)

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COMMITTEE NOTICES ...

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INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL

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- Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)
(**ab** = Assembly Bill) (**ar** = Assembly Resolution) (**ajr** = Assembly Joint Resolution)
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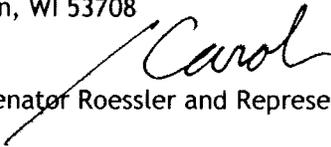
State Representative
Kitty Rhoades

PO Box 8953 Madison, WI 53708
Phone: 608-266-1526
Toll Free: 1-888-529-0030
Rep.Rhoades@legis.state.wi.us

June 2, 2006

Senator Carol Roessler, Co-Chair
Joint Legislative Audit Committee
Room 8 South State Capitol
Madison, WI 53703

Suzanne Jeskewitz, Co-Chair
Joint Legislative Audit Committee
Room 314 North State Capitol
Madison, WI 53708


Dear Senator Roessler and Representative Jeskewitz:

I am writing to request an audit of the Student Achievement Guarantee in Education (SAGE) program. I believe an independent audit is necessary to determine how SAGE money has been spent and to what extent the program is a reflection of the requirements of state law.

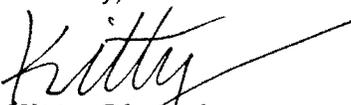
One of the most basic requirements for schools participating in SAGE is maintaining a 15:1 student-teacher class size ratio in kindergarten, first, second & third grades. However, in its interpretation of this clearly written law, DPI on a regular basis allows SAGE schools to uphold a 15:1 student-teacher ratio in "core" classes and exceed that ratio in "non-core" classes.

It also appears that by way of "informal agreements," DPI grants certain SAGE schools the ability to further exceed the statutory 15:1 class size requirement, a direct violation of the statute. Since DPI is doing this off the record, we cannot identify why this is being done or whether DPI policies are being applied consistently. Furthermore, in a May 31st Milwaukee Journal Sentinel article, "State Tightening Class-Size Initiative," DPI officials admitted not knowing how some schools were using their money.

As you may know, DPI recently announced they will stop this informal practice and begin using the official waiver process required by statute when SAGE schools seek to exceed the 15:1 student-teacher ratio. DPI officials also admitted the formal waiver process may shed light on practices at SAGE schools that run contrary to program requirements.

I believe there must be accountability for how SAGE funding has been spent. As you know, approximately \$98 million will be spent *annually* on SAGE in this biennium alone. Parents, teachers, and above all students, deserve to know how money for the program has been spent and whether it is achieving its intended goals.

Sincerely,


Kitty Rhoades
State Representative
30th Assembly Representative



State Representative
Kitty Rhoades

PO Box 8953 Madison, WI 53708
Phone: 608-266-1526
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June 2, 2006

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Sincerely,

Kitty Rhoades

State Representative
30th Assembly Representative

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Schools miss class-size goal

Early-learning SAGE program falling short

By AMY HETZNER
ahetzner@journalsentinel.com

Posted: March 19, 2006

Sitting at their desks, reading or carefully writing on wide-lined paper, the students waited their turn to join second-grade teacher Erin Heiman at the back of her Dousman Elementary School classroom.

Advertisement It's the easiest way for Heiman to personalize reading instruction in a class that swelled to 25 students this year because of a housing boom in western Waukesha County - despite state money the school received to reduce class sizes to nearly half that amount.

"I guess we're just trying to do the best we can," Heiman said of the school's effort to follow its contract as part of the Student Achievement Guarantee in Education program, or SAGE. "And it's harder because, in the area we have right now, there are so many subdivisions."

Now in its 10th year and facing its first funding boost since its inception, SAGE is long past the point where it can be considered just an experiment. But schools throughout Wisconsin, like Dousman, are struggling to enforce the most basic tenet of the program - its 15-to-1 student-teacher ratio in kindergarten through the third grade.

Milwaukee Public Schools, which is slated to receive nearly one-third of the \$96 million to be distributed to schools in 2005-'06, has staffed many of its SAGE-funded schools with two teachers for every classroom of 30 students as allowed by law due to space pressures. This year, MPS also received permission from the state to allow four of its 86 SAGE schools to exceed the program's student limit in the second and third grades.

Money is cited as the major issue by most. The state's allocation of \$2,000 for every low-income student hasn't changed since the program began in 1996-'97, although a deal struck between key lawmakers in the state would raise that reimbursement by \$250 per child in the 2007-'09 budget. In schools where the percentage of low-income students has dropped, school leaders have found the program hard to afford.

Exceeding ratios

If his school couldn't exceed the SAGE ratios, Burdick K-8 School Principal Robert Schleck said his school probably would have dumped the program.

"There's different models that are being used throughout the city," he said, noting that in some SAGE classrooms, groups of students are pulled into the hallway or other locations during the day to maintain the teacher-to-student ratio.

Particularly in schools with fewer low-income students, which receive less SAGE funding, the state Department of Public Instruction has been willing to allow classrooms to exceed the law's 15-student cap, although it often requires that they have extra personnel for reading and mathematics.

State DPI data show that at least 40% of SAGE schools employed half-time teachers to meet the program's requirements in 2004-'05.

"If they call us and say 'We just don't have space, next year we have this big bulge at kindergarten, what will we do,' we'll work with them," said Margaret Planner, assistant state superintendent for reading and student achievement.

But Stevens Point School Board member Mark Ptak said he is concerned about such compromises.

He said he has seen a "whittling down of services" provided as part of SAGE as class sizes have grown to 18 and 22 students each.

If the district needs to spend its own money to live up to the SAGE requirements, it should do it, Ptak said.

"If we don't do it, they should yank the money and give it to someone else," he said. "I think now they need to start enforcing the rules . . . 15-to-1 student-teacher ratio, not 18-to-1, not 19-to-1, 20-to-1 . . . or they should change the law."

SAGE was enacted by the Legislature in 1995 on the heels of the Student Teacher Achievement Ratio project in Tennessee. STAR studied more than 7,000 students in 79 schools over four years, and determined that students in small classes that averaged 15 students did better than those in larger classes.

This year, 495 Wisconsin schools are slated to divide more than \$96 million in funding from SAGE - \$2,000 for each student in kindergarten through third grade enrolled in a SAGE school who qualifies for free or reduced-price lunch.

The funding method has been a boon to some school districts, particularly those with small schools and already low student numbers. In Wisconsin Rapids, for instance, Superintendent Dean Ryerson said a recent budgetary review of SAGE found that the school system would save only \$2,000 if it quit the program, which gives the district more than \$1 million annually.

But SAGE has busted budgets in other districts that say they have had to spend more of their own money to sustain smaller class sizes.

The Racine Unified School District estimates it saved hundreds of thousands of dollars by ending SAGE at three of its elementary schools and moving the program into a school with a high proportion of low-income students.

At Dousman Elementary, which receives only \$60,000 per year for a low-income student population that hovers around 10% in the early grades, Principal Barb Reamer said the money so far has helped pay for the equivalent of one full-time reading teacher.

"We've really struggled with how to honor SAGE," Reamer said. "Each year, we look at it and say 'Is this something we can do?' It's not something we take for granted."

A deal struck between Democratic Gov. Jim Doyle and Republican Assembly Speaker John Gard that allows an increase in the number of students participating in Milwaukee's voucher program also will boost SAGE funding by \$25 million - or \$250 per student - in the 2007-'09 budget.

The money will come too late for one school.

Milwaukee's Tippecanoe Elementary School could not find a way to keep SAGE next school year without cutting its art, music, and physical education instructors, as well as the guidance counselor. With the loss of SAGE, classes are expected to jump to about 27 students.

Dawn Bell, a Tippecanoe parent whose son is a kindergartner at the school, worries about what will happen.

"A lot of people are sending their kids there because they've got smaller class sizes," she said. Her son's classroom usually has two teachers for 30 students, and on one recent week, one of the teachers was absent. "You could tell that (the other) was a little flustered, a little overwhelmed," Bell said.

While most educators like the idea of class-size reduction, they also say smaller classes aren't always the answer.

Olga Pallan, a teacher in the SAGE program at White Rock Elementary School in Waukesha, has had up to 18 students in her Spanish-speaking kindergarten class with no additional help. This school year, she has 13 students.

"There's a difference, but mostly it depends on the behavior of the children," Pallan said. "Sometimes you can get a class of 19, and they'll be just fabulous."

Sarah Carr of the Journal Sentinel staff contributed to this report.

From the March 20, 2006 editions of the Milwaukee Journal Sentinel
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**State Representative
Kitty Rhoades**

PO Box 8953 Madison, WI 53708
Phone: 608-266-1526
Toll Free: 1-888-529-0030
Rep.Rhoades@legis.state.wi.us

April 19, 2006

Department of Public Instruction
Superintendent Libby Burmaster
Hand-Delivered

Dear Superintendent Burmaster,

The purpose of this letter is to seek clarification on policies regarding the Student Achievement Guarantee in Education (SAGE) program. It has come to my attention that various schools have brokered informal agreements with DPI allowing them to exceed the 15:1 student-teacher ratio required in state law. In particular, it appears several schools in the Milwaukee Public School District (Burdick, Garland, Ninety-Fifth, and Victory) have been granted an "Agreement to Create Temporary Flexibility" by DPI to exceed the 15:1 student-teacher ratio in the 2nd and 3rd grades.

Were these "Agreements to Create Temporary Flexibility" part of the official waiver process established by state law in 1995? (State Statute §118.38) As you know, DPI has used this waiver process in the past to grant certain exceptions to SAGE requirements, including those pertaining to site designations. If the MPS "Agreements to Create Temporary Flexibility" were not made through the waiver process as other SAGE exceptions have been, can you tell me why not and under what authority DPI granted these informal agreements?

I am also seeking information on other schools in Wisconsin that may have class size policies inconsistent with the statutory 15:1 student-teacher ratio requirement. For example, how do participating SAGE schools in the Madison Public School District enforce the 15:1 class size requirement? Do the SAGE class size policies in place in Milwaukee and Madison Public Schools apply to other SAGE schools throughout the state?

Thank you in advance for your assistance with these questions. It is important that there is a message of consistency with regard to SAGE requirements to reduce the perception that certain schools are afforded flexibility while others are not.

Please contact me if you have any questions regarding my request or if I can be of any assistance in this request.

Sincerely,

Kitty Rhoades
State Representative
30th Assembly District

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FOR
EVERY
CHILD



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

May 9, 2006

Representative Kitty Rhoades
Room 320 East, State Capitol
PO Box 8953
Madison, WI 53708

Dear Representative Rhoades:

Thank you for your recent letter to State Superintendent Burmaster regarding the Student Achievement Guarantee in Education (SAGE) program. For your information, I have enclosed a copy of the current guidelines prepared by the department to aid districts in the implementation of SAGE. This guidance can be found on the department's website at <http://www.dpi.wi.gov/sage/doc/guidelines.doc>.

The many requirements of SAGE can be found in §118.43. In addition to the reduction of class size, the program also requires: that the schools are available before and after school hours; that the school collaborate with community based organizations to make educational, recreational, community and social services available to all school district residents; a rigorous curriculum; and staff development and accountability. When taken as a whole, the department has determined that intent of the law was to provide small class sizes in the core academic areas of reading and math. This is consistent with both Wisconsin assessment requirements and ESEA requirements.

The flexibility "granted" to primarily low-poverty schools merely reflects the intent of the law and recognizes the multiple service delivery configurations commonly used by schools. Among the more prevalent delivery systems are block teaching, team teaching, pull-outs and part-time teachers. The department has consistently partnered with districts to meet all of the SAGE requirements, including the class size element. However, the department also recognizes the challenges faced by districts and has permitted small deviations from the class size limit. The overall statewide teacher/student ratio in 2005-06 for SAGE schools is 15.01:1 (92,521 students to 6,164.38 FTE teachers).

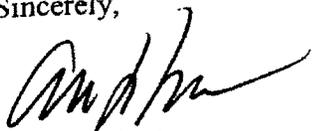
Most flexibility granted to SAGE school districts has not been via the formal waiver process outlined in §118.38, including the one you referenced for Milwaukee Public Schools, due to the department's recognition of the needs of districts to employ multiple service delivery configurations and our desire to be responsive to districts' need to often make implementation adjustments in a short timeframe. However, the department has been reviewing the processing of all waivers and it is our intent in the future to require districts seeking SAGE flexibility to

follow the provisions of §118.38. Guidance to districts in following the waiver process can be found on the department's website at: <http://dpi.wi.gov/cal/waiver.html>

You expressed concerns that certain school districts receive preferential treatment when it comes to flexibility. No district has received preferential treatment. The potential flexibility described above is applied to all districts and primarily low-poverty schools. I have enclosed a table showing the SAGE schools from 2004-05 and how they reported their implementation methods. This table has also previously been provided to the Legislative Fiscal Bureau.

Thank you for your interest in the SAGE program. If you have further questions, please contact Dr. Margaret Planner, Assistant State Superintendent for Reading and Student Achievement at 266-5450.

Sincerely,



Anthony S. Evers
Deputy State Superintendent

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State tightening class-size initiative

Schools receiving funding must get formal waiver to exceed 15-1 ratio

By AMY HETZNER
ahetzner@journalsentinel.com

Posted: May 31, 2006

In an effort to get a better handle on state money schools use to reduce class sizes, the state Department of Public Instruction plans to tighten its control over schools that seek to escape from standards set by a state class-size reduction program.

Advertisement The state agency has imposed a new requirement that schools seek formal waivers before exceeding a 15-to-1 student-teacher ratio guideline set by the Student Achievement Guarantee in Education program.

DPI Deputy Superintendent Tony Evers acknowledged that requiring schools to get a waiver could end some practices the DPI had not known were in effect. Yet the requirement isn't designed to limit flexibility schools have had, he said.

"Clearly, one of the things that's important about SAGE - and that research tends to support - is there have to be small class sizes," Evers said. "So if requests come in that don't do anything to reduce class sizes, the possibility of them passing (through DPI) are slim."

Previously, the DPI reached informal agreements with schools seeking to exceed the law's 15-to-1 student-teacher ratio while still collecting money from the SAGE program.

SAGE is to pay out \$96 million to 495 schools in the current school year. But in some cases, the DPI didn't know how some schools were using their money until a March newspaper article outlined ways SAGE schools were exceeding the class-size standard, Evers said.

One of the schools, Dousman Elementary School in Waukesha County's Kettle Moraine School District, used its SAGE funding to pay the equivalent of a full-time reading teacher even as class size reached 25 in one second-grade room.

Evers seemed to cite that case as a practice that would not be approved by DPI in its new procedure.

"I mean, that's an extreme example, but the fact is the law is about reducing class size," he said.

Kettle Moraine Superintendent Sarah Jerome said she was trying to get information about the change from the DPI. "I don't know what they're doing, nor do I know what its impact will be," she said.

In Milwaukee Public Schools, where four schools were allowed to exceed the SAGE program's class-size limit in second and third grades this school year, finance director Michelle Nate also said she hadn't heard of DPI's change and did not know if it would affect schools' eligibility for extra funding.

Evers said the DPI has yet to formally notify districts about the change.

Unease over spending

Even though the DPI's move to require formal waivers satisfies one concern that state Rep. Kitty Rhoades outlined in a recent letter to state schools Superintendent Elizabeth Burmaster, the Hudson Republican said she is still uneasy about how the DPI has allowed schools to spend SAGE money.

In particular, Rhoades questioned agreements that allowed schools to receive SAGE funds if they bring in extra teachers for reading and math lessons for classes that exceed the 15-student limit.

Rhoades said she would like her questions about the program answered before the state's next budget cycle to make sure she understands how the money is being used. She said she's not threatening funding for the program, which is supposed to get a \$25 million boost in the 2007-'09 budget in a deal struck by Doyle and Assembly Speaker John Gard.

"I think that SAGE, by definition, was pretty clear - 15-to-1, grades K, 1, 2 and 3," Rhoades said. "And apparently it's different than that."

From the June 1, 2006 editions of the Milwaukee Journal Sentinel
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School District of Amery

STEPHEN V. SCHIELL, District Administrator
115 Birch Terrace
Amery, WI 54001
Phone 715-268-9771
FAX 715-268-7300

BOARD OF EDUCATION
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December 10, 2001

Janice Zmrazek, SAGE Coordinator
Wisconsin Dept. of Public Instruction
P.O. Box 7841
Madison, WI 53707-7841

Dear Ms. Zmrazek:

On behalf of the School District of Amery, I am officially requesting a waiver in regard to the regulations that pertain to SAGE.

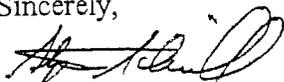
We are requesting permission to continue in the SAGE programming as a fully funded district for grades Kindergarten through 3. We are asking that we be allowed to receive the full funding without having to expand our teaching staff into Third Grade to lower the actual number of the student/teacher ratio to the 15:1 mark.

Due to our declining enrollment and the increased cost of providing SAGE teachers, we are not going to be able to expand teaching staff into the Third Grade for the 2002-03 school year. For the School District of Amery to continue with this program, we would have to include an additional \$193,333 in our budget to keep the staffing ratios so they are fully compliant with the program regulations. The District has already eliminated \$250,000 from the 2001-02 budget and we are anticipating the need to reduce costs by this same amount for the 2002-03 school year.

We are also asking for this waiver due to the fact that we know that SAGE does make a difference for our young students. All the feedback we've received from teachers and parents has been extremely positive for the smaller class sizes, and not being able to continue to provide this for K-3 would be a detriment to all of our students. We are hopeful that this one-year waiver will allow us time to continue with the program on our own with our full support in upcoming years. We know that, as time goes on, the benefit to our students will be shown in our reading and testing scores.

If you have any additional questions, please feel free to contact me at (715) 268-0272 or my Elementary Principal, Cheryl Meyer, at (715) 268-0266.

Sincerely,



STEPHEN V. SCHIELL
District Administrator

SVS/ks

*The mission of the School District of Amery is to foster
academic excellence, life-long learning and citizenship.*



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster
State Superintendent

Mailing Address: P.O. Box 7841, Madison, WI 53707-7841
125 South Webster Street, Madison, WI 53702
(608) 266-3390 TDD (608) 267-2427 FAX (608) 267-1052
Internet Address: www.dpi.state.wi.us

February 14, 2002

Stephen V. Schiell
District Administrator
School District of Amery
115 Birch Terrace
Amery, WI 54001

Dear Mr. Schiell:

This letter is being sent in response to your SAGE waiver request received by Janice Zmrazek on December 10, 2001.

It is good to know that your district wants to remain part of the SAGE program despite the current financial challenges. We are sympathetic to your situation and want to help in any way possible within the law.

Small classes in the primary grades are an educational strategy that has been proven to work to improve student achievement. Recent research indicates that multiple years of experience in small classes can provide significant long term educational benefits to the pupils involved. This research suggests that one or two years of small classes are generally not enough to ensure that children become confident readers and independent learners, to keep them from being retained or from dropping out, and to provide them with the background necessary to take advanced high school classes and be more likely to go to college. We are therefore very reluctant to grant the district a waiver (which is effective for four years) that would permit it to deny the benefits of small classes through the SAGE program to third grade pupils for that entire time period.

However, in consideration of the financial issues you describe, we are willing to amend the contract for Lien Elementary school to allow it to stay in the SAGE program during the 2002-03 school year with only limited implementation at third grade under the following conditions:

- The district will maintain 15:1 class sizes in grades K-2
- Academic objectives will be developed for third grade and the school will be accountable for their achievement
- Class sizes at third grade will be reduced as much as is possible with the SAGE aid generated on third grade pupils, or with federal aid, or whatever other resources may be available
- If additional federal funds for class size reduction become available to the district the first option for use of those funds will be to hire additional third grade teachers
- We will review the situation at the end of the 2002-03 school year to determine if the district's financial conditions have improved and the amendment is no longer necessary, or to determine if it is necessary or appropriate to extend the amendment for another year, or if it is necessary at that point to terminate the SAGE contract.

You may consider this letter as official approval of the amendment described above. Please contact Janice Zmrazek, SAGE Program Coordinator, 608/266-2489, if you have any questions.

We appreciate the time that you and elementary principal Cheryl Meyer have invested in this issue, and the desire of the board to have the school continue to participate in SAGE. We hope this compromise will provide the flexibility in program implementation that the district needs for next year, and still keep the door open for full implementation of SAGE in grades K-3 sometime in the future as the district's situation improves.

Sincerely,



Anthony S. Evers
Deputy State Superintendent

ASE: jsz

School District of Amery

STEPHEN V. SCHIELL, District Administrator

115 Birch Terrace
Amery, WI 54001
Phone 715-268-9771
FAX 715-268-7300

BOARD OF EDUCATION

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Dan Draxler, Director

March 28, 2003

Janice Zmrazek, SAGE Coordinator
Wisconsin Dept. of Public Instruction
P.O. Box 7841
Madison, WI 53707-7841

Dear Ms. Zmrazek:

On behalf of the School District of Amery, I am officially requesting a waiver in regard to the regulations that pertain to SAGE.

We are requesting permission to continue in the SAGE programming as a fully funded district for grades Kindergarten through 3. We are asking that we be allowed to receive the full funding without having to expand our teaching staff into Third Grade to lower the actual number of the student/teacher ratio to the 15:1 mark.

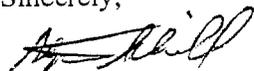
Due to our declining enrollment and the increased cost of providing SAGE teachers, we are not going to be able to expand teaching staff into the Third Grade for the 2003-04 school year. For the School District of Amery to continue with this program, we would have to include an additional \$203,000 in our budget to keep the staffing ratios so they are fully compliant with the program regulations. This figure only represents salary and fringes, not operating expenses that would be needed for teacher supplies for the classrooms.

We are currently using all of our Title II money to help subsidize one of our teaching positions in order to help lower the student ratios. In other words, there are not enough additional funds coming in from Title II or from the SAGE program to cover the District's actual costs.

We are also asking for this waiver due to the fact that we know that SAGE does make a difference for our students. All the feedback that we've received from our teachers and parents has been extremely positive for the smaller class sizes, and not being able to continue to provide this for K-3 would be a detriment to all of our students. We are hopeful that this waiver will allow us to continue with this beneficial program within our District.

If you have any additional questions, please feel free to contact me at (715) 268-9771 or my Elementary Principal, Cheryl Meyer, at (715) 268-0266.

Sincerely,



STEPHEN V. SCHIELL
District Administrator

SVS/ks



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 TDD (608) 267-2427 FAX (608) 267-1052
Internet Address: www.dpi.state.wi.us

Janice mailed 5/12/03
Elizabeth Burmaster
State Superintendent

May 13, 2003

Stephen V. Schiell
District Administrator
School District of Amery
115 Birch Terrace
Amery, WI 54001

Dear Mr. Schiell:

This letter is being sent in response to your March 28 letter to Janice Zmrazek that requested a waiver related to SAGE. Several requests for flexibility in program implementation had been received and it was necessary for the State Superintendent and cabinet to consider a number of issues before we could reply to you.

The State Superintendent understands and accepts the fact that it is not possible for schools to implement and maintain the SAGE class-size program requirement under the letter of the law at all times. We have allowed flexibility in a variety of ways. Our preference for schools where financial issues make it difficult to maintain class sizes of 15 or less for all K-3 students is to ensure that these students get the benefits of individualized attention and 15:1 class sizes for at least reading, language arts, and mathematics, or about half of the time of the regular school day. We expect this option to have been considered for the third grades before you implement the plan for the 2003-04 school year described in your letter. If this option is not possible you may proceed to carry out the SAGE implementation plan described in your letter of March 28 with the following conditions:

- The district will maintain 15:1 class sizes in grades K-2
- Academic objectives developed for third grade will remain in place and the schools will be accountable for their achievement
- Class sizes at third grade will be reduced as much as is possible with the SAGE aid generated on third grade pupils, or with federal aid, or whatever other resources may be available
- If additional funds for class size reduction become available to the district the first option for use of those funds will be to hire additional third grade teachers
- At the end of the year we will expect the school staff members to review the degree to which the identified SAGE academic objectives were achieved in all grades and for all students and include that information with the required program report.
- We will expect the district to resume implementation of SAGE with full time classroom teachers and class sections of 15 or less at third grade as soon as possible.

Thank you for the work you and your staff members have done to try to plan for the continued implementation of SAGE in the best way possible, given the existence of many competing needs and priorities and funding limitations. We hope this compromise will provide the flexibility in program implementation that the district needs for next year, while keeping the requirements in place as the ideal to be resumed when the financial situation improves.

Please feel free to contact me at any time with questions or to discuss other educational issues.

Sincerely,

Margaret Planner, Ph.D.
Assistant State Superintendent
Division for Reading and Student Achievement

MP:jsz



REC'D FEB 02 2004

CENTRAL SERVICES BUILDING
5225 West Vliet Street
P.O. Box 2181
Milwaukee, Wisconsin 53201-2181
Area 414: 475-8001
Fax 414: 475-8585

January 29, 2004

file

Ms. Elizabeth Burmaster
State Superintendent
State of Wisconsin Department of Public Instruction
P.O. Box 7841
Madison, WI 53707-7841

Dear Libby,

Thank you for the opportunity to discuss our SAGE funding challenges with you and Tony Evers last Thursday. During the past week I have had several conversations with Mr. Sam Carmen, Executive Director of the Milwaukee Teachers' Education Association, regarding this issue. Enclosed is the Milwaukee Public Schools SAGE 2004-05 Sustainability Plan.

I hope to hear from you soon that the Wisconsin Department of Public Instruction approves the plan given the fiscal challenges associated with SAGE aid and our goal of continuing the SAGE program in our 87 schools. Please contact me if you have any questions.

Sincerely,

William G. Andreopoulos
Superintendent of Schools

Enclosure

C: Sam Carmen, Milwaukee Teachers' Education Association
Tony Evers, Wisconsin Department of Public Instruction

MILWAUKEE PUBLIC SCHOOLS
SAGE 2004-05 SUSTAINABILITY PLAN
January 29, 2004

Introduction

Wisconsin's Student Achievement Guarantee in Education (SAGE) program, first implemented in 1996, is designed to increase the academic achievement of low-income students by reducing five-year-old kindergarten through grade three class size to 15 students to 1 teacher; establishing "lighted schoolhouses" that are open longer than the traditional school day; developing more rigorous curriculums; and structuring professional development and accountability for school professionals. The Milwaukee Public Schools currently has 87 SAGE schools. Six contracts that began in 1996-97 and were renewed in 2001-02 will expire at the conclusion of the 2005-06 school year, seven contracts that began in 1998-99 and were renewed in 2003-04 will expire at the conclusion of the 2007-08 school year, and seventy-four contracts that began in 2000-01 will expire at the conclusion of the 2004-05 school year.

As reported by Phil Smith, Alex Molnar, and John Zahorik in "Class-Size Reduction – A Fresh Look at the Data" published in *Educational Leadership*, September 2003, "SAGE findings support what most people could consider common sense: Fewer students means more teacher attention for each student. More teacher attention translates into fewer students slipping between the cracks, more students getting personal help with their work, and better relationships developing between teachers and students. Teachers of small classes also have more time to communicate with parents, inform them of their children's performance, and engage them in supporting their children's learning. The evidence that the SAGE program significantly increases student achievement is clear, consistent, and powerful. The program appears to promote effective teaching, mitigate the impact of poor attendance, and narrow the achievement gap between African Americans and whites."

SAGE Funding and Problem Analysis

The State of Wisconsin provides up to \$2,000 per full-time equivalent free or reduced lunch pupil in five-year-old kindergarten through grade three to support SAGE implementation. In 2003-04 SAGE aid to Milwaukee Public Schools was \$30,922,000. An additional \$502,000 was requested in January, 2004, based on the updated free and reduced lunch status of 2003-04 SAGE pupils.

The 2004-05 projected Milwaukee SAGE aid is \$30,588,000. Milwaukee Public Schools subsidizes the implementation of SAGE by allowing schools to charge the actual costs of SAGE teachers to the SAGE budget. (Generally, Milwaukee Public Schools budgets and charges school budgets teacher costs based on district averages.) Beyond this subsidy there is a \$14,190,735 shortfall based on district average teacher costs between the projected 2004-05 SAGE aid and the cost of teachers to achieve the 15:1 class size.

In the past, Milwaukee Public Schools has addressed the shortfall by providing class size reduction teacher support. In 2003-04, 88.5 class size reduction teachers were provided to SAGE schools. Milwaukee Public Schools has been informed that Title II guidelines require more funding be allocated to professional development, resulting in less funding for class size reduction teachers. Consequently, the \$8,136,875 funding budgeted in 2003-04 for 115.5 class size reduction teachers has been reduced to \$4,440,508 for 2004-05. Individual schools also contribute to bridging the funding gap by directing local school funds to SAGE implementation support.

The 2004-05 \$14,190,735 SAGE shortfall will be reduced to \$9,750,227 using the \$4,440,508 Title II class size reduction support. Milwaukee Public Schools requests permission from the Wisconsin Department of Public Instruction to address the remaining shortfall through the three strategies stated below. (Additional district and school budgeting strategies will be necessary to fully sustain 2004-05 SAGE implementation in 87 schools.)

Milwaukee's SAGE Sustainability Plan Strategy 1

Milwaukee Public Schools will continue to implement class sizes of 15:1 in five-year-old kindergarten through grade two. In schools where SAGE aid and allocated class size reduction support are insufficient to cover the costs of the SAGE teachers needed to fund class sizes of 15:1, a third grade alternative will be implemented. This alternative consists of class sizes of 15:1 for one-half of the school day when the basic subjects of reading, language arts, and mathematics are taught and 30:1 for one-half of the school day. We will provide support to teachers through the school learning teams to acclimate them to this model. It is estimated that at least 57 of the 87 SAGE schools will need to access this strategy. Each school would determine the best implementation plan that maximizes student achievement based on local options. This third grade alternative plan will provide a transition for students from second grade class sizes of 15:1 to fourth grade class sizes of 30:1.

This strategy has been discussed with and is supported by the Milwaukee Teachers' Education Association. The SAGE program is an investment that continues to pay dividends by helping to close the achievement gap.

Milwaukee's SAGE Sustainability Plan Strategy 2

Milwaukee Public Schools will administer SAGE aid centrally. Year-end school SAGE surpluses will be used in the following school year to address the district SAGE shortfall. Year-end school SAGE deficits will be the responsibility of the school. SAGE aid will be distributed to schools consistent with the goal of sustaining SAGE in as many schools as possible. This may result in high poverty schools that generate SAGE aid beyond the cost of the SAGE teachers receiving SAGE aid lower than \$2,000 per full-time equivalent free or reduced lunch pupil. A joint labor/management SAGE committee will be established to address implementation of this strategy as well as other SAGE issues.

The SAGE requirements beyond class size (i.e., "lighted schoolhouse," rigorous curriculum, professional development, and accountability) will continue to be addressed through district initiatives such as community learning centers, learning targets, comprehensive literacy and mathematics framework, literacy coaches, principal leadership and accountability, and teacher evaluation.

Milwaukee's SAGE Sustainability Plan Strategy 3

As previously communicated to the Wisconsin Department of Public Instruction, Milwaukee Public Schools will request the transfer of SAGE contracts from one school to another as necessary consistent with the full implementation of the Neighborhood Schools Plan.

ELM CREATIVE ARTS 2004-2005 S.A.G.E. PROPOSAL

INTRODUCTION

Elm Creative Arts is a Milwaukee Public School that serves over 550 elementary grade students from all neighborhoods. The students who attend Elm are representative of the diverse population found in the City of Milwaukee. The mission of Elm is to integrate the arts - visual art, music, drama, dance and creative writing - into a curriculum that supports the Milwaukee Public Schools Learning Targets and the State Academic Standards. Elm Creative Arts School has a commitment to both the arts focus of our program and the goals of S.A.G.E. The Elm Community feels that the continued success and achievement of our students are a direct result of *both* programs.

PROBLEM

At the present time, our Arts Program is about to be severely impacted by next year's budget. We have a \$250,000 shortfall to continue our current program for next year. Elm highly values S.A.G.E.; however, implementing the standard 15:1 pupil:teacher S.A.G.E. ratio at Elm Creative Arts School will mean eliminating our art, music, dance and drama teachers. If we are forced to break our S.A.G.E. contract, our students will not reap the benefits that the program offers. Elm has designed a proposal where S.A.G.E. will remain an integral part of how we deliver our curriculum and the Arts remain intact. The staff, parents and students at Elm Creative Arts School are respectfully asking the Wisconsin Department of Public Instruction to approve the 2004-2005 proposal outlined below.

ELM CREATIVE ARTS SCHOOL 2004-2005 S.A.G.E. PROPOSAL

We have a 2004-2005 projected enrollment of 75 students in each of the S.A.G.E. grade levels (i.e., K5 through Grade 3). K5 through Grade 3 will have four classes at each grade level. Each grade level will have three classrooms of 15 students. A fourth classroom at each grade level will be a traditional size class with 28-30 students. The traditional size classroom teacher will work congruently with the arts teachers, literacy coach, paraprofessionals and administrators to guarantee that during the reading, language arts and math periods, no child will be taught in a group larger than 15 students.

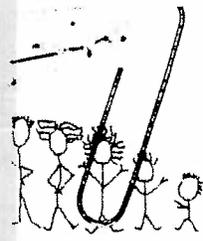
It will be during the blocks of time where reading, language arts and math are taught that the above mentioned support staff will be scheduled to work with the traditional size classroom teachers to deliver instruction in the core subjects. This could be accomplished by teaming with the classroom teacher in the room, scheduling the arts classes so that half the students are receiving arts instruction as the other half are taught by the classroom teacher or by one of the support staff taking a learning group to be taught in the library or art gallery.

To ensure that the traditional size classroom does not become racially, socially or academically unbalanced, parents will be asked to volunteer their child to be a member of the larger class. By offering incentives such as special art/academic projects or artists in residences, Elm is confident of and will ensure classroom diversity.

EA	2001-02 SAGE	SCH	2001-02 SAGE School Names	Ave 04-05	Pov 2001
3619	Milwaukee	0073	Allen-Field El	14.03	102.44%
3619	Milwaukee	0075	Alcott El	15.73	54.15%
3619	Milwaukee	0081	Barton El	14.75	85.74%
3619	Milwaukee	0089	Brown Street El	14.26	93.93%
3619	Milwaukee	0092	Browning El	14.85	101.27%
3619	Milwaukee	0093	Bruce El	14.56	87.10%
3619	Milwaukee	0094	Bryant El	16.08	90.74%
3619	Milwaukee	0095	Burbank El	16.13	78.14%
3619	Milwaukee	0098	Burdick El	15.45	45.65%
3619	Milwaukee	0101	Carleton El	16.32	89.28%
3619	Milwaukee	0104	Cass Street El	13.54	97.52%
3619	Milwaukee	0150	Emerson El	14.44	82.14%
3619	Milwaukee	0108	Benjamin Carson Acad of Sci	12.81	94.61%
3619	Milwaukee	0113	Clement Avenue El	14.86	65.75%
3619	Milwaukee	0114	Clemens El	15.67	100.00%
3619	Milwaukee	0116	Congress El	14.54	82.42%
3619	Milwaukee	0117	Cooper El	16.88	49.84%
3619	Milwaukee	0122	Curtin El	16.00	80.43%
3619	Milwaukee	0125	Doerfler El	14.42	90.55%
3619	Milwaukee	0127	Douglass El	15.82	102.55%
3619	Milwaukee	0131	Dover Street El	16.83	88.44%
3619	Milwaukee	0140	Milwaukee French Immersion	14.40	52.66%
3619	Milwaukee	0143	Eighty-First Street El	13.42	78.91%
3619	Milwaukee	0148	Elm Creative Arts El	16.05	48.05%
3619	Milwaukee	0149	Starms Early Childhood	16.67	109.64%
3619	Milwaukee	0152	Engleburg El	15.18	88.15%
3619	Milwaukee	0154	Thurston Woods El	13.79	81.57%
3619	Milwaukee	0155	Fairview El	15.81	40.10%
3619	Milwaukee	0167	Milwaukee Spanish Immersion	15.29	54.17%
3619	Milwaukee	0170	Fifty-Third Street El	15.65	75.77%
3619	Milwaukee	0173	Forest Home Avenue El	16.13	97.46%
3619	Milwaukee	0182	Fratney El	14.63	76.59%
3619	Milwaukee	0185	Gaenslen El	13.50	86.95%
3619	Milwaukee	0188	Garden Homes El	12.25	94.06%
3619	Milwaukee	0190	Garfield Avenue El	14.79	94.31%
3619	Milwaukee	0191	Garland El	13.56	67.94%
3619	Milwaukee	0192	Goodrich El	14.44	76.13%
3619	Milwaukee	0193	Grant El	15.50	86.77%
3619	Milwaukee	0194	River Trail El	15.92	78.96%
3619	Milwaukee	0196	Grantosa Drive El	13.64	84.82%
3619	Milwaukee	0197	Granville El	13.50	97.88%
3619	Milwaukee	0202	Greenfield Montessori El	15.94	94.78%
3619	Milwaukee	0205	Hampton El	15.06	98.79%
3619	Milwaukee	0206	Happy Hill El	14.64	91.97%
3619	Milwaukee	0208	Hartford Avenue El	15.39	63.33%
3619	Milwaukee	0211	Hawley Road El	14.08	67.43%

EA	2001-02 SAGE	SCH	2001-02 SAGE School Names	Ave 04-05	Pov R 2006
3619	Milwaukee	0212	Hawthorne El	15.56	104.01%
3619	Milwaukee	0214	Hayes City-Wide Bilingual Sch	15.00	95.55%
3619	Milwaukee	0217	Hi-Mount Boulevard El	15.03	90.63%
3619	Milwaukee	0223	Humboldt Park El	14.94	70.42%
3619	Milwaukee	0226	Milwaukee Sign Language El	14.53	77.08%
3619	Milwaukee	0241	Lancaster El	14.13	100.63%
3619	Milwaukee	0250	Lincoln Avenue El	14.36	94.24%
3619	Milwaukee	0253	Lloyd Street El	15.57	85.13%
3619	Milwaukee	0256	Longfellow El	15.00	104.48%
3619	Milwaukee	0257	Lowell El	13.72	76.21%
3619	Milwaukee	0265	Manitoba El	14.47	62.19%
3619	Milwaukee	0267	Maple Tree El	15.00	89.25%
3619	Milwaukee	0268	Maryland Avenue El	13.33	55.38%
3619	Milwaukee	0274	Mitchell El	14.40	95.38%
3619	Milwaukee	0277	Morgandale El	14.83	71.40%
3619	Milwaukee	0283	Neeskara El	14.33	71.12%
3619	Milwaukee	0289	Ninety-Fifth Street El	14.17	42.38%
3619	Milwaukee	0295	Zablocki El	15.65	78.75%
3619	Milwaukee	0301	Parkview El	16.13	79.13%
3619	Milwaukee	0304	Philipp El	13.38	85.50%
3619	Milwaukee	0312	Starms Discovery Learning Ctr	16.17	84.16%
3619	Milwaukee	0316	Acad of Accelerated Learning	15.55	64.07%
3619	Milwaukee	0319	Sherman El	14.53	84.18%
3619	Milwaukee	0325	Silver Spring El	13.58	86.57%
3619	Milwaukee	0328	Sixty-Eight Street Early Cldh	16.00	78.99%
3619	Milwaukee	0331	Sixty-Fifth Street El	15.82	85.71%
3619	Milwaukee	0337	Kluge El	15.14	98.72%
3619	Milwaukee	0343	Story El	13.29	96.69%
3619	Milwaukee	0344	Stuart El	16.00	81.57%
3619	Milwaukee	0347	Thirty-Eighth Street El	14.55	96.01%
3619	Milwaukee	0350	Thirty-Fifth Street El	14.88	86.90%
3619	Milwaukee	0360	Thoreau El	14.40	80.32%
3619	Milwaukee	0362	Tippecanoe El	15.63	36.59%
3619	Milwaukee	0365	Townsend Street El	15.07	93.68%
3619	Milwaukee	0368	Trowbridge Street El	14.88	75.39%
3619	Milwaukee	0377	Twenty-First Street El	15.21	97.30%
3619	Milwaukee	0380	McNair El	13.56	87.86%
3619	Milwaukee	0387	Victory El	15.91	68.20%
3619	Milwaukee	0397	Whitman El	15.00	64.46%
3619	Milwaukee	0401	Wisconsin Avenue El	13.89	92.84%
3619	Milwaukee	0525	Ralph H Metcalfe El	15.36	104.17%

MAR 25 2004



Beaver Dam
Unified School District

Learning for a Lifetime



705 McKinley Street, Beaver Dam, WI 53916

Phone: (920) 885-7300

Fax: (920) 885-7306

Brian S. Busler, Ph.D. ♦ District Superintendent ♦ (920) 885-7300

March 10, 2004

Margaret Planner, Ph.D.
Assistant State Superintendent
Division for Reading and Student Achievement
P.O. Box 7841
Madison, WI 53707-7841

Dear Dr. Planner:

This letter is a request for your assistance in helping SAGE schools within the Beaver Dam Unified School District. During the 2003-2004 school year, SAGE schools have served students K-3 in reading, language arts, and math, with a student/teacher ratio of 15:1.

I'd like to share a little background about the Beaver Dam Unified School District. During the 2003-2004 school year we experienced a budget shortfall of approximately \$650,000 and a budget shortfall of over \$700,000 is projected for the 2004-05 school year. As you can see with our decrease in budget funding, it has become a challenge to provide support to students in the district.

The one exception to this is in our SAGE program. The past several years we utilized our SAGE funding to serve K-3 students in reading, language arts, and math, with a student/teacher ratio of 15:1. In an ideal educational and budget setting, we would like to provide a 15:1 student/teacher ratio in all of our SAGE classes, including science and the other subjects considered the responsibility of the classroom teacher. However, this has become a challenge.

At the beginning of our SAGE contract, it was our intent to eventually implement a comprehensive SAGE Program. However, due to the unforeseen budget shortfalls and the current revenue limits, we are unable to meet that goal for the 2004-2005 school year. Therefore, we are requesting an extension of the initial SAGE Program contract requirements that permitted class size reductions in only reading, language arts, and math.

The data collected from our SAGE schools show that 15:1 class sizes in reading, language arts, and math, have a positive impact on student achievement. We are very concerned that to lose SAGE support would be very detrimental to our students and would adversely affect the gains made in reading, language arts, and math.

If you have any questions concerning our request, please do not hesitate to contact me at (920)885-7309 or e-mail me at buslerb@beaverdam.k12.wi.us.

Sincerely,

Brian S. Busler, Ph.D.
District Superintendent

BSB:mlp

LEA	2004-05 SAGE District	School	2004-05 SAGE School	Avg 04-05	Pct of 2004
0336	Beaver Dam	0080	Jefferson El	16.96	47.95%
0336	Beaver Dam	0100	Lincoln El	16.63	44.21%
0336	Beaver Dam	0110	Prairie View El	17.13	23.38%

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**State of Wisconsin
Department of Public Instruction**

Elizabeth Burmaster, State Superintendent

April 22, 2004

Brian S. Busler, Ph.D.
Superintendent
Beaver Dam Unified School District
705 McKinley Street
Beaver Dam, WI 53916

Dear Dr. Busler:

This letter is in response to your request to continue to use part-time teachers in some of the district's SAGE classrooms during the 2004-05 school year. Because of the difficult financial situation in many districts and recognition that providing small classes for as much of the day as possible, to as many children as possible, does address the intent of the law, the State Superintendent has decided to revise the SAGE guidelines to allow continued use of the implementation model you describe through the 2004-05 school year.

We hope this accommodation will provide the flexibility in program implementation that the district needs, while keeping the requirements in place as the ideal to be achieved as conditions permit. We continue to expect that should additional funds for class size reduction become available to the district, those funds will be used to provide full-time teachers to all SAGE grades and students to the maximum extent possible.

Thank you for your strong support of the SAGE program. Please feel free to contact me at any time with questions or to discuss other educational issues.

Sincerely,

Margaret Planner, Ph.D.
Assistant State Superintendent
Division for Reading and Student Achievement

MP:sjb

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State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

May 3, 2004

William G. Andrekopoulos
Superintendent of Schools
Milwaukee Public Schools
P.O. Box 2181
Milwaukee, WI 53201-2181

Dear Mr. Andrekopoulos:

We appreciate the efforts of the teachers and parents of the Elm Creative Arts School to design a creative way to both maintain the school's magnet program focus and provide most K-3 students with the benefits of the SAGE program. However, we cannot support a plan that varies from the class size requirement in the law. We hope the district will work together with Elm staff to find other resources so the SAGE program can continue at Elm next year. We will continue to work toward securing the increase in SAGE aid that many SAGE schools need to ensure their continued participation in the program.

This letter is also in response to your letter requesting approval of a SAGE 2004-05 Sustainability Plan that focused on three specific strategies. Strategy #1 requested permission to provide 15:1 class sizes in core content areas for half-days for grade three in the majority of district SAGE schools, with a 30:1 class size the remainder of the day. We cannot support a change in the implementation of SAGE that would result in a majority of the district's third grade pupils being in class sizes of 30 or more for half the day. Schools that have implemented SAGE with 15:1 or 30:2 classrooms in grades K-3 are expected to maintain those arrangements through the completion of their current 5-year contracts. We are not accepting any new exceptions that deviate from the requirements of the law, and are focusing attention on the important task of seeking an increase in SAGE aid from \$2,000 to \$2,500 per student.

Strategy #2 requested permission to administer SAGE aid centrally, and to redistribute SAGE carry-over funds to district SAGE schools experiencing a budget shortfall. At this time the law does not provide a school district with the discretion to move unspent SAGE aid from one school to another. We will be glad to work directly with schools to ensure all SAGE aid is used appropriately each year, or to work with you to find ways the district can move local funds to meet identified needs.

William G. Andrekopoulos

Page 2

May 3, 2004

Strategy #3 requested permission to transfer SAGE contracts between schools. In a letter dated December 15, 2003, we indicated willingness to assist the district in transferring SAGE contracts as appropriate or necessary to accommodate the neighborhood schools initiative and other structural changes.

These are challenging times for public education. We appreciate the district's efforts to ensure that the benefits of SAGE continue for as many pupils as possible, and we ask for your understanding and support as we work to secure additional funding to ensure those benefits can continue for many years into the future.

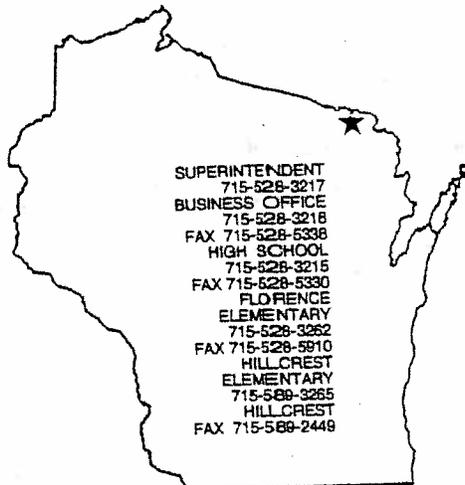
Sincerely,

Anthony S. Evers, Ph.D.
Deputy State Superintendent

AE:sjb

SCHOOL DISTRICT OF FLORENCE COUNTY

P.O. BOX 440
FLORENCE, WISCONSIN 54121



August 9, 2004

Elizabeth Burmaster, State Superintendent
Wisconsin Department of Public Instruction
P. O. Box 7841
Madison, WI 53707-7841

Dear Superintendent Burmaster:

It was a pleasure meeting you after your speech at the TRITON Academy in DePere on Thursday. I applaud you for your efforts on behalf of the children who live in the rural communities of Wisconsin.

As you are aware, our district is very fragile fiscally, and we are searching for ways to continue our quality programs as we strive to turn our fiscal situation around. For the past four years, SAGE funding has allowed our district to provide quality instructional programming in grades K-3 by significantly reducing our class sizes.

In the spring, our Board of Education voted to close a rural elementary school this fall in order to save considerable dollars. In doing so, our class sizes in grades K-3 will potentially increase to approximately 19 in each Kindergarten class, 19 in each first grade class, 23 in each second grade class, and 19 in each third grade class. (These estimates could be higher with new students entering the district or if the parents of students on open enrollment should decide to keep their children in the district.) Preliminary indications show that approximately 41% of these K-3 students are low income, with first and third grades being above 50%.

Our district is not in a financial position to hire four additional teachers with their own separate classrooms to reduce these numbers to the 15 to 1 ratio. Therefore, we would like to request that we use our SAGE funding to have additional teachers working in the K-3 classrooms during mathematics, reading, and language arts along with the regular classroom teachers to reduce the numbers to 15 to 1. Our K-3 classroom teachers are able to adjust their schedules to allow for such a structure.

We will be entering our fifth year of SAGE funding. It is our strong belief that this funding has played a significant role in increasing our student test scores on both the third grade Wisconsin Reading Comprehension Test and the fourth grade Wisconsin Knowledge and Concepts Exam. As indicated on your WINSS site, 97.3% of our third grade students at Florence Elementary performed at the proficient and advanced levels on the WRCT. All students were tested, including our special education students. On the

PARTNERS IN THE PURSUIT OF EXCELLENCE

Elizabeth Burmaster, State Superintendent

Page 2

August 9, 2004

4th grade WKCE, 87% of our students at Florence Elementary performed at the proficient and advanced levels in reading; 78% at the proficient and advanced levels in language arts, and 88% at the proficient and advanced levels in mathematics, while the state average in reading was 81%; in language arts, 78%, and in mathematics, 78%. We are proud of our children's performance and wish to continue this upward trend.

For the past several years, our district has been setting our instructional goals at a summer data retreat, and all professional development activities center around strengthening staff performance to achieve those goals. A copy of our district goals is enclosed, along with information on our summer *KEEP PACE* program. Each year, our goals have included increased emphasis on mathematics, reading, and language arts. All supplemental aid through Title I, Title II (Part A and D), Title IV, Title V, Comprehensive School Reform, and SAGE has been used to support our instructional goals. SAGE funding is an instrumental element in this support structure.

We, therefore, ask the Department of Public Instruction to grant our request to use SAGE funding in a creative fashion for the benefit of the children of the School District of Florence County.

If you should have any additional questions, please contact me at (715) 528-3217.

Sincerely,

SCHOOL DISTRICT OF FLORENCE COUNTY



Jan Dooley
District Administrator

c Janice Zmrazek

LEA	2001-02 SAGE DIST	SCH	2004-05 SAGE SC	AWR	ROWRC2005
1855	Florence	0040	Florence EI	16.44	42.54%



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

August 24, 2004

Jan Dooley
Superintendent
School District of Florence County
P.O. Box 440
Florence, WI 54121

Dear Ms. Dooley:

I am providing this response on behalf of the DPI SAGE Advisory Council to your request to implement SAGE with the use of part-time teachers in some of the district's K-3 classrooms during the 2004-05 school year.

You may proceed with the general plan described in your letter of August 9 with the following conditions:

- Maintain class sizes as close to 15 as possible for kindergarten and first grade for all regular classroom instruction.
- Use half time teachers at second and third grade as needed to ensure that at least during the time reading, language arts and mathematics instruction takes place all students are in groups of 15 or less.
- Consider implementing multiage classes or combined grades to provide full day 15:1 class sizes for as many K-3 students as possible.
- Consider allocating more of the federal ESEA Title II A funds to support class size reduction at K-3.
- Expand to full time sections at second and third grades if sufficient SAGE aid is available when the calculation based on the actual count of low income children is done in October.

I was glad to have a chance to meet you and discuss these issues with you over the phone again today. Thank you for the work you and your staff members have done to try to plan for the continued implementation of SAGE in the best way possible, given the existence of many competing needs and priorities and funding limitations. We hope this accommodation will provide the flexibility in program implementation that the district needs this year, and that conditions improve enough by next year to allow the district to resume full implementation of SAGE at all grades at that time.

Please feel free to contact me at any time if you have additional questions.

Sincerely,

Janice Zmrazek
SAGE Program Coordinator

CC: Margaret Planner



State Representative
Kitty Rhoades

PO Box 8953 Madison, WI 53708
Phone: 608-266-1526
Toll Free: 1-888-529-0030
Rep.Rhoades@legis.state.wi.us

April 19, 2006

Department of Public Instruction
Superintendent Libby Burmaster
Hand-Delivered

Dear Superintendent Burmaster,

The purpose of this letter is to seek clarification on policies regarding the Student Achievement Guarantee in Education (SAGE) program. It has come to my attention that various schools have brokered informal agreements with DPI allowing them to exceed the 15:1 student-teacher ratio required in state law. In particular, it appears several schools in the Milwaukee Public School District (Burdick, Garland, Ninety-Fifth, and Victory) have been granted an "Agreement to Create Temporary Flexibility" by DPI to exceed the 15:1 student-teacher ratio in the 2nd and 3rd grades.

Were these "Agreements to Create Temporary Flexibility" part of the official waiver process established by state law in 1995? (State Statute §118.38) As you know, DPI has used this waiver process in the past to grant certain exceptions to SAGE requirements, including those pertaining to site designations. If the MPS "Agreements to Create Temporary Flexibility" were not made through the waiver process as other SAGE exceptions have been, can you tell me why not and under what authority DPI granted these informal agreements?

I am also seeking information on other schools in Wisconsin that may have class size policies inconsistent with the statutory 15:1 student-teacher ratio requirement. For example, how do participating SAGE schools in the Madison Public School District enforce the 15:1 class size requirement? Do the SAGE class size policies in place in Milwaukee and Madison Public Schools apply to other SAGE schools throughout the state?

Thank you in advance for your assistance with these questions. It is important that there is a message of consistency with regard to SAGE requirements to reduce the perception that certain schools are afforded flexibility while others are not.

Please contact me if you have any questions regarding my request or if I can be of any assistance in this request.

Sincerely,

Kitty Rhoades
State Representative
30th Assembly District



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

May 2, 2006

Joyce Kiel, Senior Staff Attorney
Legislative Council
One East Main Street
Suite 401
Madison, WI 53703-3382

Bill Cosh
Office of Representative Dan Meyer
Room 306 East
State Capitol
P.O. Box 8953
Madison, WI 53708

Dear Ms. Kiel and Mr. Cosh:

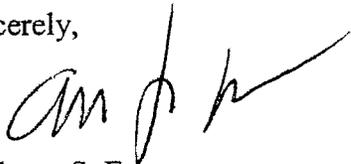
This letter is in response to your joint request for information about the Student Achievement Guarantee in Education (SAGE) program and compliance with Wis. Stats. §118.43. For your information, I have enclosed a copy of the current guidelines prepared by the department to aid districts in the implementation of SAGE. This guidance can be found on the department's website at <http://www.dpi.wi.gov/sage/doc/guidelines.doc>.

The many requirements of SAGE can be found in §118.43. In addition to the reduction of class size, the program also requires: that the schools are available before and after school hours; that the school collaborate with community based organizations to make educational, recreational, community and social services available to all school district residents; a rigorous curriculum; and staff development and accountability. When taken as a whole, the department has determined that intent of the law was to provide small class sizes in the core academic areas of reading and math. This is consistent with both Wisconsin assessment requirements and ESEA requirements. The flexibility "granted" to primarily low-poverty school districts merely reflects the intent of the law and recognizes the multiple service delivery configurations used by schools. Among the more prevalent delivery systems are block teaching, team teaching, pull-outs and part-time teachers. The department has consistently partnered with districts to meet all of the SAGE requirements, including the class size element. However, the department also recognizes the challenges faced by districts and has permitted small deviations from the class size limit.

Some people have expressed concerns that certain school districts receive preferential treatment when it comes to this interpretation. No district has received preferential treatment. The flexibility described above is applied to all districts and primarily low-poverty schools.

If you have further questions, please contact Dr. Margaret Planner, Assistant State Superintendent for Reading and Student Achievement at 266-5450.

Sincerely,

A handwritten signature in black ink, appearing to read 'Anthony S. Evers', written in a cursive style.

Anthony S. Evers
Deputy State Superintendent

Encl.

A QUALITY
EDUCATION
FOR
EVERY
CHILD



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

May 9, 2006

Representative Kitty Rhoades
Room 320 East, State Capitol
PO Box 8953
Madison, WI 53708

Dear Representative Rhoades:

Thank you for your recent letter to State Superintendent Burmaster regarding the Student Achievement Guarantee in Education (SAGE) program. For your information, I have enclosed a copy of the current guidelines prepared by the department to aid districts in the implementation of SAGE. This guidance can be found on the department's website at <http://www.dpi.wi.gov/sage/doc/guidelines.doc>.

The many requirements of SAGE can be found in §118.43. In addition to the reduction of class size, the program also requires: that the schools are available before and after school hours; that the school collaborate with community based organizations to make educational, recreational, community and social services available to all school district residents; a rigorous curriculum; and staff development and accountability. When taken as a whole, the department has determined that intent of the law was to provide small class sizes in the core academic areas of reading and math. This is consistent with both Wisconsin assessment requirements and ESEA requirements.

The flexibility "granted" to primarily low-poverty schools merely reflects the intent of the law and recognizes the multiple service delivery configurations commonly used by schools. Among the more prevalent delivery systems are block teaching, team teaching, pull-outs and part-time teachers. The department has consistently partnered with districts to meet all of the SAGE requirements, including the class size element. However, the department also recognizes the challenges faced by districts and has permitted small deviations from the class size limit. The overall statewide teacher/student ratio in 2005-06 for SAGE schools is 15.01:1 (92,521 students to 6,164.38 FTE teachers).

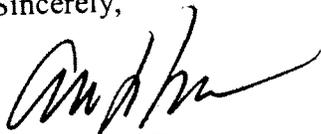
Most flexibility granted to SAGE school districts has not been via the formal waiver process outlined in §118.38, including the one you referenced for Milwaukee Public Schools, due to the department's recognition of the needs of districts to employ multiple service delivery configurations and our desire to be responsive to districts' need to often make implementation adjustments in a short timeframe. However, the department has been reviewing the processing of all waivers and it is our intent in the future to require districts seeking SAGE flexibility to

follow the provisions of §118.38. Guidance to districts in following the waiver process can be found on the department's website at: <http://dpi.wi.gov/cal/waiver.html>

You expressed concerns that certain school districts receive preferential treatment when it comes to flexibility. No district has received preferential treatment. The potential flexibility described above is applied to all districts and primarily low-poverty schools. I have enclosed a table showing the SAGE schools from 2004-05 and how they reported their implementation methods. This table has also previously been provided to the Legislative Fiscal Bureau.

Thank you for your interest in the SAGE program. If you have further questions, please contact Dr. Margaret Planner, Assistant State Superintendent for Reading and Student Achievement at 266-5450.

Sincerely,



Anthony S. Evers
Deputy State Superintendent