



# Joint Legislative Council's Report of the Study Committee on the Student Achievement Guarantee in Education (SAGE) Program

[2015 Senate Bill 31 and 2015 Assembly Bill 195; and  
2015 Senate Bill 32 and 2015 Assembly Bill 196]

February 18, 2015 (Revised May 4, 2015)

JLCR 2015-01

Wisconsin Legislative Council  
One East Main Street, Suite 401  
Madison, WI 53703-3382  
Phone: (608) 266-1304  
Fax: (608) 266-3830

[www.legis.wisconsin.gov/lc](http://www.legis.wisconsin.gov/lc)



# STUDY COMMITTEE ON THE STUDENT ACHIEVEMENT GUARANTEE IN EDUCATION (SAGE) PROGRAM

Prepared by:  
Katie Bender-Olson and Jessica Ozalp, Staff Attorneys  
February 18, 2015 (Revised May 4, 2015)

---

## CONTENTS

<b>PART I KEY PROVISIONS OF COMMITTEE RECOMMENDATIONS</b>	<b>3</b>
2015 Senate Bill 31 and 2015 Assembly Bill 195, Relating to a One-Year Extension of Student Achievement Guarantee in Education Program Contracts	3
2015 Senate Bill 32 and 2015 Assembly Bill 196, Relating to Achievement Gap Reduction Contracts Requiring Participating Schools to Implement Strategies for Improving Academic Performance of Low-Income Pupils in Reading and Mathematics, Granting Rule-Making Authority, and Making an Appropriation	3
<b>PART II COMMITTEE ACTIVITY</b>	<b>5</b>
Assignment	5
Summary of Meetings	5
Discussion of Bill Drafts	10
<b>PART III RECOMMENDATIONS INTRODUCED BY THE JOINT LEGISLATIVE COUNCIL</b>	<b>13</b>
2015 Senate Bill 31 and 2015 Assembly Bill 195	13
Background	13
Description	13
2015 Senate Bill 32 and 2015 Assembly Bill 196	13
Background	13
Description	14
<b>APPENDIX 1</b>	<b>15</b>
Committee and Joint Legislative Council Votes	15
<b>APPENDIX 2</b>	<b>17</b>
Joint Legislative Council	17
<b>APPENDIX 3</b>	<b>19</b>
Committee List	19

<b>APPENDIX 4 .....</b>	<b>21</b>
Committee Materials List.....	21

# PART I

## KEY PROVISIONS OF COMMITTEE RECOMMENDATIONS

---

The Joint Legislative Council recommends the following for introduction in the 2015-16 Session of the Legislature.

### **2015 SENATE BILL 31 AND 2015 ASSEMBLY BILL 195, RELATING TO A ONE-YEAR EXTENSION OF STUDENT ACHIEVEMENT GUARANTEE IN EDUCATION PROGRAM CONTRACTS**

Senate Bill 31 and Assembly Bill 195 allow the Department of Public Instruction (DPI) to provide a one-year extension on existing SAGE contracts set to expire at the end of the current 2014-15 school year. Senate Bill 31 and Assembly Bill 195 are companion bills, meaning they have identical content but were introduced separately in each house of the Legislature. The bills also prohibit DPI from renewing contracts expiring at the end of the 2014-15 school year.

The Study Committee on the Student Achievement Guarantee in Education (SAGE) Program intends these bills to work together with 2015 Senate Bill 32 and 2015 Assembly Bill 196, not to stand alone. Senate Bill 32 and Assembly Bill 196 are also companion bills. The one-year extension of SAGE contracts in the bills will allow a replacement program recommended by the committee in Senate Bill 32 and Assembly Bill 196 to be implemented in the 2016-17 school year.

### **2015 SENATE BILL 32 AND 2015 ASSEMBLY BILL 196, RELATING TO ACHIEVEMENT GAP REDUCTION CONTRACTS REQUIRING PARTICIPATING SCHOOLS TO IMPLEMENT STRATEGIES FOR IMPROVING ACADEMIC PERFORMANCE OF LOW-INCOME PUPILS IN READING AND MATHEMATICS, GRANTING RULE-MAKING AUTHORITY, AND MAKING AN APPROPRIATION**

Senate Bill 32 and Assembly Bill 196 end the SAGE program and create the Achievement Gap Reduction (AGR) program. The AGR program is similar to SAGE in the following key aspects:

- The AGR program targets funding to low-income students in participating schools subject to a five-year contract between the school district and DPI which requires the school to meet contractual conditions.
- The AGR program makes a school district eligible to sign an AGR contract on behalf of a school that is currently participating in SAGE when the existing SAGE contract expires. It does not authorize AGR contracts for schools not currently in the SAGE program.

- The AGR program allows a participating school to meet the obligations of its contract by limiting classroom ratios to 18:1 or 30:2, in addition to providing professional development for teachers on small group instruction.
- The AGR program is subject to a required annual evaluation.
- No AGR contract may contain a waiver of AGR requirements. School districts are currently prohibited from requesting waivers of SAGE requirements.

The new AGR program differs from the existing SAGE program in the following key aspects:

- The AGR program allows a school to meet its obligations under the contract by using one of three strategies, or a combination of these strategies: (a) one-to-one tutoring provided by a licensed teacher; (b) instructional coaching for teachers provided by a licensed teacher; or (c) maintaining 18:1 or 30:2 classroom ratios and providing professional development on small group instruction. Unlike SAGE, the AGR program does not require all participating grades to meet the 18:1 or 30:2 classroom ratios in order to receive funding.
- The AGR program requires a participating school to create performance goals, including reduction of the achievement gap between low-income students in that school and the statewide average.
- The AGR program requires school board review of implementation and progress toward achieving performance objectives in each participating school every semester.
- The AGR program is funded by a sum sufficient appropriation at the per-pupil level currently received by SAGE participants (\$2,027).

# PART II

## COMMITTEE ACTIVITY

---

### ASSIGNMENT

The Joint Legislative Council established the Study Committee on the Student Achievement Guarantee in Education (SAGE) Program and appointed the chairperson by a March 19, 2014 mail ballot. The committee was directed to study the SAGE program; whether there are alternatives to current class size limitations that would allow schools to achieve the aims of SAGE; and whether the Department of Public Instruction should be authorized to waive the class size limitations in a school that implements alternative interventions, or to otherwise provide funds and assistance for alternatives to class size limitations.

Membership of the Study Committee was appointed by a May 21, 2014 mail ballot. The final committee membership consisted of two Senators, four Representatives, and eight public members. A list of committee members is included as **Appendix 3** to this report.

### SUMMARY OF MEETINGS

The committee held five meetings on the following dates:

July 23, 2014

August 14, 2014

September 22, 2014

October 22, 2014

November 10, 2014

At the July 23, 2014 meeting, the Study Committee heard invited testimony from DPI regarding the SAGE program's history, funding, and flexibility. The committee received testimony from the Value-Added Research Center of UW-Madison (VARC) regarding its evaluation of the effectiveness and impact of the SAGE program. The committee also heard from a panel of school administrators regarding school districts' and schools' experiences with the SAGE program.

Jennifer Kammerud and Shelly Greller, DPI, presented to the committee regarding changes to the SAGE program since its establishment in the 1996-97 school year, and flexibility for schools and districts in meeting SAGE requirements. They explained that DPI was allowed to grant waivers from various SAGE requirements under prior law, but was prohibited from waiving such requirements after passage of 2009 Wisconsin Act 301. They also addressed state funding for the program, and research on the impacts of the SAGE program.

The presenters explained that participation in the SAGE program originally required teacher-to-student ratios of 15:1, but was later raised to 18:1 or 30:2. They informed the committee

that funding for SAGE has been prorated among eligible, low-income students in recent years and provided statistics regarding participation and funding levels. DPI noted that the number of low-income students eligible for SAGE funding has increased considerably since 2001.

The speakers explained that SAGE has shown an impact on students while they are in SAGE classrooms, but that lasting effects are difficult to determine given the changes to the program over time. Grant Sim of VARC also provided comments regarding VARC's preliminary findings about the effectiveness and impact of SAGE. He also described the evaluation methods being used in ongoing research comparing academic performance in SAGE and non-SAGE schools.

A panel of school administrators provided the committee with background on their SAGE experiences. The panel included Peggy Jones, Elementary School Principal, Bonduel School District; Wally Leipart, Superintendent, Merrill Area Public Schools; and Kenneth Lasure, Elementary School Principal, Spring Valley School District. The panel suggested that additional flexibility in classroom ratios and authorization for new SAGE contracts would be helpful to schools.

Ms. Jones addressed the importance of small class sizes in developing quality relationships between teachers and students, allowing closer connections between teachers and parents, and providing more individualized instruction. Mr. Leipart noted the importance of the program for maintaining elementary staff levels and teacher collaboration. He suggested that the committee consider additional flexibility in the 18:1 classroom ratio in situations where the addition of one or two students renders the entire grade or school ineligible for SAGE funding. He noted that such an "equivalency" model could allow schools to maintain SAGE funding by implementing research or evidence-based programs to support early literacy. Mr. Lasure noted that in smaller schools like his, the small number of class sections at each grade level pose difficulties in meeting the 18:1 ratio requirement of the SAGE program. In such circumstances, the addition of one or two students can render a small elementary school ineligible for SAGE funding.

Following testimony from invited speakers, the committee discussed potential changes to the SAGE program, and made requests for specific statistics and data, as well as research on the efficacy of limiting classroom size.

At the August 14, 2014 meeting, the Study Committee received invited testimony addressing research on the efficacy of limiting classroom size, the impact of SAGE reforms on student outcomes, the importance of professional development for primary school teachers, the funding of the SAGE program, and classroom size reduction efforts in other states.

Beth Graue, Professor of Early Childhood Education, Department of Curriculum and Instruction, University of Wisconsin-Madison, presented to the committee regarding research on the effects of class size reduction and the SAGE program. She emphasized that classroom size is only one of the reforms implemented by the SAGE program, along with the provision of challenging curriculum, teacher professional development, and better home-school collaboration. Ms. Graue then discussed the findings from the Student Teacher Achievement Ratio (STAR) study of Tennessee elementary students assigned to smaller classes of 13-17 students.

Ms. Graue informed the committee about "side effects" of smaller class sizes, such as impacts on teacher hiring and teacher quality, and variations in local implementation of class size reduction.



She also addressed differential effects on students from varied racial backgrounds. In response to committee questions, she discussed alternative options and influential factors, such as teacher quality and teacher professional development. The committee members discussed with Ms. Graue the importance of professional development and access to resources and supports for teachers in SAGE classrooms, which enable teachers to adapt responsive teaching strategies to maximize the benefits of small classrooms.

Dave Loppnow and Christa Pugh, Legislative Fiscal Bureau (LFB), presented general information about categorical aid funding, information on state funding for the SAGE program, as well as information regarding participation by school districts across the state. Mr. Loppnow and Ms. Pugh described the LFB memorandum submitted to the committee, which provides an overview of SAGE funding and participation.

Lauren Heintz, Research Analyst, National Conference of State Legislatures (NCSL), addressed the committee regarding legislative and policy initiatives other states have implemented regarding class size reduction. She provided information regarding national trends, state class size statutes, and the range of measures to enforce caps and ratios. She informed the committee about a variety of funding mechanisms utilized in different states to achieve smaller class sizes, and explained the most common uses for the funding. She then outlined recent research on class size reduction and its effect on student outcomes.

Chair Olsen led committee discussion regarding various options for altering the current SAGE program that were raised during the July meeting and summarized by Legislative Council staff in Memo No. 1. The committee requested fiscal estimates from LFB. The committee also requested that the Legislative Council perform a survey of schools which have terminated participation in SAGE to find out more about their reasons and what factors would make it feasible for them to participate again.

At the September 22, 2014 meeting, the Study Committee received invited testimony on data requested from the LFB, SAGE school finances, and the results of the requested survey of non-SAGE schools. The committee also heard from two school administrators regarding school decisions not to participate in SAGE, watched a video comparing the U.S. educational system with higher-performing school systems in other countries, discussed Legislative Council Memo No. 2, and raised several suggestions for revising the existing SAGE program.

Christa Pugh, LFB, described the numbers contained in Attachment 2 to the Memo distributed to committee members prior to the meeting. The Memo addressed local district expenditures and fiscal estimates of proposed changes to the SAGE program raised by members at the August 14, 2014 meeting. Ms. Pugh explained the significance of various figures appearing in the attachment. The figures represented the cost or change from current appropriation levels for the various proposals, such as including 4K in the SAGE program or increasing the threshold percentage of low-income pupils required before a school is eligible to participate in SAGE.

Jonas Zuckerman, Director of Title I and School Support Staff, DPI, described the contents of a SAGE financial report distributed to committee members prior to the meeting. The report detailed the amount of state aid received by school districts participating in the SAGE program and the amount of district matching funds provided by these districts during the last three school years. Mr.

Zuckerman noted that the district matching funds information is voluntarily reported, so it does not represent all funds or all districts. He further explained that year-to-year changes in these amounts may result, in part, from different school districts reporting during each school year, as reporting is voluntary.

Grant Sim, Assistant Researcher, VARC, provided a PowerPoint presentation explaining the results of a survey distributed to administrators in school districts with at least one school that is eligible for SAGE but does not participate. According to survey respondents, the most important consideration preventing schools from participating in SAGE is inadequate funding. The changes to SAGE which they reported were most likely to increase future participation were increased funding and more flexibility on class size restrictions.

Teri Willems, Green Bay Area Public Schools, addressed the committee regarding the school district's choice to only have some of its qualifying elementary schools participate in the SAGE program. Ms. Willems explained that only 10 of the district's 21 eligible elementary schools participate in the SAGE program. Its participating schools are those with the highest poverty rates in the district. She explained that the district only participates in SAGE for those schools where the SAGE funding actually covers the additional costs of participation. Ms. Willems specifically noted that a school must have an 80% to 85% free and reduced-price lunch population before SAGE funding will cover the expenses associated with an additional classroom teacher.

Ms. Willems responded to committee questions regarding differences between SAGE schools and non-SAGE schools in the Green Bay School District. She also responded to committee questions about particular academic, behavioral, and bilingual interventions and approaches employed by the Green Bay School District.

John McMullen, Tomah School Board, addressed the committee regarding the Tomah Area School District's choice not to participate in the SAGE program. Mr. McMullen explained that the school district has never participated in SAGE, though all elementary schools in the district would qualify. He explained that when the school board considered SAGE in the past, the board's decision not to participate was largely based on a lack of classroom space, concern about future loss of SAGE funding, and equity between different elementary schools regarding class sizes. He also noted that the school board has not considered SAGE recently because of the time and attention required for other educational changes, such as Educator Effectiveness and Common Core State Standards. Mr. McMullen noted that while his district is not critical of the SAGE program, the district chooses to instead focus on attracting and developing high-quality classroom teachers and addressing retention challenges.

Chair Olsen began the committee discussion portion of the meeting by showing a short video clip regarding approaches used by successful school systems around the world. The presenter in the clip, Andreas Schleicher, Organization for Economic Cooperation and Development, described the differences between the U.S. educational system and higher-performing school systems in other countries.

Chair Olsen then commenced committee discussion by requesting a brief summary of Memo No. 2 by Legislative Council staff, which was provided. The committee discussed funding for the

SAGE program and state funding for education more generally. Members emphasized a need for increased funding if the SAGE program is expanded to include additional schools or students.

Members discussed identifying the primary goal of the SAGE program before deciding on specific options, and suggested one of the following goals: assisting low-income students, achieving small class sizes, increasing test scores, or closing the achievement gap. Committee members also raised several suggestions for revising the existing SAGE program, including flexibility for SAGE funding to be directed towards high-quality teaching rather than class size reduction, and allowing schools to achieve one of the purposes behind the SAGE program (such as implementation of rigorous curriculum), rather than requiring rigid compliance with the existing SAGE criteria.

The committee discussed implementing an equivalency model that would allow school districts to use alternative methods for closing the achievement gap, rather than requiring strict compliance with required classroom ratios. The chair suggested requiring schools districts employing these alternatives to show progress in closing the achievement gap within a specified number of years.

At the October 22, 2014 meeting, the Study Committee received invited testimony on the effect sizes of specific interventions designed to improve the academic performance of low-income students, and methods of measuring reductions in the achievement gap between low-income students and other students. The committee then held discussion regarding three bill drafts under consideration.

Dr. Sarah Archibald addressed the committee regarding two research-supported interventions that could be used by school districts as potential alternatives to small class sizes under draft legislation requested by the committee. Dr. Archibald first noted that these two interventions, one-to-one tutoring by a certified teacher and instructional coaching, achieved larger effect sizes than other interventions studied in a 2007 report. The effect size of these interventions was greater than the effect of small class sizes.

Dr. Archibald addressed ways to ensure implementation of the most effective interventions. She informed the committee about small class size research and findings with class sizes of 14 to 17. She then answered questions as the committee discussed the type of licenses or certifications that should be required for tutors or instructional coaches.

Jonas Zuckerman and Laura Pinsonneault, DPI, provided a presentation regarding potential methods of measuring reductions in the achievement gap between low-income students and other students. The speakers also provided information regarding the timeline for existing SAGE contracts. They noted that many SAGE contracts will expire at the end of the 2014-15 school year, and that renewal applications will be due from these schools in April 2015.

Ms. Pinsonneault identified challenges in measuring achievement gap reduction or progress toward a specific statewide gap reduction goal. These challenges include the lack of state testing before 3<sup>rd</sup> grade, small cell sizes being measured in some schools, identifying a specific reduction goal, and the transition to new Smarter Balanced assessments in the current school year. She recommended a one-year extension on existing SAGE contracts and also recommended waiting to

set a target effect size until two years of performance data have been collected from the new Smarter Balanced assessments.

After asking questions of Mr. Zuckerman and Ms. Pinsonneault, the committee considered the impact of selecting a gap reduction target on SAGE schools and their resulting eligibility for future contracts. The committee expressed an intent not to disqualify participating schools for failure to accomplish a particular achievement gap reduction goal.

## **Discussion of Bill Drafts**

Chair Olsen initiated committee discussion of the three bill drafts under consideration: WLC: 0024/1; WLC: 0026/1; and WLC: 0027/1. Legislative Council staff summarized the contents of all three drafts.

The committee initially discussed WLC: 0027/1, relating to achievement gap reduction contracts requiring one-on-one tutoring for low-income pupils, instructional coaches for teachers, or small class size and professional development. The committee discussed appropriate ways to measure gap reduction and discussed the possibility of using the Phonological Awareness Literacy Screening (PALS) assessment or using attendance data for earlier grades. Members expressed general concern about using any measurement in a punitive manner to expel schools from participation in the proposed AGR program and noted that the goal of the committee was not to reduce the number of participating schools.

The committee members then discussed allowing each school to propose its own achievement gap reduction goal for the five-year contract period. The committee asked DPI staff about related policy considerations this might entail. Next, the committee discussed eligibility for the AGR program and determined that eligibility should remain limited to current SAGE schools for the initial years of the AGR program. The committee went on to discuss whether to prohibit waiver of any statutory requirements of the AGR program. The members reached consensus that waiver requests should be allowed. The committee then discussed whether to require evaluation of the new AGR program and decided that evaluation should be retained in the draft legislation.

The committee turned to consideration of WLC: 0024/1, relating to including four year-old kindergarten (4K) in the SAGE program, and WLC: 0026/1, relating to a one-year extension of SAGE contracts. The committee determined that WLC: 0024/1 should allow a participating school the option to either have its 4K classes participate in SAGE, or to have its 3rd grade classes participate in SAGE. Ultimately, the committee did not take action on WLC: 0024/1. The committee also decided to move forward with WLC: 0026/1 to allow one-year extensions of SAGE contracts expiring at the end of the current 2014-15 school year.

At the November 10, 2014 meeting, the Study Committee voted to finalize WLC: 0026/1. The committee reviewed a revised draft of the bill creating a new program to replace SAGE, WLC: 0027/2. After discussing and resolving questions raised by Legislative Council staff in order to prepare final drafting instructions, the committee voted to finalize identified changes to this draft.

Katie Bender-Olson, Staff Attorney, Legislative Council staff, explained that WLC: 0026/1 had not been revised since the committee's October 22, 2014 meeting, when the committee decided that a one-year extension of SAGE contracts expiring at the end of the 2014-15 school year would

facilitate introduction of the new program created by WLC: 0027/2. The committee noted that passing this bill draft eliminates the SAGE program, but that it intends to replace the program with a new one through WLC: 0027/2. Chair Olsen noted that if WLC: 0026/1 passed but WLC: 0027/2 did not, further legislative action would be required to reinstate the SAGE program.

*Representative Czaja moved, seconded by Mr. Sanchez, to finalize WLC: 0026/1 without changes. The motion carried on a vote of Ayes, 10 (Sen. Olsen; Reps. Czaja, Billings, Pope, and Thiesfeldt; and Public Members Kipp, Nelson, Sanchez, Smith, and Wiemer); and Absent, 4 (Sen. Hanson; and Public Members Gaier, Graue, and Way).*

Jessica Ozalp, Staff Attorney, Legislative Council staff, presented WLC: 0027/2, revised as directed by the committee, with a list of questions for the committee to resolve in order for the draft to be finalized. These questions are listed in the document, "Questions for Resolution by SAGE Committee Regarding Draft WLC: 0027/2," which may be found on the committee's website at: <http://docs.legis.wisconsin.gov/misc/lc/study/2014/1194>. The committee discussed the listed questions and decided on the changes summarized below:

- Prohibit DPI from waiving any AGR program requirement for participating schools.
- Require a participating school to implement one of the three strategies, specifically class size reduction, instructional coaching, or one-to-one tutoring, in every grade from Kindergarten through Grade 3 (making all these grades "participating grades").
- Require that DPI have a participating school return AGR funding from the prior year for any grade level in which its year-end report indicates it did not implement the strategies identified in its November 1 report to DPI.
- Clarify the achievement gap definition to reflect that pupils in a participating grade in an AGR school will be compared to pupils in the same grade who are enrolled in public schools statewide.
- Require that a participating school report to its school board at the end of every semester of an AGR contract regarding both strategies implemented and progress toward performance objectives.
- Change "formative assessments" to "formative and summative assessments" in proposed statutory language requiring a school to identify the assessments it will use to evaluate the school's progress toward performance objectives.
- Change the appropriation for the AGR program to a sum-sufficient appropriation at the current per-pupil amount awarded under the SAGE program (\$2,027 per pupil).
- Require the entity completing an annual evaluation of the AGR program (the VARC) to send its yearly evaluation report to each participating school.

*Mr. Nelson moved, seconded by Mr. Kipp, to finalize WLC: 0027/2 with the above-listed changes. The motion carried on a roll call vote of Ayes, 10 (Sen. Olsen; Reps. Czaja, Billings, Pope, and Thiesfeldt; and Public*

*Members Kipp, Nelson, Sanchez, Smith, and Wiemer); and Absent, 4  
(Sen. Hansen; and Public Members Gaier, Graue, and Way).*

# PART III

## RECOMMENDATIONS INTRODUCED BY THE JOINT LEGISLATIVE COUNCIL

---

This Part of the report provides background information on, and a description of, the bills as recommended by the Study Committee on the Student Achievement Guarantee in Education (SAGE) Program and introduced by the Joint Legislative Council.

### **2015 SENATE BILL 31 AND 2015 ASSEMBLY BILL 195**

#### **Background**

SAGE is a categorical state aid program that provides funding to schools for low-income students in primary grades (K-3) if certain statutory requirements are met. Before a school may participate in SAGE, the school board of the district must enter into a contract with DPI on behalf of individual schools in the district that qualify for participation. SAGE contracts are for five years and may be renewed for additional five-year terms.

#### **Description**

The bills allow DPI to provide a one-year extension on existing SAGE contracts set to expire at the end of the current 2014-15 school year. The bills also prohibit DPI from renewing contracts expiring at the end of this 2014-15 school year. Without an extension, the 354 SAGE contracts set to expire at the end of the current 2014-15 school year will likely be renewed before any legislation changing the SAGE program can be enacted. Therefore, unless the existing SAGE contracts are extended, any changes to the program will not take effect until another five years has passed and these contracts are renewed again in 2020-21.

### **2015 SENATE BILL 32 AND 2015 ASSEMBLY BILL 196**

#### **Background**

The SAGE program was established in the 1996-97 school year to improve student achievement through the implementation of four specific school improvement strategies. For more information about the history of SAGE, please see [Department of Public Instruction Testimony by Jennifer Kammerud and Shelley Greller \(July 23, 2014\)](#).

Through SAGE, a school district can contract with DPI on behalf of individual schools in the district that qualify for participation. If the bills pass into law, the SAGE program as it currently exists will end. The committee intends both bills to work together to transition schools from the SAGE program to a new replacement program. Senate Bill 32 and Assembly Bill 196 make schools

currently participating in SAGE eligible for a new program created by the bills, which will become available when the SAGE contracts end.

## **Description**

These bills create a program entitled “Achievement Gap Reduction” (AGR) under a new section of the statutes. The new program is similar to the SAGE program and incorporates many existing aspects of the SAGE program. Part I of this report outlines the similarities and differences between SAGE and the new program created by the bills.

The AGR program targets funding to low-income students in participating schools subject to a five-year contract between the school district and DPI which requires the school to meet contractual conditions. The AGR program allows a school to meet its obligations under the contract by using one of three strategies, or a combination of these strategies: (a) one-to-one tutoring provided by a licensed teacher; (b) instructional coaching for teachers provided by a licensed teacher; or (c) maintaining 18:1 or 30:2 classroom ratios and providing professional development on small group instruction. Other contractual conditions include creation of performance goals such as reduction of the achievement gap between low-income students and the statewide average academic achievement. The bills prohibit DPI from waiving any statutory requirements in an AGR contract.

The AGR program requires school board review of implementation and progress toward achieving performance objectives in each participating school every semester. The program is subject to a required annual evaluation, to be distributed to all participating schools. The program is funded by a sum sufficient appropriation at the per-pupil level currently received by SAGE participants (\$2,027).



# APPENDIX 1

---

## COMMITTEE AND JOINT LEGISLATIVE COUNCIL VOTES

The following drafts were recommended by the Study Committee on the Student Achievement Guarantee in Education (SAGE) Program to the Joint Legislative Council for introduction in the 2015-16 Session of the Legislature.

### SPECIAL COMMITTEE VOTE

The Study Committee voted by a November 19, 2014 mail ballot to recommend the following drafts to the Joint Legislative Council for introduction in the 2015-16 Session of the Legislature. The vote on the drafts was as follows:

- WLC: 0026/1, relating to a one-year extension of student achievement guarantee in education contracts, passed by a vote of Ayes, 11 (Sen. Olsen; Reps. Czaja and Thiesfeldt; and Public Members Gaier, Graue, Kipp, Nelson, Sanchez, Smith, Way, and Wiemer); and Noes, 3 (Sen. Hansen; and Reps. Billings and Pope). [WLC: 0026/1 subsequently became LRB-0729/1.]
- WLC: 0027/3, relating to achievement gap reduction contracts requiring participating schools to implement strategies for improving academic performance of low-income pupils in reading and mathematics, passed on a vote of Ayes, 11 (Sen. Olsen; Reps. Czaja and Thiesfeldt; and Public Members Gaier, Graue, Kipp, Nelson, Sanchez, Smith, Way, and Wiemer); and Noes, 3 (Sen. Hansen; and Reps. Billings and Pope). [WLC: 0027/3 subsequently became LRB-1312/1.]

### JOINT LEGISLATIVE COUNCIL VOTE

At its February 11, 2015 meeting, the Joint Legislative Council voted as follows on the recommendations of the Study Committee:

*Sen. Lazich moved, seconded by Sen. Petrowski, that **LRB-0729/1 and LRB-1312/1**, be introduced by the Joint Legislative Council. The motion passed on a roll call vote as follows: Ayes, 16 (Reps. Ballweg, August Knodl, Murtha, Nygren, Steineke, and Vos; Sens. Lazich, Fitzgerald, Gudex, Miller, Moulton, Petrowski, Risser, Taylor, and Wanggaard); Noes, 5 (Reps. Barca, Mason, Shankland, and Taylor; and Sens. Shilling); and Excused, 1 (Sen. Darling).*



## APPENDIX 2

### JOINT LEGISLATIVE COUNCIL

#### **SENATE MEMBERS**

**MARY LAZICH, Co-Chair**  
4405 South 129<sup>th</sup> St.  
New Berlin, WI 53151

**ALBERTA DARLING**  
1325 West Dean Road  
River Hills, WI 53217

**SCOTT FITZGERALD**  
N4692 Maple Road  
Juneau, WI 53039

**RICK GUDEX**  
361 East Division St.  
Fond du Lac, WI 54935

**MARK MILLER**  
4903 Roigan Terrace  
Monona, WI 53716

**TERRY MOULTON**  
980 118<sup>th</sup> St.  
Chippewa Falls, WI 54729

**JERRY PETROWSKI**  
720 North 136<sup>th</sup> Avenue  
Marathon, WI 54448

**FRED A. RISSE**  
100 Wisconsin Avenue  
Unit 501, Madison, WI 53703

**JENNIFER SHILLING**  
2608 Main Street  
La Crosse, WI 54601

**LENA TAYLOR**  
1518 West Capitol  
Milwaukee, WI 53206

**VAN WANGGAARD**  
1246 Blaine Ave.  
Racine, WI 53405

#### **ASSEMBLY MEMBERS**

**JOAN BALLWEG, Co-Chair**  
170 W. Summit Street  
Markesan, WI 53946

**TYLER AUGUST**  
116 Evelyn Lane Unit 3A  
Lake Geneva, WI 53147

**PETER BARCA**  
1339 38 Ave.  
Kenosha, WI 53144

**DAN KNODL**  
N101 W14475 Ridgfield Ct.  
Germantown, WI 53022

**CORY MASON**  
3611 Kinzie Ave  
Racine, WI 53405

**JOHN MURTHA**  
2283 20<sup>th</sup> Ave.  
Baldwin, WI 54002

**JOHN NYGREN**  
N2118 Keller Rd.  
Marinette, WI 54143

**KATRINA SHANKLAND**  
5782 Sandpiper Dr.  
Stevens Point, WI 54482

**JIM STEINEKE**  
Room 115  
State Capitol

**CHRIS TAYLOR**  
306 West  
State Capitol

**ROBIN VOS**  
960 Rock Ridge Road  
Burlington, WI 53105

This 22-member committee consists of the majority and minority party leadership of both houses of the Legislature, the co-chairs and ranking minority members of the Joint Committee on Finance, and 5 Senators and 5 Representatives appointed as are members of standing committees.



## COMMITTEE LIST

Legislative Council Study Committee on the Student Achievement Guarantee in Education (SAGE) Program	
<p><b>Chair Luther Olsen</b>, Senator 1023 Thomas Street Ripon, WI 54971</p> <p><b>Jill Billings</b>, Representative 403 13th St. South LaCrosse, WI 54601</p> <p><b>Beth Graue</b>, Professor of Curriculum and Instruction Wisconsin Center for Academic Research 528-c Teacher Education Building 225 North Mills Street Madison, Wisconsin 53706</p> <p><b>N. David Kipp</b>, President Board of Education, School District of Wausaukee N11929 Lubka Rd. Wausaukee, WI 54177</p> <p><b>Sondy Pope</b>, Representative 9262 Moen Road Cross Plains, WI 53528</p> <p><b>Anne Smith</b>, Past Educator N7278 River Rd. Wittenberg, WI 54499</p> <p><b>Robert Way</b> MHLT Elementary, Creative Minds, and Woodland Schools 9830 Baker Lake Rd. Minocqua, WI 54548</p>	<p><b>Vice Chair Mary Czaja</b>, Representative W4587 Hwy S Apt. A Irma, WI 54442</p> <p><b>John Gaier</b>, District Administrator Neillsville School District 614 E. 5th St. Neillsville, WI 54456</p> <p><b>Dave Hansen</b>, Senator 3489 Blackwolf Run Green Bay, WI 54311</p> <p><b>Randy Nelson</b>, District Administrator La Crosse School District 807 East Avenue South La Crosse, WI 54601</p> <p><b>Miguel Sanchez</b>, Principal Lincoln Avenue School Milwaukee, WI</p> <p><b>Jeremy Thiesfeldt</b>, Representative 604 Sunset Lane Fond du Lac, WI 54935</p> <p><b>Angela Wiemer</b>, 2nd Grade Teacher Cambria-Friesland School District 171 Deer Run Dr. Fall River, WI 53932</p>

**STUDY ASSIGNMENT:** The Study Committee is directed to study the SAGE program; whether there are alternatives to current class size limitations that would allow schools to achieve the aims of SAGE; and whether the Department of Public Instruction should be authorized to waive the class size limitations in a school that implements alternative interventions, or to otherwise provide funds and assistance for alternatives to class size limitations.

**14 MEMBERS:** 4 Representatives; 2 Senators; and 8 Public Members.

**LEGISLATIVE COUNCIL STAFF:** Katie Bender-Olson and Jessica Ozalp, Staff Attorneys; and Kelly Mautz, Support Staff.



## COMMITTEE MATERIALS LIST

*[Copies of documents are available at [www.legis.wisconsin.gov/lc](http://www.legis.wisconsin.gov/lc)]*

### **July 23, 2014 Meeting**

- Department of Public Instruction Testimony by Jennifer Kammerud and Shelley Greller (July 23, 2014)
- DPI Handout 2013-14 District SAGE Allocation
- DPI Handout -- SAGE Statistics at a Glance
- DPI Presentation - Poverty is Growing in WI; Change in Free and Reduced Lunch (2001-2012)
- Staff Brief 2014-04, Student Achievement Guarantee (SAGE) in Education Programs (July 11, 2014)
- Testimony by Margaret "Peggy" Jones, Elementary Principal, School District of Bonduel
- Testimony by Wally Liepart, Superintendent, Merrill Area Public Schools

### **August 14, 2014 Meeting**

- Memorandum, Overview of SAGE Funding and School District Participation, from Dave Loppnow and Christa Pugh, Legislative Fiscal Bureau (August 14, 2014)
- Presentation, Research on Class Size Reduction, by Beth Graue, Sorenson Professor of Early Childhood Education, UW Madison, Department of Curriculum and Instruction
- Presentation, Class Size in the States, Laure Heintz, Research Analyst, National Conference of State Legislatures (August 14, 2014)
- Memo No. 1, Options Raised by the SAGE Study Committee at Initial Meeting

### **September 22, 2014 Meeting**

- Memo No. 2, Options for Discussion Following Second Meeting (September 15, 2014)
- Handout, 2013-14 SAGE Financial Report, Department of Public Instruction
- Memorandum, Consideration for a SAGE Equivalency Model, Wally Leipart, Superintendent, Merrill Area Public Schools
- Memorandum, Local District Expenditures by SAGE Aid Recipients and Fiscal Estimates of Changes to the SAGE Program, Christa Pugh, Fiscal Analyst, Legislative Fiscal Bureau (September 15, 2014)
- Presentation, Non-Sage Survey Results, Grant Sim, UW-Madison (September 22, 2014)

- Memorandum, Non-SAGE Survey Results, Grant Sim, Value-Added Research Center, UW-Madison (September 15, 2014)
- Testimony, Tomah Area School District Report for SAGE Study Committee, by John McMullen, School Board President, Tomah Area School District.

### **October 22, 2014 Meeting**

- WLC: 0024/1, relating to including 4-year-old kindergarten in the student achievement guarantee in education program.
- WLC: 0026/1, relating to one-year extension of student achievement guarantee in education program contracts
- WLC: 0027/1, relating to achievement gap reduction contracts requiring one-on-one tutoring for low-income pupils, instructional coaching for teachers, or small class size and professional development.
- Legislative Fiscal Bureau Memo, SAGE Schools With Fewer than 50% Free and Reduced Price Lunch-Eligible Pupils and Additional Schools Eligible for SAGE Under Existing Criteria (dated October 15, 2014)
- Excerpt from 2007 Report, Moving from Good to Great in Wisconsin: Funding Schools Adequately and Doubling Student Performance
- SAGE End of Year Report, Department of Public Instruction
- Handout, Potential Guidelines for SAGE Program Flexibility, distributed at the request of the Value-Added Research Center, UW-Madison.
- Presentation, Measurement Considerations from the Office of Educational Accountability, presented by Laura Pinsonneault, Director, Office of Educational Accountability, and Jonas Zuckerman, Director, Title I and School Support, DPI

### **November 10, 2014 Meeting**

- WLC: 0026/1, relating to one-year extension of student achievement guarantee in education program contracts
- WLC: 0027/2, relating to achievement gap reduction contracts requiring one-on-one tutoring for low-income pupils, instructional coaching for teachers, or small class size and professional development.
- Questions for Resolution by SAGE Committee

### **November 19, 2014 Mail Ballot**

- WLC: 0026/1, relating to one-year extension of student achievement guarantee in education program contracts



- WLC: 0027/3, relating to achievement gap reduction contracts requiring participating schools to implement strategies for improving academic performance of low-income pupils in reading and mathematics
- Results of the November 19, 2014 Mail Ballot
- November 19, 2014 Mail Ballot of the Study Committee on Student Achievement Guarantee in Education (SAGE) Program

### **Recommendations to the Joint Legislative Council (February 11, 2015)**

- LRB-1312/1, relating to achievement gap reduction contracts requiring participating schools to implement strategies for improving academic performance of low-income pupils in reading and mathematics, granting rule-making authority, and making an appropriation.
- LRB-0729/1, relating to a one-year extension of student achievement guarantee in education program contracts.