

# Wisconsin Grade Retention Policy Brief

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## ELPA 870: Politics of Education

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### Intended audience

- Education policy makers and those interested in the short- and long-term effects and alternatives to grade retention policy.

### Key messages

- Grade retention often causes more harm than good, especially for those in early education (K-3rd grade)
- Grade retention is often based on teacher recommendations and/or test scores/assessments.
- In Wisconsin, migrant-status, English language learners, Black, Hispanic, and “unknown” students have higher representation in those retained than other student populations.

### Policy options

- No one test score or teaching experience should decide retention decisions.
- Identify struggling students earlier and increase development for teachers.
- Apply an equity-minded lens to written policy to address and acknowledge inequity in retention numbers

## Introduction

*Grade retention* is the practice of holding a student back from advancing to the next grade. This practice usually occurs when a student is identified as not meeting the academic requirements needed to advance. Requirements often entail reaching proficient levels in varying academic skills, such as reading, writing, and math. Grade retention is often justified as a preventative measure used to mitigate the advancement of students to a grade in which they are doomed to fail. *Social promotion* is the practice of advancing a student to the next grade when they do not meet the requirements for that grade. Social promotion is generally viewed as a harmful practice, resulting in increasing national trends of school districts and states using grade retention as a tool to avoid it. Nonetheless, there exists widespread criticism about the implications of grade retention. Regardless of why a student is held back, there are consequences (many unintended) in doing so. Therefore, there exists a need to examine grade retention, the policies around the practice, and the implications of the practice.

The purpose of this policy brief is to examine grade retention policies, how they have changed over time, and their impact on students, schools, and communities. This brief will

include a literature review summarizing the criteria for grade retention, how retention differs from social promotion, and the short- and long-term impacts of retention. This is followed by an analysis of Wisconsin state statutes and school board written policies. In the early 2000's, Wisconsin adopted a policy against the practice of social promotion. Since then, widespread efforts have been taken at the school district level to create and implement grade retention policies. This brief will analyze these various policies using Wisconsin Department of Public Instruction (DPI) data to determine who is retained and when, summarize the research and implications of retention, and ultimately offer recommendations for policy makers and school districts regarding grade retention in Wisconsin.

### Problems of Grade Retention

Grade retention has received various forms of criticism due to the consequences it imposes on retained students, as well as disproportionalities in who is retained. Despite being well intentioned, grade retention has been criticized for exacerbating a student's challenges rather than alleviating them. Critics argue that retained students are more likely to achieve at lower levels, drop out of school, and experience negative social and economic impacts than their non-retained peers (Jimerson, 1999; Alexander, Entwisle, & Dauber, 2003). Despite being a countermeasure to social promotion, critics claim that both practices have negative consequences, and that grade retention is a symptom of the problems faced by students, rather than a solution to them. Many of the achievement and opportunity gaps experienced by students with varying identities are argued to be exacerbated by grade retention (Reardon, 2008). Some of the ways in which this plays out include:

- Racially minoritized students are more likely to be retained than their white peers (Shores, 2020).
- Boys are more likely than girls to be retained (Bassock, 2013).
- Students with disabilities are more likely to be retained (Anderson, 2002).
- Low-income/Free & Reduced lunch qualifying students are more likely to be retained (Leckrone, 2006).

Despite the short-term benefits that grade retention can present, critics argue that grade retention has no long-term positive impacts (Jimerson, 1999). All these criticisms should be concerning to any policy maker/school board official that drafts policy resulting in the implementation of grade retention. These criticisms will be explored further throughout the following literature review. This brief aims to measure the extent of which these criticisms are true, both nationally, and as it relates to Wisconsin students. DPI collects and publishes data regarding grade retention in Wisconsin schools, which we will use alongside the following literature review to determine whether the criticisms listed above play out in practice in Wisconsin and nationally.

### Literature Review

This section reviews the literature on grade retention policy and processes, identifying key research schemes and practices. The scope of this study is an analysis of literature between the years of 1909-2021, mostly concentrating on the last three decades. The major findings of this review includes extensive literature highlighting the relationship between grade retention and social promotion, changes in the criteria used in retention decisions, and

the consequences of grade retention on teachers, schools, and vulnerable student populations. We categorize the literature review analysis into three themes: grade retention vs. social promotion, teacher-based vs. test-based retention, and short- and long-term effects. Overall, the literature indicates a seismic policy shift from social promotion to grade retention and from teacher-based to test-based criteria, as well as examines how negative long-term effects outweigh most short-term benefits of grade retention, especially for the youngest students (pre-third grade).

### *Teacher-based vs Test-based Retention*

Research examining the criteria for retention largely falls into two distinct categories: teacher-based and test-based retention (Huddleston, 2014). Test-based retention uses high-stakes tests based on norms established by the professional testing community (Penfield, 2010). On the other hand, teacher-based retention relies on teachers' assessment of their students' academic proficiency (Penfield, 2010).

Research shows that teachers largely have a positive orientation towards retention, despite having limited knowledge on the long-term effects (M. Witmer, 2004). Research also highlights that teachers often feel pressure to meet testing expectations and as a result may teach to the test rather than focus on improving gains in academic achievement (Renaud, 2013). This could also compel teachers to recommend retention based on their own judgement and other subjective factors rather than academic data (Silberglitt et al., 2006; Cardigan et al., 1986). The attitudes and perceptions of teachers can disproportionately impact students who are racially minoritized, students whose parents are less involved in the school, and students with more frequent disciplinary incidents (Range et al., 2011). There are some noted positives effects of teacher-based retention, mainly effects on improved teacher motivation and better alignment of teaching practices with curriculum (Huddleston, 2014; Renaud, 2013).

Test-based retention criteria have been increasingly common with the rise of high-stakes testing/assessment which ties important consequences to test results. There are some short-term gains with test-based retention, such as improved grades and curriculum and instruction alignment, yet similar to the teacher-based criteria, these benefits fade over time with students falling behind again with increased risks of dropping out of school (Huddleston, 2014). The current iteration of test-based retention is connecting retention with literacy and reading assessment. First initiated in Florida, now seventeen states plus DC require retention for third graders whose assessments indicate that they are behind on reading (Cumming & Turner, 2020.) For some states, this has resulted in thousands of students being held back, sometimes more than once (APM Reports, 2018). Overall, more scholars are acknowledging that no one single measure of achievement (teacher, test, or intervention) should be solely used in determining a potentially life-altering decision such as grade retention (Huddleston, 2014; Xia & Kirby, 2009).

### *Grade Retention vs Social Promotion*

Social promotion is the practice of passing a student to the next grade even if they have not satisfied academic requirements (Hernandez-Tutop, 2012). Over the past century, research has shown both advantages and disadvantages to social promotion. The practice is called "social" promotion because it is done in the perceived interest of a student's social and psychological well-being (Doherty, 2004). Proponents of social promotion claim it is better than the alternative – holding back students who do not meet academic targets. Today,

research largely shows that promoting students who are unprepared does not provide short- or long-term benefits (Doherty, 2004). Overall, neither social promotion nor retention are effective for improving academic achievement (Berlin, 2008), yet both continue to be used in schools throughout the country (McMahon, 2018).

Literature in support of social promotion can be traced back as early as 1909 – soon after the formation of formal grade levels – when concerns grew around the number of misfitting overaged students (Shepard, 1990; Ayers, 1909; Keyes, 1911). In the following decades, scholars argued that students who were promoted did better academically, socially, and emotionally than students who were retained. Research around academic benefits showed that promoted students did better in language arts, reading, mathematics, social studies, and overall grade-point averages than students who were retained (Goodlad, 1954; Cunningham & Owens, 1976; Holmes and Matthews, 1984). A study from 1984 found that students who were retained had more negative attitudes toward school than students who were promoted (Holmes and Matthews, 1984). Additionally, retained students were shown to struggle with social adjustment, emotional adjustment, and behavior (Holmes and Matthews, 1984). A study in 1997 comparing students who were retained with similarly performing students who were promoted, found higher absenteeism and lower social-emotional rankings among students retained (Jimerson et al., 1997).

Arguments against the use of high-stakes testing have highlighted the benefit of social promotion to alleviate the dependency on test scores by passing students to the next grade even if they have not satisfied testing requirements (Huddleson, 2014). Further, grade retention results in stigmatization and embarrassment; promotion aims to mitigate the social and emotional detriment by allowing students to stay with children their own age (Alexander, Entwisle, & Dauber, 2003). Studies find racial and class disproportionality in students who are retained as opposed to promoted. Students who are retained are more likely to be poor, Black and Latinx, male, and have mothers with low IQs, than their equally low achieving peers who were promoted (Jimerson et al., 1997; Jimerson et al., 2006).

Promotion policies pushed onward until the 1970s and 1980s, when education took a hard reversal. *A Nation at Risk*, a notable reform report from 1983, announced that American schools were failing and were not internationally competitive (National Commission on Excellence in Education, 1983). This fear called for education reform based on rigorous standards and testing, causing reformers to advocate for the end of social promotion. Opponents of social promotion have argued it creates a pattern of entitlements for students who do not meet expectations (McMahon, 2018). A report from 2003, revealed that about three-quarters of parents and more than 80 percent of teachers think that it is worse for a child who is struggling to be promoted than it is for them to be held back (Johnson et al., 2003). President Clinton urged states to end social promotion practices and asserted that students should not pass fourth grade until they can independently read (Hauser, 2000).

Now, over twenty years after President Clinton called for the end of social promotion, schools still use this practice, though it is difficult to know how prevalent it is because teachers are unlikely to admit when they promote students (Doherty, 2004). In a 2003 report from Public Agenda, most teachers reported that their colleagues promoted unprepared students, and many teachers reported having done this themselves (Johnson et al., 2003). Research suggests that social promotion does little to advance a child's education, and it hides the failures of the school to properly educate students (Huddleston, 2014; Johnson et al., 2003). Cities and states have implemented test-based grade retention policies to prevent the use of social promotion practices (Huddleston, 2014). In many states and school districts, promotion and retention decisions are made on a case-by-case basis (Doherty, 2004).

Looking ahead to the next school year, districts are considering how to address “learning loss” that has resulted from a year of remote schooling during the Covid-19 pandemic. Many states have policies requiring students to be reading proficiently by the end of third grade and several states will retain students who do not meet these criteria (Cummings & Turner, 2020). However, this year 19 states and D.C. have addressed promotion and retention policy in their reopening plans (Cummings & Turner, 2020). Michigan decided to waive third-grade retention, while Ohio passed legislation prohibiting retention (Michigan Department of Education, 2020; Ohio Department of Education, 2020). Mississippi allows students to be promoted if they have met other district requirements (Mississippi Department of Education, 2020). Michigan, Ohio, and Mississippi are all among the states which typically require third-grade retention for students who cannot read proficiently (Cummings & Turner, 2020). This year and the following year will see more students promoted based on age rather than competency than in typical years, having an impact on students in the years to come.

### *Short and Long-Term Retention Effects*

Grade retention has immediate effects on students’ social, emotional, and academic well-being, as well as lasting, life-long impacts. The short, intermediate, and long-term effects of retention are explored in research and how the effects compare with students who are socially promoted and students who meet academic targets.

In the short-term, students who are retained may show improvement in the subject areas in which they struggled. Reading and mathematics scores generally improve in the repeated year (Silberglitt et al., 2006); however, numerous studies reveal that students experience negative effects in the short-term such as stigmatization from peers, low self-esteem, separation from friends, and decreased motivation (Alexander, Entwisle, & Dauber, 2003). The academic benefits experienced from retention diminish over time and disappear completely in as little as three years (Johnson & Rudolph, 2001; Holmes, 1989). Jimerson (2001) revealed that two thirds of retained students show improvements in the second year of the repeated grade, but these initial gains were not maintained over time (Jimerson, 2001).

Some educators have claimed that retaining students at an early age does less harm. However, retaining students in elementary school increases their risk of dropping out by 20 to 50 percent (Jimerson, 2006). In fact, early grade retention is one of the most powerful predictors of future drop out (Silberglitt et al., 2006). Silberglitt, Jimerson, and Appleton (2006) conducted a longitudinal study that compared students retained early (kindergarten through second grade) with students retained slightly later (third through fifth grade). The study revealed that students retained early had better reading scores than students retained later; however, the general trajectories of both groups showed similarly decelerated growth. In other words, regardless of whether students are retained earlier or later, long-term outcomes remain largely the same (Silberglitt et al., 2006).

A study by Jimerson (1999) on grade retention followed students for 21 years, comparing students who were retained, students who were socially promoted, and a control group of students who advanced at the typical rate. By 11th grade, students who were retained had lower levels of academic achievement, more behavioral challenges, and lower attendance (Jimerson, 1999). Longitudinal studies consistently demonstrate that retained students are more likely to drop out than their equally low achieving peers (Jimerson, 1999; Alexander, Entwisle, & Dauber, 2003). In the 21-year study, retained students were more likely to drop out of school and less likely to receive a diploma by age 20 (Jimerson, 1999). The link

between retention and dropping out is stronger for Black and Latinx students, and strongest for Black and Latinx girls (Hughes et al., 2018).

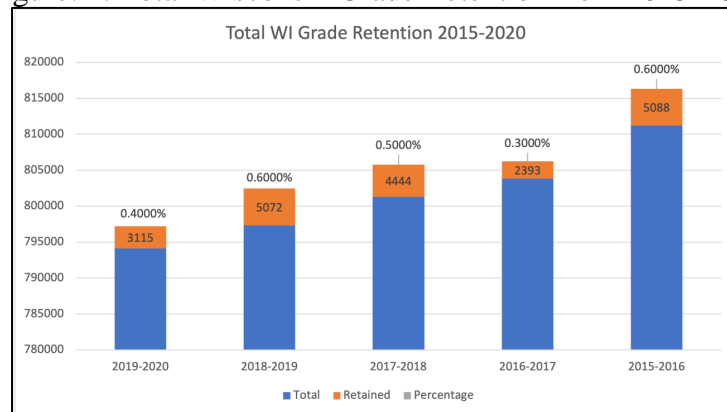
The negative impacts of grade retention span beyond the duration of school. Dropping out has detrimental impacts for students' future well-being. High school dropouts are far more likely to be periodically unemployed, on government assistance, or in prison than high school graduates (Jimerson, 1999; Hughes et al., 2018). Eide and Showalter (2001) found significant correlation between grade retention and post-high school labor market earnings. The effect was greater for Black students than for White students (Eide & Showalter, 2001). The Centers for Disease Control and Prevention (CDC) found that dropouts report more health issues after age 25 (Pleis, Ward & Lucas, 2010). Lastly, Jimerson (1999) found that students who were retained were less likely to be enrolled in a postsecondary education program.

Some scholars have argued that studies showing an association between grade retention and long-term impacts have methodological limitations. The factors that increase a students' risk of being retained, such as low achievement, poor learning-related skills, and low cognitive competence, also increase their risk of dropping out of school and having inconsistent employment. Confounding factors challenge the evidence that suggests a causal relationship between retainment and negative long-term outcomes. To address the limitation of previous studies, recent longitudinal studies incorporate strong controls for potential baseline differences (Hughes et al., 2018; Peguero et al., 2021). These studies reinforced a causal relationship between retention and long-term impacts.

### Wisconsin Context

From 2015-2020, data from the Wisconsin Department of Public Instruction (DPI) shows that retention rates for Wisconsin hovered on average around 0.5% . This is below the national average rate of 1.9% (Warren et al., 2014), and amongst the states with the lowest retention rates in the country. In the 2017-2018 as well as the 2018-2019 academic years, there was a steady increase in the percentage of students retained followed by another decrease during the 2019-2020 academic year (and start of the Covid-19 global health pandemic). At the moment, it is unclear how and if the global pandemic and subsequent school disruption and abrupt shift to online learning shaped the decrease of retention numbers. Continued vigilance around retention numbers will be crucial in the era of post-pandemic schooling.

Figure: 1. Total Wisconsin Grade Retention from 2015-2020

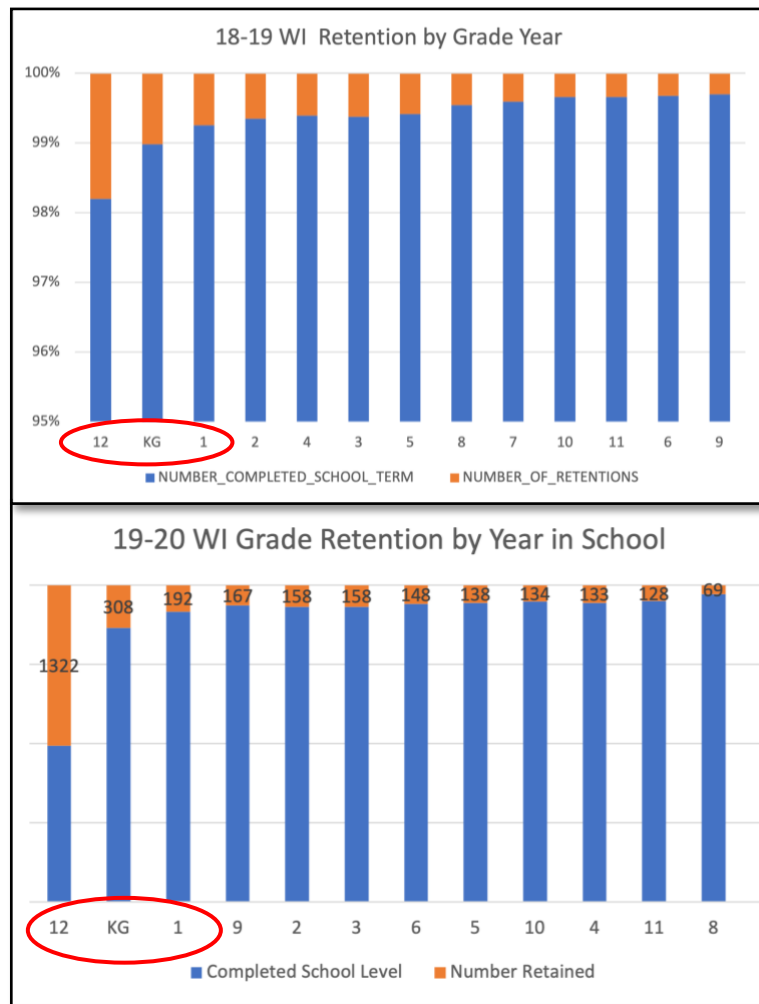


Source: Wisconsin Department of Public Instruction (2021)

### *When does Retention Occur?*

Disaggregating retention numbers by when retention occurs reveals disproportionate levels of retention by grade level. Twelfth, kindergarten, and first grades (respectively) are the most common grade levels for retention in Wisconsin between the years 2018-2020 (see Figure 2). In comparison, first and ninth grades are the most common nationally (Warren et al., 2014). Given the research regarding the ill effects of retention, especially in early education (Huddleston, 2014; Silbergliitt et al., 2006), the prevalence of retention in the early grade levels warrants cause for concern and further inquiry.

Figure 2: Wisconsin Grade Retention by Year, 2018-2020



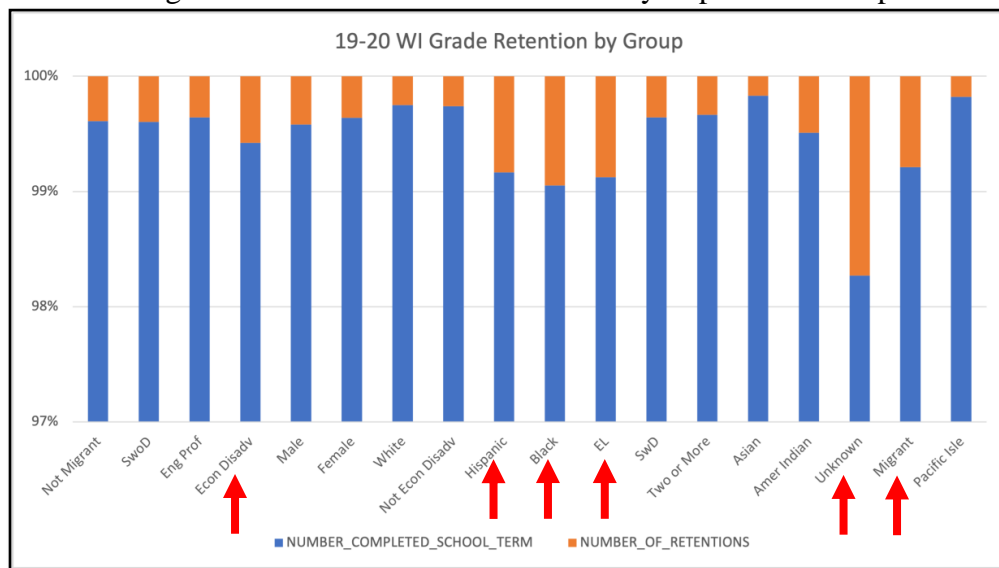
Source: Wisconsin Department of Public Instruction (2021)

### *Who is Being Retained?*

National studies often see large disparities by race/ethnicity, sex, location, and socioeconomic circumstances (Warren et al., 2014), and Wisconsin also follows this trajectory. Though inconsistent from year to year, Wisconsin data from 2018-2020 show that

students identified as having migrant-status, Black, Hispanic, English language learners (ELL), or economically disadvantaged share a larger percentage of those retained and are often higher than the state average (see figure 3). Furthermore, the largest population percentage retained is within an “unknown” category in the data, suggesting that for a large majority of student retained, DPI does not have accurate or available demographic data.

Figure 3: Wisconsin Grade Retention by Population Group



Source: Wisconsin Department of Public Instruction (2021)

### Wisconsin Grade Retention Policy

Wisconsin, like many other states were early adopters of eliminating social promotion as a means to increase accountability and to be seen as a stronger vocational and economic powerhouse (Brown, 2007). Wisconsin state statutes provide minimal guidance for retention policies and give each school district control with setting the parameters of retention. Each school district is strongly encouraged to adopt written policy detailing promotion criteria from kindergarten to first grade, fourth to fifth grade, eighth to ninth grade, and high school graduation. These milestone transition years largely align with pivotal moments in the Wisconsin Student Assessment System (WSAS). As a result, written guidelines vary drastically by school district (especially regarding parent involvement and required intervention) but includes a combination of test, academic performance, teacher, and other intervention-based criteria (Wis. Stat. § 118.33). While the policy seeks to include multiple criteria for decision-making, it does not provide guidance on addressing inequities in who and when students are being retained.

### Recommendations & Promising Practices

Research indicates that neither grade retention nor social promotion is successful for improving academic achievement in the long-term (Jimerson et al., 2006). Therefore, a

number of educators and researchers suggest alterations to grade retention, which include a combination of evidence-based interventions and teaching strategies (Linda Darling-Hammond, n.d.; Jimerson et al., 2006; Rafoth & Carey, 1995).

Figure 4: Evidence-Based Recommendations for Grade Retention

- Parent/ family Involvement (Jimerson et al., 2006)
- Age appropriate & culturally sensitive instruction (Jimerson et al., 2006)
- Multi-age classrooms/learning (Jimerson et al., 2006)
- Early identification of struggling students (Lynch, 2014)
- Designing (and assessing) evidence-based interventions
- Increasing instructional time (Lynch, 2014)
- Tutoring programs (Lynch, 2014)
- Wrap around services (e.g. mental health) (Huang, 2014)
- Looping (Jimerson et al., 2006)

Furthermore, new alternatives to replace grade retention are also being developed in response to current educational challenges during the Covid-19 pandemic. Emerging research is showing that nearly every student in the United States has fallen behind in the 2020-2021 school year due to the pandemic (Dorn et al., 2020). In response, several school districts are more intentionally including parent and families in the decision-making process (Caprariello, 2021). Likewise, Jimerson and colleagues (2006) encourage schools to ask the students themselves what are their perspectives regarding grade retention.

Other alternative focus on changes to the existing school and learning structure (Jimerson et al., 2006). For example, looping and multi-age classrooms can also be excellent alternatives to grade retention. Looping classes allow students to spend two or more years with the same teacher which aides in informing teachers to meet each student's needs and accept their strengths. The multi-age classroom includes students of various ages and abilities, so each student can move forward at their own pace and learn from each other (May, Kundert, & Brent, 1995). Both looping and multi-age classrooms provide opportunities for teachers to better understand and adapt to students' individual learning styles (e.g., Nicholas & Nicholas, 2002; Yang, 1997). Other countries with significantly lower retention rates compared to the United States (e.g., Japan, Germany) often use looping (Reynolds, Bahart, & Martin, 1999).

From an international perspective, South Korea, Japan, and Sweden ban grade retention (Dineen, 2015). In South Korea, age perception has significant cultural value, coupled with a prejudice that students who repeat the grade are more likely to be delinquent teenagers. As schools consider the social perception that students will experience with grade retention, they enact the policy of “level learning”, which assesses both horizontal and vertical movement by grade. Level-specific curriculum means that the curriculum by which students learn in classes is developed by student ability level, and includes all factors such as education content, purpose, method, materials, evaluation, and teaching. The purpose of each level-specific curriculum is to maximize the growth potential and educational efficiency of each student by considering individual differences in students' abilities, aptitude, needs, and interests. Important variables to consider when organizing moving classes by level are usually represented through learning skills, learning interests, and learning styles, and the shape of classes by level may also vary depending on how students develop them in real-world classroom situations. The type of curriculum by level is

determined by how the learning group is organized, first by learners with similar abilities by grade, then by learners with similar abilities without distinguishing grades due to the opening of the no-year system, and third is based on the grade system. Pre-existing studies on the curriculum by level have been consistently suggested that this has a positive impact on academic achievement (Mani et al., 2018).

## Conclusion

This brief examined grade retention, the literature surrounding it, as well as its implementation in Wisconsin school districts. Many of the criticisms made about grade retention have been backed by research and data. This brief shows that not only are there disproportionalities in who is retained, but also that there are clear long-term negative consequences experienced by retained students, despite potential short-term benefits. The Wisconsin Department of Public Instruction has collected and published grade retention data that concerningly shows disproportionalities in retention, often impacting students who are most vulnerable. Research shows that those retained often have their academic and social challenges exacerbated through the practice of retention, leading to the widening opportunity and achievement gaps. This begs the question: how should Wisconsin policymakers address retention?

It should be no surprise that this is not a simple task. Grade retention is often used as a method to mitigate social promotion, a practice that also has negative consequences. Solving the issue of retention is not as simple as barring the retention of students. This brief has shown that grade retention is a *symptom* of deep-seeded issues in educational institutions. An examination into best practices, both domestically and internationally, was conducted in this brief. These best practices often involve wide sweeping, some would say radical, changes in educational practices and the narratives that surround them. These kinds of changes are often hard to achieve due to dwindling budgets, restrictive bureaucracies, and political battles at the state and school district levels. Nonetheless, there exists a clear need to advocate for grade-retention policy reform. Whether it be creating uniformity in grade-retention policy, the restructuring of classroom practices and curriculums, or investing in effective assessment/intervention strategies, there exists a need for change.

## Additional Resources

1. **Louisiana's Individual Academic Plan:** for students at risk at being retained which includes an option for summer retesting as well as evidence-based interventions to address the student's specific academic weaknesses
  - <https://hechingerreport.org/held-back-not-helped/>
  - <https://go.boarddocs.com/la/bese/Board.nsf/goto?open&id=ARUN7H5DCA3D>
2. **Alternatives to grade retention** by Linda Darling- Hammond. Published on the School Superintendents Association. <https://www.aasa.org/schooladministratorarticle.aspx?id=15030>
3. **Politico:** 'Parents are powerless'. Students face being held back after a year of remote learning <https://www.politico.com/news/2021/04/22/repeat-school-year-482336>

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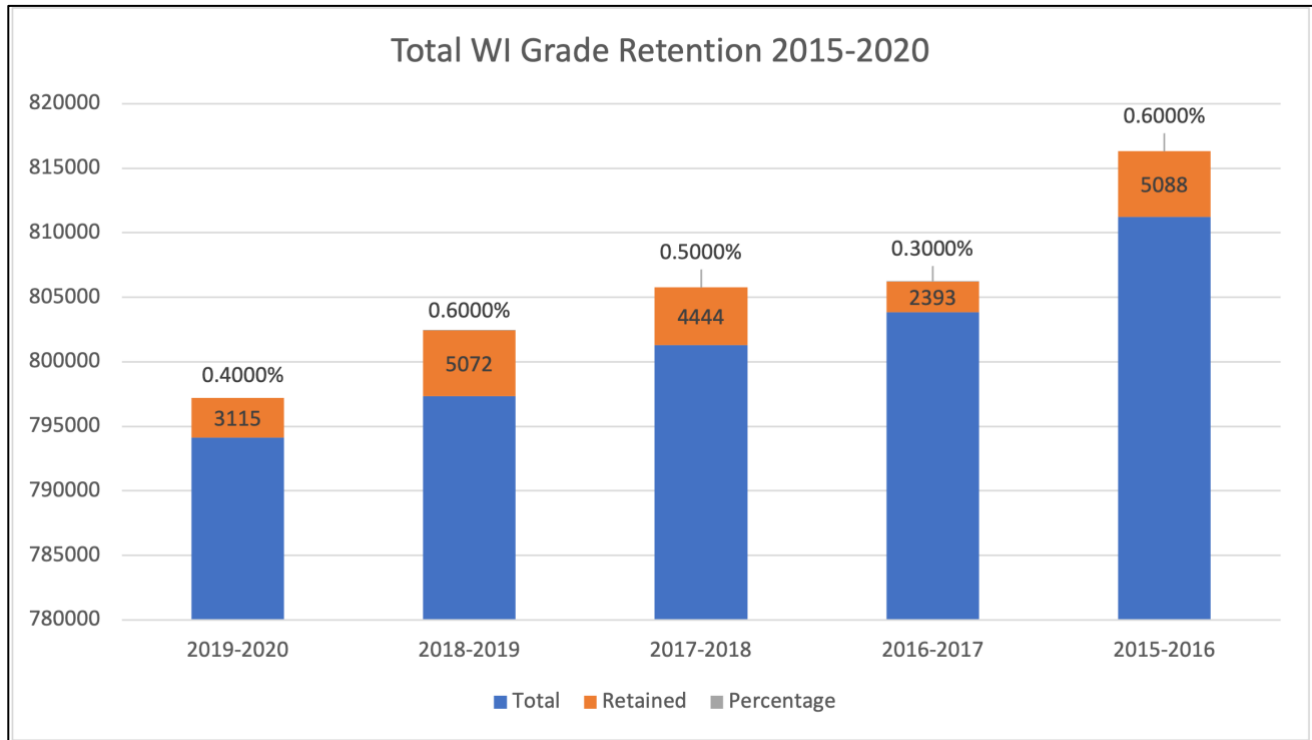
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## Appendix

Figure: 1. Total Wisconsin Grade Retention from 2015-2020



Source: Wisconsin Department of Public Instruction (2021)

Figure 2: Wisconsin Grade Retention by Year, 2018-2020

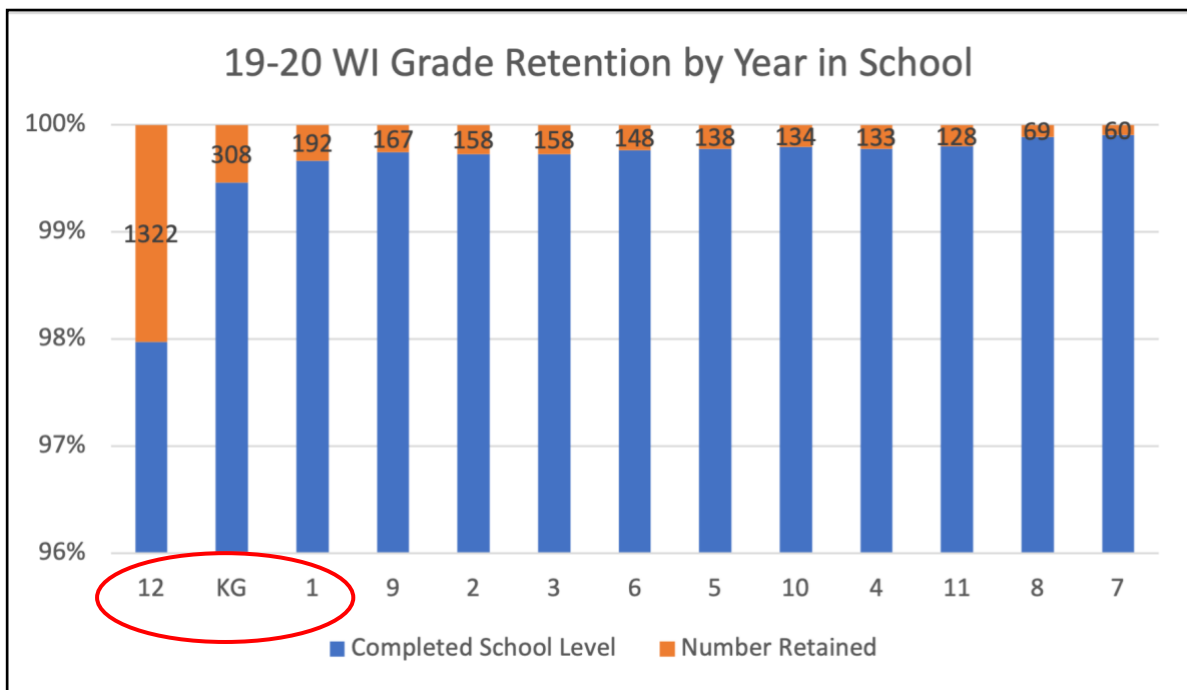
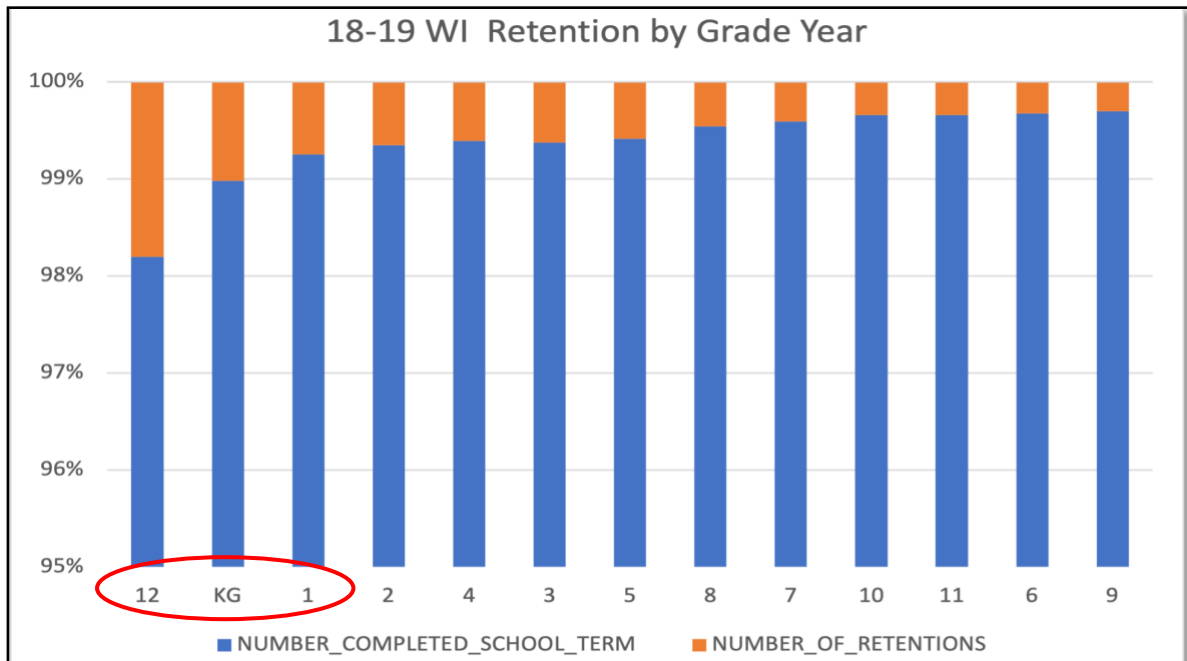


Figure 3: Wisconsin Grade Retention by Population Group

