



WE *inspire* STUDENTS TO  
BE EXCEPTIONAL  
BE CONFIDENT  
BE YOU

**BE BOLD**

# MEETING

## *Board of Education*

APRIL 22, 2024  
5:00 PM

Board Room | Education Service Center | 1516 Washington Street | Waterloo, IA 50702



2023-2024



# PLAN *Strategic*

## P · A · C · E

PEOPLE | ACHIEVEMENT | COMMUNITY | ENVIRONMENT

### OUR VISION

Unfolding Futures

### OUR MISSION

The Waterloo Schools community commits to a comprehensive system of education and support to assure that each and every student will graduate prepared for college, career, and citizenship as evidenced by continuing education, pursuing a career path, and contributing to a community.

### OUR GOALS . OUR PACE

**Attendance:** Student chronic absenteeism will decrease by 10% by the end of the 2023-24 school year.

**Climate:** Staff climate will improve by 10% by the end of the 2023-24 school year.









**Achievement:** Student achievement in ELA and Math will increase by 10% by the end of the 2023-24 school year.



WE INSPIRE STUDENTS TO BE BOLD

## AGENDA

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<b>I. Call to Order</b>	
<b>II. Moment of Silence</b>	
<b>III. Pledge of Allegiance</b>	
<b>IV. Mission Statement</b>	
The Waterloo Schools community commits to a comprehensive system of education and support to assure that each and every student will graduate prepared for college, career, and citizenship as evidenced by continuing education, pursuing a career path, and contributing to a community.	
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## V. Public Hearing: 2024-2025 Budget Certification

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### Contact Person

Jeff Sommerfeldt, Chief Financial Officer  
Dr. Jared Smith, Superintendent

### Details

April 30, 2024, is the last day for school districts to certify the 2024-2025 budget with the Black Hawk County Auditor and the Department of Education. Per new State of Iowa requirements, school districts are required to hold two public hearings for budget certification. The first public hearing was held on March 25, 2024. This is the second public hearing for the proposed budget certification. The notice of public hearing must be published at least ten days and not more than twenty days prior to the hearing, and must include the proposed budget, time, date and location of the public hearing. The attached budget was published in the Waterloo/Cedar Falls Courier on April 9, 2024.

The certified budget is the product of the state foundation aid formula furnished by the Iowa Department of Management, as directed by the state legislature. The state set the supplemental state aid increase of 2.5% for the 2024-2025 school year. The foundation formula is primarily a calculation of the certified enrollment of students multiplied by the state allocated amount per student.

The property tax rate for the 2024-2025 school year was published at \$13.97947 per thousand dollars of taxable valuation. The published maximum certified expenditure budget is \$248,560,356.

Later in this meeting, the Board of Education will consider the motion to approve and certify the 2024-2025 budget summary and local property tax rate.

## PUBLIC HEARING

### Supporting Documents



Notice of Public Hearing - Budget Certification

**NOTICE OF PUBLIC HEARING**  
**Proposed WATERLOO School Budget Summary**  
**Fiscal Year 2024 - 2025**

Location of Public Hearing: Education Service Center, 1515 Washington Street, Waterloo IA	Date of Hearing: 04/22/2024	Time of Hearing: 05:00 PM
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The Board of Directors will conduct a public hearing on the proposed 24/25 school budget at the above noted location and time. At the hearing, any resident or taxpayer may present objections to, or arguments in favor of, any part of the proposed budget. This notice represents a summary of the supporting detail of the revenues and expenditures on file with the district secretary. A copy of the details will be furnished upon request.

		Budget 2025	Re-est. 2024	Actual 2023	Avg % 23-25
Taxes Levied on Property	1	39,364,660	36,810,836	37,634,409	% 2.3
Utility Replacement Excise Tax	2	1,205,311	1,198,225	1,197,602	% 0.3
Income Surtaxes	3	0	0	0	
Tuition/Transportation Received	4	1,388,000	1,340,000	1,191,531	
Earnings on Investments	5	1,998,000	2,583,000	2,361,429	
Nutrition Program Sales	6	96,000	94,000	89,404	
Student Activities and Sales	7	1,295,000	1,290,000	1,256,009	
Other Revenues from Local Sources	8	655,000	1,559,000	630,275	
Revenue from Intermediary Sources	9	0	0	0	
State Foundation Aid	10	104,322,923	98,457,112	94,240,936	
Instructional Support State Aid	11	514,233	0	0	
Other State Sources	12	16,599,335	15,724,800	15,584,340	
Two Tier Assessment Limitation Replacement	13	0	0	0	
Title I Grants	14	4,850,000	4,860,000	4,671,532	
IDEA and Other Federal Sources	15	16,360,000	15,157,000	32,729,009	
<b>Total Revenues</b>	<b>16</b>	<b>188,648,462</b>	<b>179,073,973</b>	<b>191,586,476</b>	
General Long-Term Debt Proceeds	17	65,000,000	0	0	
Transfers In	18	9,646,400	9,182,518	9,960,478	
Proceeds of Fixed Asset Dispositions	19	3,000	15,000	68,804	
Special Items/Upward Adjustments	20	0	0	0	
<b>Total Revenues &amp; Other Sources</b>	<b>21</b>	<b>263,297,862</b>	<b>188,271,491</b>	<b>201,615,758</b>	
Beginning Fund Balance	22	46,647,491	66,432,391	75,195,294	
<b>Total Resources</b>	<b>23</b>	<b>309,945,353</b>	<b>254,703,882</b>	<b>276,811,052</b>	
<b>*Instruction</b>	<b>24</b>	<b>105,390,000</b>	<b>108,997,200</b>	<b>104,463,824</b>	<b>% 0.4</b>
Student Support Services	25	6,348,600	6,976,500	6,953,593	
Instructional Staff Support Services	26	7,446,800	7,350,000	7,325,700	
General Administration	27	3,936,000	3,963,000	3,849,087	
School Administration	28	10,089,300	10,013,000	9,919,805	
Business & Central Administration	29	6,968,250	6,913,000	6,750,374	
Plant Operation and Maintenance	30	15,708,800	14,943,500	14,514,916	
Student Transportation	31	5,204,600	4,903,000	4,273,714	
<b>*Total Support Services (lines 25-31)</b>	<b>31A</b>	<b>55,702,350</b>	<b>55,062,000</b>	<b>53,587,189</b>	<b>% 2.0</b>
<b>*Noninstructional Programs</b>	<b>32</b>	<b>9,893,350</b>	<b>8,679,090</b>	<b>8,184,609</b>	<b>% 9.9</b>
Facilities Acquisition and Construction	33	61,670,000	19,841,500	19,997,206	
Debt Service (Principal, interest, fiscal charges)	34	9,310,400	8,775,120	8,443,385	
AEA Support - Direct to AEA	35	6,594,256	5,826,481	5,741,971	
<b>*Total Other Expenditures (lines 33-35)</b>	<b>35A</b>	<b>77,574,656</b>	<b>34,443,101</b>	<b>34,182,562</b>	<b>% 50.6</b>
<b>Total Expenditures</b>	<b>36</b>	<b>248,560,356</b>	<b>207,181,391</b>	<b>200,418,184</b>	
Transfers Out	37	0	875,000	9,960,477	
Other Uses	38	0	0	0	
<b>Total Expenditures, Transfers Out &amp; Other Uses</b>	<b>39</b>	<b>248,560,356</b>	<b>208,056,391</b>	<b>210,378,661</b>	
Ending Fund Balance	40	61,384,997	46,647,491	66,432,391	
<b>Total Requirements</b>	<b>41</b>	<b>309,945,353</b>	<b>254,703,882</b>	<b>276,811,052</b>	
<b>Proposed Property Tax Rate (per \$1,000 taxable valuation)</b>		<b>13.97947</b>			

## VI. Public Hearing: East High Pool Infill Project

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### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A public hearing provides an opportunity for any and all interested parties to appear before the Board and comment on the proposed project. The District proposes to infill the pool at East High School and repurpose the room as a multipurpose room for athletic and other activities.

The Public Hearing for the proposed East High Pool Infill project will be held on Monday, April 22, 2024, at 5:00pm in the Board Room of the Education Service Center, 1615 Washington Street, Waterloo, IA 50702.

The Notice of Public Hearing regarding the project has been published in *The Courier*.

## PUBLIC HEARING

### Supporting Documents

 Notice of Public Hearing-East High Pool Infill

NOTICE OF PUBLIC HEARING

NOTICE OF PUBLIC HEARING ON PROPOSED PLANS SPECIFICATIONS, AND FORM OF CONTRACTS, AND ESTIMATED TOTAL COST OF THE PUBLIC IMPROVEMENT FOR THE CONSTRUCTION OF THE EAST HIGH POOL INFILL PROJECT FOR THE WATERLOO COMMUNITY SCHOOL DISTRICT, WATERLOO, IA.

Notice is hereby given that the Board of Education of the Waterloo Community School District of Waterloo, Iowa, will meet in the Board Room of the Education Service Center, 1516 Washington Street, in said City on the 22nd day of April 2024, at 5:00 p.m., at which time and place a hearing will be held on the proposed plans, specifications, form of contract, and estimated of cost for the construction of the East High Pool Infill project, Waterloo, Iowa in and for said City.

If approved, consideration of such bids for the construction of the aforesaid project will be made following the hearing. Any interested person may appear at said hearing and file objections to the proposed plans, specifications, form of contract, and estimated costs for said improvements. It is anticipated that bids will be received for aforesaid improvements on the 9th day of April 2024, at 2:00 p.m.

**Project Scope:** Infill the existing pool, provide new floor topping, update mechanical in the space, repaint, and provide some new translucent openings where existing openings once existed, and other related Work indicated in the Drawings and Specifications. The project is located at East High School, 214 High Street, Waterloo, Iowa.

A more detailed description of the kinds and approximate quantities of materials and types of construction for which bids will be received are set forth in the Bidding Documents prepared by ISG, Inc., of Waterloo, Iowa. which together with the proposed form of contract, have heretofore been approved by the Board of Education and are now on file for public examination in the Waterloo District's Administration Office, and are by this reference made part hereof as though fully set out and incorporated herein.

The Architect/Engineer has prepared plans and specifications governing the construction of the proposed improvements. These plans and specifications, and the proceedings of the Board of Education referring to and defining said improvements, are hereby made a part of this Notice and the proposed contract by reference, and the proposed contract shall be executed to comply therewith.

Published upon order of the Waterloo Community School District.

WATERLOO COMMUNITY SCHOOL DISTRICT

BY /s/ Pam Arndorfer  
Secretary to the Board

ATTEST:

BY /s/ Jeff Sommerfeldt  
Chief Financial Officer/Board Treasurer



## VII. Public Hearing: West High Pool Infill Project

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### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A public hearing provides an opportunity for any and all interested parties to appear before the Board and comment on the proposed project. The District proposes to infill the pool at West High School and repurpose the room as a multipurpose room for athletic and other activities.

The Public Hearing for the proposed West High Pool Infill project will be held on Monday, April 22, 2024, at 5:00pm in the Board Room of the Education Service Center, 1615 Washington Street, Waterloo, IA 50702.

The Notice of Public Hearing regarding the project has been published in *The Courier*.

## PUBLIC HEARING

### Supporting Documents



Notice of Public Hearing - West High Pool Infill

**NOTICE OF PROPOSED PUBLIC IMPROVEMENTS**

Notice is hereby given, in accordance with [Chapter 73A, Section 73A.2 of the 2021 Code of Iowa], applicable to the Board of Directors of the **WATERLOO COMMUNITY SCHOOL DISTRICT**.

This District includes all or part of the following Iowa Counties: **BLACK HAWK**.

The said Board proposes **TO INFILL THE POOL AT WEST HIGH SCHOOL AND REPURPOSE THE ROOM AS A MULTIPURPOSE ROOM FOR ATHLETIC AND OTHER ACTIVITIES**.

Proposed Drawings, Specifications and copies of said contract documents are now on file and available for inspection at the **OFFICE OF RAPIDS REPRODUCTIONS, BY LOGGING ON TO RAPIDSREPRO.COM/PLANROOM OR CALLING 1-800-383-1223**

A public hearing at which any and all interested persons may appear and file objection to said proposed Plans, Specifications, Form of Contract for, or cost of such improvements will be held as provided by law in the **BOARD ROOM, EDUCATION SERVICE CENTER, 1516 WASHINGTON STREET, WATERLOO, IA**.

The time of the public hearing is hereby set at **5:00pm** (local time) on **APRIL 22, 2024**.

Dated at: **WATERLOO, IA, this 11<sup>th</sup> day of APRIL, 2024**.

By order of: **WATERLOO COMMUNITY SCHOOL DISTRICT**

BY: **PAM ARNDORFER, BOARD SECRETARY**

## VIII. Public Hearing: Central Water Upgrade Main Project

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### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A public hearing provides an opportunity for any and all interested parties to appear before the Board and comment on the proposed project. The District proposes to construct water main upgrades at Central Middle School, located at 1350 Katoski Drive, Waterloo.

The Public Hearing for the proposed Central Water Main Upgrade project will be held on Monday, April 22, 2024, at 5:00pm in the Board Room of the Education Service Center, 1615 Washington Street, Waterloo, IA 50702.

The Notice of Public Hearing regarding the project has been published in *The Courier*.

## PUBLIC HEARING

### Supporting Documents

 Notice of Public Hearing - Central MS Water Main

**SECTION 00 0100**  
**NOTICE OF PROPOSED PUBLIC IMPROVEMENTS**

**NOTICE IS HEREBY GIVEN IN ACCORDANCE WITH CHAPTER 26, SECTION 26.12 OF THE 2023 CODE OF IOWA, APPLICABLE TO THE BOARD OF DIRECTORS OF THE WATERLOO COMMUNITY SCHOOL DISTRICT.**

This District includes all or part of the following Counties: BLACK HAWK.

The said Board proposes to construct Waterloo CSD Central Middle School Water Main Upgrades located at 1350 Katoski Dr, Waterloo, IA 50701.

Proposed Drawings and Specifications, as well as proposed form of contract have been adopted therefore by the said Directors and copies of said construction contract documents are now on file and available for inspection at WATERLOO COMMUNITY SCHOOL DISTRICT, EDUCATION SERVICE CENTER, 1516 WASHINGTON STREET, WATERLOO, IA 50702.

A public hearing at which all interested persons may appear and file objection to said proposed Plans, Specifications, Form of Contract for, or cost of such improvements will be held as provided by law in the WATERLOO COMMUNITY SCHOOL DISTRICT, EDUCATION SERVICE CENTER, 1516 WASHINGTON STREET, WATERLOO, IA 50702.

The time of the public hearing is hereby set at 5:00pm on April 22, 2024. By  
Order of: WATERLOO COMMUNITY SCHOOL DISTRICT.

BY: Pamela G. Arndorfer, Board Secretary

**END OF SECTION 00 0100**

## **X. School Presentation: George Washington Carver Academy**

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### **Contact Person**

Josh Payton, Principal, George Washington Carver Academy  
Pam Arndorfer, Assistant to the Superintendent / Board Secretary

### **Details**

Throughout the 2023-2024 school year, we will hear about the many amazing things happening in each of our buildings. Administrators from each school were provided with a list of school board meeting dates and were asked to sign up for a night to present. Two slots were provided for each board meeting.

In tonight's first presentation, the Carver Academy Bulldog PAC (Principal Advisory Committee) will highlight the exciting developments and achievements happening at Carver. From academic triumphs to community initiatives, students will showcase the impactful work of their school community. Get ready to be inspired by the spirit of Carver Academy!

## **XI. School Presentation: Expo Alternative Learning Center**

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### **Contact Person**

Cary Wieland, Principal, Expo Alternative Learning Center  
Pam Arndorfer, Assistant to the Superintendent / Board Secretary

### **Details**

Throughout the 2023-2024 school year, we will hear about the many amazing things happening in each of our buildings. Administrators from each school were provided with a list of school board meeting dates and were asked to sign up for a night to present. Two slots were provided for each board meeting.

In tonight's second presentation we will hear from Expo Alternative Learning Center principal, Cary Wieland, and listen to the student voices as Expo students share their experiences of attending the school.

## **XII. West High Journalism Student Travel to Kansas City, MO**

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### **Contact Person**

Nicole Goodman, English Teacher, Yearbook Adviser, Wahawk Insider Adviser, West High School  
Andy Miehe, Principal, West High School

### **Details**

At the February 26, 2024, board meeting, travel was approved for West High Journalism students and Nicole Goodman, Adviser, to attend the JEA/NSPA National Journalism Convention in Kansas City, MO, from April 3-7. Nicole and several students will present about their experience at the conference.

### **XIII. Board Celebration: Waterloo Youth City Council**

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#### **Contact Person**

Pam Arndorfer, Assistant to the Superintendent / Board Secretary  
Carol Luce, Executive Director, Waterloo Youth City Council

#### **Details**

Pulling members from all four of the high schools in Waterloo, the Youth City Council empowers young people to think critically, debate civilly, and forge consensus on the most critical issues facing our city. Following in the footsteps of other successful youth city council programs the Waterloo Youth City Council seeks to harness the passion and idealism of our youth today in order to create a better future for tomorrow.

Recently, eight Waterloo Schools students (four from East High and four from West High) had the privilege to attend the Close Up program in Washington, DC. Carol Luce, Executive Director of the Youth City Council, and students, will present information about their experience at the conference.



## XIV. Waterloo Open Enrollment Study

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### Contact Person

Sheena Canady, Director of Student and At-Risk Services

### Details

Open Enrollment is the process by which a parent or guardian residing in an Iowa district may enroll their child(ren) into another Iowa school district under the terms and conditions of Iowa Code 282.18 and Iowa Administrative Code 281-17.

This past fall, the Student Services Department performed a root cause analysis of the current state of Open Enrollment in Waterloo Schools. A total of 430 cold calls were made to households in which students are currently open enrolled out of the District. Parents were asked the following three questions in an effort to better understand the data.

- What was the primary reason for leaving, or never attending, our District?
- Did you give WCSD staff a chance to resolve concerns?
- Would you ever consider returning to our District?

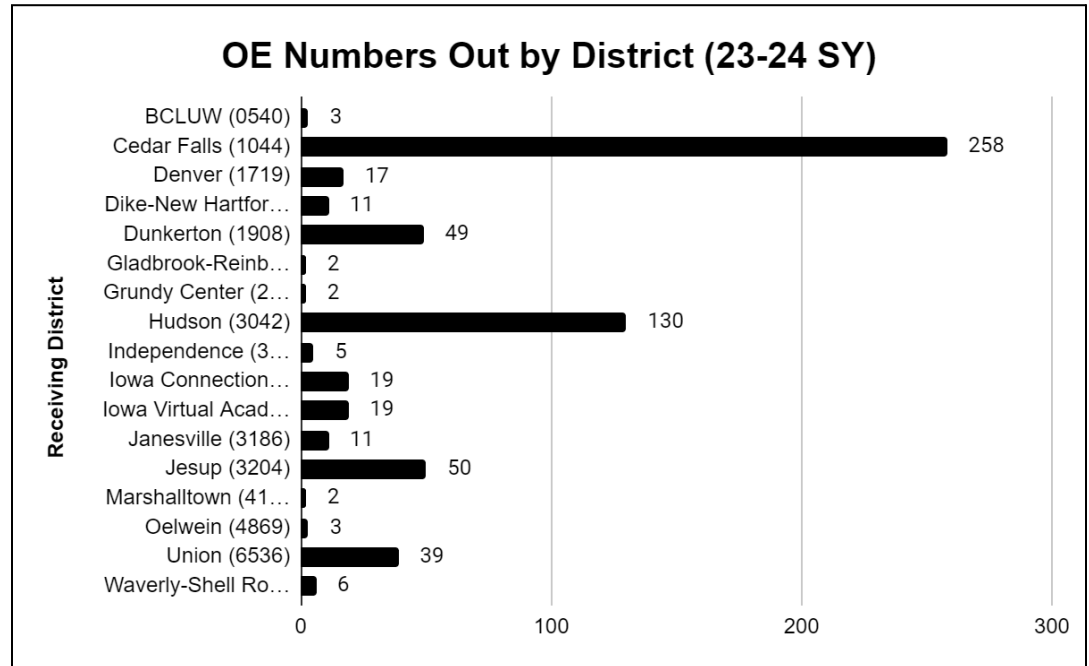
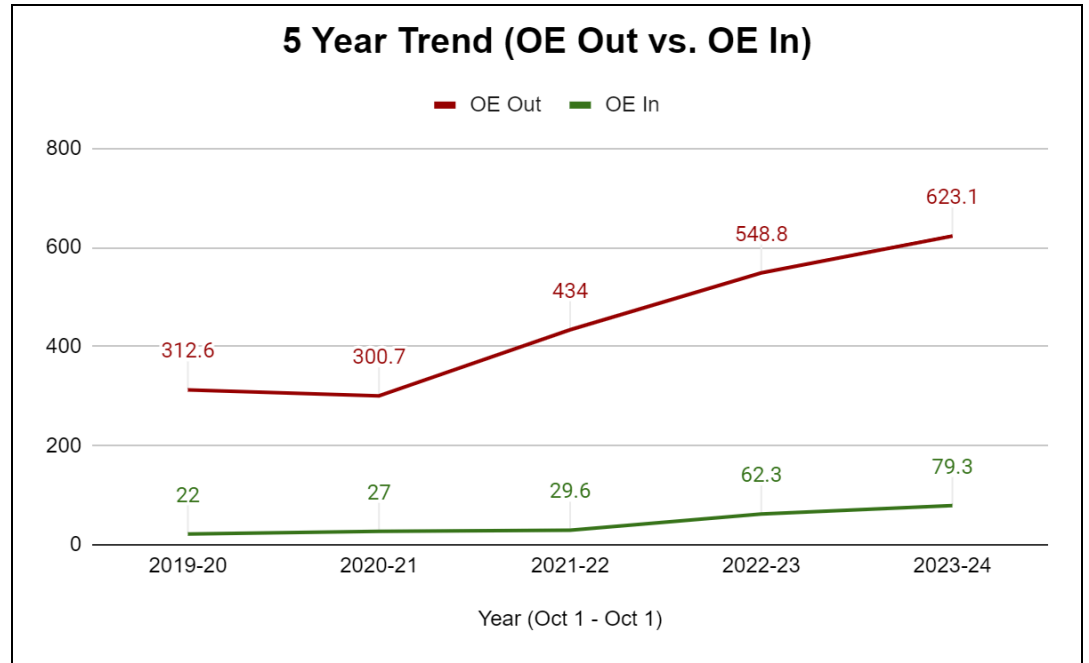
Sheena Canady, Director of Student and At-Risk Services, will be present to share the data compiled from the cold calls and the District's next steps in response to the data.

### Supporting Documents



OE Root Cause Summary


WCSD Open Enrollment/ESA At-A-Glance	
OE Out Funding	\$4,757,368
OE In Funding	\$605,456
Rolling Total OE Out	623.1
New OE Out 23-24SY	74.3
Rolling Total OE In	79.3
Total ESA	684
New ESA 23-24SY	187
* 23-24SY per pupil funding = \$7,635	



## Root Cause Analysis

**Background Information:** In the fall of the 23-24 SY, Student Services personnel performed “cold calls” to all of the current open enrollment out households; we asked/analyzed three basic questions to collect information to better understand our open enrollment out data. Below is the summary of our analysis:

Total Calls (made)	Total Reached (households)	Success Rate	What was the primary reason for leaving/never attending our District?			Did you give WCSD staff a chance to resolve concerns?			Would you ever consider returning to our District?		
430	185	43.02%	Continuous (Following a move to Waterloo)	55	29.7%	Yes	40	21.6%	Yes	63	34.1%
			School/Class Size	25	13.5%	No	117	63.2%	No	106	57.3%
			Negative Experience (Staff)	19	10.3%	Not Applicable	23	12.4%	Prefer Not to Disclose	16	8.6%
			Opportunity (Academics)	18	9.7%	Prefer Not to Disclose	5	2.7%		<b>185</b>	
			Perception	18	9.7%		<b>185</b>				
			Proximity to Other District	17	9.2%						
			Bullying/Conflict	10	5.4%						
			Parent's Job Location	10	5.4%						
			Negative Experience (Peer)	3	1.6%						
			Custodial Arrangement	3	1.6%						
			Child Care	2	1.1%						
			Opportunity (Extracurricular)	2	1.1%						
			Transportation	2	1.1%						
			Prefer Not to Disclose	1	0.5%						
				<b>185</b>							

**XV. i. Approval of Minutes: April 8, 2024 Regular Board Meeting** 

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**Recommendation**

The Superintendent's recommendation is that the Board of Education approve the minutes of the April 8, 2024, Regular Board meeting.

**Contact Person**

Pam Arndorfer, Assistant to the Superintendent / Board Secretary

**Supporting Documents**



April 8, 2024 Meeting Minutes



## MEETING MINUTES

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### Attendees

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#### Voting Members

Astor Williams, Board President  
Lyle Schmitt, Board Vice President  
Jonathan Cox, Board Member  
Jesse Knight, Board Member  
Krystal Madlock, Board Member  
Stacie Mills, Board Member

#### Absent

Janelle Ewing, Board Member

#### Non-Voting Members

Dr. Jared Smith, Superintendent  
Anthony Spurgetis, Chief Human Resources Officer  
Jeff Sommerfeldt, Chief Financial Officer / Board Treasurer  
Pam Arndorfer, Board Secretary

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### I. Call to Order

President Williams called the meeting to order at 5:04pm.

### II. Moment of Silence

### III. Pledge of Allegiance

### IV. Mission Statement

The Waterloo Schools mission statement was read by President Williams.

### V. Public Hearing: East High Auditorium and Pool Roof Replacement Project

The Public Hearing for the East High Auditorium and Pool Roof Replacement project was declared open at 5:06pm.

No public comments were brought forth.

The Superintendent's recommendation is to close the Public Hearing for the East High Auditorium and Pool Roof Replacement project.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

The Public Hearing was closed at 5:07pm.

**VI. School Presentation: Becker Elementary**

This item was presented as Information Only. Brandy Welch, Becker Elementary principal, and Amber Megivern, Becker support staff, provided information regarding their efforts to increase student, parent and family engagement within the school and community.

**VII. Board Celebration: FIRST Tech Challenge and FIRST Robotics Competition**

This item was presented as Information Only. Dick Hurban, along with several student members of FIRST Tech Challenge and FIRST Robotics, provided information and shared a demonstration of their robots.

**VIII. Information from Individuals and Delegations**

- Forest Dillavou, 1725 Huntington Road, Waterloo, spoke about the recent property purchase on Katoski Drive and asked for any written communication from the City regarding the flood plain issue. He also expressed his appreciation to the board member who met him and walked the property.
- Faythe Kubik, 1569 Corrine St, Waterloo, expressed her concerns regarding the proposed high school project, stating that she believes it will be too large and diminish opportunities for student engagement. She also fears there will be more cliques and less diversity among groups.

**IX. Consent Agenda**

The Superintendent's recommendation is that the Board of Education approve the Consent Agenda including items i, iii, and v as presented.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

**i. Approval of Minutes: March 25, 2024, Regular and Special Board Meetings**

**ii. Personnel Appointments and Adjustments**

The Superintendent's recommendation is that the Board of Education approve the personnel items as listed.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

Anthony Spurgetis, Chief Human Resources Officer, Dr. Jared Smith, Superintendent, and Amy Schmidt, Director of Secondary Education, provided information.

**iii. Bills Due & Payable and Bills Paid Between Board Meetings**

**iv. Acceptance of SLFRF Safety Grant**

The Superintendent's recommendation is that the Board of Education accepts the State and Local Fiscal Recovery Funds (SLFRF) grant in the amount of \$900,000 to provide safety improvements in District school buildings.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

Jeff Sommerfeldt, Chief Financial Officer, and Dr. Jared Smith, Superintendent, provided information.

**v. Set Date of Second Public Hearing for the 2024-2025 Budget Certification**

**X. Time and Attendance System Purchase**

The Superintendent's recommendation is that the Board of Education approve the purchase of the UKG Ready system as presented.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

Matt O'Brien, Director of Technology, provided information.

**XI. Bid Approval: East High Auditorium and Pool Roof Replacement Project**

The Superintendent's recommendation is that the Board of Education accept the recommendation from ISG and approve the bid from Service Roofing for the East High Auditorium and Pool Roof Replacement as outlined for a total contract cost of \$364,000.

Motion made by: Jesse Knight

Motion seconded by: Krystal Madlock

Voting:

Unanimously Approved

Nathan Compton, Senior Architect with ISG, provided information.

**XII. Resolution Amending Revenue Purpose Statement to Authorize Expenditures from Revenue Received from SAVE for Radon Testing**

The Superintendent's recommendation is that the Board of Education approve the Resolution Amending the Revenue Purpose Statement to Authorize Expenditures from Revenue Received from the State Secure an Advanced Vision for Education (SAVE) Fund for Radon Testing as presented.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Astor Williams - Yes

Lyle Schmitt - Yes

Jonathan Cox - Yes

Jesse Knight - Yes

Krystal Madlock - Yes  
Stacie Mills - Yes

Jeff Sommerfeldt, Chief Financial Officer, and Zach Kelly, Director of Operations, provided information.

**RESOLUTION AMENDING REVENUE PURPOSE STATEMENT  
TO AUTHORIZE EXPENDITURES  
FROM REVENUE RECEIVED FROM THE STATE SECURE AN ADVANCED VISION  
FOR EDUCATION FUND FOR RADON TESTING**

WHEREAS, the School District receives revenue from the State of Iowa Secure an Advanced Vision for Education Fund ("SAVE Revenue") pursuant to Iowa Code Section 423F.2, as amended; and

WHEREAS, the voters of the School District approved a Revenue Purpose Statement at the March 3, 2020 election; and

WHEREAS, the School District's Revenue Purpose Statement authorizes the use of SAVE Revenue for multiple purposes, including to provide funds for other authorized expenditures and purposes as now or hereafter permitted by law and designated by the School District; and

WHEREAS, in 2022, the General Assembly enacted House File 2412, an act requiring radon testing and mitigation in public schools as required by Iowa Code section 280.32; and

WHEREAS, pursuant to HF 2412, the General Assembly amended Iowa Code section 423F.3(3)(a) to provide that boards of directors may adopt a resolution to use SAVE Revenue to pay for radon testing and may approve a revenue purpose statement for that purpose without submitting the revenue purpose statement to a vote of the electors; and

WHEREAS, the School District wishes to amend its Revenue Purpose Statement that includes all proposed uses of SAVE Revenue, to provide for the use of SAVE Revenue to pay for radon testing mandated pursuant to Iowa Code section 280.32:

NOW, THEREFORE, BE IT RESOLVED BY THE WATERLOO COMMUNITY SCHOOL DISTRICT, IN THE COUNTY OF BLACK HAWK, STATE OF IOWA:

Section 1. That the Board hereby authorizes spending SAVE Revenue to pay for radon testing mandated pursuant to Iowa Code section 280.32 and, in doing so, hereby approves the following amendment to its Revenue Purpose Statement.

Section 2. That the School District's Revenue Purpose Statement, as approved by the voters at an election held on March 3, 2020, be amended to provide that, in addition to all previously authorized purposes, revenue received by the School District from the State of Iowa Secure an Advanced Vision for Education Fund may be spent to provide funds for radon testing required pursuant to Iowa Code section 280.32.

PASSED AND APPROVED this 8th day of April, 2024.

**XIII. Superintendent's Report**

- We are excited to share that Lowell Elementary received news the day following their Board presentation that they have been approved as a Lighthouse school!



- We are looking forward to the Board Recognition breakfast on Thursday morning at the WCC. We will be joined by a number of WCC students who will share their experiences at the WCC and the impact taking WCC classes has had on their lives.
- Earlier today we made the announcement of three new administrative level hires, pending board approval:
  - Ryan Christoffer - Lincoln Elementary principal
  - Cassandra Hart - Kittrell Elementary principal
  - Sunni Hart - Associate Director of Special Education

#### **XIV. Information from Board Members**

Each board member was given the opportunity to comment.

#### **XV. Adjourn**

The Superintendent's recommendation is that the Board of Education adjourn the meeting.

Motion made by: Jesse Knight

Motion seconded by: Stacie Mills

Voting:

Unanimously Approved

The meeting adjourned at 6:33pm.

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Pamela G. Arndorfer, Board Secretary

## XV. ii. Personnel Appointments and Adjustments

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the personnel items as listed.

### Contact Person

Anthony Spurgetis, Chief Human Resources & Equity Officer

### Details

Routine personnel matters, as outlined in the attachment, are recommended for approval.

### Supporting Documents



Routine Personnel Appointments

**WATERLOO COMMUNITY SCHOOL DISTRICT  
HUMAN RESOURCES  
April 22, 2024**

**PERSONNEL APPOINTMENTS**

<u>NAME</u>	<u>SALARY</u>	<u>BUILDING</u>	<u>SUBJECT</u>	<u>SEN.DATE</u>	<u>REASON</u>	<u>EFFECT. DATE</u>
<b><u>Certified</u></b>						
Olivia Astarita	Step 10 MA (Salary TBD)	Bunger	ELL Teacher	3/8/2024	Melanie Shayer	8/20/2024
Jenny Bantolinao	Step 10 MA (Salary TBD)	TBD	Early Childhood Special Education Teacher	4/3/2024	New Position	8/20/2024
Rachel Burns	Step 7 BA (Salary TBD)	TBD	Early Childhood Dual Gen Ed - Special Ed Teacher	3/4/2024	Stephanie Miller	8/20/2024
Cade Carstens	Step 7 BA (Salary TBD)	Hoover	PE Teacher	4/5/2024	Justin Decker	8/20/2024
Stacey Coulter	Step 14 MA (Salary TBD)	Irving	Strat I Teacher	2/21/2024	Hannah Clark	8/20/2024
Troy Ersland	Step 7 BA (Salary TBD)	East High	Strat I Teacher	3/28/2024	Shannon Boos	8/20/2024
Carter Greenfield	Step 7 BA (Salary TBD)	Highland	PE Teacher	1/8/2024	Robert Hansen	8/20/2024
Hunter Hamilton	Step 7 MA (Salary TBD)	Waterloo Career Center	Agri-Science Teacher	2/20/2024	New positioin	8/20/2024
Angela Johnson	Step 9 Supplemental (Salary TBD)	TBD	Family Support Worker	3/7/2024	Tavis Smith/Sheila Butler	8/20/2024
Jayden Moeller	Step 7 BA (Salary TBD)	Irving	Strat I Teacher	3/25/2024	Page Foss	8/20/2024
Kara Soughan	Step 7 BA (Salary TBD)	West High	Math Teacher	3/25/2024	Irv Laube	8/20/2024
Taylor Webb	Step 8 MA (Salary TBD)	Orange	Strat I Teacher	3/28/2024	Lexus Dunn	8/20/2024
Cedrick Whitlock	Step 7 BA (Salary TBD)	Waterloo Career Center	Beauty and Wellness Teacher	3/21/2024	New Position	8/20/2024
Piper Wiedenhoff	Step 7 BA (Salary TBD)	West High	PE Teacher	3/1/2024	Gabrielle Schwaring	8/20/2024

**Classified**

Elisha Ackles	\$ 4,636.38	East High	Special Ed Para	4/4/2024	Raquel Harmon	4/9/2024
Denisha Washington	\$ 4,436.32	Expo	Behavior Intervention Specialist	3/27/2024	Victoria Fuhrman	4/15/2024
Kayla Grigg	\$ 3,936.38	Becker	Special Ed Para	3/22/2024	Samajda Hasic	4/18/2024

**PERSONNEL APPOINTMENTS cont.**

<b><u>NAME</u></b>	<b><u>SALARY</u></b>	<b><u>BUILDING</u></b>	<b><u>SUBJECT</u></b>	<b><u>SEN.DATE</u></b>	<b><u>REASON</u></b>	<b><u>EFFECT. DATE</u></b>
<b><u>Classified</u></b>						
Andrea Gillam	\$ 4,041.24	East High	Special Ed Para - Extended Core	4/4/2024	Kacey Meihost	4/15/2024

**Coach**

Jaden Keller	\$ 3,313.50	West	Assistant Basketball Coach	TBD	Jared Johnston	12/26/2023
Alyvia Kirschman	\$ 2,397.00	East High	Assistant Volleyball Coach	TBD	Cameren Happel	8/23/2024
Hailee Sgontz	\$ 2,978.63	Central	Girls Wrestling Assistant Coach	TBD	New Position	1/4/2024
Elisha Ackles	\$ 2,397.00	East	Assistant Baseball Coach	TBD	Cade Nolan	4/29/2024
Tyus Phillips	TBD	East High	Assistant Football Coach	TBD	Derrick Turner	8/7/2024
Kelly Martin	TBD	East High	Assistant Girls Basketball Coach	TBD	Aaron Love	11/6/2024

**CHANGE OF ASSIGNMENTS****Administrative**

Ben Barnett	\$ 90,000.00	Carver	Assistant Principal	TBD	Charlotte Coleman	8/1/2024
Whitney Fischer	\$ 80,000.00	WCC	Dean of Students	TBD	New Position	8/1/2024
Cassandra Hart	\$ 115,000.00	Kittrell	Principal	TBD	Audrey Wallican-Green	7/1/2024
Ryan Christoffer	\$ 115,000.00	Lincoln	Principal	TBD	Tamera Cook	7/1/2024

**Administrative Support**

Tia Velasquez	\$ 35,000.00	Irving	Learning Supports Coordinator	TBD	Morgan Marx	8/19/2024
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**Certified**

Talia Nieman		WCC	Hospitality and Tourism Teacher	TBD	New Position	8/20/2024
Melissa Westerman		Orange	Special Ed Strat 1	TBD	Kay Spratt	8/20/2024
Mark Stuenkel		East	Strat II MD and ID Teacher	TBD	New Position	8/20/2024
Kelly Carl		WCC	Special Ed Strat 1	TBD	New Position	8/20/2024
Robin Earle		Bunger	Special Ed Strat 1	TBD	Cory Sornson	8/20/2024
Andrew Martin		WCC	Advanced Manufacturing Instructor	TBD	New Position	8/20/2024

**CHANGE OF ASSIGNMENTS cont.**

<b><u>NAME</u></b>	<b><u>SALARY</u></b>	<b><u>BUILDING</u></b>	<b><u>SUBJECT</u></b>	<b><u>SEN.DATE</u></b>	<b><u>REASON</u></b>	<b><u>EFFECT. DATE</u></b>
<b><u>Certified</u></b>						
Justin Decker		West	PE Teacher	TBD	Dave Gettman	8/20/2024
Page Foss		Hoover	Special Ed Strat 1	TBD	Tia Smith	8/20/2024
Ashley Clark		Carver	Special Ed Strat II BD	TBD	Mark Stuenkel	8/20/2024
Will Tieskotter		TBD	ELP Teacher	TBD	Jake Bates	8/20/2024
Adam Ahrendsen		Orange	Lead Teacher	TBD	Melissa Westerman	8/20/2024
Naomi Feldman Kraus		District	Instructional Coach - Fine Arts	TBD	Travis Gratteau- Zinnel	8/20/2024
Dezirae Bainum		TBD	ELP Teacher	TBD	Kelly Carl	8/20/2024
Danielle Kuhlmann		Lincoln	Special Ed Strat 1	TBD	Leslie Tripp- Rieks	8/20/2024
Trisha Krusemark		East	Credit Recovery Teacher	TBD	Kurt Hempen	8/20/2024
Jill Jackson		Hoover	Special Ed Strat 1	TBD	Kathryn Gainer	8/20/2024
Brandy Twedt		Kinglsey	.5 Special Ed Strat 1 and .3 Title	TBD	Student need	8/20/2024

**Classified**

Michelle Culp		Central	Sp. Ed Behavior Intervention	TBD	Amanda Brewer	4/8/2024
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**Coach**

Morgan Hines		East	Head Volleyball	TBD	Ashley Sterger	8/1/2022
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**INVOLUNTARY TRANSFER****Certified**

Larry Kubitz		Hoover	Social Studies Teacher - 6th Grade	TBD	April Kleinschmidt	8/20/2024
Anthony Boggs		Hoover	Social Studies Teacher	TBD	Larry Kubitz	8/20/2024

**RETURN FROM LEAVE OF ABSENCE****Certified**

Josh Hovenga		Kittrell	PE Teacher	TBD		4/15/2024
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**LEAVES OF ABSENCE TO BE APPROVED****Certified**

Emily Stevenson		Kittrell	Elementary Teacher	TBD	Changed from a FMLA to an LOA- Family Leave	4/8/2024
Jordan Beltz		Carver	Math Teacher	TBD	FMLA	3/26/2024

**LEAVES OF ABSENCE TO BE APPROVED cont.**

<u>NAME</u>	<u>SALARY</u>	<u>BUILDING</u>	<u>SUBJECT</u>	<u>SEN.DATE</u>	<u>REASON</u>	<u>EFFECT. DATE</u>
<b>Classified</b>						
Nijaza Samardzic		Bunger	Custodian	TBD	Changed from an LOA to LTD	12/5/2022
Roger Yeager		West	Custodian	TBD	Changed from an LOA to LTD	11/13/2023
Asmira Tricic		West	General Worker	TBD	Changed from an LOA to LTD	11/4/2022
Shavionte Spates		Lowell	Special Ed Para	TBD	LOA- Self	3/20/2024
Kiara Bates		Becker	Special Ed Para	TBD	LOA - Health & Family responsibility	2/29/2024

**RESIGNATIONS**

**Certified**

Emily Geerdes		Lou Henry	Elementary Teacher	TBD	Resignation	24
Makayla Tangeman		Lowell	Special Ed Strat 1	TBD	Resignation	End of 23-24
Haley Fienup		Kingsley	Special Ed. Strat 1	TBD	Resignation	End of 23-24
Mark Schmadeke		Expo	Virtual Secondary Special Ed. Teacher	TBD	Resignation	End of 23-24
Dakota Grattan		Orange	Elementary Teacher	TBD	Resignation	End of 23-24
Josh Blomker		Bunger	Career and Technology Teacher	TBD	Resignation from LTD	4/3/2024
Caitlin Bailey		Kingsley	Elementary Teacher	TBD	Resignation	End of 23-24
Paige Slack		Expo	Special Ed Teacher	TBD	Resignation	End of 23-24
Tonya Mastin		Bunger	Math Teacher	TBD	Resignation	End of 23-24
Ra'Shuna Greer		Becker	Media Specialist	TBD	Resignation	End of 23-24
Faye Pleggenkuhle		Lou Henry	Art Teacher	TBD	Resignation	End of 23-24
Lydia Butters		West	Math Teacher	TBD	Resignation	End of 23-24
Mackenzie Kuehn		Kittrell	Elementary Teacher	TBD	Resignation	End of 23-24
Brittany Graham		Kittrell	Elementary Teacher	TBD	Resignation	End of 23-24

**RESIGNATIONS cont.**

<b><u>NAME</u></b>	<b><u>SALARY</u></b>	<b><u>BUILDING</u></b>	<b><u>SUBJECT</u></b>	<b><u>SEN.DATE</u></b>	<b><u>REASON</u></b>	<b><u>EFFECT. DATE</u></b>
<b><u>Certified</u></b>						
Matthew Goodman		West	IGNITE Instructor	TBD	Resignation	End of 23-24
Jordan Barkley		Expo	Language Arts Teacher	TBD	Resignation	End of 23-24
Jill Schares		WCC	Marketing Instructor	TBD	Resignation	5/1/2024

**Classified**

Emily Darney		East	Special Ed Para	TBD	Resignation	4/10/2024
Brenda Heinz		Becker	Special Ed. Para	TBD	Resignation	4/26/2024
Selma Rivera		Bunger	General Worker	TBD	Resignation	3/28/2024
Cerrita Anderson		Hoover	General Worker	TBD	Resignation	4/25/2024
Cheryle Shook		West	Cook2	TBD	Retirement	5/31/2024
Latasha Mcghee		Lowell Pre-k	Special Ed Pre-K Para	TBD	Resignation	4/15/2024

**Coaching**

Andrew Peiffer		West	Assistant Basketball Coach	TBD	Resignation	3/8/2024
Jarred Johnston		West	Assistant Basketball Coach	TBD	Resignation	11/14/2023
Tanyon Schutjer		West	Assistant Volleyball Coach	TBD	Resignation	11/2/2023
Caitlin Bailey		Kingsley	FIRST Lego League Coach	TBD	Resignation	5/31/2024
Timothy Hopper		Central	Head Football Coach	TBD	Resignation	10/31/2023
Allison Jones		West	Assistant Cheer Coach	TBD	Resignation.	3/31/2024
Eric Jesse		East High	Assistant Boys Basketball Coach	TBD	Resignation	3/8/2024

**RETIREMENT****Certified**

Stacey Snyder		Orange	ELP Teacher	TBD	Retirement	End of 23-24
Mary Feltes		Bunger	Special Ed Teacher	TBD	Retirement	End of 23-24
Anne Cook		Orange	Special Ed Para	TBD	Retirement	End of 23-24
Anne Schreck		Irving	Title 1 Teacher	TBD	Retirement	End of 23-24

**TERMINATIONS**

<b><u>NAME</u></b>	<b><u>SALARY</u></b>	<b><u>BUILDING</u></b>	<b><u>SUBJECT</u></b>	<b><u>SEN.DATE</u></b>	<b><u>REASON</u></b>	<b><u>EFFECT. DATE</u></b>
<b><u>Classified</u></b> Amanda Spencer		Expo	Behavior Intervention Specialist	TBD	Termination due to job abandonment.	4/9/2024

Signed: \_\_\_\_\_

Astor Williams, Board President

Date: \_\_\_\_\_



### XV. iii. Bills Due & Payable and Bills Paid Between Board Meetings

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#### Recommendation

The Superintendent's recommendation is that the Board of Education approve the Bills Due and Payable and the Bills Paid Between Board Meetings.

#### Contact Person

Jeff Sommerfeldt, Chief Financial Officer  
Dr. Jared Smith, Superintendent

#### Details

The Board authorizes the issuance of warrants for payment of claims against the school district for goods and services. The Board will allow the warrants after the goods and services have been received and accepted in compliance with Board policy.

#### Supporting Documents



Check Register Summary



Electronic Vendor Payments

Check Register Summary

Batch Year: 24 Bank: All Date Range: 04/03/2024 - 04/16/2024

Bank	Check	Type	Date	Vendor	Vendor Name	Amount
10	00236809	CV	04/08/2024	36587	LATASHA FROST	-1,021.00
10	00238865	CV	04/05/2024	13555	DONOVAN GROUP I	-5,000.00
10	00239138	CV	04/08/2024	8082	LISTER CONCRETE PRODUCTS INC	-602.00
10	00239805	C	04/05/2024	13904	AMY KIMBALL	575.04
10	00239806	C	04/08/2024	12276	CENTURYLINK	31.32
10	00239807	C	04/08/2024	540	CITY OF WATERLOO	40,816.39
10	00239808	C	04/08/2024	3768	KWIK TRIP INC	128.06
10	00239809	C	04/08/2024	7971	MEDIACOM	1,105.00
10	00239810	C	04/08/2024	13031	REPUBLIC SERVICES #897	7,052.89
10	00239811	C	04/08/2024	12545	TANYA SBIRAL	2,227.50
10	00239812	C	04/11/2024	128	BLACK HAWK CLERK OF COURT	230.00
10	00239813	C	04/11/2024	123	BLACK HAWK COUNTY SHERIFF	2,379.32
10	00239814	C	04/11/2024	2431	CEDAR VALLEY SPORTSPLEX	6,954.10
10	00239815	C	04/11/2024	103	CEDAR VALLEY UNITED WAY	653.00
10	00239816	C	04/11/2024	13383	HORN LAW OFFICES	50.00
10	00239817	C	04/11/2024	4445	IOWA DEPT OF REVENUE & FINANCE	124.14
10	00239818	C	04/11/2024	132	NEW YORK LIFE	105.25
10	00239819	C	04/11/2024	12511	NYS CHILD SUPPORT PROCESSING CENTER	588.87
10	00239820	C	04/11/2024	3870	POLK COUNTY SHERIFF	2,467.60
10	00239821	C	04/11/2024	112	PUBLIC EMPLOYEES CREDIT UNION	26,020.00
10	00239822	C	04/11/2024	8077	WASHINGTON STATE SUPP REGISTRY	375.00
10	00239823	C	04/16/2024	242	A1 SEPTIC & PUMPING SERVICES	275.00
10	00239824	C	04/16/2024	4050	ACCESS SYSTEMS	6,688.73
10	00239825	C	04/16/2024	13601	ADAC INC.	12,641.82
10	00239826	C	04/16/2024	13863	ADDISON RISETTER	73.70
10	00239827	C	04/16/2024	4144	ADVANCED ENVIRON TESTING & ABATEMENT	365.00
10	00239828	C	04/16/2024	7222	ADVANTAGE SCREENPRINT & EMBROI	1,084.00
10	00239829	C	04/16/2024	1870	AHLERS & COONEY PC	335.00
10	00239830	C	04/16/2024	13231	AJLA MAJETIC	75.00
10	00239831	C	04/16/2024	13244	AJLA TURANOVIC	73.80
10	00239832	C	04/16/2024	13652	AMANDA UMBDENSTOCK	81.74
10	00239833	C	04/16/2024	10249	AMY MIEHE	134.14
10	00239834	C	04/16/2024	13874	ANDRE WRIGHT	78.65
10	00239835	C	04/16/2024	9238	ANDREW MELCHER	40.00
10	00239836	C	04/16/2024	13314	ASHLEY CHASE	278.64
10	00239837	C	04/16/2024	8341	B & B LOCK & KEY, INC	3.25
10	00239838	C	04/16/2024	344	BDI 061	9.22
10	00239839	C	04/16/2024	13778	BELLA SCHOO	70.40
10	00239840	C	04/16/2024	13775	BELLE WILLIAMS	157.20
10	00239841	C	04/16/2024	7424	BERGANKDV LTD	381.33
10	00239842	C	04/16/2024	18996	BLACK HAWK COUNTY ABSTRACT	450.00
10	00239843	C	04/16/2024	1095	BLACK HAWK WASTE DISPOSAL	1,151.75
10	00239844	C	04/16/2024	300	BOLAND RECREATION	2,000.00
10	00239845	C	04/16/2024	13770	BROOKE BOCKENSTEDT	169.00
10	00239846	C	04/16/2024	3579	BUILDERS SELECT	1,742.40
10	00239847	C	04/16/2024	559	CAMPBELL SUPPLY CO	386.62
10	00239848	C	04/16/2024	578	CAPITAL SANITARY SUPPLY CO INC	10,861.79
10	00239849	C	04/16/2024	13580	CARLSON DETTMANN CONSULTING	5,270.00
10	00239850	C	04/16/2024	479	CAROLINA BIOLOGICAL SUPPLY CO	133.00
10	00239851	C	04/16/2024	6729	CARRIE TAYLOR	25.68
10	00239852	C	04/16/2024	3791	CEDAR VALLEY MEDICAL SPECS P C	110.00
10	00239853	C	04/16/2024	144	CENTRAL RIVERS AEA	2,286.99
10	00239854	C	04/16/2024	1653	CENTURYLINK	2,066.24
10	00239855	C	04/16/2024	540	CITY OF WATERLOO	150.00
10	00239856	C	04/16/2024	13908	CLAIRE LITTLEFIELD	70.00
10	00239857	C	04/16/2024	9315	COLOFF MEDIA	1,095.48
10	00239858	C	04/16/2024	597	COMMUNICATIONS ENGINEERING CO	2,195.00
10	00239859	C	04/16/2024	2763	COMPRESSED AIR AND EQUIP INC	141.12
10	00239860	C	04/16/2024	2293	COURIER COMMUNICATIONS	281.70
10	00239861	C	04/16/2024	2964	D & N FENCE CO., INC	3,337.00
10	00239862	C	04/16/2024	956	DEB KISCH	32.72
10	00239863	C	04/16/2024	218	DECKER SPORTING GOODS	2,005.60

Check Register Summary

Batch Year: 24 Bank: All Date Range: 04/03/2024 - 04/16/2024

Bank	Check	Type	Date	Vendor	Vendor Name	Amount
10	00239864	C	04/16/2024	1793	DEPT OF EDU DIV OF VOCATIONAL REHABILIT	61,624.24
10	00239865	C	04/16/2024	7513	DEPT OF EDU/INTERNAL ADMIN SERV	300.00
10	00239866	C	04/16/2024	703	DES MOINES PUBLIC SCHOOLS	1,029.50
10	00239867	C	04/16/2024	7232	DEVON WINTERS	750.00
10	00239868	C	04/16/2024	6340	DOLLY'S TAXI	1,200.00
10	00239869	C	04/16/2024	12961	DOMINIQUE WALLICAN	115.00
10	00239870	C	04/16/2024	35181	DOMINOS PIZZA	132.50
10	00239871	C	04/16/2024	13555	DONOVAN GROUP I	5,000.00
10	00239872	C	04/16/2024	2554	ECHO GROUP INC	135.65
10	00239873	C	04/16/2024	8010	EL SARA GREER	107.29
10	00239874	C	04/16/2024	817	ELECTRICAL ENG & EQUIPMENT (THREE E)	1,228.54
10	00239875	C	04/16/2024	1201	ELECTRONIC ENGINEERING CO	515.00
10	00239876	C	04/16/2024	1443	EMC RISK SERVICES, LLC	19,098.60
10	00239877	C	04/16/2024	13844	EMINA ALAGIC	139.20
10	00239878	C	04/16/2024	1085	ERIC BRASCH	434.44
10	00239879	C	04/16/2024	6960	ETHNIC MINORITIES OF BURMA ADVOCACY	187.50
10	00239880	C	04/16/2024	13741	EX-YU HUNTING & FISHING	1,000.00
10	00239881	C	04/16/2024	6288	FAREWAY STORES INC	83.81
10	00239882	C	04/16/2024	4014	FARNSWORTH ELECTRONICS	22.10
10	00239883	C	04/16/2024	873	FASTENAL COMPANY	3.12
10	00239884	C	04/16/2024	29190	FERGUSON ENTERPRISES INC #1657	1,297.41
10	00239885	C	04/16/2024	7741	FIRST STUDENT INC	575,111.46
10	00239886	C	04/16/2024	3592	FRAN'S PRO SHOP	1,349.39
10	00239887	C	04/16/2024	13381	FRUHAUF UNIFORMS, INC	59,458.00
10	00239888	C	04/16/2024	34924	GINA FRAZIER-MCCUTCHISON	85.15
10	00239889	C	04/16/2024	981	GRADY INSTRUMENT SERVICE INC	219.00
10	00239890	C	04/16/2024	12353	GRANITE TELECOMMUNICATIONS LLC	4,831.19
10	00239891	C	04/16/2024	995	GROSSE STEEL COMPANY INC	1,208.00
10	00239892	C	04/16/2024	12519	HANDS UP COMMUNICATIONS	19,736.25
10	00239893	C	04/16/2024	13907	HANNAH STEIN	87.12
10	00239894	C	04/16/2024	5691	HAPPY DATA LLC	1,640.40
10	00239895	C	04/16/2024	2207	I & S GROUP INC	47,070.80
10	00239896	C	04/16/2024	4366	INFOMAX OFFICE SYSTEMS, INC	2,690.00
10	00239897	C	04/16/2024	27219	INTERNATIONAL BACCALAUREATE ORG	269.00
10	00239898	C	04/16/2024	1255	INTERSTATE ALL BATTERY CENTER	1,709.31
10	00239899	C	04/16/2024	12850	INTERSTATE POWER SYSTEMS	2,232.87
10	00239900	C	04/16/2024	9444	INVISION ARCHITECTURE	33,750.00
10	00239901	C	04/16/2024	5289	IOWA HIGH SCHOOL MUSIC ASSOC	505.00
10	00239902	C	04/16/2024	11838	IOWA SCHOOL FINANCE INFO SERVICES INC	906.00
10	00239903	C	04/16/2024	21814	IOWA SKILLSUSA	390.00
10	00239904	C	04/16/2024	1202	IOWA SPORTS SUPPLY	570.00
10	00239905	C	04/16/2024	13860	ISABELLE RAND	106.20
10	00239906	C	04/16/2024	8304	IWWL (KWVL.COM)	750.00
10	00239907	C	04/16/2024	13525	JACKIE URBANO-GAYTON	153.00
10	00239908	C	04/16/2024	6234	JANICE DYKSTRA	325.00
10	00239909	C	04/16/2024	13776	JESSICA HAGEMAN	114.00
10	00239910	C	04/16/2024	1140	JILL SCHARES	144.08
10	00239911	C	04/16/2024	6152	JOSHUA MEYER	90.00
10	00239912	C	04/16/2024	4528	JP GASWAY	631.39
10	00239913	C	04/16/2024	1236	JW PEPPER & SONS INC	338.98
10	00239914	C	04/16/2024	13779	KARIS BURCH	15.90
10	00239915	C	04/16/2024	7859	KELLY T MARTIN	133.62
10	00239916	C	04/16/2024	25313	KELSEY HAMMER PRODUCTIONS	8,000.00
10	00239917	C	04/16/2024	13772	KEYLEE JASPER	208.00
10	00239918	C	04/16/2024	2990	KIRKWOOD COMMUNITY COLLEGE	90.00
10	00239919	C	04/16/2024	22209	LANGUAGE LINE SERVICES	1,708.15
10	00239920	C	04/16/2024	36587	LATASHA FROST	1,021.00
10	00239921	C	04/16/2024	7820	LEADER VALLEY FOUNDATION	3,500.00
10	00239922	C	04/16/2024	13777	LIBERTY PFALZGRAF	24.00
10	00239923	C	04/16/2024	1369	LINDGREN GLASS LLC	1,354.00
10	00239924	C	04/16/2024	3936	LUCAS ROGERS	73.69
10	00239925	C	04/16/2024	13653	MADISON MCLEY	48.47

Check Register Summary

Batch Year: 24 Bank: All Date Range: 04/03/2024 - 04/16/2024

Bank	Check	Type	Date	Vendor	Vendor Name	Amount
10	00239926	C	04/16/2024	12441	MARCHING AGAINST THE DARKNESS INC	400.00
10	00239927	C	04/16/2024	1441	MARTIN BROTHERS	737.03
10	00239928	C	04/16/2024	2831	MATT HARKEN	303.88
10	00239929	C	04/16/2024	3279	MCCLOUD SERVICES	405.20
10	00239930	C	04/16/2024	1402	MCDONALD SUPPLY	1,229.88
10	00239931	C	04/16/2024	9273	MEGAN LUMETTA	64.32
10	00239932	C	04/16/2024	6699	METEOR EDUCATION, LLC	25,050.43
10	00239933	C	04/16/2024	13869	MICHAEL PRINCE PRODUCTIONS LLC	219.71
10	00239934	C	04/16/2024	8125	MICROBAC LABORATORIES INC	21.50
10	00239935	C	04/16/2024	9186	MODUS ENGINEERING LTD	21,600.00
10	00239936	C	04/16/2024	13022	NAOMI JOSEPH	39.30
10	00239937	C	04/16/2024	730	NAPA AUTO PARTS	46.98
10	00239938	C	04/16/2024	5270	NRG MEDIA, LLC	1,198.00
10	00239939	C	04/16/2024	2786	O'REILLY AUTOMOTIVE INC	17.55
10	00239940	C	04/16/2024	10158	OFFICE EXPRESS	6,297.74
10	00239941	C	04/16/2024	4936	PEOPLES TV & APPLIANCE, INC	134.99
10	00239942	C	04/16/2024	1507	PETERS CONSTRUCTION CORPORATION	3,301.25
10	00239943	C	04/16/2024	5899	PETERSEN AND TIETZ	50.00
10	00239944	C	04/16/2024	4842	PROFESSIONAL LAWN CARE LLC	253.00
10	00239945	C	04/16/2024	1100	PROFESSIONAL OFFICE SERVICES, INC	123.72
10	00239946	C	04/16/2024	13877	RACHEL LUEDERS	10.00
10	00239947	C	04/16/2024	13780	REAGAN COLE	11.70
10	00239948	C	04/16/2024	13873	REESE TISUE	208.00
10	00239949	C	04/16/2024	5135	REFERENCE POINT PRESS	514.25
10	00239950	C	04/16/2024	7330	RITE ENVIRONMENTAL	308.92
10	00239951	C	04/16/2024	12143	RSCHOOL TODAY	562.50
10	00239952	C	04/16/2024	13881	SADIE WAGEMESTER	64.85
10	00239953	C	04/16/2024	9927	SALT AND PEPPER	200.00
10	00239954	C	04/16/2024	13774	SAMANTHA HERRERA	428.40
10	00239955	C	04/16/2024	1915	SANDEES	285.00
10	00239956	C	04/16/2024	925	SCHULTZ STRINGS	750.00
10	00239957	C	04/16/2024	1949	SCHUMACHER ELEVATOR COMPANY	2,903.04
10	00239958	C	04/16/2024	13771	SCOUT KOHAGEN	54.60
10	00239959	C	04/16/2024	13903	SENROR WOOLY	570.00
10	00239960	C	04/16/2024	637	SERVICE ROOFING	1,248.60
10	00239961	C	04/16/2024	12195	SHEETZ TOWING & RECOVERY	125.00
10	00239962	C	04/16/2024	3814	SHERWIN WILLIAMS	2,060.80
10	00239963	C	04/16/2024	2784	SHRED-IT USA	441.00
10	00239964	C	04/16/2024	1998	SLED SHED THE	114.90
10	00239965	C	04/16/2024	14185	STEEPIE PERRY	501.95
10	00239966	C	04/16/2024	7444	SUCCESSLINK	8,333.33
10	00239967	C	04/16/2024	2092	SUPERIOR WELDING SUPPLY CO	360.06
10	00239968	C	04/16/2024	5237	TAWANDA HACKETT	303.00
10	00239969	C	04/16/2024	3219	THE SHRED MASTER LLC	75.00
10	00239970	C	04/16/2024	11482	TIMBERLINE BILLING SERVICE LLC	12,138.01
10	00239971	C	04/16/2024	12769	TONY'S PLUMBING & HEATING, LLC	3,875.00
10	00239972	C	04/16/2024	24970	TRACEY HULME	91.36
10	00239973	C	04/16/2024	3452	UNITY POINT HEALTH	16,566.50
10	00239974	C	04/16/2024	4539	UNIVERSITY OF NORTHERN IOWA	17.00
10	00239975	C	04/16/2024	2243	VAN METER INDUSTRIAL INC	168.57
10	00239976	C	04/16/2024	2283	WARDS NATURAL SCIENCE	2,522.90
10	00239977	C	04/16/2024	2623	WATERLOO EXCHANGE CLUB	150.00
10	00239978	C	04/16/2024	6167	WATERLOO ROTARY CLUB	160.00
10	00239979	C	04/16/2024	6691	WAVERLY SHELL ROCK COM.SCHOOLS	35,575.23
10	00239980	C	04/16/2024	3820	WBC MECHANICAL INC	917.90
10	00239981	C	04/16/2024	2327	WEST MUSIC COMPANY	899.51
10	00239982	C	04/16/2024	12844	WHITNEY FISCHER	129.17
10	00239983	C	04/16/2024	8570	WILSON RESTAURANT SUPPLY	2,262.20
10	00239984	C	04/16/2024	7575	YOUNG ARENA	1,190.00
10	00239985	C	04/16/2024	2614	YOUNG PLUMBING AND HEATING	12,071.40
10	00239986	C	04/16/2024	13797	Z'AIRAH HARRINGTON	92.00

**Total Bank: 10 \$1,181,877.64**

Check Register Summary

Batch Year: 24 Bank: All Date Range: 04/03/2024 - 04/16/2024

Bank	Check	Type	Date	Vendor	Vendor Name	Amount
12	00024823	C	04/16/2024	11967	ANDERSON ERICKSON DAIRY CO	37,210.78
12	00024824	C	04/16/2024	14445	DZEMILA HODZIC-SULJIC	10.48
12	00024825	C	04/16/2024	7005	LOFFREDO	11,369.54
12	00024826	C	04/16/2024	1441	MARTIN BROTHERS	158,397.16
12	00024827	C	04/16/2024	2130	SHELLY SMALLRIDGE	24.04
<b>Total Bank: 12</b>						<b>\$207,012.00</b>
14	00106876	CV	04/11/2024	6815	MTI ENTERPRISES, INC	-75.00
14	00107305	CV	04/11/2024	1122	WESTERN DUBUQUE ATHLETICS	-90.00
14	00107308	C	04/03/2024	7222	ADVANTAGE SCREENPRINT & EMBROI	100.00
14	00107309	C	04/03/2024	372	BLACK HAWK COUNTY HEALTH DEPT	250.00
14	00107310	C	04/03/2024	877	BLACK HAWK MEMORIAL CO INC	100.00
14	00107311	C	04/03/2024	2431	CITY OF WATERLOO LEISURE SERVICES	400.00
14	00107312	C	04/03/2024	13902	DERRICK SLATER	213.75
14	00107313	C	04/03/2024	953	GIBSON SPECIALTY CO	420.00
14	00107314	C	04/03/2024	8962	GLENN DALBEY	50.00
14	00107315	C	04/03/2024	1202	IOWA SPORTS SUPPLY	120.00
14	00107316	C	04/03/2024	26069	LEADING EDGE FUNDRAISING	6,951.85
14	00107317	C	04/03/2024	1441	MARTIN BROTHERS	561.99
14	00107318	C	04/03/2024	7828	NEIBA	1,600.00
14	00107319	C	04/03/2024	9955	PATTI SURMA	45.87
14	00107320	C	04/03/2024	4522	PEPSI-COLA	697.57
14	00107321	C	04/03/2024	4592	POYNER ELEMENTARY PTO	1,117.10
14	00107322	C	04/03/2024	1973	ROBYN RODENBURGH	25.00
14	00107323	C	04/03/2024	13696	THE SAVVY BEAN	469.31
14	00107324	C	04/03/2024	6691	WAVERLY SHELL ROCK COM.SCHOOLS	100.00
14	00107325	C	04/11/2024	7975	BRIDGETTE KELLUM	320.00
14	00107326	C	04/11/2024	5348	CEDAR FALLS HIGH SCHOOL	250.00
14	00107327	C	04/11/2024	12651	CITY OF WATERLOO CONVENTION CENTER	3,749.64
14	00107328	C	04/11/2024	35548	DANIEL STUBER	140.00
14	00107329	C	04/11/2024	8720	ERIN ARICKX	497.62
14	00107330	C	04/11/2024	9873	HEMPSTEAD HIGH SCHOOL	150.00
14	00107331	C	04/11/2024	9803	IAHSGCA	25.00
14	00107332	C	04/11/2024	1202	IOWA SPORTS SUPPLY	791.00
14	00107333	C	04/11/2024	13084	JIMMY JOHNS #3693	365.40
14	00107334	C	04/11/2024	9733	JUSTIN JACOBS	200.00
14	00107335	C	04/11/2024	13267	KELLY ANGELL	256.87
14	00107336	C	04/11/2024	3106	KYLE CLARK	180.00
14	00107337	C	04/11/2024	26069	LEADING EDGE FUNDRAISING	6,951.85
14	00107338	C	04/11/2024	13875	LUKE JOHN FISCHER	207.60
14	00107339	C	04/11/2024	1441	MARTIN BROTHERS	1,413.69
14	00107340	C	04/11/2024	13255	MIDLAND HIGH SCHOOL	45.00
14	00107341	C	04/11/2024	4093	MILLIE PHILLIPS	120.00
14	00107342	C	04/11/2024	4522	PEPSI-COLA	370.59
14	00107343	C	04/11/2024	8308	PHIL WATSON	200.00
14	00107344	C	04/11/2024	7330	RITE ENVIRONMENTAL	122.68
14	00107345	C	04/11/2024	13906	RYAN WALTER	140.00
14	00107346	C	04/11/2024	12834	TERENCE MORIARTY	140.00
14	00107347	C	04/11/2024	4342	ULTIMATE ENTERTAINMENT IOWA LLC	426.25
14	00107348	C	04/11/2024	32620	WAUKEE COMMUNITY SCHOOL DISTRICT	140.00
14	00107349	C	04/11/2024	8515	WYHE'S CHOICE FUNDRAISING	20.00
<b>Total Bank: 14</b>						<b>\$30,280.63</b>
16	00004204	C	04/16/2024	9444	INVISION ARCHITECTURE	161,879.37
16	00004205	C	04/16/2024	994	KIRK GROSS CO	36,344.75
16	00004206	C	04/16/2024	5351	LARSON CONSTRUCTION COMPANY INC	249,999.25
16	00004207	C	04/16/2024	9186	MODUS ENGINEERING LTD	16,218.75
<b>Total Bank: 16</b>						<b>\$464,442.12</b>

**Check Register Summary**

Batch Year: 24    Bank: All    Date Range: 04/03/2024 - 04/16/2024

Bank	Check	Type	Date	Vendor	Vendor Name	Amount
<b>Total Computer Checks:</b>						<b>\$1,890,400.39</b>
<b>Total Manual Checks:</b>						<b>\$0.00</b>
<b>Total ACH Checks:</b>						<b>\$0.00</b>
<b>Total Other Checks:</b>						<b>\$0.00</b>
<b>Total Electronic Checks:</b>						<b>\$0.00</b>
<b>Total Computer Voids:</b>						<b>-\$6,788.00</b>
<b>Total Manual Voids:</b>						<b>\$0.00</b>
<b>Total ACH Voids:</b>						<b>\$0.00</b>
<b>Total Other Voids:</b>						<b>\$0.00</b>
<b>Total Electronic Voids:</b>						<b>\$0.00</b>
<b>Grand Total:</b>						<b>\$1,883,612.39</b>
<b>Number of Checks:</b>						<b>238</b>

Batch Year	Batch	Amount
24	000227	-1,021.00
24	001132	-75.00
24	001377	-5,000.00
24	001416	-602.00
24	001487	514.25
24	001717	-90.00
24	001733	13,149.87
24	001764	72.57
24	001787	575.04
24	001797	804,049.48
24	001799	42,080.77
24	001801	13,108.62
24	001808	207,012.00
24	001815	9,280.39
24	001819	292,053.43
24	001842	39,947.28
24	001843	4,114.57
24	001874	464,442.12

Batch Year: 24 Bank: All Date Range: 04/03/2024 - 04/16/2024

FPREG01A (build 24.3.5.1)

**Selection Criteria**

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Batch Year	24
Begin Date	04/03/2024
End Date	04/16/2024
Include Voids Voided After End Date	Yes
Bank	All
Begin Check	00000000
End Check	99999999
Begin Batch 1	All
End Batch 1	
Begin Batch 2	
End Batch 2	
Begin Batch 3	
End Batch 3	
Begin Batch 4	
End Batch 4	
Begin Batch 5	
End Batch 5	
Role ID	FASADMIN

Electronic Payments to Vendors:

MID AMERICAN ENERGY	173,085.87
PITNEY BOWES – ESC POSTAGE	9,000.00
DELTA DENTAL – INSURANCE	61,613.24
BMO – PROCUREMENT CARD PAID	187,497.26
Total Electronic Payments	431,196.37



## XV. iv. Set Date of Public Hearing for the East High A/C Split System Project and Approve Notice to Bidders

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the date of June 10, 2024, to hold a public hearing for the East High A/C Split System project and approve publication of a Notice to Bidders.

### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. The District proposes to install split system air conditioning units at East High School.

The Public Hearing for the proposed East High A/C Split System project will be held on Monday, June 10, 2024, at 5:00pm in the Board Room of the Education Service Center, 1516 Washington Street, Waterloo, IA 50702. The Notice of Public Hearing regarding the project will be published in *The Courier*.

The bid date for the proposed East High A/C Split System project is scheduled for Thursday, May 30, 2024, at 2:00pm in the Board Room of the Education Service Center. Bids are expected to be acted on following the Public Hearing on June 10, 2024.

## XV. v. Set Date of Public Hearing for the West High A/C Split System Project and Approve Notice to Bidders

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the date of June 10, 2024, to hold a public hearing for the West High A/C Split System project and approve publication of a Notice to Bidders.

### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. The District proposes to install split system air conditioning units at West High School.

The Public Hearing for the proposed West High A/C Split System project will be held on Monday, June 10, 2024, at 5:00pm in the Board Room of the Education Service Center, 1516 Washington Street, Waterloo, IA 50702. The Notice of Public Hearing regarding the project will be published in *The Courier*.

The bid date for the proposed West High A/C Split System project is scheduled for Thursday, May 30, 2024, at 2:00pm in the Board Room of the Education Service Center. Bids are expected to be acted on following the Public Hearing on June 10, 2024.

**XV. vi. Board Meeting Dates**

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**Recommendation**

The Superintendent's recommendation is that the Board of Education hold their regularly scheduled meetings as presented.

**Contact Person**

Pam Arndorfer, Assistant to the Superintendent / Board Secretary

**Details**

Board policy calls for regular board meetings to be held on the second and fourth Mondays of the month, unless an alternate schedule is approved. It is proposed that the schedule of board meetings through July 2025 is as follows:

Monday, May 13, 2024	5:00pm	Regular Board Meeting
Monday, May 27, 2024	<b>No Meeting</b>	<b>Memorial Day</b>
Monday, June 10, 2024	5:00pm	Regular Board Meeting
Monday, June 24, 2024	<b>No Meeting</b>	<b>Summer Schedule</b>
Monday, July 8, 2024	5:00pm	Regular Board Meeting
Monday, July 22, 2024	<b>No Meeting</b>	<b>Summer Schedule</b>
Monday, August 12, 2024	5:00pm	Regular Board Meeting
Monday, August 26, 2024	5:00pm	Regular Board Meeting
Monday, September 9, 2024	5:00pm	Regular Board Meeting
Monday, September 23, 2024	5:00pm	Regular Board Meeting
Monday, October 14, 2024	5:00pm	Regular Board Meeting
Monday, October 28, 2024	5:00pm	Regular Board Meeting
Monday, November 11, 2024	5:00pm	Regular Board Meeting
Monday, November 25, 2024	<b>No Meeting</b>	<b>Holiday Schedule</b>
Monday, December 9, 2024	5:00pm	Regular Board Meeting
Monday, December 23, 2024	<b>No Meeting</b>	<b>Holiday Schedule</b>
Monday, January 13, 2025	5:00pm	Regular Board Meeting
Monday, January 27, 2025	5:00pm	Regular Board Meeting
Monday, February 10, 2025	5:00pm	Regular Board Meeting
Monday, February 24, 2025	5:00pm	Regular Board Meeting
Monday, March 10, 2025	5:00pm	Regular Board Meeting
Monday, March 24, 2025	5:00pm	Regular Board Meeting
Monday, April 14, 2025	5:00pm	Regular Board Meeting
Monday, April 28, 2025	5:00pm	Regular Board Meeting
Monday, May 12, 2025	5:00pm	Regular Board Meeting
Monday, May 26, 2025	<b>No Meeting</b>	<b>Memorial Day</b>
Monday, June 9, 2025	5:00pm	Regular Board Meeting
Monday, June 23, 2025	<b>No Meeting</b>	<b>Summer Schedule</b>



Monday, July 14, 2025  
Monday, July 28, 2025

5:00pm Regular Board Meeting  
**No Meeting Summer Schedule**

## XVI. Resolution Encouraging Best Practices in Safe Firearm Storage

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the Resolution Encouraging Best Practices in Preventing Minors from Accessing Firearms in the Waterloo Community School District.

### Contact Person

Sheena Canady, Director of Student and At-Risk Services  
Dan Huff, Director of Athletics & Activities/Safety Coordinator

### Details

Whereas the safety and well-being of students, staff, and community members in the Waterloo Community School District are of paramount importance; reputable research highlights the significant risk associated with minors' access to firearms, contributing to increased risks of accidental injuries, suicides, and school shootings; and firearms are the leading cause of death for children under the age of 18 in the United States.

The Board is being asked to support a Resolution Encouraging Best Practices in Preventing Minors from Accessing Firearms in the Waterloo Community School District. Through this resolution, Waterloo Schools will commit to providing information to students and parents about safe firearm storage, continue to advocate for mental health funding, and continue efforts in providing a safe environment for our students and staff.

### Supporting Documents



Resolution Encouraging Best Practices in Preventing Minors from Accessing Firearms in the Water...

**Resolution Encouraging Best Practices  
in Preventing Minors from Accessing Firearms in the  
Waterloo Community School District**

Director \_\_\_\_\_ introduced and caused to be read the Resolution hereinafter set out and moved its adoption; seconded by Director \_\_\_\_\_; after due consideration thereof by the Board, the president put the question upon the adoption of said Resolution and the roll having been called, the following Directors voted:

Aye: \_\_\_\_\_

Nay: \_\_\_\_\_

Whereupon the President declared said Resolution duly adopted as follows:

**RESOLUTION**

WHEREAS, the safety and well-being of students, staff, and community members in the Waterloo Community School District are of paramount importance;

WHEREAS, reputable research highlights the significant risk associated with minors' access to firearms, contributing to increased risks of accidental injuries, suicides, and school shootings;

WHEREAS, firearms are the leading cause of death for children under the age of 18 in the United States;

NOW, THEREFORE, BE IT RESOLVED, that the Waterloo Community School District Board of Education commits to the following:

1. Safe Storage Information: Provide students and parents with information focusing on the risks associated with firearms and the importance of safe storage practices;
2. Mental Health Funding: Advocate for additional state and federal funding for Iowa's youth mental health system;
3. Safe Environment: Continue the District's commitment to a safe, supportive, and collaborative learning environment for all students and staff.

BE IT FURTHER RESOLVED, that the Waterloo Community School District Board of Education shall work diligently towards the implementation of these measures.

Adopted this 22<sup>nd</sup> day of April, 2024, by the Waterloo Community School District Board of Education.

By: \_\_\_\_\_  
Astor Williams, Board President

Attest: \_\_\_\_\_  
Pam Arndorfer, Board Secretary

## XVII. Leader in Me Agreement

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the Memorandum of Understanding with Leader in Me at a cost of \$65,100 per year as presented.

### Contact Person

Dr. Jared Smith, Superintendent  
Sheena Canady, Director of Student Services  
Melissa Reade, Executive Director, Leader Valley

### Details

Leader in Me is an international initiative based on Steven Covey's *7 Habits of Highly Effective People*. Leader in Me is a school-wide process dedicated to transforming the leadership culture and performance at the schools. Leader in Me works in connection with the academic, behavioral, and culture-based initiatives common in today's schools. Leader in Me has 4 principle focuses: *The 7 Habits of Highly Effective People*, an intentional focus on identifying and cultivating the special gifts and talents for all students, authentic learning and leadership opportunities, and the development of essential soft skills.

Waterloo Schools has been partnering with Leader in Me since 2010, with programs fully implemented at Becker Elementary, Irving Elementary, Kingsley Elementary, Kittrell Elementary, Lincoln Elementary, Lou Henry Elementary, Lowell Elementary, Orange Elementary, Poyner Elementary, Bunger Middle, Hoover Middle, Expo Alternative Learning Center and the Waterloo Career Center. Among these thirteen schools, we are proud to have four who have reached Lighthouse status: Expo ALC, Hoover Middle, Orange Elementary, and most recently, Lowell Elementary.

Leader Valley offsets the costs for all Leader in Me schools, leaving a portion of the expense with the district. The agreed upon reimbursement per school from the district is \$5,000 for schools starting Leader in Me prior to the 2021-22 school year. Any new Leader in Me school starting the process in the 2022-23 school year or later will have an annual membership fee of \$5,100 instead of the previous \$5,000. This is why Lincoln's invoice is for \$5,100.

The membership fee to implement Leader in Me in the aforementioned schools totals \$65,100. If approved, the Memorandum of Understanding will remain in effect until terminated by either of the parties in writing or by mutual agreement.

### Supporting Documents



LIM Memorandum of Understanding



# Memorandum of Understanding

## **I. The Parties**

The Memorandum of Understanding (“MOU”) is made and entered into on this 3rd day of November, 2023 by and between Leader Valley Foundation, (hereinafter referred to as “Leader Valley”), with the address of 360 Westfield Avenue, Suite 300 A, Waterloo, and Waterloo Community School District, with the address of 1516 Washington Street, Waterloo, (hereinafter referred to as “Waterloo Community Schools”), collectively known as the “Parties”.

## **II. Context**

During the early years of Leader Valley’s establishment, we had an MOU with your district. This MOU hasn’t been revisited in many years. As Leader Valley grows the reach of districts and schools being served, it was determined that drafting an MOU reflecting our current working partnership would be beneficial to both parties. The Leader Valley team and board want to ensure that we are the best possible partner for your LIM schools. Much of what is outlined below is already in place and our purpose in specifying this within the MOU is to ensure it continues.

Leader Valley Foundation was established in 2012 to encourage and support Leader in Me (LIM) implementation in Cedar Valley schools. What started with 2 pilot LIM schools, has grown to 27 schools in 8 districts. Your district has 13 LIM schools.

For the first 9 years of Leader in Me implementation within the Waterloo Community Schools, Leader Valley committed to offsetting nearly all LIM implementation costs, with the exception of sub-related costs. Beginning in the 2021-2022 school year, your district agreed to offset the cost for LIM implementation with \$5,000 per building each year moving forward. This \$5,000 fee covers the cost of annual membership with FranklinCovey (proprietor of LIM), as well as intellectual property license, and access to LIM online and thousands of electronic resources. FranklinCovey has slightly increased the membership cost to \$5,100 for schools starting LIM during and after the 2021-2022 school year. Lincoln Elementary is the only school with a \$5,100 membership fee in your district. Multi-year agreements with FranklinCovey have been established to ensure no price increases through the 2027-2028 school year. Leader Valley offsets the remainder of each building’s LIM cost (roughly \$8,000 per school).

**III. Purpose and Scope.** The purpose of this MOU is to provide the framework, scope of work, terms, conditions, and responsibilities of the Parties associated with their work on LIM within 13 schools. The Parties enter into an MOU, setting out the working arrangements that each of the two agree are necessary for effective partnership. The Parties desire and wish that this document will not create any form or manner of a formal agreement, but rather an agreement between the Parties to work together in such a manner that would promote a genuine atmosphere of collaboration with the goal of maintaining, safeguarding, and sustaining LIM efforts within the district.

**VI. The Parties’ Responsibilities.** The Parties represent that they have unique, specialized expertise that will be drawn upon to meet the objectives of the Project. See attached Appendix 1 with the specific contributions by each of the Parties.

## **VII. Terms**

- a. Duration: This MOU shall be effective from the date of execution by both parties and shall remain in effect until terminated by either of the Parties in writing or by mutual agreement
- b. Termination: Either party may terminate this MOU by providing written notice to the other party if there is a material breach of the MOU by the other party, or for any other reason agreed upon in writing by both parties.

**IX. Intellectual Property (IP).** With the purchase of the annual LIM membership, FranklinCovey grants each building a limited, non-exclusive license to use the FranklinCovey IP in connection with or promotion of LIM. For clarity and by

way of example, this may include materials used for lessons, bulletin boards, posters, t-shirts, songs, and other similar uses. However, FranklinCovey-related IP may not be used with planners/agendas, unless such planners/agendas are purchased through [SDI Innovations](#).

Should a building decline continued involvement with LIM or Leader Valley, all LIM associated content and material should no longer be utilized in the building. Tangible materials are encouraged to be returned to Leader Valley so that they may be repurposed in other schools.

**X. Non-Binding Agreement**

This MOU is not intended to create a legally binding agreement between the parties and shall not be construed as such. It is a statement of mutual understanding and cooperation between the parties and does not create any legal rights or obligations, except as expressly stated herein.

**XI. Execution**

By signing below, the parties acknowledge that they have read and understood this MOU and agree to be bound by its terms and conditions.

**Leader Valley Representative:**

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

**District Representative:**

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

This Memorandum of Understanding is hereby accepted and agreed upon by the parties as of the date first written above.

# Appendix 1

## Leader Valley Contributions to Partnership

- **Intermediary between FranklinCovey and respective districts.**

Leader Valley acts as a liaison to:

- Negotiate LIM multi-year agreements for optimal group pricing for annual membership, professional development offerings, and materials
- Host FranklinCovey events
- Provide LIM schools updates from FranklinCovey (e.g., content, process)
- Advocate for the needs of Leader Valley LIM schools
- Pilot FranklinCovey's upcoming and unique innovations and share resources with schools
- Order materials
- Find necessary resources to support LIM implementation and specific school needs

- **Student Leadership Opportunities**

Leader Valley identifies and coordinates community-based leadership opportunities for student ambassadors

- **Coaching**

Leader Valley designates a coach for each building and provides various types of coaching to LIM schools, including:

- **Implementation Coaching**

Helps teams implement LIM with fidelity. May include, but is not limited to coaching work with:

- Adult Lighthouse Teams
- Action teams
- Student Lighthouse Teams
- Grade-level teams
- School-wide teams
- Measurable Results Assessment analysis
- Connecting LIM to district/building priorities
- Annual planning

- **New Educator Support**

- Equips new staff to acclimate to a LIM school
- 7 Habits of Highly Effective People for all new educators
- LIM 101: How To Launch a Leadership Classroom

- **Principal Community Coaching/Leader Up Calls/Principal Academy**

Equips LIM principals to lead out with LIM and develop leadership skills.

- **Principal Transitions**

Equips new principals to LIM buildings to further develop a leadership culture in their building

- **Coordinator Community Coaching/Leader Up Calls**

Equips LIM Coordinators to lead out with LIM and develop leadership skills.

- **1:1 Executive coaching with Principals and District Leaders**

Equips principals by strengthening their leadership skills and moving them toward targeted results for their school.

- Targeted Coaching/Impact Journeys  
Equips teams with new learning in areas that complement their academic efforts. Includes special topics, such as culture of belonging/equity in education, empowering instruction, resilience, social-emotional learning, and trust-building.

- **Workshop Facilitation**

Leader Valley provides whole-school and district learning that facilitates LIM learning and implementation.

- Required LIM workshops
- Professional development booster sessions
- Student workshops

- **Special Events**

Leader Valley partners with other LIM school districts in Iowa to showcase leadership and share best practices. We provide learning and connection with these schools through learning labs, school visits, and bus tours.

Additionally, Leader Valley celebrates LIM Week the first week in October each year and invites schools to participate to the level they prefer. A LIM toolkit and service project toolkit are provided to all schools.

- **Material Resources**

Leader Valley provides the physical materials needed as a new LIM school launches. The implementation and program materials include:

- Workshop participant materials
- Teacher implementation materials
- Student implementation materials
- Supplemental and customized materials

- **Fundraising**

Leader Valley staff, board, and volunteers fundraise on behalf of all LIM metro schools to help mitigate the costs to districts/schools for LIM.

- **Communications, Celebrations, and Advocacy**

Leader Valley staff are committed to highlighting the important leadership work that the district and schools are engaged in.

- Leader Valley shares out district and school leadership highlights, including but not limited to photos and videos for electronic and print communications
- Leader Valley identifies volunteers for school leadership events per their request
- Leader Valley coaches will meet with district-level leaders periodically to provide updates on LIM school progress
- Leader Valley staff and board members are champions for the Waterloo Schools and all associated LIM efforts.

## **District/Building Contributions to Partnership**

### **District Contributions**

- Annual Membership Fee  
Leader Valley secures pricing through multi-year agreements with FranklinCovey. The district and/or individual LIM buildings are responsible for the agreed upon annual membership fee, to be processed between July 1-September 30 each school year. This annual membership fee provides an intellectual property license and access

to LIM online and thousands of electronic resources. This fee is \$5,000 for all established LIM schools and for schools starting during or after the 2021-2022 school year the fee is \$5,100. These fee amounts are valid through the 2027-2028 school year.

- Professional Development

The district provides designated time for LIM-related professional development that may include, but is not limited to, the whole staff, Lighthouse team, LIM coordinators, principals, and action team members. This may include time during regular professional development days, Teacher Quality days, and/or before or after school.

- Communications

Community and family awareness are vital for growing support of LIM in your building.

- The district shares Leader Valley happenings related to their LIM schools and Leader Valley events in district communications, including but not limited to newsletters and social media
- The district notes Leader Valley's partnership on the district website with a link to [www.leadervalley.org](http://www.leadervalley.org)
- The district provides access to family contact information or a system of communications flow through to families via Peachjar at no cost due to the partnership.

- Exclusivity with Partnership

The district agrees that Leader Valley is the exclusive provider of LIM-related content and implementation-related processes for their building. This includes work with former Leader Valley and/or FranklinCovey team members.

- Hiring Building Principals

Building leadership is critical to strong culture and LIM implementation. The district will make all efforts to find a LIM-friendly or LIM-experienced educator to fill their building leadership roles.

- Volunteer Screening

Leader Valley hosts events each year for the benefit of your students and their families. To ensure their safety, volunteer screening protocols are utilized. The district will run Leader Valley event volunteers through the district screening system and provide confirmation of volunteer status. Leader Valley will purchase this service.

### **Building Contributions** (This information is summarized in Appendix 4)

- Annual Membership Fee

Leader Valley secures pricing through multi-year agreements. The district and/or individual LIM buildings are responsible for the agreed upon annual membership fee, to be processed between July 1-September 30 each school year. This annual membership fee provides an intellectual property license and access to LIM online and thousands of electronic resources. This fee is \$5,000 for all established LIM schools and for schools starting during or after the 2021-2022 school year the fee is \$5,100. These fee amounts are valid through the 2027-2028 school year.

- Professional Development

The building provides designated time for LIM-related professional development that may include, but is not limited to, the whole staff, Lighthouse team, LIM coordinators, principals, and action team members. This may include time during regular professional development days, Teacher Quality days, and/or before or after school. Team members are also encouraged to attend and/or coordinate the attendance at the following Leader Valley community-based workshops:

- Administrator Community Coaching/Leader Up Calls (all administrators encouraged to attend each time)
- Administrator Academy (all administrators encouraged to attend each time)
- Administrator Executive Coaching (optional and available to all LIM administrators)
- Coordinator Community Coaching (at least 1 coordinator encouraged to attend each session)
- New Staff 7 Habits (100% of new staff should attend in their first year)

- New teacher LIM 101 (100% of new PreK-8 staff should attend within two years of being in a LIM building)
- Implementation Process
 

Building leadership agree to and coordinate the following minimum touchpoints with their Leader Valley coach:

  - Onboarding- During the onboarding phase, the building agrees to provide staff with ample opportunities to learn from this [Onboarding Menu](#) (also noted below in Appendix 2).
  - Implementing Buildings- During the implementation process, buildings agree to follow the [LIM process map](#) at the pace that is right for their school (also noted below in Appendix 3).
    - Each building should participate in the following at a minimum:
      - Summer annual planning connection with Leader Valley coach
      - Beginning of the year coaching
      - Middle of the year coaching
      - Year-end coaching
      - Professional development as specified above
    - All schools are encouraged to hold a leadership event each year and may include, but is not limited to, “leaderizing” an existing event, parent event, community event, school tours, or mock interviews.
  - Lighthouse Milestone Schools
    - Lighthouse milestone (in process) buildings wishing to pursue the Lighthouse Milestone designation agree to actively participate in the Leader Valley Lighthouse Milestone preparation process. It is important to note that the lead up to Lighthouse Milestone Review requires more time allocated to coaching, implementation, and certification readiness. See sample [Lighthouse Milestone Timeline](#) (noted in Appendix 5)
    - Lighthouse milestone (achieved) buildings that have achieved Lighthouse Milestone agree to:
      - Remain in a state of continual improvement and continue with the LIM implementation journey
      - Maintain their designation with FranklinCovey by recertifying every 2 years following the alternating schedule of virtual and in-person certification visit
      - Open your doors and serve as a beacon to other LIM schools
      - Collaborate with other Lighthouse schools
      - Host one community-based leadership event a year
- Leader in Me Team
 

Each building will identify a team of people to meet regularly for the purposes of moving LIM implementation forward

  - Designate an administrative lead (principal, assistant principal, lead teacher) to support the LIM efforts
  - Designate LIM coordinators (minimum 2) to lead the schoolwide LIM implementation efforts
  - Assemble an Adult Lighthouse Team that represents various facets of the building team
  - Coordinate action teams focused on specific implementation goals for their building
- LIM Online
 

All new staff should have LIM online accounts established for them at the beginning of the school year and have login credentials shared with them.
- Measurable Results Assessment
 

Each spring, buildings administer the Measurable Results Assessment (MRA) with families, educators, and students. The data collected will be used for year-end coaching to determine future priorities and annual planning for the subsequent school year. Additionally, buildings must work to offer the MRA to students within the parameters identified within Iowa Senate File 496.

- Replacement Materials  
Leader Valley will provide the initial implementation materials to a new LIM school. Should any replacement materials be needed, the building will be responsible to purchase them. Leader Valley will assist with ordering.
- Communications  
Community and family awareness are vital for growing support of LIM in your building.
  - The building shares Leader Valley happenings and events in district communications, including but not limited to newsletters and social media
  - The building notes Leader Valley’s partnership on the building website with a link to [www.leadervalley.org](http://www.leadervalley.org)
  - The building provides access to family contact information or a system of communications flow through to families
- Exclusivity with Partnership  
The building agrees that Leader Valley is the exclusive provider of LIM-related content and implementation-related processes for their building. This includes work with former Leader Valley and/or FranklinCovey team members.
- Exiting LIM Process and Partnership with Leader Valley  
While we hope that all LIM schools continue with LIM and partner with Leader Valley, we acknowledge that a school may withdraw from the LIM process prior to the 2027-2028 school year. Because of the multi-year nature of the agreement, should a school withdraw, the district/building will still be responsible to pay for the full amount of the multi-year agreement through the 2027-2028 school year. Should a building exit LIM or Leader Valley, all LIM associated content and material should no longer be utilized in the building. Tangible materials are encouraged to be returned to Leader Valley so that they may be repurposed in other schools.

The building leader may formally request an exit from the LIM process and/or Leader Valley partnership and upon that request, a meeting will be held with the building administrative team, district administrative representative, building LIM coordinators, Leader Valley Executive Director, and Leader Valley Coach.

In the event of a LIM school closure, move, or realignment in some fashion, Leader Valley will negotiate with FranklinCovey to discontinue the annual membership agreement if applicable.

In the off chance the Leader Valley team deems it necessary to exit a LIM school or discontinue partnership with Leader Valley, this process will be followed:

- 1) Leader Valley coaches will meet with the building principal and LIM coordinators to address the concerns and create a plan of action with designated time frames.
- 2) If the plan of action is not implemented with fidelity and improvements have not been made within the designated time frame, Leader Valley coaches will meet with the building principal, LIM coordinators, and district administrative representative to address the concerns and create an updated plan of action.
- 3) If the updated plan of action is not implemented with fidelity, Leader Valley will again meet with the building principal, LIM coordinators, and district administrative representative for the purposes of exiting the school from LIM and the Leader Valley partnership.

## Appendix 2



# LEADER IN ME Onboarding Process

## Pre-work/Exploration

Schools considering implementing Leader in Me will be asked to complete a variety of “pre-work” activities that demonstrate readiness and commitment to Leader in Me. You choose your path to onboarding! These types of activities will secure staff buy in, long term commitment, excitement, and fidelity of implementation.

### Intro Conversations

- Parent organization convo and Q&A with Leader Valley Staff
- Administration/Leadership Team convo and Q&A with Leader Valley Staff

### Individual Learning Opportunities

- School visits- regular school days
- School visits- leadership events (mostly spring, dates TBD)
- Lighthouse school visit
- LIM Symposium Attendance
- Send a scout from your team to [Leader Valley trainings and events](#)
  - 7 Habits of Highly Effective People
  - Leader in Me 101 for New Teachers
  - Principal and coordinator sessions
  - Leadership Accelerators
  - School leadership and community events
- Small group book study (choose 1 of most interest to you)
  - 7 Habits of Highly Effective People
  - 7 Habits for Teens
  - 7 Habits for Families
  - 4 Disciplines of Execution (goal setting)
  - Speed of Trust (self-trust, team-trust, organizational trust)
  - Leader in Me paperback

### Whole Staff Learning Opportunities

- “Connect the dots” Business/Education presentation & Q&A (1-1.5 hours)
- Educator and student panel- Q&A (45 mins)
- Bus tour to other schools for environmental walk through (building determined)
- Rethinking Leadership “Paradigm” Workshop \* (3 hours)

### Staff Input- Readiness Survey (at end of onboarding)



# Appendix 3



## 4.0 IMPLEMENTATION PROCESS



FIND YOUR VOICE

PRE-WORK/ EXPLORATION	ONBOARDING ACTIVITIES	RETHINKING LEADERSHIP 3 HOURS			
CORE 1	7 HABITS SIGNATURE 4.0 1-2 DAYS ALL STAFF	CORE 1 (LEADERSHIP, CULTURE, ACADEMICS) 1 DAY ALL STAFF	COACHING LIGHTHOUSE TEAM 1	COACHING	COACHING
	CORE 2		CORE 2 (LEADERSHIP, CULTURE, ACADEMICS) 1 DAY ALL STAFF	COACHING LIGHTHOUSE TEAM 2	COACHING
CORE 3		CORE 3 (LEADERSHIP, CULTURE, ACADEMICS) 1 DAY ALL STAFF		COACHING LIGHTHOUSE TEAM 3	COACHING
	ONGOING		LEARNING JOURNEYS ALL STAFF		COACHING

# Appendix 4

## Annual School “To-Do” List

These are the minimum touchpoints and responsibilities for a LIM school each year.

- Annual membership fee processed
- LIM Team established
- Professional Development
  - Building Level LIM PD schedule set at beginning of school year
  - Coordinator Learning
    - Ensure LIM coordinators attend Community Coaching 3 times a year
    - Ensure new LIM coordinators meet 1:1 with their LIM coach to get acclimated to the role
    - Ensure new LIM coordinators have the appropriate LIM online level of access
  - New Teacher Learning
    - Ensure all new staff are registered for 7 Habits of Highly Effective people
    - Ensure all new classroom teachers are registered for LIM 101
    - Ensure all new staff have access to LIM online
  - Administrator Learning
    - Attend Community Coaching/Leader Up Calls
    - Attend Administrator Academy
    - Participate in Executive Coaching (optional)
    - New administrators have a 1:1 onboarding conversation with their LIM coach
- Implementation Coaching
  - Schedule summer annual planning connection with Leader Valley coach
  - Schedule beginning of the year coaching
  - Schedule middle of the year coaching
  - Schedule year-end coaching
- Leadership event of any kind held at school
- Participate in LIM Week as it makes sense for your school
- Complete the MRA between March 15-May 15 in alignment with the district protocols
- Share Leader Valley communications with families

Schools launching LIM in their first year or schools seeking Lighthouse Milestone will have additional touchpoints based on their team’s needs.

# Appendix 5

## **SAMPLE TIMELINE TO LIGHTHOUSE MILESTONE REVIEW (Includes coaching, PD)**

<input type="checkbox"/>	August 31	Submit prospective dates to FC for spring review- <a href="#">complete this form</a>
<input type="checkbox"/>	September 7	Coaching
<input type="checkbox"/>	September 7	Lighthouse rubric self-check
<input type="checkbox"/>	September 26	Coaching
<input type="checkbox"/>	September 30	Evidence Binder framework established
<input type="checkbox"/>	Sept 30-Nov 12	Populate Evidence Binder
<input type="checkbox"/>	October 5	Lighthouse team self-check rubric
<input type="checkbox"/>	October 5	Draft of leadership readiness day/review agenda completed
<input type="checkbox"/>	October 5	Measurable Results focus areas and schoolwide goal
<input type="checkbox"/>	October 27	Coaching- PLCs- 4DX, SLC, Lead Notebooks
<input type="checkbox"/>	November 4 PD	PD-4DX, SLC, Lead Notebooks
<input type="checkbox"/>	November 12	Evidence Binder Complete to Coach
<input type="checkbox"/>	November 16	Coach feedback on Evidence Binder
<input type="checkbox"/>	November 25	Lighthouse rubric self-check (key areas that needed focus)
<input type="checkbox"/>	December 3	Lighthouse Readiness Day with Leader Valley Coaches
<input type="checkbox"/>	December 20	Confirm moving forward with spring review
<input type="checkbox"/>	January 7	Resubmit evidence binder to Melissa
<input type="checkbox"/>	Jan 10-14	Coach will review evidence binder again
<input type="checkbox"/>	January 15	Coaching
<input type="checkbox"/>	February 1	FC reviewers access your evidence binder and agenda
<input type="checkbox"/>	March 15	MRA Completed
<input type="checkbox"/>	March 30	Lighthouse Review with FranklinCovey
<input type="checkbox"/>	May 15	Notification from FranklinCovey
<input type="checkbox"/>	May 31	Celebrate!

## **XVIII. Bid Approval: East High Pool Infill Project**

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### **Recommendation**

The Superintendent's recommendation is that the Board of Education accept the recommendation from ISG and approve the base bid from Larson Construction for the East High Pool Infill project as outlined for a total cost of \$539,000 (excluding Alternate #1).

### **Contact Person**

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### **Details**

In accordance with Section 73A and Section 26.12 of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A Public Hearing for the East High Pool Infill project was held on Monday, April 22, at 5pm, in the Board Room of the Education Service Center, 1516 Washington Street, Waterloo, IA 50702.

A Notice to Bidders was posted to the District website and submitted to MBI for printing in the Construction Update Plan Room Network. ISG supplied specifications to bidders for all aspects of the project. Bids were received and opened on April 9, 2024. Three companies bid the project: Failor Hurley Construction (Waterloo), Larson Construction (Independence), and Peters Construction (Waterloo). All base bids were below the expected cost for the work.

The recommendation from ISG is to accept the base bid only, no alternate, from Larson Construction at a total cost of \$539,000. Construction on the project is scheduled to begin this summer with completion by mid-October.

### **Supporting Documents**



Letter of Recommendation - EHS Pool Infill



Bid Tabulation - EHS Pool Infill

# Letter of Recommendation



APRIL 11, 2024  
Board of Education  
Waterloo Community School District  
1516 Washington Street  
Waterloo, Iowa 50703

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## RE: Official Notice to Proceed for Waterloo CSD - East High Pool Infill

Dear Board of Education,

On Tuesday, April 9, 2024, Bids were received for the East High Pool Infill. 3 bids were received ranging in amount from \$539,000 to \$644,200 with a add alternate ranging in the amount of \$50,000 to \$54,100.

The apparent low bidder is Larson Construction of Independence, Iowa, with a bid price of \$539,000. We have confirmed that Larson Construction's bid is complete and thorough. Therefore, we recommend approval of Larson Construction's base bid without accepting the Add alternate.

Sincerely,

A handwritten signature in black ink, appearing to read 'Nathan Compton'.

**Nathan Compton, AIA, CDT, NCARB**  
Senior Architect  
Nathan.Compton@ISGInc.com

# Bid Tabulation

## East High School Pool Infill

### Waterloo, IA

Project Number: 24-30608  
 Bid Letting Time & Date: 2:00 p.m. - Tuesday, April 9, 2024  
 Bid Letting Location:

Contractor	Base Bid	Add Alt. #1 Outdoor Shelter	Total	Bid Bond	Add. #1	Add. #2	Acknowledged All Qualifications to Bid
Fallor	\$644,200.00	\$54,100.00	\$698,300.00	5	X	X	X
Larson	\$539,000.00	\$50,000.00	\$589,000.00	5	X	X	X
Peters	\$569,421.00	\$53,210.00	\$622,631.00	5	X	X	X
			\$0.00				
			\$0.00				
			\$0.00				
			\$0.00				
			\$0.00				
			\$0.00				

## **XIX. Bid Approval: West High Pool Infill Project**

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### **Recommendation**

The Superintendent's recommendation is that the Board of Education accept the recommendation from InVision and approve the base bid from Larson Construction for the West High Pool Infill project as outlined for a total cost of \$489,000 (excluding Alternate #1).

### **Contact Person**

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### **Details**

In accordance with Section 73A and Section 26.12 of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A Public Hearing for the West High Pool Infill project was held on Monday, April 22, at 5pm, in the Board Room of the Education Service Center, 1516 Washington Street, Waterloo, IA 50702.

A Notice to Bidders was posted to the District website and submitted to MBI for printing in the Construction Update Plan Room Network. InVision supplied specifications to bidders for all aspects of the project. Bids were received and opened on April 9, 2024. Five companies bid the project: Failor Hurley Construction (Waterloo), N.B. Koch General Contractors, Inc. (Cedar Falls), Larson Construction (Independence), Don Gardner Construction (Waterloo), and Peters Construction (Waterloo). All base bids were below the expected cost for the work.

The recommendation from Invision is to accept the base bid only, no alternate, from Larson Construction at a total cost of \$489,000. Construction on the project is scheduled to begin this summer with completion by mid-October.

### **Supporting Documents**



Letter of Recommendation - WHS Pool Infill



Bid Tabulation - WHS Pool Infill

April 9, 2024

# INVISION

Zach Kelly  
Director of Facilities  
1516 Washington Street  
Waterloo, IA 50701

Zach,

Re: West High Pool Infill

Below is a summary of the bids received at the April 9, 2024 bid opening.



Selected Bid Summary	LARSON	Recommendation	Comments
Base Bid	\$489,000	accept	Cost is below budget.
Alternate #1		not accepted	School district decision to not accept.
<b>Total</b>	<b>\$489,000</b>		

### General Notes

All the base bid amounts are below the expected costs for the work. With the added cost of the Alternate, two of the five bids remain below the budget amount. Five bidders with reasonably close bids, shows that there was good competition and representation.

In summary, we recommend accepting the base bid from Larson Construction for a total contract amount at \$489,000.

Larson Construction is a reliable and experienced contractor that has successfully worked on projects for WCSD and other institutions in the area. We are confident that they will provide the quality of work that WCSD expects.

We recommend the owner maintain contingency of 5% during construction to manage unforeseen items that may arise during the construction of this project. Please let us know how you plan to proceed. As always, we are glad to meet with you to discuss this in more detail.

Attached is the bid tab for your reference.

Sincerely,

Kate Payne, AIA  
Architect



# INVISION

## BID TABULATION

**DATE** April 9, 2024  
**PROJECT** Waterloo CSD - West High Pool Infill  
**PROJECT #** 24016  
**CONSTRUCTION BUDGET** \$600,000

Bidding Company Location	Failor Hurley Construction Waterloo, IA	Matt Construction, Inc Sumner, IA	N.B Koch General Contractors, Inc Cedar Falls, IA	LARSON Independence	Woodruff Construction, LLC Waterloo, IA	Don Gardner Construction	Peters
Bid Security (5%)	X		X	X			Construction
Addendum #1 dated March 22, 2024	X		X	X		X	X
Addendum #2 dated April 3, 2024	X		X	X		X	X
Addendum #3 dated April 5, 2024	X		X	X		X	X
MBE			X	X		X	X
<b>BASE BID</b>	\$ 558,400.00		\$581,512.00	\$489,000.00		\$598,000.00	\$513,770.00
<b>ALTERNATES</b>	Selected X						
Alternate #1 - ADD HVAC Equipment	\$53,500.00		\$55,000.00	\$49,000.00		\$70,600.00	\$52,000.00
<b>Total = Base Bid + Selected Alternates</b>	\$611,900.00		\$636,512.00	\$538,000.00		\$668,600.00	\$565,770.00

## XX. Bid Approval: Central Middle School Water Main Upgrade Project

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### Recommendation

The Superintendent's recommendation is that the Board of Education accept the recommendation from MODUS Engineering and approve the bid from Denver Underground and Grading, Inc., for the Central Middle School Water Main Upgrade project as outlined for a total cost of \$151,000.

### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

In accordance with Section 73A and Section 26.12 of the Code of Iowa, a Public Hearing is required if the Board of Education of a school corporation proposes to make public improvements that may exceed \$100,000. A Public Hearing for the Central Middle School Water Main Upgrade project was held on Monday, April 22, at 5pm, in the Board Room of the Education Service Center, 1516 Washington Street, Waterloo, IA 50702.

A Notice to Bidders was posted to the District website and submitted to MBI for printing in the Construction Update Plan Room Network. MODUS Engineering supplied specifications to bidders for all aspects of the project. Bids were received and opened on March 11, 2024. Four companies bid the project: JQ Construction LLC, BG Brecke, Inc., Denver Underground & Grading, Inc., and Plumb Tech, Inc. The recommendation from MODUS Engineering is to accept the low base bid of \$151,000 from Denver Underground and Grading, Inc. Construction on the project is scheduled to take place this summer, with a completion date of July 1.

### Supporting Documents

 Letter of Recommendation - CMS Water Main

 Bid Tabulation - CMS Water Main Upgrade

April 16, 2024

Zach Kelly – Director of Operational Services  
Waterloo Community School District  
1516 Washington Street  
Waterloo, IA 50702

RE: Waterloo CSD Central MS Water Main Upgrade  
Waterloo, Iowa

Dear Zach:

We have opened and reviewed the bids for the above referenced project.

The project saw a good amount of contractor interest with (4) contractors submitting a bid. We recommend that the Waterloo Community School District accept the low base bid of \$151,000 submitted by Denver Underground and Grading, Inc with a stated completion date of July 1, 2024.



If you have any questions or concerns please feel free to call.

Sincerely,

A handwritten signature in blue ink that reads "Jake Connor".

Jake R. Connor, P.E.  
JRC/tss  
Project #23-108



PROJECT NAME: CMS Water Main Upgrade  
 PROJECT NO.: 23-108  
 BIDS RECEIVED AT: WCSD ESC Building

Contractor	Bid Bond (5%)	Addendum #1	Base Bid
JQ Construction LLC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 222,611.00
BG Brecke, Inc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 231,569.50
Denver Underground & Grading, Inc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 151,000.00
Plumb Tech, Inc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 192,525.00

## XXI. Consideration of Quotes for the Central Middle School Steamer/Kettle Replacement Project

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### Recommendation

The Superintendent's recommendation is that the Board of Education accept the recommendation from the Facilities Committee and approve the purchase of two Combi electric ovens and one Groen electric kettle from Wilson Restaurant Supply, Inc., at a total cost of \$80,851.63 as presented.

### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

The current steamer/kettle combo used in the Central Middle School cafeteria was installed in 2009. The unit has needed several repairs over the past three years, and is in need of replacement. Zach Kelly, Director of Operations, worked with food service staff, other school districts, and representatives of the food service equipment industry to determine the best equipment options for replacement of the unit.

Quotes were received from two companies as follows:

- Wilson Restaurant & Supply, Inc.: \$80,851.63
- Martin Brothers Distributing Co., Inc.: \$85,567.83

Both price quotes include the equipment purchase along with installation to take place during the summer of 2024. The Facilities Committee has reviewed the quotes and recommends moving approval of the quote from Wilson Restaurant & Supply, Inc. at a cost of \$80,851.63.

### Supporting Documents



Wilson Restaurant Quote



Martin Brothers Quote

**Project:**  
Waterloo Community Schools-  
Central Middle

**From:**  
Wilson Restaurant Supply  
Ron Heying  
5746 Westminster Drive  
Cedar Falls, IA 50613  
(319) 277-9000  
319-277-9000 111 (Contact)

Item	Qty	Description	Sell	Sell Total
1A	1 ea	<b>COMBI OVEN, ELECTRIC</b> Alto-Shaam Model No. 7-20E PRO Prodigi™ Pro Combi Oven/Steamer, electric, boiler-free, countertop, capacity (7) 18" x 26" full size sheet or (16) 12" x 20" full size hotel pan (GN 1/1), Wi-Fi enabled control with steam/convection/combi cooking modes, removable "T" style temperature probe, (2) power levels, programmable cool-down, SafeVent™ steam venting, (5) cleaning levels, triple-pane door, high efficiency LED lighting, (2) side racks with (8) non-tilt support rails, door hinged right, stainless steel construction, adjustable stainless steel legs, EcoSmart®, cULus, UL EPH Classified, CE, IPX5, ENERGY STAR®, EAC, city-wide COA for New York City	\$16,351.35	\$16,351.35
	1 ea	NOTE: Subject to Manufacturer's Terms & Conditions. See Documents Section		
	1 ea	12 month extended warranty to begin at the end of std. warranty & continue for 12 additional months (net)	\$653.00	\$653.00
	1 ea	It is the sole responsibility of the owner/operator/purchaser of this equipment to verify that the incoming water supply is comprehensively tested and, if required, provide a means of water treatment that would meet the compliance requirements with the manufacturers water quality standards published on the product spec sheet. Non-compliance with these minimum standards will potentially damage this equipment and/or components and VOID the original equipment manufacturers warranty		
	1 ea	Alto-Shaam Prodigi Factory Authorized Installation Program (First unit only) ((NET) NO FURTHER DISCOUNTS APPLY)	\$1,100.00	\$1,100.00
	1 ea	Alto-Shaam Prodigi Factory Authorized Installation Program, for Table-top Units, per each additional unit ((NET) NO FURTHER DISCOUNTS APPLY)	\$880.00	\$880.00
	1 ea	Installation Program includes: 1. Travel within 60 miles (120 miles round-trip) of installer 2. Pre-installation site survey 3. Professionally reviewed and managed installation process		



Item	Qty	Description	Sell	Sell Total
		4. Assembly of purchased equipment 5. Assembly of any accessories 6. Placement and leveling of unit 7. Connection to existing utilities within three feet of unit 8. Mechanical to ensure proper function (Note: Installation of units outside of the 60 mile radius will require additional travel charges payable by the customer)		
		Installation Program does not include:		
		1. Delivery to end user location		
		2. Unit must be within five feet of and have a clear and unobstructed path to final destination		
		3. Special licensing or permits		
		4. Overtime travel or labor		
		5. Removal of packing material		
		6. Removal and scrapping of old unit		
		7. Installation kit		
	1 ea	ECO		
	1 ea	440-480v/50/60/3-ph, 20.6-22.4 amps, 15.7-18.7kW, 8 AWG, NO cord or plug	\$732.60	\$732.60
	1 kt	5021519 Installation Kit, for electric combi ovens, CPVC, rated up to 30.0 amps, includes quick disconnect kit, per oven ((NET) NO FURTHER DISCOUNTS APPLY)	\$666.74	\$666.74
	1 ea	Note: Please refer to Installation Program brochure for kit contents		
	1 ea	Wifi, standard		
	1 ea	Removable "T" style temperature probe, standard		
	1 ea	5016084 Combi Oven Stand, stationary, 25-7/16" x 39-13/16" x 36-5/16" (645mm x 1010mm x 922mm), with pan slides and shelf, spacing 2-11/16" (68mm), stainless steel, for 7-20 or 10-20	\$958.95	\$958.95
		Freight:	\$300.00	\$300.00
		<b>ITEM TOTAL:</b>		<b>\$21,642.64</b>

1B	1 ea	<b>COMBI OVEN, ELECTRIC</b>	\$16,351.35	\$16,351.35
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Alto-Shaam Model No. 7-20E PRO  
Prodigi™ Pro Combi Oven/Steamer, electric, boiler-free, countertop, capacity (7) 18" x 26" full size sheet or (16) 12" x 20" full size hotel pan (GN 1/1), Wi-Fi enabled control with steam/convection/combi cooking modes, removable "T" style temperature probe, (2) power levels, programmable cool-down, SafeVent™ steam venting, (5) cleaning levels, triple-pane door, high efficiency LED lighting, (2) side racks with (8) non-tilt support rails, door hinged right, stainless steel construction, adjustable stainless steel legs, EcoSmart®, cULus, UL EPH Classified, CE, IPX5, ENERGY STAR®, EAC, city-wide COA for New York City

1 ea NOTE: Subject to Manufacturer's Terms & Conditions. See Documents Section

Item	Qty	Description	Sell	Sell Total
	1 ea	12 month extended warranty to begin at the end of std. warranty & continue for 12 additional months (net)	\$653.00	\$653.00
	1 ea	It is the sole responsibility of the owner/operator/purchaser of this equipment to verify that the incoming water supply is comprehensively tested and, if required, provide a means of water treatment that would meet the compliance requirements with the manufacturers water quality standards published on the product spec sheet. Non-compliance with these minimum standards will potentially damage this equipment and/or components and VOID the original equipment manufacturers warranty		
	1 ea	ECO		
	1 ea	440-480v/50/60/3-ph, 20.6-22.4 amps, 15.7-18.7kW, 8 AWG, NO cord or plug	\$732.60	\$732.60
	1 kt	5021519 Installation Kit, for electric combi ovens, CPVC, rated up to 30.0 amps, includes quick disconnect kit, per oven ((NET) NO FURTHER DISCOUNTS APPLY)	\$666.74	\$666.74
	1 ea	Note: Please refer to Installation Program brochure for kit contents		
	1 ea	Wifi, standard		
	1 ea	Stacked		
	1 ea	Everpure OPS175CR/16 Reverse Osmosis System, 16 gallon hydropneumatic storage tank, up to 175 gpd production, operates at line pressure (non-electric), particulate & chlorine reduction prefilter, mineral-addition cartridge, post-filter for chloramine reduction, full system bypass valve and valve-in-head system shut off, includes hose, tubing & fittings for installation, compact wall-mount processor with remote storage tank provides installation flexibility (164-01416)	\$1,915.00	\$1,915.00
	1 ea	Everpure RO SYSTEM INSTALL - LEVEL I Installation of Level I RO Models - EZ-RO 200-375 G & G-BL, BWS 100-175, OPS 70-175, Conserv 75S & E, LT-S and LVRO-75HE, BWS 100-175, OPS 70-175. Includes pre/post filter install when applicable (EVNTW0080)	\$680.00	\$680.00
	1 ea	Removable "T" style temperature probe, standard		
	1 ea	5016084 Combi Oven Stand, stationary, 25-7/16" x 39-13/16" x 36-5/16" (645mm x 1010mm x 922mm), with pan slides and shelf, spacing 2-11/16" (68mm), stainless steel, for 7-20 or 10-20	\$958.95	\$958.95
		Freight:	\$300.00	\$300.00
		<b>ITEM TOTAL:</b>		<b>\$22,257.64</b>
1C	1 ea	<b>KETTLE, ELECTRIC, TILTING</b> Groen Model No. DEE/4-40C Tilting Kettle, electric, 40-gallon capacity, 2/3 jacket, IPX6 water rated electronic Classic controls, 316 stainless steel liner, crank tilt, floor mounted control console, stainless steel construction, bullet feet, 50 PSI, cULus, NSF, Made in USA	\$26,265.26	\$26,265.26
	1 ea	(K-12 School purchases only) Two year parts and labor warranty		
	1 ea	(153255) 480v/60/3-ph, 24.0kW, 29.0 amps	\$1,628.81	\$1,628.81





## Wilson Restaurant Supply

04/01/2024

Item	Qty	Description	Sell	Sell Total
	1 ea	2" Tangent draw-off (TDO)	\$2,404.93	\$2,404.93
	1 ea	159102 Drain cup & 8' hose assembly for TDO	\$1,695.48	\$1,695.48
	1 ea	Etch Marks, 4 gallon increments	\$765.90	\$765.90
	1 ea	159143 Hinged Cover Kit (no. 41), for 40 gallon tilting kettle, factory installed	\$2,695.97	\$2,695.97
	1 ea	Z091877 Faucet, double pantry, with 11" rear swing spout & 5" riser	\$695.00	\$695.00
			<b>ITEM TOTAL:</b>	<b>\$36,151.35</b>
2	1 ea	<b>INSTALLATION</b> Wilson Restaurant Supply Installation of Groen kettle	\$800.00	\$800.00
			<b>ITEM TOTAL:</b>	<b>\$800.00</b>
			Subtotal	\$80,851.63
			Total	\$80,851.63



**Martin Bros.**  
DISTRIBUTING CO INC

04/04/2024

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# Quotation

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Project: Waterloo - Central Middle School

From: Martin Bros. Distributing  
Rick Moser  
406 Viking Road  
Cedar Falls, IA 50613-  
319-266-1775  
(319)231-3934 (Contact)  
319-273-9761 (Fax)  
rmoser@martinsnet.com

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Job Reference Number: 21364

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**\*\*Pricing may change 5/1/2024 with manufacturer increases, items purchased 3/1/2024 or after will need to be updated to reflect current manufacturer pricing\*\***

**Quoted pricing is subject to change due to historic increases in parts, materials and labor shortages. This also includes freight and transportation charges.**

**Increases will be passed along as we receive them from our vendors without notice.**


**If total quote/estimate is over \$5,000, a down payment of 50% may be required prior to placing the order. A down payment invoice can be created upon request. All additional payments will be due within terms noted on invoice. If you have any questions regarding payment, please reach out to our credit department to discuss further. Deb Kroeze (319) 553-0456 or Michelle Even (319) 859-9841**

Equipment will be delivered by common carrier. Unloading, un-crating, inspected for damage before signing bill of lading and installation by owner. Martin Bros can not be held responsible for freight damage not duly noted on the bill of lading. Installation quote available upon request.

Item	Qty	Description	Sell	Sell Total
1A	1 ea	<b>COMBI OVEN, ELECTRIC</b> Alto-Shaam 7-20E PRO Prodigi™ Pro Combi Oven/Steamer, electric, boiler-free, countertop, capacity (7) 18" x 26" full size sheet or (16) 12" x 20" full size hotel pan (GN 1/1), Wi-Fi enabled control with steam/convection/combi cooking modes, removable "T" style temperature probe, (2) power levels, programmable cool-down, SafeVent™ steam venting, (5) cleaning levels, triple-pane door, high efficiency LED lighting, (2) side racks with (8) non-tilt support rails, door hinged right, stainless steel construction, adjustable stainless steel legs, EcoSmart®, cULus, UL EPH Classified, CE, IPX5, ENERGY STAR®, EAC, city-wide COA for New York City	\$16,951.45	\$16,951.45
	1 ea	NOTE: Subject to Manufacturer's Terms & Conditions. See Documents Section		
	1 ea	12 month extended warranty to begin at the end of std. warranty & continue for 12 additional months (net)	\$711.77	\$711.77
	1 ea	It is the sole responsibility of the owner/operator/purchaser of this equipment to verify that the incoming water supply is comprehensively tested and, if required, provide a means of water treatment that would meet the compliance requirements with the manufacturers water quality standards published on the product spec sheet. Non-compliance with these minimum standards will potentially damage this equipment and/or components and VOID the original equipment manufacturers warranty		
	1 ea	Alto-Shaam Prodigi Factory Authorized Installation Program (First unit only) ((NET) NO FURTHER DISCOUNTS APPLY)	\$2,289.00	\$2,289.00
	1 ea	Installation Program includes: 1. Travel within 60 miles (120 miles round-trip) of installer 2. Pre-installation site survey 3. Professionally reviewed and managed installation process 4. Assembly of purchased equipment		



Item	Qty	Description	Sell	Sell Total
		5. Assembly of any accessories		
		6. Placement and leveling of unit		
		7. Connection to existing utilities within three feet of unit		
		8. Mechanical to ensure proper function		
		Installation Program also includes:		
		1. Delivery to end user location		
		2. Unit must be within five feet of and have a clear and unobstructed path to final destination		
		3. Removal of packing material		
		4. Removal and relocate of old unit		
1 ea		XP-SVC START-UP Installation start-up check ((NET) NO FURTHER DISCOUNTS APPLY) (NOTE: Includes travel within 60 miles (120 miles round-trip) of installer. Additional trip charges may apply outside the 60-mile limit. Contact your local factory-authorized service agent for details)	\$441.45	\$441.45
1 ea		ECO		
1 ea		440-480v/50/60/3-ph, 20.6-22.4 amps, 15.7-18.7kW, 8 AWG, NO cord or plug	\$753.34	\$753.34
1 kt		5021519 Installation Kit, for electric combi ovens, CPVC, rated up to 30.0 amps, includes quick disconnect kit, per oven ((NET) NO FURTHER DISCOUNTS APPLY)	\$685.61	\$685.61
1 ea		Note: Please refer to Installation Program brochure for kit contents		
1 ea		Wifi, standard		
1 ea		Single		
1 ea		5031205 Reverse Osmosis System, 16 gallon hydropneumatic storage tank, up to 175 gpd production, operates at line pressure (non-electric), particulate & chlorine reduction prefilter, mineral-addition cartridge, post-filter for chloramine reduction, full system bypass valve and valve-in-head system shut off, includes hose, tubing & fittings for installation, compact wall-mount processor with remote storage tank provides installation flexibility (Single Oven Application) ((NET) NO FURTHER DISCOUNTS APPLY)	\$1,783.20	\$1,783.20
1 ea		Reverse Osmosis System Field Install Program ((NET) NO FURTHER DISCOUNTS APPLY)	\$396.76	\$396.76
1 ea		Removable "T" style temperature probe, standard		
1 ea		5016084 Combi Oven Stand, stationary, 25-7/16" x 39-13/16" x 36-5/16" (645mm x 1010mm x 922mm), with pan slides and shelf, spacing 2-11/16" (68mm), stainless steel, for 7-20 or 10-20	\$986.09	\$986.09
		<b>Extended Total:</b>		<b>\$24,998.67</b>
1B	1 ea	<b>COMBI OVEN, ELECTRIC</b>	\$16,951.45	\$16,951.45

Item	Qty	Description	Sell	Sell Total
		Alto-Shaam 7-20E PRO Prodigi™ Pro Combi Oven/Steamer, electric, boiler-free, countertop, capacity (7) 18" x 26" full size sheet or (16) 12" x 20" full size hotel pan (GN 1/1), Wi-Fi enabled control with steam/convection/combi cooking modes, removable "T" style temperature probe, (2) power levels, programmable cool-down, SafeVent™ steam venting, (5) cleaning levels, triple-pane door, high efficiency LED lighting, (2) side racks with (8) non-tilt support rails, door hinged right, stainless steel construction, adjustable stainless steel legs, EcoSmart®, cULus, UL EPH Classified, CE, IPX5, ENERGY STAR®, EAC, city-wide COA for New York City		
	1 ea	NOTE: Subject to Manufacturer's Terms & Conditions. See Documents Section		
	1 ea	12 month extended warranty to begin at the end of std. warranty & continue for 12 additional months (net)	\$711.77	\$711.77
	1 ea	It is the sole responsibility of the owner/operator/purchaser of this equipment to verify that the incoming water supply is comprehensively tested and, if required, provide a means of water treatment that would meet the compliance requirements with the manufacturers water quality standards published on the product spec sheet. Non-compliance with these minimum standards will potentially damage this equipment and/or components and VOID the original equipment manufacturers warranty		
	1 ea	ECO		
	1 ea	440-480v/50/60/3-ph, 20.6-22.4 amps, 15.7-18.7kW, 8 AWG, NO cord or plug	\$753.34	\$753.34
	1 kt	5021519 Installation Kit, for electric combi ovens, CPVC, rated up to 30.0 amps, includes quick disconnect kit, per oven ((NET) NO FURTHER DISCOUNTS APPLY)	\$685.61	\$685.61
	1 ea	Note: Please refer to Installation Program brochure for kit contents		
	1 ea	Wifi, standard		
	1 ea	Single		
	1 ea	5031205 Reverse Osmosis System, 16 gallon hydropneumatic storage tank, up to 175 gpd production, operates at line pressure (non-electric), particulate & chlorine reduction prefilter, mineral-addition cartridge, post-filter for chloramine reduction, full system bypass valve and valve-in-head system shut off, includes hose, tubing & fittings for installation, compact wall-mount processor with remote storage tank provides installation flexibility (Single Oven Application) ((NET) NO FURTHER DISCOUNTS APPLY)	\$1,783.20	\$1,783.20
	1 ea	NOTE: Prodigi Factory Authorized Installation Program (above) MUST be selected for RO field install option to become available	\$396.00	\$396.00
	1 ea	Removable "T" style temperature probe, standard		
	1 ea	5016084 Combi Oven Stand, stationary, 25-7/16" x 39-13/16" x 36-5/16" (645mm x 1010mm x 922mm), with pan slides and shelf, spacing 2-	\$1,037.99	\$1,037.99

Item	Qty	Description	Sell	Sell Total
		11/16" (68mm), stainless steel, for 7-20 or 10-20		
	1 ea	XP-SVC START-UP Installation start-up check ((NET) NO FURTHER DISCOUNTS APPLY) (NOTE: Includes travel within 60 miles (120 miles round-trip) of installer. Additional trip charges may apply outside the 60-mile limit. Contact your local factory-authorized service agent for details)	\$441.45	\$441.45
			<b>Extended Total:</b>	<b>\$22,760.81</b>
1C	1 ea	<b>KETTLE, ELECTRIC, TILTING</b> Groen DEE/4-40C Tilting Kettle, electric, 40-gallon capacity, 2/3 jacket, IPX6 water rated electronic Classic controls, 316 stainless steel liner, crank tilt, floor mounted control console, stainless steel construction, bullet feet, 50 PSI, cULus, NSF, Made in USA	\$28,034.80	\$28,034.80
	1 ea	(K-12 School purchases only) Two year parts and labor warranty		
	1 ea	(153255) 480v/60/3-ph, 24.0kW, 29.0 amps	\$1,738.55	\$1,738.55
	1 ea	2" Tangent draw-off (TDO)	\$2,566.95	\$2,566.95
	1 ea	Etch Marks, 4 gallon increments	\$817.50	\$817.50
	1 ea	159143 Hinged Cover Kit (no. 41), for 40 gallon tilting kettle, factory installed	\$2,877.60	\$2,877.60
	1 ea	Z091877 Faucet, double pantry, with 11" rear swing spout & 5" riser	\$822.95	\$822.95
	1 ea	INSTALL Installation Program includes: 1. Travel within 60 miles (120 miles round-trip) of installer 2. Pre-installation site survey 3. Professionally reviewed and managed installation process 4. Assembly of purchased equipment 5. Assembly of any accessories 6. Placement and leveling of unit 7. Connection to existing utilities within three feet of unit 8. Mechanical to ensure proper function	\$950.00	\$950.00
		Installation Program also includes: 1. Delivery to end user location 2. Unit must be within five feet of and have a clear and unobstructed path to final destination 3. Removal of packing material 4. Removal and relocate of old unit		
			<b>Extended Total:</b>	<b>\$37,808.35</b>
			Subtotal	\$85,567.83
			Total	\$85,567.83

Price does not include Sales Tax unless shown in total. Applicable sales tax will be charged when the invoice for the equipment is printed.

FREIGHT IS ONLY AN ESTIMATE.

Thumbnail pictures are representatives and may not show equipment as proposed.

This is a special order item. Special order items are non-returnable.

Acceptance: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Project Grand Total: \$85,567.83

## XXII. East High and West High Security Camera Upgrade

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### Recommendation

The Superintendent's recommendation is that the Board of Education accept the recommendation from the Facilities Committee and approve the quotes from Hawkeye Alarm & Signal Company to install security cameras at East High and West High for a total cost of \$278,200 to be paid out of the Stronger Connections Grant.

### Contact Person

Zach Kelly, Director of Operations  
Jeff Sommerfeldt, Chief Financial Officer

### Details

The District is proposing an upgrade of the security cameras at both East High School and West High School. Quotes were received from two companies as follows:

- Hawkeye Alarm & Signal Company: \$278,200
- Tri-City Electric Co.: \$318,020

Both price quotes include the equipment purchase along with the installation of interior and exterior cameras throughout both high schools. The Facilities Committee has reviewed the quotes and recommends approval of the quotes from Hawkeye Alarm & Signal Company at a total cost of \$278,000. The project will be paid for with funds from the Stronger Connections Grant.

### Supporting Documents



Hawkeye Alarm Quote - EHS



Hawkeye Alarm Quote - WHS



Tri-City Electric Quote - EHS



Tri-City Electric Quote - WHS





# HAWKEYE ALARM & SIGNAL COMPANY

LISTED BY UNDERWRITERS LABORATORIES

16 WEST COMMERCIAL STREET, WATERLOO IA 50701

PO BOX 2431 319-232-0490

BURGLAR ALARM - FIRE ALARM - VIDEO SURVEILLANCE - ACCESS CONTROL - NETWORK CABLING- FIBER OPTICS

March 22, 2024

Waterloo Community Schools

Attn: Zach Kelly

RE: East High Security Camera Project

Hawkeye Alarm will provide and install the following:

1. 50- QNV-8093R IP security cameras
2. 18- PNM-C12083RVD IP security cameras.
3. 3- PNM-C16083RVQ IP security cameras.
4. 6- QNO-C9083R IP security cameras.
5. 4- PNM-8082VT IP security cameras.
6. 6- SBO-140BW mounting accessory.
7. 4- SBP-300KMW1 mounting accessory.
8. 4- SBP-WMW2 mounting accessory.
9. 3- SBP-250HMW mounting accessory.
10. 1- SBP-215HMW mounting accessory.
11. 10- DTK-MRJPOE lightning protection.
12. 10- 15m Outdoor patch cable.
13. 6- 48 port patch panels.
14. 81- Single port surface mount boxes.
15. 162- Cat6 cable jacks.
16. 81- ExacqVision Professional camera licenses.
17. All wire and labor to install the above equipment.
18. All programming and final camera adjustments.
19. Removal of all existing cameras and cabling.

Hawkeye Alarm's bid for the above work is \$127,000.00



# HAWKEYE ALARM & SIGNAL COMPANY

LISTED BY UNDERWRITERS LABORATORIES

16 WEST COMMERCIAL STREET, WATERLOO IA 50701

PO BOX 2431 319-232-0490

BURGLAR ALARM - FIRE ALARM - VIDEO SURVEILLANCE - ACCESS CONTROL - NETWORK CABLING- FIBER OPTICS

March 22, 2024

Waterloo Community Schools

Attn: Zach Kelly

RE: West High Security Camera Project

Hawkeye Alarm will provide and install the following:

1. 46- QNV-8093R IP security cameras
2. 22- PNM-C12083RVD IP security cameras.
3. 9- PNM-C16083RVQ IP security cameras.
4. 2- QNO-C9083R IP security cameras.
5. 6- PNM-8082VT IP security cameras.
6. 2- PNM-9031RV IP security cameras.
7. 1- XNO-6120R IP security camera.
8. 2- SBO-140BW mounting accessory.
9. 12- SBP-300KMW1 mounting accessory.
10. 12- SBP-WMW2 mounting accessory.
11. 1- SBP-276HMW mounting accessory.
12. 7- SBP-250HMW mounting accessory.
13. 4- SBP-215HMW mounting accessory.
14. 1- SBP-WCW mounting accessory.
15. 16- DTK-MRJPOE lightning protection.
16. 16- 15m Outdoor patch cable.
17. 4- 48 port patch panels.
18. 88- Single port surface mount boxes.
19. 187- Cat6 cable jacks.
20. 88- ExacqVision Professional camera licenses.
21. All wire and labor to install the above equipment.
22. All programming and final camera adjustments.
23. Removal of all existing cameras and cabling.

Hawkeye Alarm's bid for the above work is \$151,200.00



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March 25, 2024

Zack Kelly  
Director of Operations  
Waterloo School District

RE: East High School Security Camera Project RFP  
Estimate Number: 27537

Zack,

Tri-City Security Solutions, a division of Tri-City Electric Co., is pleased to provide the following proposal for the video surveillance work in the East High camera RFP.

**Video Surveillance System total: \$144,875.00**

**Scope of work: Video Surveillance system**

Includes:

- Nineteen (19) Hanwha PNM-C12083RVD IP network cameras.
- Three (3) Hanwha PNM-C16083-RVQ IP network cameras.
- Four (4) Hanwha PNM-8080VT IP network cameras.
- Six (6) Hanwha QNO-C9083R IP network cameras.
- Forty-nine (49) Hanwha QNV-C8083R IP network cameras.
- Eighty-one (81) Exacq EVIP-01 device licenses.
- Nine (9) Ditek DTK-MRJPOE surge protectors.
- Mounts, pendants, and miscellaneous hardware.
- Provide and install (81) category 6 cables to the following locations:
  - (72) 1-port interior camera locations.
  - (09) 1-port exterior camera locations.
- Provision and installation of j-hooks as required. This pricing assumes existing pathways to be used for most cabling.
- Basic setup, adjustment, programming, and training of the system are included.

Excludes:

- Any allowances, bonds, permit fees.
- Any 110VAC power wiring, boxes, rough-ins, conduit, or cable trays.
- Network electronics and PC's.
- BIM coordination.
- Tri-City Electric will not pay liquidated damages due to manufacturer's lead time issues.
- We have not included any conduit, wiring, connections, disconnects, starters, variable frequency drives or related control wiring to any equipment shown on the mechanical drawings and not on the electrical drawings.
- Demolition labor is excluded.
- Provision and installation of network racks and equipment is excluded.

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- Provision of patch cords is by the owner and is therefore excluded.
- Provision and installation of vertical and horizontal conduit and backboxes is excluded.
- Provision and installation of surface mount raceway is excluded.
- Provision and installation of ground riser is excluded.
- Provision and installation of plywood backing, and backboards is excluded.
- Repair, replacement, and painting of sheetrock and concrete is excluded.
- Where information is conflicting between engineered drawings and specifications, engineered drawings were assumed to supersede specifications.
- All work not specifically mentioned in the above scope is excluded.

All work to be between 7:00 AM and 3:30 PM, M-F.

This quote **does not** include any taxes.

Thank you for the opportunity to quote this project. Please feel free to call with any questions concerning this quote.

Sincerely,

Sean Kirby  
Estimator  
Tri-City Security Solutions  
Phone: 563.823.1663  
E-mail: skirby@tricityelectric.com

**Notes**

**Due to the increasing rise in copper, aluminum, steel and PVC products Tri-City Electric reserves the right to review and adjust all material pricing on a daily basis.** Bid is based on the daily market rate for goods and commodities reflected by the submitted date of this proposal. Tri-City Electric reserves the right to increase said bid accordingly to reflect the market rates on the day of receipt of the Purchase Order. Changes will be shown in documentation through commercial quotes, invoices, and/or receipts for such goods and commodities if applicable. Bid is subject to the terms of a mutually acceptable contract.

**Tri-City Electric shall have the option to withdraw this proposal if not accepted within 10 days from its date.** Work is to be performed during a standard 8-hour workday between 7:00 AM and 3:30 PM, Monday through Friday. Payments are due every 30 days as the work progresses. A 1.5% service charge will be applied to all outstanding account balances over 30 days past due.

**Please note:** As the global COVID-19 and associated sub-variants situation continues; material lead time, material pricing, and manpower scheduling is subject to change in the event of adverse situations caused by pandemic effects. We appreciate your business and will work closely with you to minimize any possible impacts to your project.

**Excavation Notes**

Proposal is based on normal soil conditions for trenching, auguring and excavation. If TCE encounters rock, debris, old foundations, high water, loose or unstable soil conditions; additional charges will be added respectively. All excavation spoils are to remain on site. If included in bid for removal is based on CLEAN, Non-Contaminated soil removal and does not include remediation or special hauling fees, treatment charges and special permits relating to contaminated soils. Owner/General Contractor is responsible for all excavated areas if not specified and included in the scope of work.

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**Non Solicitation of Employees**

By acceptance of this proposal, customer agrees not to directly or indirectly recruit, solicit, hire or induce any employee of Tri City Electric Company or any affiliate thereof, to terminate his or her employment with Tri City Electric Company. This restriction does not apply to solicitation of any employee of Tri City Electric Company or any affiliate thereof, who Tri City Electric Company has terminated due to job elimination or reduction in work force. Contractor agrees that it must obtain written consent of Tri City Electric Company prior to hiring any such Tri City Electric Company employee. The duties, objections and restrictions set forth in this paragraph shall expire upon the first anniversary of the conclusion date of the engagement contemplated in this proposal.

**Force Majeure**

If the Subcontractor is delayed at any time in the commencement or progress of the Work by diseases, epidemics, pandemics, including but not limited to labor or material shortages, unusual delay in deliveries, restrictions on access or travel, unavoidable casualties or other causes beyond the Subcontractor's control, then the contract times shall be extended.

**Other Terms**

TCE is proposing a price for the scope of its work based on the assumption the parties will execute a commercial reasonable subcontract agreement, such as an unmodified ConsensusDOC 751, Short Form Agreement between Contractor and Subcontractor, or AIA A401, Standard Form of Agreement between Contractor and Subcontractor.



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March 25, 2024

Zack Kelly  
Director of Operations  
Waterloo School District

RE: West High School Security Camera Project RFP  
Estimate Number: 27537

Zack,

Tri-City Security Solutions, a division of Tri-City Electric Co., is pleased to provide the following proposal for the video surveillance work in the Wesh High camera RFP.

**Video Surveillance System total: \$173,145.00**

**Scope of work: Video Surveillance system**

Includes:

- Twenty-three (23) Hanwha PNM-C12083RVD IP network cameras.
- Nine (9) Hanwha PNM-C16083-RVQ IP network cameras.
- Six (6) Hanwha PNM-8080VT IP network cameras.
- Two (2) Hanwha PNM-9031RV IP network cameras.
- Two (2) Hanwha QNO-C9083R IP network cameras.
- Forty-five (45) Hanwha QNV-C8083R IP network cameras.
- Eighty-eight (88) Exacq EVIP-01 device licenses.
- Nineteen (19) Ditek DTK-MRJPOE surge protectors.
- Mounts, pendants, and miscellaneous hardware.
- Provide and install (88) category 6 cables to the following locations:
  - (69) 1-port interior camera locations.
  - (19) 1-port exterior camera locations.
- Provision and installation of j-hooks as required. This pricing assumes existing pathways to be used for most cabling.
- Basic setup, adjustment, programming, and training of the system are included.

Excludes:

- Any allowances, bonds, permit fees.
- Any 110VAC power wiring, boxes, rough-ins, conduit, or cable trays.
- Network electronics and PC's.
- BIM coordination.
- Tri-City Electric will not pay liquidated damages due to manufacturer's lead time issues.
- We have not included any conduit, wiring, connections, disconnects, starters, variable frequency drives or related control wiring to any equipment shown on the mechanical drawings and not on the electrical drawings.
- Demolition labor is excluded.

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- Provision and installation of network racks and equipment is excluded.
- Provision of patch cords is by the owner and is therefore excluded.
- Provision and installation of vertical and horizontal conduit and backboxes is excluded.
- Provision and installation of surface mount raceway is excluded.
- Provision and installation of ground riser is excluded.
- Provision and installation of plywood backing, and backboards is excluded.
- Repair, replacement, and painting of sheetrock and concrete is excluded.
- Where information is conflicting between engineered drawings and specifications, engineered drawings were assumed to supersede specifications.
- All work not specifically mentioned in the above scope is excluded.

All work to be between 7:00 AM and 3:30 PM, M-F.

This quote **does not** include any taxes.

Thank you for the opportunity to quote this project. Please feel free to call with any questions concerning this quote.

Sincerely,

Sean Kirby  
Estimator  
Tri-City Security Solutions  
Phone: 563.823.1663  
E-mail: skirby@tricityelectric.com

**Notes**

**Due to the increasing rise in copper, aluminum, steel and PVC products Tri-City Electric reserves the right to review and adjust all material pricing on a daily basis.** Bid is based on the daily market rate for goods and commodities reflected by the submitted date of this proposal. Tri-City Electric reserves the right to increase said bid accordingly to reflect the market rates on the day of receipt of the Purchase Order. Changes will be shown in documentation through commercial quotes, invoices, and/or receipts for such goods and commodities if applicable. Bid is subject to the terms of a mutually acceptable contract.

**Tri-City Electric shall have the option to withdraw this proposal if not accepted within 10 days from its date.** Work is to be performed during a standard 8-hour workday between 7:00 AM and 3:30 PM, Monday through Friday. Payments are due every 30 days as the work progresses. A 1.5% service charge will be applied to all outstanding account balances over 30 days past due.

**Please note:** As the global COVID-19 and associated sub-variants situation continues; material lead time, material pricing, and manpower scheduling is subject to change in the event of adverse situations caused by pandemic effects. We appreciate your business and will work closely with you to minimize any possible impacts to your project.

**Excavation Notes**

Proposal is based on normal soil conditions for trenching, auguring and excavation. If TCE encounters rock, debris, old foundations, high water, loose or unstable soil conditions; additional charges will be added respectively. All excavation spoils are to remain on site. If included in bid for removal is based on CLEAN, Non-Contaminated soil removal and does not include remediation or special

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hauling fees, treatment charges and special permits relating to contaminated soils. Owner/General Contractor is responsible for all excavated areas if not specified and included in the scope of work.

**Non Solicitation of Employees**

By acceptance of this proposal, customer agrees not to directly or indirectly recruit, solicit, hire or induce any employee of Tri City Electric Company or any affiliate thereof, to terminate his or her employment with Tri City Electric Company. This restriction does not apply to solicitation of any employee of Tri City Electric Company or any affiliate thereof, who Tri City Electric Company has terminated due to job elimination or reduction in work force. Contractor agrees that it must obtain written consent of Tri City Electric Company prior to hiring any such Tri City Electric Company employee. The duties, objections and restrictions set forth in this paragraph shall expire upon the first anniversary of the conclusion date of the engagement contemplated in this proposal.

**Force Majeure**

If the Subcontractor is delayed at any time in the commencement or progress of the Work by diseases, epidemics, pandemics, including but not limited to labor or material shortages, unusual delay in deliveries, restrictions on access or travel, unavoidable casualties or other causes beyond the Subcontractor's control, then the contract times shall be extended.

**Other Terms**

TCE is proposing a price for the scope of its work based on the assumption the parties will execute a commercial reasonable subcontract agreement, such as an unmodified ConsensusDOC 751, Short Form Agreement between Contractor and Subcontractor, or AIA A401, Standard Form of Agreement between Contractor and Subcontractor.

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## XXIII. Iowa Local Government Risk Pool

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### Recommendation

The Superintendent's recommendation is that the Board of Education approve the quote of \$599,160.63 and participation in the Iowa Local Government Risk Pool for the 2024-2025 school year.

### Contact Person

Jeff Sommerfeldt, Chief Financial Officer  
Dr. Jared Smith, Superintendent

### Details

The Iowa Local Government Risk Pool (LGRP) was organized under Iowa Code Chapter 28E and began in 2019 in an effort to provide greater stability to school district budgets by pooling risks. The program provides an alternative method for the purchase of natural gas utilities. By joining with other districts in the pool, the increased buying power can lead to purchasing natural gas at a lower per unit cost.

Participation in the program is an annual board decision. The district will pay an annual premium to the LGRP at the beginning of the school year. The premium covers all our natural gas service requirements for the year. The district will not receive a utility bill from MidAmerican Energy, but they will still be our utility provider. The premium is based on historical usage, calculated at the gas prices the Iowa LGRP procures, plus a risk premium to establish a fixed budget. This premium will be paid from the district's management fund instead of the traditional method as a general fund expenditure.

As with other products that transfer risk, there is a trade off between cost and certainty. Some years our district may not save money by participating in LGRP. However, we will be protected from years when rare events, such as an unusually severe winter, or events that cause reduction of or interruption of natural gas.

### Supporting Documents



LGRP Informational Packet

# Iowa Local Government Risk Pool

The Iowa Local Government Risk Pool (Iowa LGRP) was organized under Iowa Code Chapter 28E in the fall of 2019 in an effort to provide greater stability to school district budgets by pooling risks.

The Iowa LGRP is governed by a board of directors comprised of school superintendents. WoodRiver Energy and ISFIS are service providers to the program, with decades of combined energy service experience working with Iowa schools and local governments.

*"The Iowa LGRP is a tool our district uses to help mitigate the natural gas price volatility we used to see in our General Fund."*

*- Brian Johnson, Superintendent,  
Southeast Valley CSD*

155

districts participating

900

meters operated

99%

retention of participating districts

## Benefits of Participating in the Iowa LGRP

### Budget Certainty

Districts remit a single lump-sum premium that covers the requirements for the term. The premium is based on historical usage, at current natural gas prices at the time of district approval, plus a risk premium, to establish the fixed budget. Wholesale gas is passed through to the premium with no additional markup.

**Risks are transferred to the service providers so the district has budget certainty and known costs.**

### Budget Flexibility

Iowa LGRP is a local government risk pool through which governmental entities join together to pool and transfer risks.

**According to an opinion issued by Iowa's Auditor of State, these premiums may be paid from the district's Management Fund.**

### Capped Underwriting Profits

Total Premiums consist of the entire amount owed unless a "material event" such as adding or removing a building or changing equipment occurs. In such cases, a Participation Agreement Amendment will be issued, which may result in additional premium owed or a refund of the premium. **Underwriting profit of Iowa LGRP service providers is capped, with any excess amounts returned to Iowa LGRP.**

## How to Participate?

After reviewing your prior natural gas usage, we will provide you with a quote. Upon approval from your school board to join the 28E entity and the Participation Agreement, we will take care of the remaining process.

## Contact us to learn more!

Jen Albers, ISFIS  
jen@iowaschoolfinance.com  
515-251-5970 x4

Athena Simpson, WoodRiver Energy  
athena.simpson@woodriverenergy.com  
641-990-3778

Iowa Local Government Risk Pool  
1201 63rd Street  
Des Moines, Iowa 50311  
www.iowalocalgovernmentriskpool.org





Local Government Risk Pool

Iowa Local Government Risk Pool Commission

1201 63rd Street

Des Moines, IA 50311

Phone: 1 (515) 251-5970

---

**Iowa Local Government Risk Pool Commission  
Program Participation Agreement**

THIS PARTICIPATION AGREEMENT is entered into by and between Iowa Local Government Risk Pool Commission ("28E"), 1201 63rd Street, Des Moines, Iowa, 50311, and Waterloo CSD ("District"), effective as of the 1st day of July, 2024.

WHEREAS, 28E has established a local government risk pool program called Education Energy Group Pool (the "Program") to pool risks and stabilize gas prices for public entities in conjunction with Education Energy Group LLC to administer the Program in accordance with this agreement ("Program Administrator"), and other service providers including but not limited to WoodRiver Energy LLC as a Certified Natural Gas Provider ("CNGP") and Iowa School Finance Information Services, Inc., an Iowa corporation (hereinafter collectively referred to as "Service Provider(s)"); and

WHEREAS, District is a member of the 28E pursuant to the Iowa Local Government Risk Pool Agreement (the "28E Agreement"), and has a need for such Program in connection with stabilization of natural gas costs within its budget;

NOW, THEREFORE, in consideration of mutual promises and warranties contained in this Agreement, the parties hereby agree to the following:

1) **Services.** District agrees to pay a premium to 28E for participation in Program for Enrolled Meters listed in Exhibit A of this Agreement, under the terms outlined herein. 28E agrees to meet natural gas requirements for Enrollment Meters listed in Exhibit A of this Agreement, under the terms outlined herein. District shall take title, possession, and control of gas delivered to each enrolled meter under the Program at the point of delivery.

2) **Term.** The term of this Agreement shall commence on the effective date listed above and shall be in effect until June 30, 2025.

3) **Total Premium.** The Total Premium shall be set as the sum of all District Enrolled Meters and is set forth in Exhibit B of this Agreement. Exceptions are also noted in Exhibit B of this Agreement. Premiums and any Premium Amendments shall be due and payable, within 30 days of receipt of invoice by the District to the 28E. Late charges may be assessed on Premiums not paid timely.

4) **Limitation of Liability & Indemnification.**

(a) District and 28E will fully indemnify and hold harmless one another and each of their respective officers, directors, agents, and employees, from and against all claims, actions, proceedings, or settlements based upon, arising out of, or sustained in connection with, any other program or service offered by District or 28E unrelated to this Agreement.

(b) **Force Majeure** – District shall fully indemnify 28E and Service Providers for acts of God, strikes, lock outs, pipeline explosions, pipeline maintenance, pipeline disturbances or other industrial disturbances, including those involving or affecting Service Providers producing or transporting gas on behalf of 28E.

- 5) 28E as Agent. Pursuant to the 28E Agreement, 28E has authority to enter into contracts and agreements to carry out the purposes of the 28E Agreement, including agreements with the Service Providers. District hereby assigns and grants 28E the right and discretion to contract with the Service Providers to administer and operate the Program, by and on behalf of the District, throughout the Term of this Agreement. The parties acknowledge that the 28E shall have no authority to undertake action on behalf of District that is beyond the scope of the authorization stated in the 28E Agreement and this Agreement. In no event shall 28E, in its capacity as agent or otherwise, take title to any gas purchased by and delivered to the District. Program Administrator has read and acknowledges the agency agreed to in this Agreement.
- 6) Assignment. The 28E may assign this Agreement to a designated Service Provider, upon notice to the District. Other assignments of this Agreement shall only be by mutual consent of the parties.
- 7) Severability. If any provision of this Agreement is held to be unenforceable, in whole or in part, such holding will not affect the validity of the other provisions of this Agreement.
- 8) Choice of Law. This Agreement will be governed and interpreted in accordance with the laws of the State of Iowa. The parties agree to venue and jurisdiction in the state court located in Polk County, Iowa.
- 9) Entire Agreement. This Agreement constitutes the complete and entire statement of all terms, conditions and representations of the Agreement between 28E and District with respect to its subject matter.
- 10) Modification, Waiver. No modification of or amendment to this Agreement, nor any waiver of any rights under this Agreement, will be effective unless in writing signed by the parties via an amendment to this Agreement. Waiver by a Party of any breach of any provision of this Agreement will not operate as a waiver of any other subsequent breach.

**IN WITNESS THEREOF, the parties hereto have caused this instrument to be executed by their officers designated below.**

**Iowa Local Government Risk Pool (28E)**

**Waterloo CSD**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Read and acknowledge:**

Education Energy Group LLC "Program Administrator"



Jon Muller  
President  
Date: 7/1/24

**Iowa Local Government Risk Pool  
Program Participation Agreement  
Exhibit A: Enrolled Meters**

Entity Name: Waterloo CSD

Entity Billing Address: 1516 Washington St, Waterloo, IA

Primary Contact Name: Jared Smith

Primary Contact Email Address: smithjr@waterlooschools.org

Primary Contact Phone: 319-433-1800

District shall enroll the following meters in the Program for the term of this Agreement ("Enrolled Meters"):

Facility Name	Facility Physical Address	Utility Account Number	Utility Meter Number	Utility/LDC	Material Changes Anticipated (Yes or No)
WCSD POYNER ELEMENTARY	1138 CENTRAL AVE EVANSDALE, IA 50707	03630-03025	A97929205	MidAm	
WCSD LINCOLN	302 CEDAR-BEND ST WATERLOO, IA 50703	03930-25075	AE1204845	MidAm	
WCSD KINGSLEY	201 SUNSET RD WATERLOO, IA 50701	05950-77001	SY2372631	MidAm	
CENTRAL INTERMEDIATE WCSD	1350 KATOSKI DR WATERLOO, IA 50701	08150-11015	TY1952241	MidAm	
CENTRAL INTERMEDIATE WCSD	1350 KATOSKI DR WATERLOO, IA 50701	08150-11015	SY1945397	MidAm	
WCSD EAST HIGH SCHOOL	342 VINE ST WATERLOO, IA 50703	10790-01017	AY0275850	MidAm	
WATERLOO COMMUNITY SCHOOL	1304 OREGON ST WATERLOO, IA 50702	16681-56005	SY1946437	MidAm	
WCSD DR CUNNINGHAM SCHOOL	1224 MOBILE ST WATERLOO, IA 50703	20581-00013	TY0132233	MidAm	
WCSD GREENBRIER SCHOOL	1554 OAKWOOD DR WATERLOO, IA 50703	21240-17025	TY2148504	MidAm	
WCSD KITTRELL ANNEX	1705 W 11TH ST WATERLOO, IA 50702	26910-10010	T98183283	MidAm	
WCSD HIGHLAND ELEM	812 IDAHO ST WATERLOO, IA 50703	44030-85046	AY2160274	MidAm	
WCSD IRVING	1115 W 5TH ST WATERLOO, IA 50702	49790-98008	AY0276148	MidAm	
WCSD WEST HIGH	2200 BALTIMORE ST WATERLOO, IA 50701	55790-97028	TY0132115	MidAm	
WCSD EAST HIGH SCHOOL	214 HIGH ST WATERLOO, IA 50703	56650-95006	TY2046138	MidAm	
WCSD LOU HENRY HOOVER	320 RACHAEL ST WATERLOO, IA 50701	57231-18005	AE1508505	MidAm	
WCSD MCKINSTRY	1410 INDEPENDENCE AVE WATERLOO, IA 50703	64440-91022	TY1890144	MidAm	
WATERLOO COMMUNITY SCHOOL	1505 LOGAN AVE WATERLOO, IA 50703	75081-01000	AY0801893	MidAm	
WCSD BUNGER	157 S ROOSEVELT RD EVANSDALE, IA 50707	84470-03020	84470-03020	MidAm	
WCSD MCKINSTRY	1410 INDEPENDENCE AVE	85200-07011	T98183409	MidAm	

	WATERLOO, IA 50703				
WCSD CASTLE HILL	1720 MAYNARD AVE WATERLOO, IA 50701	86100-04027	R06004714	MidAm	
WCSD BOARD OF EDUCATION	1516 WASHINGTON ST WATERLOO, IA 50702	92660-03022	TY2051547	MidAm	
WATERLOO COMMUNITY SCHOOL	1624 BLACK-HAWK ST WATERLOO, IA 50702	97030-01040	SY1470954	MidAm	
WATERLOO COMMUNITY SCHOOL	1707 WILLISTON AVE WATERLOO, IA 50702	00961-28040	TY1952068	MidAm	
WATERLOO COMMUNITY SCHOOL	1709 UNIVERSITY AVE WATERLOO, IA 50701	02280-13064	RY2243832	MidAm	
WATERLOO COMMUNITY SCHOOL	1239 SHELDON ST WATERLOO, IA 50701	05631-69028	A96896901	MidAm	
WATERLOO COMMUNITY SCHOOL	1715 JEFFERSON ST WATERLOO, IA 50702	10300-11071	A93209872	MidAm	
WCSD ORANGE	5805 KIMBALL AVE WATERLOO, IA 50701	44471-10021	AE1206984	MidAm	
WATERLOO COMMUNITY SCHOOL	1601 BLACK-HAWK ST WATERLOO, IA 50702	83380-01023	AE2019413	MidAm	
WCSD HOOVER INTER	630 HILLCREST RD WATERLOO, IA 50701	87040-18022	TY1101618	MidAm	

**Iowa Local Government Risk Pool  
Program Participation Agreement  
Exhibit B: Premiums**

Entity Name: **Waterloo CSD**

Total Premium(s). Total Premium(s) shall be the complete and total amounts owed by the District to the 28E for participation in Program for the Enrolled Meters for the Term of this Agreement, with the Exceptions defined below. 28E agrees to meet natural gas requirements for Enrolled Meters for the Term of this Agreement, with the Exceptions defined below. District recognizes it is paying a premium for this transfer of risk and resulting budget certainty. The Total Premium also includes amounts needed to pay the administrative and other expenditures of the 28E.

Exception. Total Premium is set based upon current equipment and historical consumption for each Enrolled Meter. A Material Change may result from facility capital investment or changes in property and equipment ("Material Change(s)"). District shall inform 28E of any Material Change anticipated in advance or immediately upon occurrence, to equipment or gas consumption or facilities for each Enrolled Meters during the Term of this Agreement. In the event the Material Change anticipates gas consumption to decrease, 28E may refund a portion of the Premium. In the event the Material Change anticipates gas consumption to increase, 28E may assess additional Premium. In the event a Material Change occurs, regardless of notification to the 28E by the District, the 28E may adjust the Premium to either refund a portion of the Premium to the District or assess additional Premium from the District ("Premium Adjustment" or "Amendment"). Premium Adjustments shall be due and payable by the District to 28E within 30 days of notification.

Premiums for Enrolled Meters ("Total Premiums"): **\$599,160.53** July 1, 2024 – June 30, 2025.

Facility Name	Facility Physical Address	Total Premium 2024/2025
WCSD POYNER ELEMENTARY	1138 CENTRAL AVE EVANSDALE, IA 50707	\$ 1,727.97
WCSD LINCOLN	302 CEDAR-BEND ST WATERLOO, IA 50703	\$ 1,777.67
WCSD KINGSLEY	201 SUNSET RD WATERLOO, IA 50701	\$ 1,001.27
CENTRAL INTERMEDIATE WCSD	1350 KATOSKI DR WATERLOO, IA 50701	\$ 13,176.46
CENTRAL INTERMEDIATE WCSD	1350 KATOSKI DR WATERLOO, IA 50701	\$ 1,000.19
WCSD EAST HIGH SCHOOL	342 VINE ST WATERLOO, IA 50703	\$ 4,350.83
WATERLOO COMMUNITY SCHOOL	1304 OREGON ST WATERLOO, IA 50702	\$ 2,998.15
WCSD DR CUNNINGHAM SCHOOL	1224 MOBILE ST WATERLOO, IA 50703	\$ 33,939.10
WCSD GREENBRIER SCHOOL	1554 OAKWOOD DR WATERLOO, IA 50703	\$ 5,771.48
WCSD KITTRELL ANNEX	1705 W 11TH ST WATERLOO, IA 50702	\$ 6,588.76
WCSD HIGHLAND ELEM	812 IDAHO ST WATERLOO, IA 50703	\$ 2,674.53
WCSD IRVING	1115 W 5TH ST WATERLOO, IA 50702	\$ 1,938.35
WCSD WEST HIGH	2200 BALTIMORE ST WATERLOO, IA 50701	\$ 136,896.01
WCSD EAST HIGH SCHOOL	214 HIGH ST WATERLOO, IA 50703	\$ 132,977.89
WCSD LOU HENRY HOOVER	320 RACHAEL ST WATERLOO, IA 50701	\$ 2,551.84
WCSD MCKINSTRY	1410 INDEPENDENCE AVE WATERLOO, IA 50703	\$ 73,820.70
WATERLOO COMMUNITY SCHOOL	1505 LOGAN AVE WATERLOO, IA 50703	\$ 2,825.62
WCSD BUNGER	157 S ROOSEVELT RD EVANSDALE, IA 50707	\$ 56,414.12
WCSD MCKINSTRY	1410 INDEPENDENCE AVE WATERLOO, IA 50703	\$ 803.83
WCSD CASTLE HILL	1720 MAYNARD AVE WATERLOO, IA 50701	\$ 8,601.13

WCSD BOARD OF EDUCATION	1516 WASHINGTON ST WATERLOO, IA 50702	\$	14,973.14
WATERLOO COMMUNITY SCHOOL	1624 BLACK-HAWK ST WATERLOO, IA 50702	\$	10,423.91
WATERLOO COMMUNITY SCHOOL	1707 WILLISTON AVE WATERLOO, IA 50702	\$	8,244.20
WATERLOO COMMUNITY SCHOOL	1709 UNIVERSITY AVE WATERLOO, IA 50701	\$	340.42
WATERLOO COMMUNITY SCHOOL	1239 SHELDON ST WATERLOO, IA 50701	\$	2,550.15
WATERLOO COMMUNITY SCHOOL	1715 JEFFERSON ST WATERLOO, IA 50702	\$	264.94
WCSD ORANGE	5805 KIMBALL AVE WATERLOO, IA 50701	\$	2,215.73
WATERLOO COMMUNITY SCHOOL	1601 BLACK-HAWK ST WATERLOO, IA 50702	\$	29,353.70
WCSD HOOVER INTER	630 HILLCREST RD WATERLOO, IA 50701	\$	38,958.43



Application and Agreement to Join the  
Iowa Local Government Risk Pool Agreement

This Application and Agreement entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by and between the Iowa Local Government Risk Pool Commission (the "Commission"), and the School Corporation executing this Application and Agreement (the "Public Agency"), a school corporation organized under the laws of the State of Iowa, is for the purpose of providing a means by which the Public Agency can join the Iowa Local Government Risk Pool Agreement (as amended from time to time, the "Agreement") entered into as of the 20th day of August, 2019 by and between the Clarion-Goldfield-Dows Community School District, the Union Community School District and the Prairie Valley Community School District [the "Organizing Public Agencies" and, along with the other Iowa school corporations, cities, counties and other political subdivisions of the State of Iowa (including the Public Agency) that have joined or will join the Agreement (the "Public Agencies"), hereinafter and in the Agreement collectively referred to as the "Participating Public Agencies".

By joining the Agreement, the Public Agency and the other Participating Public Agencies may exercise powers, privileges, or authority, and make use of benefits jointly to which each of the Participating Public Agencies separately is entitled under state and federal legislative acts.

This Application and Agreement amends the Agreement to add the Public Agency as a party and shall be effective upon its execution and filing with the Secretary of State of the State of Iowa.

The Commission was created pursuant to the Agreement for the purpose of establishing one or more local government risk pools to help the Participating Public Agencies mitigate budget risks associated with winter heating and other natural gas consumption, to enter into contractual arrangements with private parties to access natural gas for the benefit of the Participating Public Agencies, to establish premiums to be paid by the Participating Public Agencies, to pool their risks and stabilize gas prices annually and to facilitate the purchase by and delivery to the Participating Public Agencies of natural gas periodically.

The Public Agency agrees to be bound by the terms and conditions of the Agreement and such rules and regulations as may from time to time be adopted by the Board of Commissioners of the Commission.

The Public Agency may choose to be involved in or take advantage of any local government risk pool, program or activity of the Commission for any fiscal year and failure to be involved in or take advantage thereof for any fiscal year shall not constitute a withdrawal by the Public Agency from the Agreement.

There are specific provisions relating to withdrawal from the Agreement set forth therein, and the Public Agency agrees to make payment of all amounts due for its contracts, and all contracts and obligations of the Public Agency shall survive any withdrawal by the Public Agency from the Agreement.

IN WITNESS WHEREOF, the parties hereto do execute this Application and Agreement as of the day and year first above written.

IOWA LOCAL GOVERNMENT  
RISK POOL COMMISSION

Waterloo Community School District

By \_\_\_\_\_  
Chairperson, Board of Commissioners

By \_\_\_\_\_  
President, Board of Directors

By \_\_\_\_\_  
Secretary, Board of Commissioners

By \_\_\_\_\_  
Secretary, Board of Directors

**BOARD RESOLUTION TO JOIN IOWA LOCAL GOVERNMENT RISK POOL**

RESOLUTION NO. \_\_\_\_\_

Resolution approving the participation by the School District in a joint agreement establishing local government risk pools

WHEREAS, the Board of Directors (the "Board") of the Waterloo Community School District in the County (Counties) of Black Hawk, State of Iowa (the "School District") is required by Section 274.3 of the Code of Iowa, as amended, to operate, control and supervise all public schools within the boundaries of the School District and is authorized to exercise any broad and implied power not inconsistent with the laws of the State of Iowa and administrative rules adopted by state agencies pursuant thereto, related to the operation, control and supervision of those public schools; and

WHEREAS, pursuant to Section 670.7, subsection 1 of the Code of Iowa, as amended, the School District may join and pay funds into a local government risk pool to protect the School District against any and all liability, loss of property, or any other risks associated with the operation of the School District and the costs of local government risk pools shall be included in the School District's management levy as provided in Section 296.7 of the Code of Iowa, as amended, or, if the School District has not certified a management levy, the costs shall be paid from the School District's general fund; and

WHEREAS, pursuant to Section 296.7 of the Code of Iowa, as amended, the School District may enter into agreements obligating the School District to make payments beyond its current budget year to establish and maintain local government risk pools to protect the School District from tort liability, loss of property, environmental hazards or any other risk associated with the operation of the School District; and

WHEREAS, the School District is authorized pursuant to Chapter 28E of the Code of Iowa, as amended, to enter into joint agreements with other public agencies and with private agencies (both as defined therein) for the joint exercise of powers, privileges and authorities exercised or capable of being exercised by the School District; and

WHEREAS, because of the fluctuation of the costs of natural gas and variability of the quantities of natural gas used by the School District caused by changes in winter weather conditions, it is in the best interests of the School District to enter into a joint agreement with other public agencies, in substantially the form as has been presented to and considered by the Board (the "Iowa Local Government Risk Pool Agreement" or the "Agreement") providing for the forming and creation of the Iowa Local Government Risk Pool Commission (the "Commission") for the purpose of establishing one or more local government risk pools (together, the "Local Government Risk Pools") to help the participating public agencies mitigate budget risks associated with winter heating and other natural gas consumption, to enter into contractual arrangements with private parties to access natural gas for the benefit of the participating public agencies, to establish premiums to be paid by the participating public agencies, to pool their risks and stabilize gas prices annually and to facilitate the purchase by and delivery to the participating public agencies of natural gas periodically;

-1-

DORSEY & WHITNEY LLP, ATTORNEYS, DES MOINES, IOWA

**BOARD RESOLUTION TO JOIN IOWA LOCAL GOVERNMENT RISK POOL**

NOW, THEREFORE, It Is Hereby Resolved by the Board of Directors of the School District, as follows:

Section 1. The participation by the School District in the Iowa Local Government Risk Pool Agreement and the Local Government Risk Pools established in accordance therewith are hereby approved.

Section 2. The Iowa Local Government Risk Pool Agreement is hereby approved, and the President and Board Secretary are hereby authorized and directed to accept and execute the same and any related documents for and on behalf of the School District.

Section 3. The Board shall determine from time to time which, if any, of the Local Government Risk Pools established by the Commission are appropriate for the School District to participate in and shall enter into such related documents and agreements as may be necessary in connection therewith and the President and Board Secretary are hereby authorized and directed to execute the same for and on behalf of the School District.

Section 4. To the extent that the School District incurs obligations to pay premiums or other costs in connection with such Local Government Risk Pools, the Board agrees to include in its annual budget sufficient funds to pay such obligations each fiscal year from its management levy and/or general fund levy.

Section 5. The President and the Board Secretary (or their acting designees) are hereby authorized to execute and deliver any and all agreements, documents and instruments required in connection with the Agreement and to carry out the purposes set forth in this resolution.

Section 6. All resolutions or parts thereof in conflict herewith are hereby repealed to the extent of such conflict.

Passed and approved the \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
President, Board of Directors

Attest:

\_\_\_\_\_  
Secretary, Board of Directors

**SUGGESTED TEXT TO INCLUDE IN BOARD MINUTES RE  
RESOLUTION TO JOIN IOWA LOCAL GOVERNMENT RISK POOL**

The Board took up and considered matters relating to participating in a joint agreement relating to the establishment of a local government risk pool.

After due consideration and discussion, Director \_\_\_\_\_ introduced the resolution below and moved that the resolution be adopted, seconded by Director \_\_\_\_\_. After due consideration, the President put the question on the motion and the roll being called, the following named Directors voted:

Ayes: \_\_\_\_\_

Nays: \_\_\_\_\_.

Whereupon, the President declared the resolution duly adopted, as follows:

[include final approved resolution language]

## XXIV. 2024-2025 Budget and Property Tax Certification

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### Recommendation

The Superintendent's recommendation is that the Board of Education certify and adopt the 2024-2025 Budget with maximum expenditures of \$248,560,356 and the property tax levy rate of \$13.97947 as presented.

### Contact Person

Jeff Sommerfeldt, Chief Financial Officer  
Dr. Jared Smith, Superintendent

### Details

April 30, 2024, is the last day for school districts to certify the 2024-2025 budget with the Black Hawk County Auditor and the Department of Education.

The published budget summary will serve as the District's maximum certified expenditure budget. The certified budget can only be exceeded if there is sufficient spending authority and if the budget has gone through an amendment process, including a public hearing. The budget is established from the State Aid and Levy worksheet provided by the Iowa Department of Management. This worksheet utilizes a state formula to determine the mix of local property taxes and state aid.

The District's line item budget will be developed within these parameters, along with the additional restrictions of spending authority carried forward from the previous year and the desired end of year spending authority goals established by the district's administration.

The certified budget is the product of the state foundation aid formula furnished by the Iowa Department of Management, as directed by the state legislature. The state set the supplemental state aid increase of 2.5% for the 2024-2025 school year. The foundation formula is primarily a calculation of the certified enrollment of students multiplied by the state allocated amount per student.

The property tax rate for the 2024-2025 school year was published at \$13.97947 per thousand dollars of taxable valuation. The published maximum certified expenditure budget is \$248,560,356.

### Supporting Documents



Certified Budget Worksheets

**ADOPTION OF BUDGET AND TAXES JULY 1, 2024 - JUNE 30, 2025**  
**WATERLOO**  
**DISTRICT NUMBER - 6795**

Department of Management - Form S-TX

<b>Total Special Program Funding</b>					
Instructional Support (A&L line 10.27)		5,357,610			
Educational Improvement (A&L line 11.3)		0			
Voted Physical Plant & Equipment (A&L line 19.3)		2,306,668			
<b>Special Program Income Surtax Rates</b>					
Instructional Support (A&L line 10.15)		% 0			
Educational Improvement (A&L line 11.4)		% 0			
Voted Physical Plant & Equipment (A&L line 19.4)		% 0			
<b>Utility Replacement and Property Taxes Adopted</b>					
		Utility Replacement AND Property Tax Dollars	Levy Rate	Property Taxes Levied	Estimated Utility Replacement Dollars
Levy to Fund Combined District Cost (A&L line 15.3)	1	26,333,806			
+Educational Improvement Levy (A&L line 15.5)	2	0			
+Cash Reserve Levy - SBRC (A&L line 15.9)	3	2,000,000			
+Cash Reserve Levy - Other (A&L line 15.10)	4	0			
-Use of Fund Balance to Reduce Levy (A&L line 15.11)	5	0			
=Subtotal General Fund Levy (A&L line 15.14)	6	28,333,806	10.15671	27,458,090	875,716
+Instructional Support Levy (A&L line 15.13)	7	4,843,377	1.40682	4,722,087	121,290
=Total General Fund Levy (A&L line 15.12)	8	33,177,183	11.56353	32,180,177	997,006
	9				
Management	10	3,950,000	1.41594	3,827,914	122,086
Amana Library	11	0	0	0	0
Voted Physical Plant & Equipment (Loan Agreement)	12	0			
+Voted Physical Plant & Equipment (Capital Project)	13	2,306,668			
=Subtotal Voted Physical Plant & Equipment	14	2,306,668	0.67000	2,248,901	57,767
+Regular Physical Plant & Equipment	15	1,136,120	0.33000	1,107,668	28,452
=Total Physical Plant & Equipment	16	3,442,788			
	17				
Reorganization Equalization Levy	18	0	0.00000	0	0
Emergency Levy (for Disaster Recovery)	19	0	0.00000	0	0
Public Education/Recreation (Playground)	20	0	0.00000	0	0
Debt Service	21	0	0.00000	0	0
<b>GRAND TOTAL</b>	22	40,569,971	13.97947	39,364,660	1,205,311
1-1-2023 Taxable Valuation WITH Gas & Electric Utilities		2,789,663,709	WITHOUT Gas & Elec	2,703,443,320	
1-1-2023 Tax Increment Valuation WITH Gas & Electric Utilities		653,125,039	WITHOUT Gas & Elec	653,125,039	
1-1-2023 Debt Service, PPEL, ISL Valuation WITH Gas & Electric Utilities		3,442,788,748	WITHOUT Gas & Elec	3,356,568,359	

FY 2025 Adopted Budget Control Lines - The amounts below must be equal to or less than the publication amounts to be certified to the County Auditor

Taxes Levied on Property (Line 1) = 39,364,660

Instruction (Line 24) = 105,390,000

Total Support Services (Line 31A) = 55,702,350

NonInstructional Programs (Line 32) = 9,893,350

Total Other Expenditures (Line 35A) = 77,574,656

The School District by signing below certifies the following:

1. The Proposed Property Tax Notice (first hearing notice) was available on the School District website on the day it was also published in the newspaper.
2. The Proposed Property Tax Notice or a link to the Notice was posted on all social media sites controlled by the school district.

(entered upon adoption)

District Secretary

Date Budget Adopted

County Auditor

Property Tax and Rate Comparison

	FY 2025	FY 2024	FY 2025 vs. FY 2024	FY 2025	FY 2024	FY 2025 vs. FY 2024
<b>Uniform Levy Dollars Before Utility Repl and C&amp;I State Repl Adj (Line 6.3)</b>	15,064,184	14,933,127	131,057	5,400,000	5,400,000	0.00000
<b>Additional Levy Components</b>						
Regular Program Property Tax Portion	9,787,311	9,455,658	331,653	3,508,421	3,419,228	0.08914
Regular Program Budget Adjustment	0	0	0	0.00000	0.00000	0.00000
Supplementary Weight Property Tax Portion	319,522	305,816	13,706	0.11059	0.11059	0.00395
Special Education District Cost Property Tax Portion	2,095,949	2,031,270	64,679	0.75133	0.73453	0.01680
DCPP greater than SCPP Regular Program	0	0	0	0.00000	0.00000	0.00000
DCPP greater than SCPP Supplementary Weight	0	0	0	0.00000	0.00000	0.00000
DCPP greater than SCPP Special Education	0	0	0	0.00000	0.00000	0.00000
Dropout and Dropout Prevention	4,096,826	3,955,688	141,138	1,468,571	1,430,421	0.03815
AEA Special Education and Sharing Property Tax	995,018	951,006	44,012	0.35668	0.34390	0.01278
AEA Special Education Support Adjustment	0	0	0	0.00000	0.00000	0.00000
AEA Media Services	767,769	736,209	31,560	0.27522	0.26622	0.00900
AEA Education Services	855,715	820,825	34,890	0.30674	0.29682	0.00992
Enrollment Audit Adjustment	0	-19,274	19,274	0.00000	-0.00697	0.00697
Enrollment Audit Adjustment - State Aid Portion	0	17,038	-17,038	0.00000	0.00616	-0.00616
<b>Additional Levy Adjustments</b>						
Property Tax Adjustment Aid (Line 8.1.4)	-117,961	-119,008	1,047	-0.04229	-0.04303	0.00074
Property Tax Replacement Payment (PTRP) (Line 8.1.9)	-2,689,429	-2,675,329	-14,100	-0.96407	-0.96743	0.00336
Foundation Base Supplement Aid (Line 8.2.2)	-227,464	-133,101	-94,363	-0.08154	-0.04813	-0.03341
Adjusted Additional Property Tax Levy Aid (Line 8.3.5)	-4,285,147	-3,559,228	-725,919	-1.53608	-1.28706	-0.24901
District Special Ed Positive Balance, Property & Utility Repl Tax Portion (Line 8.4.3)	0	0	0	0.00000	0.00000	0.00000
Additional Levy Utility Replacement Adjustment (Line 13.3)	460	5,650	-5,190	0.00016	0.00204	-0.00188
Additional Levy Two Tiered Assessment Limitation Replacement: Paid FYNaN (Line 13.1.1)	-328,947	0	-328,947	-0.11792	0.00000	-0.11792
<b>Additional Levy Adjusted for Utility Replacement and two Tiered Assessment (Line 13.1.2)</b>	11,269,622	11,773,221	-503,599	4.03978	4.25734	-0.21755
Instructional Support Levy (Line 10.2.1)	4,843,377	4,877,573	-34,196	1.40682	1.53136	-0.12454
Ed Improvement Levy (Line 11.9)	0	0	0	0.00000	0.00000	0.00000
Cash Reserve Levy - SBRC	2,000,000	0	2,000,000	0.71693	0.00000	0.71693
Cash Reserve Levy - Other	0	0	0	0.00000	0.00000	0.00000
Use of Fund Balance to Reduce Levy	0	0	0	0.00000	0.00000	0.00000
<b>Total General Fund Levy</b>	33,177,183	31,583,921	1,593,262	11,56353	11,18870	0.37483
<b>Management</b>	3,950,000	3,240,000	710,000	1.41594	1.17162	0.24431
Amana Library	0	0	0	0.00000	0.00000	0.00000
<b>Voted Physical Plant and Equipment</b>	2,306,668	2,134,040	172,628	0.67000	0.67000	0.00000
<b>Regular Physical Plant and Equipment</b>	1,136,120	1,051,094	85,026	0.33000	0.33000	0.00000
<b>Reorganization Equalization</b>	0	0	0	0.00000	0.00000	0.00000
<b>Public Education/Recreation (Playground)</b>	0	0	0	0.00000	0.00000	0.00000
<b>Debt Service</b>	0	0	0	0.00000	0.00000	0.00000
<b>Grand Total</b>	40,569,971	38,009,055	2,560,916	13.97947	13.36032	0.61914
Taxable Valuation with Gas & Electric Utilities (Line 6.1)	2,789,663,709	2,765,393,920	24,269,789			
Taxable and TIF Valuations with Gas & Electric	3,442,788,748	3,185,134,054	257,654,694			

FY 2025 BUDGET YEAR WORKSHEET  
 Dist Name: WATERLOO  
 Dist Number: 6795

Resources:	General (10)	Activity (21)	Management (22)	PERL (24)	Emtrp(23) Equal(25) Lib(29) Spec.Rev(27)	Emg Levy (26)/ Disaster R (28)	Sales Tax (33)	PPEL (36)	Other Cap Proj	Debt Service (40)	Nutrition (61)	Oth Emp (62-68)	Total
Taxes Levied on Property	1	32,180,177		3,827,914	0	0		3,356,569		0			39,364,660
Utility Replacement/Excise Tax	2	997,006		122,086	0	0		86,219		0			1,205,311
Income Surtax	3	0						0					0
Tuition/Transportation Received	4	1,350,000	38,000				29,000			163,000	56,000		1,388,000
Earnings on Investments	5	1,750,000									96,000		1,998,000
Nutrition Program Sales	6												96,000
Student Activities and Sales	7	30,000	1,265,000				6,000				5,000		1,295,000
Other Revenues from Local Sources	8	640,000	4,000										655,000
Revenue from Intermediary Sources	9												0
State Foundation Aid	10	104,322,923											104,322,923
Instructional Support State Aid	11	514,233											514,233
Other State Sources	12	997,000					15,523,835				78,500		16,599,335
Two Tier Assessment Limitation Replacement	13												0
Title I Grants	14	4,850,000											4,850,000
IDEA and Other Federal Sources	15	6,175,000					800,000	900,000			8,485,000		16,360,000
Total Revenues	16	153,806,339	1,303,000	3,954,000	0	0	16,358,835	4,342,788	0	163,000	8,720,500	0	188,648,462
General Long-Term Debt Proceeds	17						65,000,000						65,000,000
Transfers In	18	155,000								9,387,400	104,000		9,646,400
Proceeds of Fixed Asset Dispositions	19	3,000											3,000
Special Items/Upward Adjustments	20												0
Total Revenues & Other Sources	21	153,964,339	1,303,000	3,954,000	0	0	81,358,835	4,342,788	0	9,550,400	8,824,500	0	263,297,862
Beginning Fund Balance	22	15,985,894	1,298,610	842,725	0	0	164,443	1,258,936	0	24,724,161	2,372,722	0	46,647,491
Total Resources	23	169,950,233	2,601,610	4,796,725	0	0	81,523,278	5,601,724	0	34,274,561	11,197,222	0	309,945,353
<b>Requirements:</b>													
Instruction	24	101,890,000	1,360,000	1,585,000			55,000	500,000					105,390,000
Student Support Services	25	6,344,300		4,300									6,348,600
Instructional Staff Support Services	26	7,298,500		148,300									7,446,800
General Administration	27	3,423,000		513,000									3,936,000
School Administration	28	9,880,000		209,300									10,089,300
Business & Central Administration	29	6,934,800		33,450									6,968,250
Plant Operation and Maintenance	30	13,750,000		1,483,800				475,000					15,708,800
Student Transportation	31	5,180,000		24,600									5,204,600
Noninstructional Programs	32	983,000		31,000									9,893,350
Facilities Acquisition and Construction	33						58,000,000	3,670,000			8,879,350		61,670,000
Debt Service (Principal, interest, fiscal charges)	34									9,310,400			9,310,400
AEA Support - Direct to AEA	35	6,594,256											6,594,256
Total Expenditures	36	162,277,856	1,360,000	4,032,750	0	0	58,055,000	4,645,000	0	9,310,400	8,879,350	0	248,560,356
Transfers Out	37												0
Other Uses	38												0
Total Expenditures, Transfers Out & Other Uses	39	162,277,856	1,360,000	4,032,750	0	0	58,055,000	4,645,000	0	9,310,400	8,879,350	0	248,560,356
Ending Fund Balance	40	7,672,377	1,241,610	763,975	0	0	23,468,278	956,724	0	24,964,161	2,317,872	0	61,384,997
Total Requirements	41	169,950,233	2,601,610	4,796,725	0	0	81,523,278	5,601,724	0	34,274,561	11,197,222	0	309,945,353



FY 2024 RE-ESTIMATED WORKSHEET  
 Dist Name: WATERLOO  
 Dist Number: 6795

Resources:	General (10)	Activity (21)	Management (22)	PERL (24)	Entrp(23) Equal(25) Lib(29) SpecRev(27)	Emg Levy (26)/ Disaster R (28)	Sales Tax (33)	PPEL (36)	Other Cap Proj	Debt Service (40)	Nutrition (61)	Oth Entrp (62-69)	Total
Taxes Levied on Property	30,580,473		3,134,914	0	0	0		3,095,449		0			36,810,836
Utility Replacement Excise Tax	2,100,346		105,077	0	0	0		89,685		0			1,198,225
Income Surtax	0							0					0
Tuition/Transportation Received	1,340,000												1,340,000
Earnings on Investments	2,100,000	62,000								280,000	86,000		2,583,000
Nutrition Program Sales	40,000	1,250,000									94,000		94,000
Student Activities and Sales	40,000	1,250,000											1,290,000
Other Revenues from Local Sources	655,000		5,000					883,000			6,000		1,559,000
Revenue from Intermediary Sources	98,457,112												98,457,112
State Foundation Aid	98,457,112												98,457,112
Instructional Support State Aid	0												0
Other State Sources	960,000										76,300		15,724,800
Two Tier Assessment Limitation Replacement	0		0					0		0			0
Title I Grants	4,860,000												4,860,000
IDEA and Other Federal Sources	6,040,000							800,000			8,317,000		15,157,000
Total Revenues	146,036,048	1,312,000	3,244,991	0	0	0	15,553,500	4,068,134	0	280,000	8,579,300	0	179,073,973
General Long-Term Debt Proceeds													0
Transfers In	150,000									8,924,518	108,000		9,182,518
Proceeds of Fixed Asset Dispositions	15,000												15,000
Special Items/Upward Adjustments													0
Total Revenues & Other Sources	146,201,048	1,312,000	3,244,991	0	0	0	15,553,500	4,068,134	0	9,204,518	8,687,300	0	188,271,491
Beginning Fund Balance	35,467,027	1,311,610	947,634	0	0	0	-924,057	3,075,302	0	24,294,763	2,260,112	0	66,432,391
Total Resources	181,668,075	2,623,610	4,192,625	0	0	0	14,629,443	7,143,436	0	33,499,281	10,947,412	0	254,703,882
<b>Requirements:</b>													
Instruction	106,107,200	1,325,000	1,485,000				80,000						108,997,200
Student Support Services	6,973,500		3,000										6,976,500
Instructional Staff Support Services	7,205,000		145,000										7,350,000
General Administration	3,450,000		510,000					3,000					3,963,000
School Administration	9,810,000		203,000										10,013,000
Business & Central Administration	6,880,000		33,000										6,913,000
Plant Operation and Maintenance	13,600,000		918,500					425,000					14,943,500
Student Transportation	4,880,000		23,000										4,903,000
Noninstructional Programs	950,000		29,400										8,679,090
Facilities Acquisition and Construction								14,385,000	5,456,500				19,841,500
Debt Service (Principal, interest, fiscal charges)	5,826,481									8,775,120			8,775,120
AEA Support - Direct to AEA	165,682,181	1,325,000	3,349,900	0	0	0	14,465,000	5,884,500	0	8,775,120	7,699,690	0	207,181,391
Total Expenditures											875,000		875,000
Transfers Out													0
Other Uses													0
Total Expenditures, Transfers Out & Other Uses	165,682,181	1,325,000	3,349,900	0	0	0	14,465,000	5,884,500	0	8,775,120	8,574,690	0	208,056,391
Ending Fund Balance	15,985,894	1,298,610	842,725	0	0	0	164,443	1,258,936	0	24,724,161	2,372,722	0	46,647,491
Total Requirements	181,668,075	2,623,610	4,192,625	0	0	0	14,629,443	7,143,436	0	33,499,281	10,947,412	0	254,703,882

FY 2023 Actual  
 Dist Name: WATERLOO  
 Dist Number: 6795

Resources:	General (10)	Activity (21)	Management (22)	PERL (24)	Entrp(23) Equip(25) Lib(29) SpecRev(27)	Emg Levy (26)/ Disaster R (28)	Sales Tax (35)	PPEL (36)	Other Cap Proj	Debt Service (40)	Nutrition (61)	Oth Entp (62-69)	Total
Taxes Levied on Property	31,622,958		2,898,490	0	0	0	3,112,961			0			37,634,409
Utility Replacement Excise Tax	1,013,426		94,551	0	0	0	89,625			0			1,197,602
Income Surtax	0		0	0	0	0	0			0			0
Tuition/Transportation Received	1,191,531	0	0	0	0	0	0			312,783	70,370	0	1,191,531
Earnings on Investments	1,780,484	51,295	0	0	0	0	146,497			0	89,404	0	2,361,429
Nutrition Program Sales	38,053	1,217,956											89,404
Student Activities and Sales	598,241	0	4,404	0	0	0	1,218	7,540		0	18,872	0	630,275
Other Revenues from Local Sources	94,240,936	0	0	0	0	0	0	0	0	0	0	0	94,240,936
Revenue from Intermediary Sources	0	0	0	0	0	0	0	0	0	0	0	0	0
State Foundation Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
Instructional Support State Aid	896,961	1,118	0	0	0	0	14,611,671	1,059	0	0	73,531	0	15,584,340
Other State Sources	0	0	0	0	0	0	0	0	0	0	0	0	0
Two Tier Assessment/Limitation Replacement	4,671,532	0	0	0	0	0	0	0	0	0	0	0	4,671,532
Title I Grants	23,657,464	1,276,288	0	0	0	0	859,287	0	0	0	8,212,258	0	32,729,009
IDEA and Other Federal Sources	159,711,586	1,269,231	2,998,563	0	0	0	15,618,673	3,211,185	0	312,783	8,464,435	0	191,586,476
<b>Total Revenues</b>	195,230,650	2,545,539	4,176,915	0	0	0	24,393,226	8,076,600	0	32,738,148	9,649,974	0	276,811,052
General Long-Term Debt Proceeds	142,749	0	0	0	0	0	0	0	0	9,711,759	105,970	0	9,960,478
Transfers In	68,804	0	0	0	0	0	0	0	0	0	0	0	68,804
Proceeds of Fixed Asset Dispositions	0	0	0	0	0	0	0	0	0	0	0	0	0
Special Items/Upward Adjustments	159,923,139	1,269,231	2,998,563	0	0	0	15,618,673	3,211,185	0	10,024,542	8,570,405	0	201,615,758
<b>Total Revenues &amp; Other Sources</b>	35,307,511	1,276,288	1,178,332	0	0	0	8,745,553	4,865,415	0	22,713,606	1,079,569	0	75,195,294
Beginning Fund Balance	195,230,650	2,545,539	4,176,915	0	0	0	24,393,226	8,076,600	0	32,738,148	9,649,974	0	276,811,052
<b>Total Resources</b>	101,664,478	1,233,929	1,446,280	0	0	0	119,137	0	0	0	0	0	104,463,824
Instruction	6,951,824	0	1,769	0	0	0	0	0	0	0	0	0	6,953,593
Student Support Services	7,198,563	0	127,137	0	0	0	0	0	0	0	0	0	7,325,700
Instructional Staff Support Services	3,389,667	0	456,988	0	0	0	0	2,432	0	0	0	0	3,849,087
General Administration	9,718,269	0	201,536	0	0	0	0	0	0	0	0	0	9,919,805
School Administration	6,718,644	0	31,730	0	0	0	0	0	0	0	0	0	6,750,374
Business & Central Administration	13,234,967	0	894,022	0	0	0	0	382,077	0	0	3,850	0	14,514,916
Plant Operation and Maintenance	4,252,315	0	21,399	0	0	0	0	0	0	0	4,273,714	0	4,273,714
Student Transportation	892,925	0	27,829	0	0	0	0	0	0	0	0	0	910,754
Noninstructional Programs	0	0	0	0	0	0	0	0	0	0	0	0	0
Facilities Acquisition and Construction	5,741,971	0	0	0	0	0	0	0	0	0	0	0	5,741,971
Debt Service (Principal, interest, fiscal charges)	159,763,623	1,233,929	3,208,690	0	0	0	15,538,574	4,962,278	0	8,443,385	7,267,705	0	200,418,184
AEA Support - Direct to AEA	0	0	20,591	0	0	0	9,778,709	39,020	0	0	122,157	0	9,960,477
<b>Total Expenditures</b>	159,763,623	1,233,929	3,229,281	0	0	0	25,317,283	5,001,298	0	8,443,385	7,389,862	0	210,378,661
Transfers Out	467,027	1,311,610	947,634	0	0	0	-924,057	3,075,302	0	24,294,763	2,260,112	0	66,432,391
Other Uses	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Expenditures, Transfers Out &amp; Other Uses</b>	159,763,623	1,233,929	3,229,281	0	0	0	24,393,226	8,076,600	0	32,738,148	9,649,974	0	276,811,052
Ending Fund Balance	195,230,650	2,545,539	4,176,915	0	0	0	24,393,226	8,076,600	0	32,738,148	9,649,974	0	276,811,052
<b>Total Requirements</b>	195,230,650	2,545,539	4,176,915	0	0	0	24,393,226	8,076,600	0	32,738,148	9,649,974	0	276,811,052

FY 2025 Aid and Levy Worksheet WATERLOO

						FY2025 A&L	FY2024 A&L	Difference
<b>BUDGET ENROLLMENT</b>								
	Budget Enrollment (Oct 2023 Budget Enrollment)					10,731.7	10,672.3	59.4
	Audit Change in Oct 2022 Certified Enrollment		1.1			0.000	-2.600	2.600
	FY2024 Regular Program District Cost Per Pupil (Line 2.3 - FY2024 Aid & Levy)		1.2			7,635	7,413	222
	Enrollment Audit Adjustment		1.3	X		0	-19,274	19,274
	FY2024 Regular Program Foundation Cost Per Pupil		1.4	=		6,749	6,553	196
	Audit Change in Oct 2022 Certified Enrollment (Line 1.2)		1.5	X		0.000	-2,600	2,600
	Enrollment Audit Adjustment - State Aid Portion		1.6	=		0	-17,038	17,038
	Enrollment Audit Adjustment - State Aid Portion		1.7	=				
<b>DISTRICT CATEGORICAL ENROLLMENT</b>								
	Budget Enrollment (Line 1.1)		1.8			10,731.7		
	Resident Students Receiving an Education Savings Account (ESA)		1.9	+		684.0		
	District Categorical Enrollment		1.10	=		11,415.7		
<b>COST PER PUPIL AMOUNTS</b>								
	FY2024 Regular Program District Cost Per Pupil (Line 1.3)		2.1			7,635	7,413	222
	FY2025 Regular Program Supplemental State Aid Amount Per Pupil		2.2	+		229	222	7
	FY2025 Regular Program District Cost Per Pupil - Minimum \$7,864		2.3	=		7,864	7,635	229
	FY2024 Teacher Salary Supplement Cost Per Pupil (Line 2.6 - FY2024 Aid & Levy)		2.4			644.82	625.75	19.07
	FY2025 Teacher Salary Supplement Supplemental State Aid Amt Per Pupil		2.5	+		19.64	19.07	0.57
	FY2025 Teacher Salary Supplement Cost Per Pupil		2.6	=		664.46	644.82	19.64
	FY2024 Professional Dev Suppl Cost Per Pupil (Line 2.9 - FY2024 Aid & Levy)		2.7			70.56	68.40	2.16
	FY2025 Professional Development Supplemental State Aid Amt Per Pupil		2.8	+		2.22	2.16	0.06
	FY2025 Professional Development Supplement Cost Per Pupil		2.9	=		72.78	70.56	2.22
	FY2024 Early Intervention Suppl Cost Per Pupil (Line 2.12 - FY2024 Aid & Levy)		2.10			88.52	86.17	2.35
	FY2025 Early Intervention Supplement Supplemental State Aid Amount Per Pupil		2.11	+		2.42	2.35	0.07
	FY2025 Early Intervention Supplement Cost Per Pupil		2.12	=		90.94	88.52	2.42
	FY2024 Teacher Leadership Suppl Cost Per Pupil (Line 2.15 - FY2024 Aid & Levy)		2.13			368.53	357.80	10.73
	FY2025 Teacher Leadership Supplement Supplemental State Aid Amount Per Pupil		2.14	+		11.06	10.73	0.33
	FY2025 Teacher Leadership Supplement Cost Per Pupil		2.15	=		379.59	368.53	11.06
<b>WEIGHTED ENROLLMENT</b>								
	0.72 Special Ed Weighting in Addition to 1.0		3.1			549.36	539.28	10.08
	1.21 Special Ed Weighting in Addition to 1.0		3.2	+		955.60	877.92	77.68
	2.74 Special Ed Weighting in Addition to 1.0		3.3	+		793.23	875.43	-82.20
	Total Special Ed Weighting in Addition to 1.0		3.4	=		2,298.19	2,292.63	5.56
	Budget Enrollment (Line 1.1)		3.5	+		10,731.7	10,672.3	59.4
	AEA Weighted Enrollment		3.6	=		13,029.89	12,964.93	64.96
	AEA Supplementary Weight for Sharing		3.7	+		16.10	16.33	-0.23
	AEA Weighted Enrollment with AEA Supplementary Weight for Sharing		3.8	=		13,045.99	12,981.26	64.73
	Supplementary Weighting - Sharing		3.9			60.410	68.870	-8.460
	Supplementary Weighting - At-Risk Formula		3.10	+		75.093	74.075	1.018
	Supplementary Weighting - ELL		3.11	+		214.85	202.22	12.63
	Supplementary Weighting - Reorganization Incentives		3.12	+		0.000	0.000	0.000
	Total Supplementary Weighting		3.13	=		350.353	345.165	5.188
	AEA Weighted Enrollment (Line 3.6)		3.14	+		13,029.89	12,964.93	64.96
	District Weighted Enrollment		3.15	=		13,380.243	13,310.095	70.148
	Total Special Ed Weighting in Addition to 1.0 (Line 3.4)		3.16	+		2,298.19	2,292.63	5.56
	District Weighted Enrollment without Special Ed Weightings		3.17	=		11,082.053	11,017.465	64.588

FY 2025 Aid and Levy Worksheet WATERLOO

					FY2025 A&L	FY2024 A&L	Difference
<b>REGULAR PROGRAM DISTRICT COST CALCULATIONS</b>							
	FY2025 Regular Program District Cost Per Pupil (Line 2.3)			4.1	7,864	7,635	229
	Budget Enrollment (Line 1.1)			4.2	10,731.7	10,672.3	59.4
	FY2025 Regular Program District Cost without Adjustment		X	4.3	84,394,089	81,483,011	2,911,078
	FY2024 Regular Program District Cost (Line 4.3 - FY2024 Aid & Levy)			4.4	81,483,011	79,170,099	2,312,912
	101% Budget Adjustment		X	4.5	1.01	1.01	0.00
	101% of FY2024 Regular Program District Cost			4.6	82,297,841	79,961,800	2,336,041
	FY2025 Regular Program District Cost without Adjustment (Line 4.3)		-	4.7	84,394,089	81,483,011	2,911,078
	FY2025 Regular Program Budget Adjustment (if negative, enter zero)			4.8	0	0	0
<b>OTHER DISTRICT COST CALCULATIONS</b>							
	FY2025 Regular Program District Cost Per Pupil (Line 2.3)			4.9	7,864	7,635	229
	Total Supplementary Weighting (Line 3.13)		X	4.10	350,353	345,165	5,188
	District Cost for Supplementary Weighting			4.11	2,755,176	2,635,335	119,841
	FY2025 Regular Program District Cost Per Pupil (Line 2.3)			4.12	7,864	7,635	229
	Total Special Ed Weighting in Addition to 1.0 (Line 3.4)		X	4.13	2,298.19	2,292.63	5.56
	Special Education Instruction District Cost			4.14	18,072,966	17,504,230	568,736
	FY2025 Teacher Salary Supplement District Cost Per Pupil (Line 2.6)			4.15	664.46	644.82	19.64
	District Categorical Enrollment (Line 1.10)		X	4.16	11,415.7	10,672.3	743.4
	Unadjusted Teacher Salary Supplement District Cost			4.17	7,585,276	6,881,712	703,564
	FY2024 Unadj Teacher Salary Suppl District Cost (Line 4.17 - FY2024 Aid & Levy)			4.18	6,881,712	6,682,947	198,765
	Unadjusted Teacher Salary Supplement District Cost (Line 4.17)		-	4.19	7,585,276	6,881,712	703,564
	Teacher Salary Supplement Budget Adjustment (if negative, enter zero)			4.20	0	0	0
	Unadjusted Teacher Salary Supplement District Cost (Line 4.17)		+	4.21	7,585,276	6,881,712	703,564
	Teacher Salary Supplement District Cost			4.22	7,585,276	6,881,712	703,564
	FY2025 Professional Development Supplement District Cost Per Pupil (Line 2.9)			4.23	72.78	70.56	2.22
	District Categorical Enrollment (Line 1.10)		X	4.24	11,415.7	10,672.3	743.4
	Unadjusted Professional Development Supplement District Cost			4.25	830,835	753,037	77,798
	FY2024 Unadj Prof Dev Suppl District Cost (Line 4.25 - FY2024 Aid & Levy)			4.26	753,037	730,505	22,532
	Unadjusted Professional Development Supplement District Cost (Line 4.25)		-	4.27	830,835	753,037	77,798
	Professional Development Supplement Budget Adjustment (if negative, enter zero)			4.28	0	0	0
	Unadjusted Professional Development Supplement District Cost (Line 4.25)		+	4.29	830,835	753,037	77,798
	Professional Development Supplement District Cost			4.30	830,835	753,037	77,798
	FY2025 Early Intervention Supplement District Cost Per Pupil (Line 2.12)			4.31	90.94	88.52	2.42
	District Categorical Enrollment (Line 1.10)		X	4.32	11,415.7	10,672.3	743.4
	Unadjusted Early Intervention Supplement District Cost			4.33	1,038,144	944,712	93,432
	FY2024 Unadj Early Intervention Suppl District Cost (Line 4.33 - FY2024 Aid & Levy)			4.34	944,712	920,287	24,425
	Unadjusted Early Intervention Supplement District Cost (Line 4.33)		-	4.35	1,038,144	944,712	93,432
	Early Intervention Supplement Budget Adjustment (if negative, enter zero)			4.36	0	0	0
	Unadjusted Early Intervention Supplement District Cost (Line 4.33)		+	4.37	1,038,144	944,712	93,432
	Early Intervention Supplement District Cost			4.38	1,038,144	944,712	93,432
	FY2025 Teacher Leadership Supplement District Cost Per Pupil (Line 2.15)			4.39	379.59	368.53	11.06
	District Categorical Enrollment (Line 1.10)		X	4.40	11,415.7	10,672.3	743.4
	Unadjusted Teacher Leadership Supplement District Cost			4.41	4,333,286	3,933,063	400,223
	FY2024 Unadj Teacher Leadership Suppl District Cost (Line 4.41 - FY2024 Aid & Levy)			4.42	3,933,063	3,821,268	111,795
	Unadjusted Teacher Leadership Supplement District Cost (Line 4.41)		-	4.43	4,333,286	3,933,063	400,223
	Teacher Leadership Supplement Budget Adjustment (if negative, enter zero)			4.44	0	0	0
	Unadjusted Teacher Leadership Supplement District Cost (Line 4.41)		+	4.45	4,333,286	3,933,063	400,223
	Teacher Leadership Supplement District Cost			4.46	4,333,286	3,933,063	400,223

FY 2025 Aid and Levy Worksheet WATERLOO

AEA DISTRICT COST CALCULATIONS				FY2025 A&L	FY2024 A&L	Difference
AEA Special Ed Support Cost Per Pupil	4.47			347.27	337.26	10.01
AEA Weighted Enrollment (Line 3.6)	4.48	X		13,029.89	12,964.93	64.96
AEA Special Ed Support District Cost without Adjustment	4.49	=		4,524,890	4,372,552	152,338
FY2024 AEA Special Ed Support Dist Cost (Line 4.49 - FY2024 Aid & Levy)	4.50			4,372,552	4,235,213	137,339
FY2024 AEA Special Ed Support Adjustment (Line 4.54 - FY2024 Aid & Levy)	4.51	+		0	0	0
FY2025 Total AEA Special Ed Support District Cost	4.52	=		4,372,552	4,235,213	137,339
AEA Special Ed Support District Cost without Adjustment (Line 4.49)	4.53	-		4,524,890	4,372,552	152,338
AEA Special Ed Support Adjustment (if negative, enter zero)	4.54	=		0	0	0
Budget Enrollment (Line 1.1)	4.55			10,731.7	10,672.3	59.4
Resident Accredited Nonpublic Students	4.56	+		1,222	1,125	97
Shared-Time Nonpublic Pupils Counted in Line 1.1	4.57	-		20.5	12.6	7.9
Total Enrollment Served - AEA Media and Ed Services	4.58	=		11,933	11,785	148
FY2025 AEA Media Cost Per Pupil	4.59	X		64.34	62.47	1.87
AEA Media Services District Cost	4.60	=		767,769	736,209	31,560
Total Enrollment Served - AEA Media and Ed Services (Line 4.58)	4.61	=		11,933	11,785	148
FY2025 AEA Ed Services Cost Per Pupil	4.62	X		71.71	69.65	2.06
AEA Ed Services District Cost	4.63	=		855,715	820,825	34,890
AEA Supplementary Weight for Sharing (Line 3.7)	4.64			16.10	16.33	-0.23
AEA Special Ed Support Cost Per Pupil (Line 4.47)	4.65	X		347.27	337.26	10.01
AEA Sharing District Cost	4.66	=		5,591	5,507	84
FY2025 AEA Teacher Salary Supplement District Cost Per Pupil	4.67			42.73	41.70	1.03
AEA Weighted Enrollment (Line 3.6)	4.68	X		13,029.89	12,964.93	64.96
Unadjusted AEA Teacher Salary Supplement District Cost	4.69	=		556,767	540,638	16,129
FY2024 Unadj AEA Teacher Salary Suppl District Cost (Line 4.69 - 2024 Aid & Levy)	4.70			540,638	526,266	14,372
Unadjusted AEA Teacher Salary Supplement District Cost (Line 4.69)	4.71	-		556,767	540,638	16,129
AEA Teacher Salary Supplement Budget Adjustment (if negative, enter zero)	4.72	=		0	0	0
Unadjusted AEA Teacher Salary Supplement District Cost (Line 4.69)	4.73	+		556,767	540,638	16,129
AEA Teacher Salary Supplement District Cost	4.74	=		556,767	540,638	16,129
FY2025 Professional Development Supplement District Cost Per Pupil	4.75			4.92	4.80	0.12
AEA Weighted Enrollment (Line 3.6)	4.76	X		13,029.89	12,964.93	64.96
Unadjusted AEA Professional Development Supplement District Cost	4.77	=		64,107	62,232	1,875
FY2024 Unadj AEA Prof Dev Suppl District Cost (Line 4.77 - FY2024 Aid & Levy)	4.78			62,232	60,514	1,718
Unadjusted AEA Professional Development Supplement District Cost (Line 4.77)	4.79	-		64,107	62,232	1,875
AEA Professional Development Suppl Budget Adjustment (if negative, enter zero)	4.80	=		0	0	0
Unadjusted AEA Professional Development Supplement District Cost (Line 4.77)	4.81	+		64,107	62,232	1,875
AEA Professional Development Supplement District Cost	4.82	=		64,107	62,232	1,875

FY 2025 Aid and Levy Worksheet WATERLOO

			FY2025 A&L	FY2024 A&L	Difference
<b>COMBINED DISTRICT COST SUMMARY</b>					
Regular Program District Cost without Adjustment (Line 4.3)	5.1		84,394,089	81,483,011	2,911,078
Regular Program Budget Adjustment Adopted (Line 4.8)	5.2	+	0	0	0
District Cost for Supplementary Weighting (Line 4.11)	5.3	+	2,755,176	2,635,335	119,841
Special Education Instruction District Cost (Line 4.14)	5.4	+	18,072,966	17,504,230	568,736
Teacher Salary Supplement District Cost (Line 4.22)	5.5	+	7,585,276	6,881,712	703,564
Professional Development Supplement District Cost (Line 4.30)	5.6	+	830,835	753,037	77,798
Early Intervention Supplement District Cost (Line 4.38)	5.7	+	1,038,144	944,712	93,432
Teacher Leacership Supplement District Cost (Line 4.46)	5.8	+	4,333,286	3,933,063	400,223
AEA Special Ed Support District Cost without Adjustment (Line 4.49)	5.9	+	4,524,890	4,372,552	152,338
AEA Special Ed Support Adjustment (Line 4.54)	5.10	+	0	0	0
AEA Media Services District Cost (Line 4.60)	5.11	+	767,769	736,209	31,560
AEA Ed Services District Cost (Line 4.63)	5.12	+	855,715	820,825	34,890
AEA Sharing District Cost (Line 4.66)	5.13	+	5,591	5,507	84
AEA Teacher Salary Supplement District Cost (Line 4.74)	5.14	+	556,767	540,638	16,129
AEA Professional Development Supplement District Cost (Line 4.82)	5.15	+	64,107	62,232	1,875
AEA Statewide State Aid Reduction	5.16	-	180,583	711,482	-530,899
FY2025 SBRC Modified Supplemental Amount - Dropout	5.17	+	4,096,826	3,955,688	141,138
Enrollment Audit Adjustment (Line 1.4)	5.18	+	0	-19,274	19,274
Combined District Cost	5.19	=	129,700,854	123,897,995	5,802,859
<b>UNIFORM LEVY DOLLARS</b>					
2023 Taxable Valuation with Gas & Electric Utilities	6.1		2,789,663,709	2,765,393,920	24,269,789
Uniform Levy Rate	6.2	X	5.40000	5.40000	0.00000
Uniform Levy Dollars	6.3	=	15,064,184	14,933,127	131,057
<b>UNIFORM LEVY - UTILITY REPLACEMENT ADJUSTMENT</b>					
Uniform Levy Utility Replacement Paid 2024	6.4		483,717	483,976	-259
Uniform Levy Utility Replacement Budgeted 2024	6.5	-	484,301	491,091	-6,790
Uniform Levy Utility Replacement Adjustment	6.6	=	-584	-7,115	6,531
Uniform Levy Dollars Before Utility Repl and Two Tier Replacement Adjustments (Line 6.3)	6.7	+	15,064,184	14,933,127	131,057
Uniform Levy Dollars Adjusted for Utility Replacement	6.8	=	15,063,600	14,926,012	137,588
<b>UNIFORM LEVY - TWO TIERED ASSESSMENT LIMITATION REPLACEMENT</b>					
Commercial, Industrial & Railroad Calculated 90% Valuation	6.9		1,361,651,737	1,130,983,549	230,668,188
Commercial, Industrial & Railroad Taxable Valuation	6.10	-	1,260,071,612	1,053,717,750	206,353,862
Commercial, Industrial & Railroad Valuation Reduction	6.11	=	101,580,125	77,265,799	24,314,326
Uniform Levy Rate (Line 6.2)	6.12	X	5.40000	5.40000	0.00000
Uniform Levy Commercial, Industrial & Railroad Two Tiered Assessment Replacement Estimate	6.13	=	548,533	417,235	131,298
FYNaN Uniform Levy C/I/R Two Tiered Assessment Limitation Replacement Paid	6.14		417,236	0	417,236
FYNaN Uniform Levy C/I/R Two Tiered Assessment Replacement Budgeted (Line 6.13 - FYNaN Aid & Levy)	6.15	-	417,235	0	417,235
FYNaN Uniform Levy C/I/R Two Tiered Assessment Replacement Paid Minus Budgeted	6.16	=	1	0	1
Uniform Levy Commercial, Industrial & Railroad Two Tiered Assessment Replacement Estimate (Line 6.13)	6.17	+	548,533	417,235	131,298
Total Uniform Levy C/I/R Two Tiered Assessment Limitation Replacement Adjustment	6.18	=	548,534	417,235	131,299
Uniform Levy Dollars Adjusted for Utility Replacement (Line 6.8)	6.19	+	15,063,600	14,926,012	137,588
Uniform Levy Dollars Adjusted for Utility Replacement & C/I/R Two Tiered Assessment Limitation Replacement	6.20	=	15,612,134	15,343,247	268,887

FY 2025 Aid and Levy Worksheet WATERLOO

									FY2024 A&L	FY2025 A&L	Difference
<b>STATE FOUNDATION AID</b>											
	State Regular Program Foundation Cost Per Pupil			7.1					6,952		203
	District Weighted Enrollment without Special Ed Weightings (Line 3.17)			7.2	X				11,017,465		64,588
	District Foundation Dollars without Special Ed			7.3	=				74,356,871		2,685,561
	State Special Ed Program Foundation Cost Per Pupil			7.4					6,749		203
	Total Special Ed Weighting in Addition to 1.0 (Line 3.4)			7.5	X				2,292,193		5,56
	District Special Ed Foundation Dollars			7.6	=				15,472,060		504,057
	State AEA Special Ed Support Foundation Cost Per Pupil			7.7					271		7
	AEA Weighted Enrollment with AEA Supplementary Weight for Sharing (Line 3.8)			7.8	X				13,045,99	12,981,26	64,73
	AEA Foundation Dollars for Special Ed and Sharing			7.9	=				3,535,463	3,427,053	108,410
	AEA Teacher Salary Supplement District Cost (Line 4.74)			7.10	+				556,767	540,638	16,129
	AEA Professional Development Supplement District Cost (Line 4.82)			7.11	+				64,107	62,232	1,875
	Total AEA Foundation Dollars			7.12	=				4,156,337	4,029,923	126,414
	District Foundation Dollars without Special Ed (Line 7.3)			7.13	+				77,042,432	74,356,871	2,685,561
	District Special Ed Foundation Dollars (Line 7.6)			7.14	+				15,977,017	15,472,960,00	504,057
	Enrollment Audit Adjustment - State Aid Portion (Line 1.7)			7.15	+				0	-17,038	17,038
	Teacher Salary Supplement District Cost (Line 4.22)			7.16	+				7,585,276	6,881,712	703,564,00
	Professional Development Supplement District Cost (Line 4.30)			7.17	+				830,835	753,037	77,798
	Early Intervention Supplement District Cost (Line 4.38)			7.18	+				1,038,144	944,712	93,432
	Teacher Leadership Supplement District Cost (Line 4.46)			7.19	+				4,333,286	3,933,063	400,223
	Total Foundation Dollars			7.20	=				110,963,327	106,355,240	4,608,087
	Uniform Levy Dollars Adjusted for Utility Replacement & C/IR Adjustment (Line 6.20)			7.21	-				15,343,247	15,343,247	268,887
	Unadjusted State Foundation Aid			7.22	=				95,351,193	91,011,993	4,339,200
	District Weighted Enrollment (Line 3.15)			7.23					13,380,243	13,310,095	70,148
	\$300 Minimum Aid Per Pupil			7.24	X				300	300	0
	Minimum Aid			7.25	=				4,014,073	3,993,029	21,044
	Unadjusted State Foundation Aid (Line 7.22)			7.26	-				95,351,193	91,011,993	4,339,200
	Minimum Aid Adjustment (if Negative, Enter Zero)			7.27	=				0	0	0
	<b>PRESCHOOL FOUNDATION AID</b>										
	Preschool Budget Enrollment (Actual Enrollment X 50%)			7.28					233.0	252.0	-19.0
	FY Regular Program State Cost Per Pupil			7.29	X				7,864	7,635	229
	Preschool Foundation Aid			7.30	=				1,832,312	1,924,020	-91,708
	Audited Change in October 2022 Preschool Budget Enrollment			7.31					0.0	0.0	0.0
	2024 Regular Program State Cost Per Pupil			7.32	X				7,635	7,413	222
	Preschool Enrollment Audit Adjustment			7.33	=				0	0	0
	Preschool Foundation Aid (Line 7.30)			7.34	+				1,832,312	1,924,020	-91,708
	Total Preschool Foundation Aid			7.35	=				1,832,312	1,924,020	-91,708

FY 2025 Aid and Levy Worksheet WATERLOO

					FY2025 A&L	FY2024 A&L	Difference
<b>ADDITIONAL DOLLAR LEVY</b>							
				8.1	129,700,854	123,897,995	5,802,859
			Combined District Cost (Line 5.19)	8.2	110,963,327	106,355,240	4,608,087
			Total Foundation Dollars (Line 7.20)	8.3	0	0	0
			Minimum Aid Adjustment (Line 7.27)	8.4	18,737,527	17,542,755	1,194,772
<b>PROPERTY TAX ADJUSTMENT AID</b>							
			2023 Taxable Valuation with Gas & Electric Utilities (Line 6.1)	8.5	2,789,663,709	2,765,393,920	24,269,789
			2022 Taxable Valuation with Gas & Electric Utilities (Line 6.1 - 2024 Aid & Levy)	8.6	2,765,393,920	2,843,707,107	-78,313,187
			Dollar Increase in Taxable Valuation (If negative, enter zero)	8.7	24,269,789	0	24,269,789
			2022 Taxable Valuation with Gas & Electric Utilities (Line 8.6)	8.8	2,765,393,920	2,843,707,107	-78,313,187
			Increase in Taxable Valuation (to 4 Decimals)	8.9	0.0088	0.0000	0.0088
			FY2024 Property Tax Adjustment Aid (Line 8.14 - FY2024 Aid & Levy)	8.10	119,008	119,008	0
			Reduction in Property Tax Adjustment Aid	8.11	1,047	0	1,047
			FY2024 Property Tax Adjustment Aid (Line 8.10)	8.12	119,008	119,008	0
			Reduction in Property Tax Adjustment Aid (Line 8.11)	8.13	1,047.00	0.00	1,047.00
			FY Property Tax Adjustment Aid	8.14	117,961	119,008	-1,047
<b>PROPERTY TAX REPLACEMENT PAYMENT (PTRP)</b>							
			FYNA's Property Tax Portion of State Cost Per Pupil	8.15	886	886	0
			Base Property Tax Portion of State Cost Per Pupil	8.16	685	685	0
			Property Tax Replacement Amount Per Pupil	8.17	201	201	0
			District Weighted Enrollment (Line 3.15)	8.18	13,380,243	13,310,095	70,148
			Property Tax Replacement Payment (PTRP)	8.19	2,689,429	2,675,329	14,100
<b>FOUNDATION BASE SUPPLEMENT (FBS)</b>							
			District Weighted Enrollment (Line 3.15)	8.20	13,380,243	13,310,095	70,148
			Foundation Base Supplement Amount Per Pupil	8.21	17	10	7
			Foundation Base Supplement Aid	8.22	227,464	133,101.00	94,363.0



FY 2025 Aid and Levy Worksheet WATERLOO

					FY2025 A&L	FY2024 A&L	Difference
<b>ADJUSTED ADDITIONAL PROPERTY TAX LEVY AID</b>							
	District Weighted Enrollment (Line 3.1.5)		8.23		13,380,243	13,310,095	70,148
	FY2025 Regular Program State Cost Per Pupil		8.24	X	7,864	7,635	229
	Property Tax Portion of State Cost Per Pupil		8.25	X	% 11.60	% 11.60	% 0.00
	Adjusted Additional Property Tax Dollar Levy		8.26	=	12,202,782	11,792,744	410,038
	Property Tax Replacement Payment (PTRP) (Line 8.19)		8.27	-	2,689,429	2,675,329	14,100
	Foundation Base Supplement (FBS) Aid (Line 8.22)		8.28	-	227,464	133,101	94,363
	Adjusted Additional Property Tax Dollar Levy less PTRP and FBS		8.29	=	9,285,889	8,984,314	301,575
	FY2023 Taxable Valuation with Gas & Electric Utilities (Line 6.1)		8.30	/	2,789,663,709	2,765,393,920	24,269,789
	Adjusted Additional Property Tax Levy Rate		8.31	=	3.32868	3.24884	0.07984
	Statewide Maximum Adjusted Additional Property Tax Levy Rate		8.32	-	1.79260	1.96178	-0.16918
	Adjusted Additional Property Tax Levy Rate Reduction (if negative, enter zero)		8.33	=	1.53608	1.28706	0.24902
	2023 Taxable Valuation with Gas & Electric Utilities (Line 6.1)		8.34	X	2,789,663,709	2,765,393,920	24,269,789
	FY Adjusted Additional Property Tax Levy Aid		8.35	=	4,285,147	3,559,228	725,919
<b>PROPERTY TAX EQUITY AND RELIEF (PTER) FUNDING</b>							
	FY Regular Program State Cost Per Pupil		8.36		7,864	7,635	229
	Increase in State Foundation Cost Per Pupil Percentage		8.37	X	% 0.00	% 0.00	% 0.00
	Increase in Foundation Cost Per Pupil		8.38	=	0	0	0
	District Weighted Enrollment (Line 3.1.5)		8.39	X	13,380,243	13,310,095	70,148
	FY Adjusted Additional Property Tax Equity and Relief Fund		8.40	=	0	0	0
<b>ADDITIONAL LEVY BEFORE UTILITY REPLACEMENT ADJUSTMENT</b>							
	Additional District Foundation Dollars from Property Tax Equity and Relief Fund		8.41		18,737,527	17,542,755	1,194,772
	Additional Dollar Levy (Line 8.4)		8.42	-	117,961	119,008	-1,047
	Property Tax Adjustment Aid (Line 8.14)		8.43	-	0	0	0
	FY2023 District Special Ed Positive Balance, Property & Utility Repl Tax Portion		8.44	-	0	0	0
	FY2023 AEA Special Ed Reduction, Property & Utility Replacement Tax Portion		8.45	-	0	0	0
	AEA Statewide State Aid Reduction (Line 5.16)		8.46	-	180,583	711,482	-530,899
	Property Tax Replacement Payment (PTRP) (Line 8.19)		4.46	-	2,689,429	2,675,329	14,100
	Foundation Base Supplement (FBS) Aid (Line 8.22)		8.47	-	227,464	133,101	94,363
	Adjusted Additional Property Tax Levy Aid (Line 8.35)		8.48	-	4,285,147	3,559,228	725,919
	Additional District Foundation Dollars from PTER Fund (Line 8.40)		8.49	-	0	0	0
	Additional Levy before Utility Replacement Adjustment		8.50	=	11,598,109	11,767,571	-169,462

FY 2025 Aid and Levy Worksheet WATERLOO

					FY 2025 A&L	FY 2024 A&L	Difference
<b>FINAL STATE FOUNDATION AID</b>							
	Unadjusted State Foundation Aid (Line 7.22)	9.1			95,351,193	91,011,993	4,339,200
	Minimum Aid Adjustment (Line 7.27)	9.2	+		0	0	0
	Property Tax Adjustment Aid (Line 8.14)	9.3	+		117,961	119,008	-1,047
	FY2023 District Special Ed Positive Balance, Property & Util Repl Portion (Line 8.43)	9.4	+		0	0	0
	FY2023 Special Ed Reduction, Property & Utility Repl Tax Portion (Line 8.44)	9.5	+		0	0	0
	AEA Statewide State Aid Reduction (Line 5.16)	9.6	-		180,583	711,482	-530,899
	Property Tax Replacement Payment (PTRP) (Line 8.19)	9.7	+		2,689,429	2,675,329	14,100
	Foundation Base Supplement (FBS) Aid (Line 8.22)	9.8	+		227,464	133,101	94,363
	Adjusted Additional Property Tax Levy Aid (Line 8.31)	9.9	+		4,285,147	3,559,228	725,919
	Additional District Foundation Dollars from PTER Fund (Line 8.36)	9.10	+		0	0	0
	Adjustment for Property Tax Repayment due to Property Assessment Appeal	9.11	+		0	0	0
	Total Preschool Foundation Aid (Line 7.35)	9.12	+		1,832,312	1,924,020	-91,708
	State Foundation Aid	9.13	+		104,322,923	98,711,197	5,611,726
<b>INSTRUCTIONAL SUPPORT PROGRAM</b>							
	FY Regular Program District Cost without Adjustment (Line 4.3)	10.1			84,394,089	81,483,011	2,911,078
	Regular Program Budget Adjustment Adopted (Line 4.8)	10.2	+		0	0	0
	Total Regular Program District Cost	10.3	=		84,394,089	81,483,011	2,911,078
	Maximum Portion (Can't exceed 10.00%)	10.4	X		% 10.00	% 10.00	% 0.00
	Unadjusted Instructional Support Program Dollars	10.5	=		8,439,409	8,148,301	291,108
	2023 Taxable Valuation with Gas & Electric Utilities (Line 6.1)	10.6	=		2,789,663,709	2,765,393,920	24,269,789
	Budget Enrollment (Line 1.1)	10.7	/		10,731.7	10,672.3	59.4
	District Taxable Valuation Per Pupil	10.8	=		259,946	259,119	827
	State Taxable Valuation Per Pupil	10.9	=		443,050	416,026	27,024
	District Taxable Valuation Per Pupil (Line 10.8)	10.10	/		259,946	259,119	827
		10.11	X		0.25	0.25	0.00
	State Aid Portion of Program Dollars (Round to 4 Decimals)	10.12	=		0.4261	0.4014	0.0247
	Unadjusted Instructional Support Program Dollars (Line 10.5)	10.13	X		8,439,409	8,148,301	291,108
	Unadjusted Instructional Support State Aid	10.14	=		3,596,032	3,270,728	325,304
	Instructional Support Income Surtax Rate	10.15	=		% 0	% 0	% 0
	District Income Tax Paid in FY NaN	10.16	X		69,460,665	70,569,796	-1,109,131
	Instructional Support Income Surtax Dollars	10.17	=		0	0	0
	Unadjusted Instructional Support Program Dollars (Line 10.5)	10.18	=		8,439,409	8,148,301	291,108
	Unadjusted Instructional Support State Aid (Line 10.14)	10.19	-		3,596,032	3,270,728	325,304
	Instructional Support Income Surtax Dollars (Line 10.17)	10.20	-		0	0	0
	Instructional Support Property & Utility Replacement Tax Dollars	10.21	=		4,843,377	4,877,573	-34,196
	Unadjusted Instructional Support State Aid (Line 10.14)	10.22	=		3,596,032	3,270,728	325,304
	Prorata Reduction to State Appropriation Amount	10.23	X		0.143	0	0.143
	Adjusted Instructional Support State Aid	10.24	=		514,233	0	0
	Instructional Support Income Surtax Dollars (Line 10.17)	10.25	+		0	0	0
	Instructional Support Property & Utility Replacement Tax Dollars (Line 10.21)	10.26	+		4,843,377	4,877,573	-34,196
	Adjusted Instructional Support Program Dollars	10.27	=		5,357,610	4,877,573	480,037



FY 2025 Aid and Levy Worksheet WATERLOO

				FY2025 A&L	FY2024 A&L	Difference
<b>SECTION 14 IS INTENTIONALLY BLANK</b>						
<b>SUMMARY OF GENERAL FUND LEVIES</b>						
	Uniform Levy Dollars before Utility Replacement (Line 6.3)	15.1		15,064,184	14,933,127	131,057
	Additional Levy Adjusted for Utility Replacement and Two Tiered Assessment (Line 13.12)	15.2	+	11,269,622	11,773,221	-503,599
	Total Levy to Fund Combined District Cost	15.3	=	26,333,806	26,706,348	-372,542
	Instructional Support Levy (Line 10.21)	15.4	+	4,843,377	4,877,573	-34,196
	Ec. Improvement Levy (Line 11.9)	15.5	+	0	0	0
	This Line is Intentionally Blank	15.6				
	This Line is Intentionally Blank	15.7				
	Levy to Fund Budget Authority	15.8	=	31,177,183	31,583,921	-406,738
	Cash Reserve Levy - SBRC	15.9	+	2,000,000	0	2,000,000
	Cash Reserve Levy - Other	15.10	+	0	0	0
	Use of Fund Balance to Reduce Levy	15.11	-	0	0	0
	Total General Fund Levy	15.12	=	33,177,183	31,583,921	1,593,262
	Instructional Support Levy (Line 10.21)	15.13	-	4,843,377	4,877,573	-34,196
	Subtotal General Fund Levy without Instructional Support	15.14	=	28,333,806	26,706,348	1,627,458
	2023 Taxable Valuation with Gas & Electric Utilities (Line 6.1)	15.15	/	2,789,663,709	2,765,393,920	24,269,789
	Subtotal General Fund Levy Rate	15.16	=	10.15671	9.65734	0.49937
	Instructional Support Levy (Line 10.21)	15.17		4,843,377	4,877,573	-34,196
	2023 Taxable and TIF Valuations with Gas & Electric	15.18	/	3,442,788,748	3,185,134,054	257,654,694
	Instructional Support Levy Rate	15.19	=	1.40682	1.53136	-0.12454
	Subtotal General Fund Levy Rate (Line 15.16)	15.20	+	10.15671	9.65734	0.49937
	Total General Fund Levy Rate	15.21	=	11.56353	11.18870	0.37483
<b>STATE PAYMENTS TO AEA AND DISTRICT</b>						
	AEA Special Ed Support District Cost without Adjustment (Line 4.49)	16.1		4,524,890	4,372,552	152,338
	AEA Special Ed Support Adjustment (Line 4.54)	16.2	+	0	0	0
	AEA Media Services District Cost (Line 4.60)	16.3	+	767,769	736,209	31,560
	AEA Ed Services District Cost (Line 4.63)	16.4	+	855,715	820,825	34,890
	AEA Sharing District Cost (Line 4.66)	16.5	+	5,591	5,507	84
	AEA Teacher Salary Supplement District Cost (Line 4.74)	16.6	+	556,767	540,638	16,129
	AEA Professional Development Supplement District Cost (Line 4.82)	16.7	+	64,107	62,232	1,875
	AEA Statewide State Aid Reduction (Line 5.16)	16.8	-	180,583	711,482	-530,899
	State Payments to AEA	16.9	=	6,594,256	5,826,481	767,775
	State Foundation Aid (Line 9.13)	16.10		104,322,923	98,711,197	5,611,726
	State Payments to AEA (Line 16.9)	16.11	-	6,594,256	5,826,481	767,775
	State Payments to District	16.12	=	97,728,667	92,884,716	4,843,951
<b>Section 17 and Section 18 have been replaced with the Unspent Authorized Budget Report</b>						

FY 2025 Aid and Levy Worksheet WATERLOO

Section 17 and Section 18 have been replaced with the Unspent Authorized Budget Report					FY2024 A&L	FY2025 A&L	Difference
<b>VOTED PHYSICAL PLANT &amp; EQUIPMENT (VPEEL)</b>							
FY2023 Taxable and TIF Valuations with Gas & Electric (Line 15.18)		19.1					
Voted PPEL Rate Limit		19.2	X		3,185,134,054	3,442,788,748	257,654,694
Maximum Voted PPEL Dollars					0.67000	0.67000	0.00000
Voted PPEL Income Surtax Rate		19.3	=		2,134,040	2,306,668	172,628
Voted PPEL Income Surtax Rate		19.4	-		% 0	% 0	% 0
District Income Tax Paid in FY2022 (Line 10.16)		19.5	X		70,569,796	69,460,665	-1,109,131
Voted PPEL Income Surtax Dollars		19.6	-		0	0	0
Maximum Voted PPEL Dollars (Line 19.3)		19.7	-		2,134,040	2,306,668	172,628
Voted PPEL Income Surtax Dollars (Line 19.6)		19.8	-		0	0	0
Voted PPEL Levy		19.9	=		2,134,040	2,306,668	172,628
<b>ALL INCOME SURTAX RATES &amp; GENERAL FUND SURTAX DOLLARS</b>							
Instructional Support Income Surtax Rate (Line 10.15)		20.1	-		% 0	% 0	% 0
Ed Improvement Income Surtax Rate (Line 11.4)		20.2	+		% 0	% 0	% 0
This Line is Intentionally Blank		20.3	-				
This Line is Intentionally Blank		20.4	-				
Voted PPEL Income Surtax Rate (Line 19.4)		20.5	+		% 0	% 0	% 0
Total Income Surtax Rate (cannot exceed 20%)		20.6	=		% 0	% 0	% 0
Instructional Support Income Surtax Dollars (Line 10.25)		20.7	-		0	0	0
Ed Improvement Income Surtax Dollars (Line 11.6)		20.8	+		0	0	0
This Line is Intentionally Blank		20.9	-				
This Line is Intentionally Blank		20.10	-				
Total General Fund Income Surtax Dollars		20.11	=		0	0	0
<b>OTHER PROPERTY &amp; UTILITY REPLACEMENT TAXES</b>							
Management		21.1	-				
Amnara Library		21.2	-		3,950,000	3,240,000	710,000
Regular Physical Plant & Equipment		21.3	-		1,136,120	1,051,094	85,026
Reorganization Equalization Levy		21.4	-		0	0	0
Emergency Levy (for Disaster Recovery)		21.5	-		0	0	0
Public Education and Recreation		21.6	-		0	0	0
Debt Service		21.7	-		0	0	0



April 22	Board Meeting	5:00pm
April 23	Work Session: Academics/Student Achievement	5:00pm
April 25	Waterloo Schools Foundation Sparking Academic Excellence Breakfast	7:00am
May 13	Board Meeting	5:00pm
May 27	Memorial Day – All Offices/Buildings Closed <i>(NOTE: No Board Meeting 5/27)</i>	
May 28	Work Session: Transportation/Activities	5:00pm

### **High School Graduations**

West – Tuesday, May 21, 6pm, McLeod Center

East – Wednesday, May 22, 6pm, McLeod Center

Expo – Thursday, May 23, 6pm, Expo Alternative Learning Center