

**WAUNAKEE COMMUNITY SCHOOL DISTRICT
BOARD OF EDUCATION COMMUNITY ENGAGEMENT MEETING**

Monday, January 31, 2022

6:30 PM

Waunakee Community School District
905 Bethel Circle
Waunakee, WI 53597

******THIS IS A NOTICE OF A POSSIBLE QUORUM OF THE
BOARD******

No Action will be taken at this event****

6:30 p.m. - 8:00 p.m.

This meeting will be held in-person, as well as virtually via Zoom Webinar format. All members of our community and school community are invited to attend, if you plan to attend in person, please know that space is limited.

To attend virtually, [link to join the webinar https://us02web.zoom.us/j/84388839270](https://us02web.zoom.us/j/84388839270). The meeting will also be live-streamed and available at this link:

<https://www.youtube.com/channel/UCIgebJT-i0GbAiYqrkpaBmA/featured>.

Participants viewing virtually will be able to ask questions or comments via email that evening.

To effectively address questions, we would like you to please submit your questions ahead of time by 4:00 p.m. on Friday, January 28.

We will also take questions at the meeting, either in person or through Q&A on the Zoom Webinar

Please use the [following form to submit your](#)

[questions https://docs.google.com/forms/d/e/1FAIpQLSdAGbHBVPIIboMyZsGIcB3zc3fyUY1ndxqgknURScogE6pzQA/viewform](https://docs.google.com/forms/d/e/1FAIpQLSdAGbHBVPIIboMyZsGIcB3zc3fyUY1ndxqgknURScogE6pzQA/viewform). If you have multiple questions, please fill out a new form for each one.

We will try to address as many questions as we can.

Your question may be addressed in the district presentation or read aloud during the question and answer session.

AGENDA

I. Community Engagement Meeting: Facilities and Referendum Planning

A. Welcome

B. District Presentation on Facility Planning, District Facility Needs, and
Timeline for a November 2022 Referendum.

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C. Community Questions and Comments

D. Thank You and Next Steps

“Any person who has a qualifying disability as defined by the Americans with Disabilities Act who requires assistance with access or materials should contact the Waunakee Community School District Office at 849-2000, 905 Bethel Circle Drive Waunakee, WI 53597, at least twenty-four hours prior to the commencement of the meeting so that necessary arrangements can be made to accommodate the request.”

Waunakee Community School District

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Community Engagement Meeting

January 31, 2022

6:30 p.m. - 8:00 p.m.



Agenda

- **Welcome**
 - **Joan Ensign, Board of Education President**
- **Purpose of the Meeting**
- **District Presentation on Referendum Planning for November 2022**
- **Community Comments and Questions**
- **Thank You and Next Steps**



Board of Education Members

Joan Ensign, President

David Boetcher, Director

Mark Hetzel, Vice President

Ted Frey, Director

Judith Engebretson, Secretary

Brian Hoefler, Director

Jack Heinemann, Treasurer



Purpose for the Meeting

- Priority of the Board of Education is to expand opportunities for community engagement on key issues.
- Agreed to conduct community engagement meetings in September, November, January, and March timeframes.
- To hear from the community and to use that information for future



Goal for this evening

Provide an update to the community on our planning process for a November 2022 referendum. This update will include information on our recent referendum history, enrollment projections, long-term planning guiding principles, financial planning, and next steps.

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Facilities Planning History

- 2010 -- High School Addition and Renovation
- 2013 -- Establish Long-Range Master Plan
- 2014 -- Intermediate School/Heritage Elementary Renovation/Prairie Elementary Addition
- 2016 -- Install trailer at the Waunakee Middle School
- 2019-2020 -- BOE Consideration of Phase II of Master Planning Options
- 2020 -- Pause master planning due to COVID-19
- 2021 -- Install 2nd trailer at Waunakee Middle School
- 2022 -- Update Long-Range Master Plan (discuss at end of presentation)

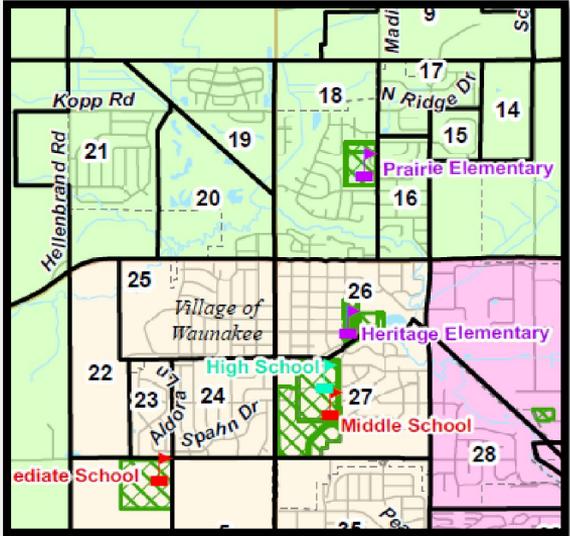
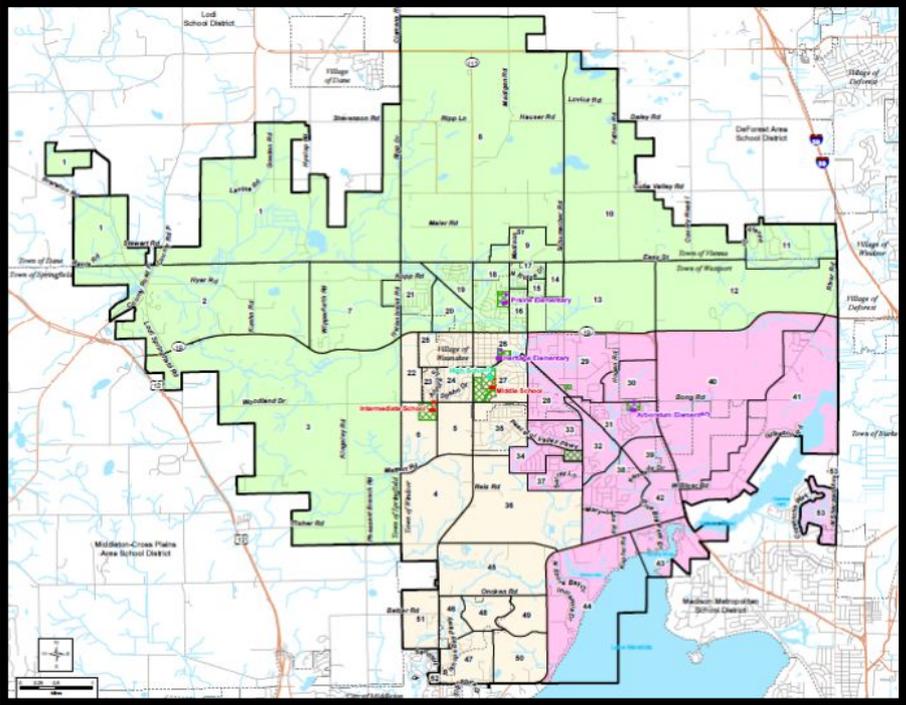


Student Enrollment Projections Methodology

- Researched impact of planned residential development and demographic changes on student enrollment
- Projected housing growth by 2023, 2025, 2030, and 2035 using community and developer plans
- Projected student per housing unit ratios to translate housing projections into enrollment projections for same years
- Assembled projections by “neighborhood” and current school attendance areas
- Compared with school capacities including updated middle school capacity from EUA



Neighborhoods and Attendance Areas



Enrollment Projections Overview

- WCSD's new housing market is strong and diversifying in a way that should attract more families and buffer lower expected birth rates than in the past.
- Also, expect a wave of neighborhood turnover by the late-2020s, as ~150 single-family homes permitted per year in early-2000s approach 30 years old. 11
- Enrollment should grow at all grade levels by late 2020s - approaching 100 additional K-12 students per year.



Grade K-12 Enrollment Projections

- Between 2021 and 2035, we project:
 - Increase of 1,380 K-12 students
 - Or ~95-100 additional students per year on average
 - To 5,501 WCSD students by 2035
- Includes resident enrollment plus open-enrollment-in at average amount by school over the past four years
- Assumes open-enrollment-out and private/home schooling at constant rates
- Does not include 4K enrollment - not in WCSD buildings

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Grade K-4 Enrollment Projections

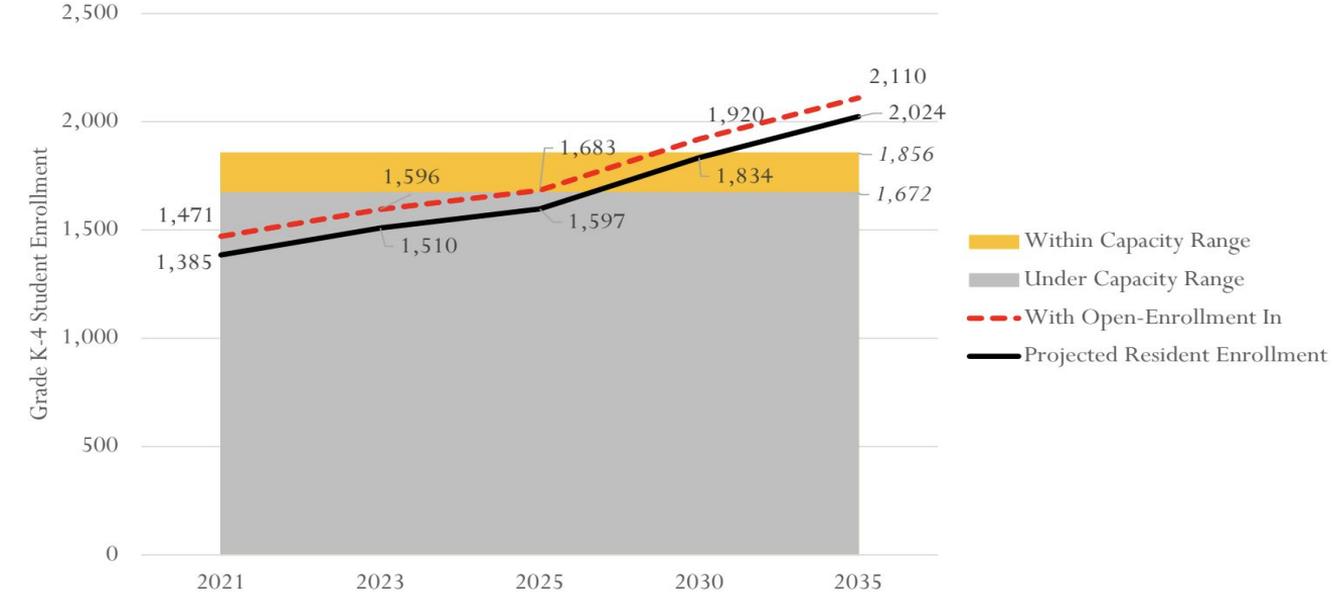
Elementary School	Sept. 2021 Enrollment	Projected Enrollment ¹				Change, 2021-2035	Building Capacity	
		2023-24	2025-26	2030-31	2035-36		Functional	Maximum
Arboretum	435	508	542	574	635	+200	418	464
Heritage	525	534	574	710	742	+217	627 ²	696 ²
Prairie	511	554	567	635	733	+222	627	696
GRADE K-4 TOTALS	1,441	1,596	1,683	1,920	2,110	+639	1,672	1,856

1 Projections assume no “forced transfers” among the elementary schools.

2 To achieve the indicated capacity of Heritage, additional classrooms in former Intermediate School would have to be remodeled.

Grade K-4 Enrollment Projections

Enrollment vs. Capacity— All Elementary Schools Combined (K-4)



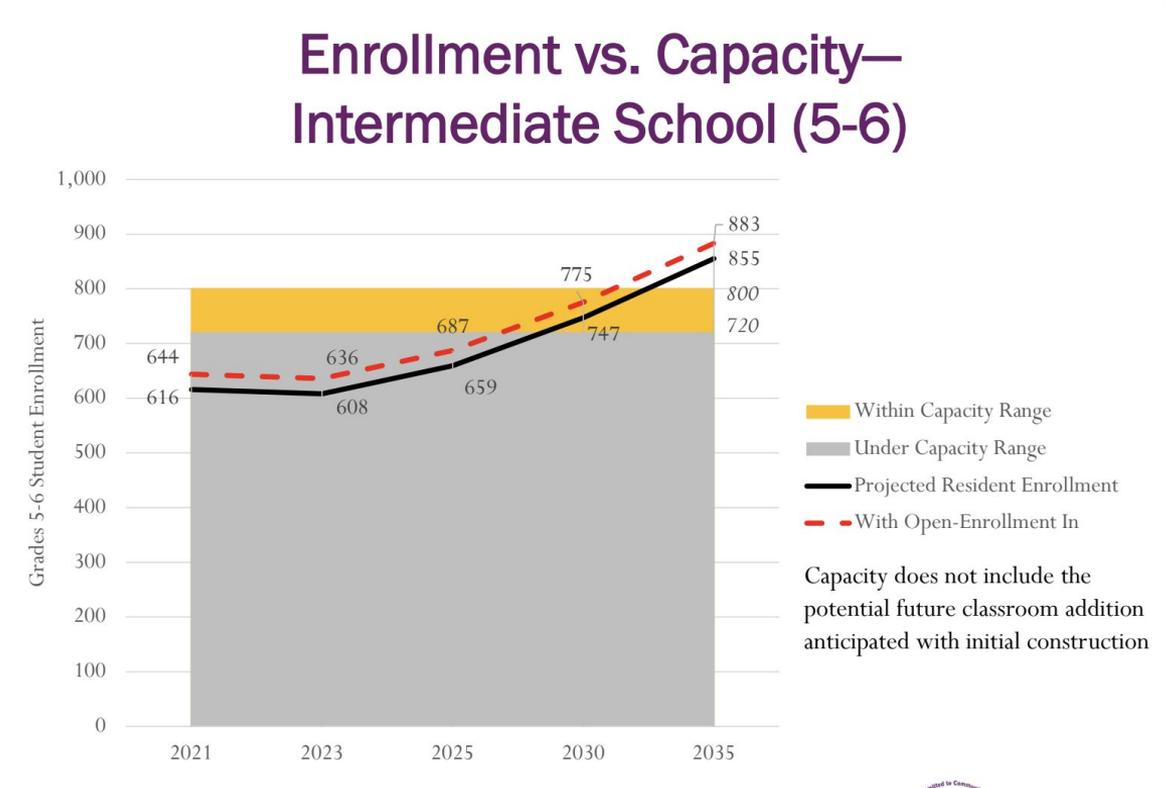
Grade 5-12 Enrollment Projections

School	Sept. 2021 Enrollment	Projected Enrollment				Change, 2021-2035	Building Capacity	
		2023-24	2025-26	2030-31	2035-36		Functional	Maximum
Intermediate	644	636	687	775	883	+239	720 ¹	800 ¹
Middle	652	671	683	778	884	+232	663 ²	
High	1,354	1,358	1,364	1,494	1,623	+269	1,642	
GRADE 5-12 TOTALS	2,650	2,665	2,734	3,047	3,391	+741	3,025	3,105

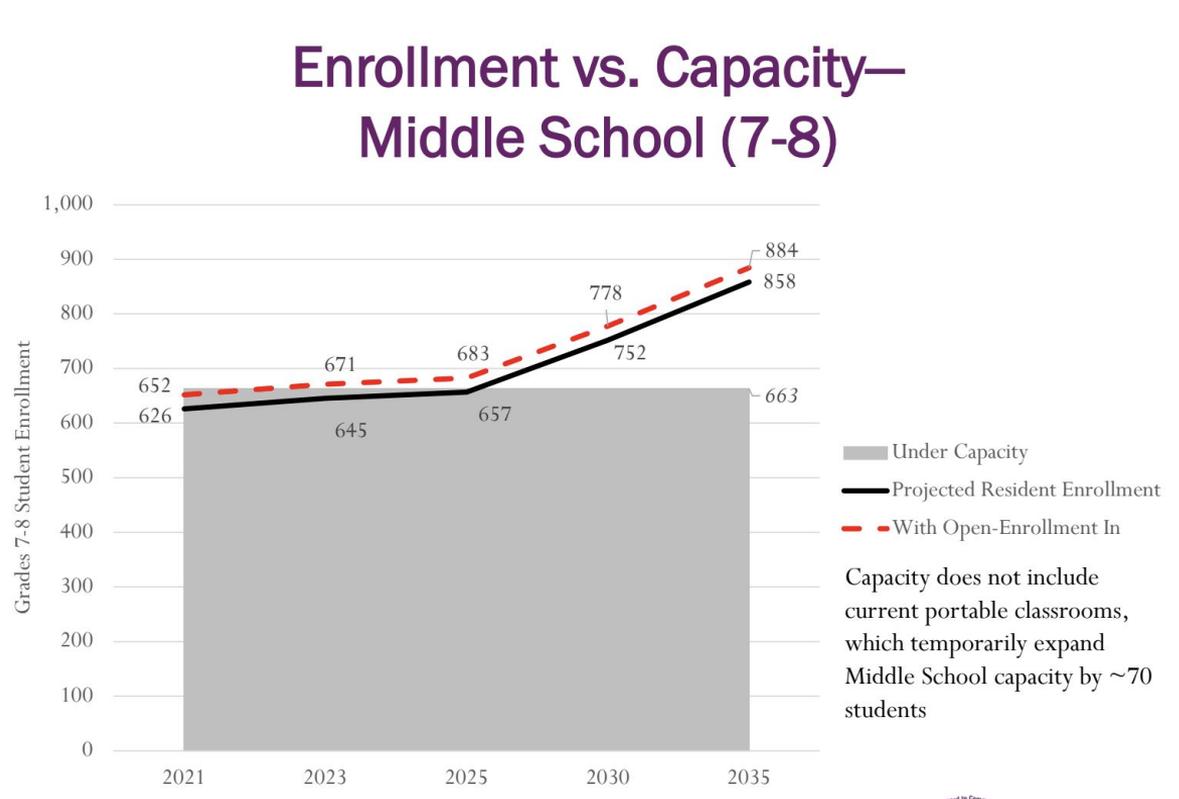
1 Does not include anticipated classroom expansion that would increase Intermediate School's functional capacity to ~900 and maximum capacity to ~1000.

2 Assumes 70% classroom utilization and does not include current portable classrooms, which may expand Middle School capacity by ~70.

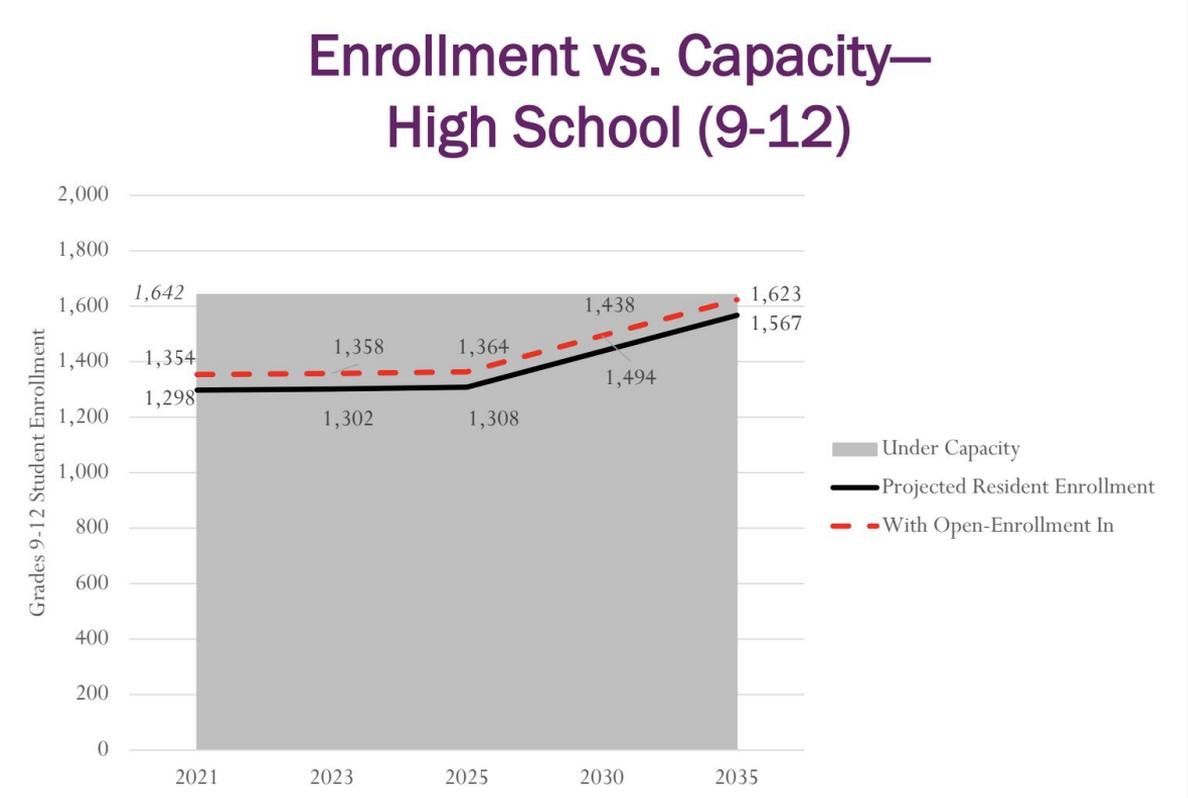
Grade 5-6 Enrollment Projections



Grade 7-8 Enrollment Projections



Grade 9-12 Enrollment Projections



Relation to School Facility Needs

- New housing plus accelerating turnover in neighborhoods like Savannah Village and Southbridge may increase stress at Arboretum Elementary in the next 3-4 years.
- Smaller projects that would increase capacity at Heritage and/or Middle School could defer new facility needs for a couple of years, but any such consideration should be made in a long-range planning context.
- Need for significant capacity expansions at middle and elementary school levels seems apparent between 2025 and 2029.
- A successful November 2022 referendum could bring new building capacity on-line when projected enrollment exceeds capacity.



Facilities Planning Needs



Prepare for enrollment
growth



Modernize learning
environments



Address district-wide
capital maintenance

Board Established Facilities Planning Guiding Principles

To deliver on the Waunakee Community School District mission, the District's long-range master planning should:

- Plan for continued long-range **enrollment growth**
- Continue the District's **long-range approach** to facilities planning
- **Create student focused, flexible, future-ready learning environments**
- **Support a goal of more equitable facilities across the district**
- Address **capital maintenance** needs
- **Deliver value** for District taxpayers
- Reflect **community values**



Modernizing our Learning Environments

- Collaboration space
- Small group instruction
- Flexible, adaptable learning environments
- Facilities help support interdisciplinary and/or school-to-work programming
- Spaces are more accessible and equitable for all learners



Where did we leave off March 2020?

2020 Heritage Options Presented

Option 1

- Renovation
- Board eliminated option



Option 2

- Renovation / addition
- Board eliminated option



2020 Heritage Options Presented

Option 3

- Renovation / large addition, and creation of green space



Option 4

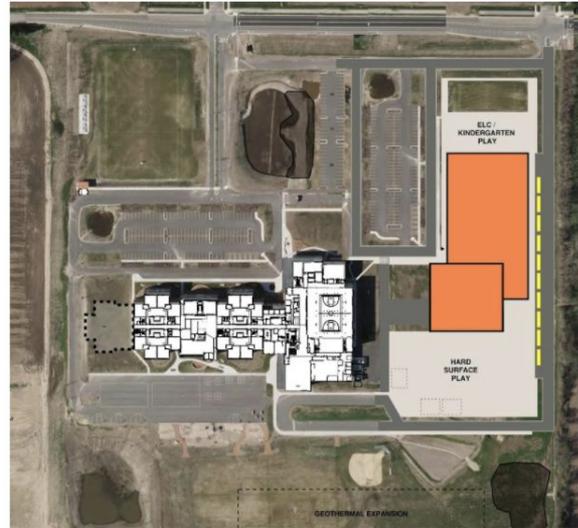
- Reconstruct Heritage on original site



2020 Heritage Options Presented

Option 5

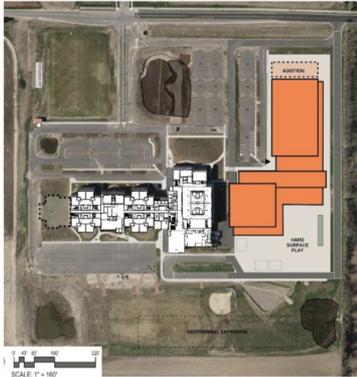
- Reconstruction of Heritage on the Intermediate School site



2020 Middle School Options Presented

Option 1

- Intermediate site
- New 800 students school with ability to expand to 1,000



eua
VOEGL
CORPORATION
"Better people = better buildings"

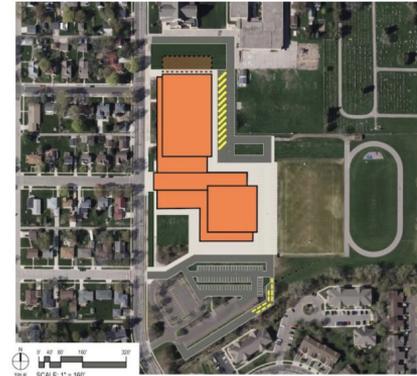
Option 2

- Intermediate site
- New 1,000 student school
- Board eliminated option



Option 3

- New 800 students school with ability to expand to 1,000
- Located at current Heritage site

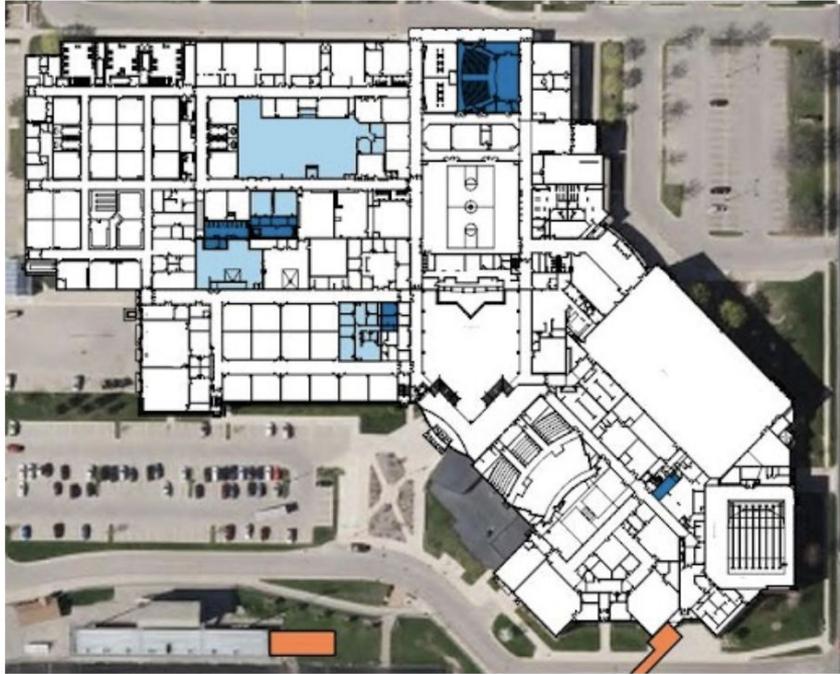


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*Option 1 no longer being considered.

*Option 4 is the construction of a Middle School at a new yet to be determined site.

2020 High School Options Presented

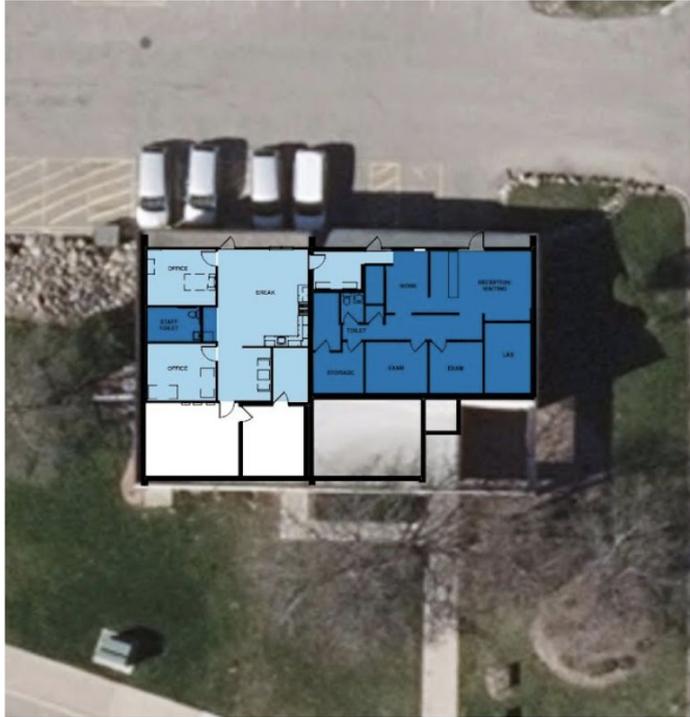


SCOPE

- ORIGINAL AUDITORIUM
- WELDING LAB
- SHOP & LABS
- NEW FURNITURE
- LARGE GROUP INSTRUCTION / TRAINING
- FAMILY CHANGING / TOILET ROOM

	0 sf	NEW CONSTRUCTION
	8000 sf	HEAVY RENOVATION
	16,500sf	LIGHT RENOVATION

2020 High School Options Presented



SCOPE

- CREATE CLINIC ON LOWER LEVEL

	0 sf	NEW CONSTRUCTION
	1,250 sf	HEAVY RENOVATION
	1,250 sf	LIGHT RENOVATION

Long Range Facilities Planning

Phase 1 (Complete) ➔ Phase 2 (In-Process) ➔ Phase 3 (Future)

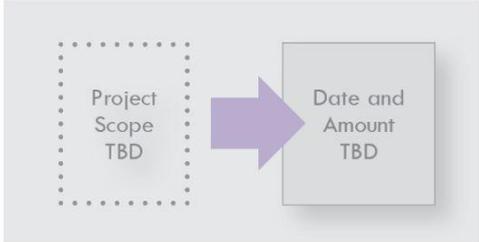
PHASE 1



PHASE 2



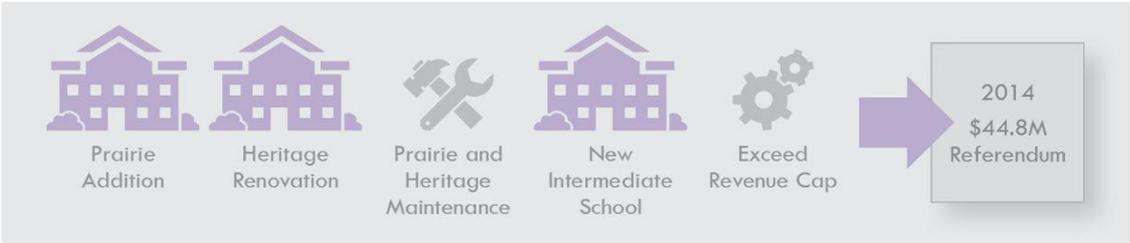
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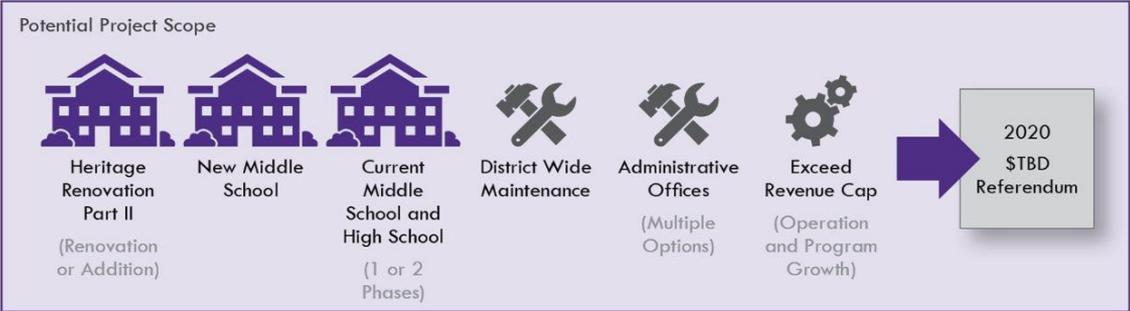
Long Range Facilities Planning

Phase 1 (Complete) ➔ **Phase 2 (In-Process)** ➔ Phase 3 (Future)

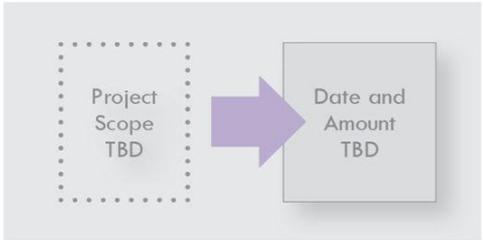
PHASE 1



PHASE 2

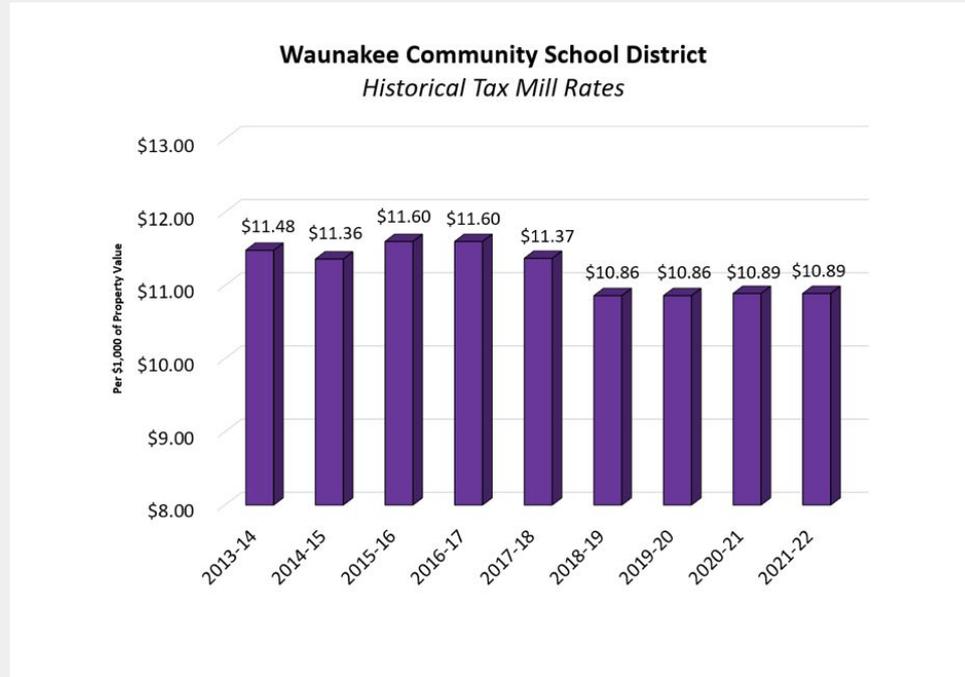


PHASE 3



Financial Planning

The School Board has a goal for a consistent property tax rate across school years.



Financial Planning

- How is a consistent tax rate accomplished?
- The School Board is able to utilize a combination of financial strategies to accomplish a consistent tax rate. Examples include:
 - Paying down existing debt early, which results in interest cost savings for taxpayers.
 - Taking advantage of low interest rates when issuing new debt.
 - Issuing new debt across multiple fiscal years which spreads out the cost over a longer period of time.
- A consistent tax rate may still result in school property tax levy changes over time because of property tax shifts between municipalities, within municipalities, property value changes, and school levy credit changes.

Waunakee Community School District
EXAMPLE NOVEMBER, 2022 REFERENDA FINANCING PLAN

\$150,000,000 FOR FACILITIES

LEVY YEAR	YEAR DUE	FUND 39 EXISTING DEBT SERVICE	EXAMPLE FUND 39 IMPACT OF 2022, 2023 DEFEASANCE	FUND 30 EXISTING DEBT SERVICE	\$400,000 G.O. SCHOOL BUILDING BONDS Dated July 1, 2023		\$400,000 G.O. SCHOOL BUILDING BONDS Dated July 1, 2024		\$400,000 G.O. SCHOOL BUILDING BONDS Dated July 1, 2025		\$300,000 G.O. SCHOOL BUILDING BONDS Dated December 1, 2026		FUND 39 EXISTING PLUS NEW	IMPACT OF EXISTING NON-RECURRING OPERATING OVERRIDE (lines after 2024-25)	NEW RECURRING OPERATING OVERRIDE	STATE AID IMPACT OVER BASE YEAR (FY 2021-22) (A)	COMBINED TOTAL (Factoring Aid)	COMBINED MILL RATE (B)	YEAR DUE	
					(First Interest 4/1/24)		(First Interest 4/1/25)		(First Interest 4/1/26)		(First Interest 4/1/27)									
					PRINCIPAL (4/1)	INTEREST (4/1 & 10/1) EST. AVG+ 3.75%	PRINCIPAL (4/1)	INTEREST (4/1 & 10/1) EST. AVG+ 3.75%	PRINCIPAL (4/1)	INTEREST (4/1 & 10/1) EST. AVG+ 3.75%	PRINCIPAL (4/1)	INTEREST (4/1 & 10/1) EST. AVG+ 3.75%								
2021	2022	\$7,203,088	\$4,813,912	\$12,017,000									\$12,017,000			\$0	\$12,017,000		\$3.50	2022
2022	2023	\$7,281,020	\$6,315,688	\$13,596,708									\$12,596,708		\$1,200,000	(\$2,400,000)	\$12,777,710		\$3.50	2023
2023	2024	\$7,359,740	(\$2,480,894)	\$4,868,855	\$3,580,000	\$1,807,875							\$10,256,730		\$2,400,000	\$120,980	\$12,777,710		\$3.50	2024
2024	2025	\$7,359,653	(\$2,493,625)	\$4,865,990		\$1,365,750	\$1,550,000	\$1,845,938					\$9,627,678		\$3,600,000	(\$86,779)	\$13,140,899		\$3.50	2025
2025	2026	\$7,360,515	(\$2,489,225)	\$4,871,290		\$1,365,750		\$1,441,875	\$1,375,000	\$1,849,219			\$10,903,134	(\$2,127,502)	\$4,800,000	(\$48,257)	\$13,527,375		\$3.50	2026
2026	2027	\$7,488,265	(\$2,620,050)	\$4,868,315		\$1,365,750		\$1,441,875		\$1,448,438	\$50,000	\$836,563	\$10,110,940	(\$2,127,502)	\$6,000,000	(\$23,731)	\$13,959,707		\$3.50	2027
2027	2028	\$7,489,465	(\$2,619,075)	\$4,870,390		\$1,365,750		\$1,441,875		\$1,448,438	\$225,000	\$1,118,006	\$10,470,359	(\$2,127,502)	\$6,000,000	\$14,721	\$14,357,578		\$3.50	2028
2028	2029	\$5,036,067	(\$168,025)	\$4,868,042		\$1,365,750		\$1,441,875		\$1,448,438	\$625,000	\$1,102,969	\$10,852,073	(\$2,127,502)	\$6,000,000	\$79,709	\$14,804,280		\$3.50	2029
2029	2030	\$5,040,947	(\$172,763)	\$4,868,184		\$1,365,750		\$1,441,875		\$1,448,438	\$1,050,000	\$1,071,563	\$11,245,809	(\$2,127,502)	\$6,000,000	\$107,873	\$15,226,180		\$3.50	2030
2030	2031	\$2,599,463		\$2,599,463	\$580,000	\$1,354,875	\$1,354,875	\$1,406,813	\$1,000,000	\$1,429,688	\$400,000	\$1,044,375	\$11,685,213	(\$2,127,502)	\$6,000,000	\$136,380	\$15,694,091		\$3.50	2031
2031	2032	\$2,601,975		\$2,601,975	\$956,000	\$1,332,844	\$1,945,000	\$1,335,281	\$1,845,000	\$1,380,094	\$250,000	\$1,032,188	\$12,117,381	(\$2,127,502)	\$6,000,000	\$167,982	\$16,157,861		\$3.50	2032
2032	2033	\$2,598,406		\$2,598,406	\$625,000	\$1,309,969	\$2,015,000	\$1,261,031	\$1,705,000	\$1,317,281	\$750,000	\$1,013,438	\$12,595,125	(\$2,127,502)	\$6,000,000	\$199,036	\$16,666,659		\$3.50	2033
2033	2034	\$2,597,319		\$2,597,319	\$650,000	\$1,286,063	\$2,095,000	\$1,183,969	\$1,770,000	\$1,252,125	\$950,000	\$981,563	\$12,766,038	(\$2,127,502)	\$6,000,000	\$233,479	\$16,872,014		\$3.44	2034
2034	2035	\$660,563		\$660,563	\$2,645,000	\$1,224,281	\$2,180,000	\$1,103,813	\$1,835,000	\$1,184,531	\$985,000	\$945,281	\$12,763,469	(\$2,127,502)	\$6,000,000	\$246,037	\$16,882,004		\$3.44	2035
2035	2036				\$3,420,000	\$1,110,563	\$2,260,000	\$1,020,563	\$1,910,000	\$1,114,313	\$1,020,000	\$907,688	\$12,763,125	(\$2,127,502)	\$6,000,000	\$246,575	\$16,882,198		\$3.44	2036
2036	2037				\$3,550,000	\$979,875	\$2,345,000	\$934,219	\$1,980,000	\$1,041,375	\$1,065,000	\$868,594	\$12,764,063	(\$2,127,502)	\$6,000,000	\$247,079	\$16,883,639		\$3.45	2037
2037	2038				\$3,690,000	\$844,125	\$2,435,000	\$844,594	\$2,055,000	\$965,719	\$1,100,000	\$828,000	\$12,762,438	(\$2,127,502)	\$6,000,000	\$247,578	\$16,882,514		\$3.44	2038
2038	2039				\$3,830,000	\$703,125	\$2,525,000	\$751,594	\$2,135,000	\$887,156	\$1,145,000	\$785,906	\$12,762,781	(\$2,127,502)	\$6,000,000	\$247,911	\$16,883,191		\$3.44	2039
2039	2040				\$3,975,000	\$566,781	\$2,625,000	\$655,031	\$2,215,000	\$805,594	\$1,190,000	\$742,135	\$12,764,531	(\$2,127,502)	\$6,000,000	\$248,402	\$16,885,431		\$3.45	2040
2040	2041				\$4,125,000	\$404,906	\$2,725,000	\$554,719	\$2,300,000	\$720,938	\$1,235,000	\$696,656	\$12,762,219	(\$2,127,502)	\$6,000,000	\$249,011	\$16,883,728		\$3.45	2041
2041	2042				\$4,285,000	\$247,219	\$2,830,000	\$450,563	\$2,385,000	\$633,094	\$1,285,000	\$649,406	\$12,765,281	(\$2,127,502)	\$6,000,000	\$249,348	\$16,887,128		\$3.45	2042
2042	2043				\$4,450,000	\$83,438	\$2,935,000	\$342,469	\$2,480,000	\$541,875	\$1,330,000	\$600,375	\$12,763,156	(\$2,127,502)	\$6,000,000	\$250,089	\$16,885,743		\$3.45	2043
2043	2044						\$7,665,000	\$143,719	\$2,575,000	\$447,094	\$1,385,000	\$549,469	\$12,765,281	(\$2,127,502)	\$6,000,000	\$250,479	\$16,888,258		\$3.45	2044
2044	2045							\$1,635,000	\$199,406	\$1,430,000	\$496,688	\$12,761,094	(\$2,127,502)	\$6,000,000	\$251,193	\$16,884,785		\$3.45	2045	
2045	2046										\$12,530,000	\$234,938	\$12,764,938	(\$2,127,501)	\$6,000,000	\$251,478	\$16,888,914		\$3.45	2046
		\$72,676,594	(\$1,924,094)	\$70,752,500	\$400,000,000	\$21,440,438	\$400,000,000	\$21,043,688	\$400,000,000	\$21,563,250	\$300,000,000	\$16,606,688	\$301,406,562			\$1,486,574	\$390,215,595		IMPACT \$0.00	

(A) State aid impact based on prior fiscal year incremental expenditure over base year (FY 2021-22) at the following aid levels (2021-22 October certification):
 Tertiary Aid Percentage..... -7.01% NOTE: Estimated, one-time aid benefit of \$2.4 ml expected in 2022-23.
 (B) Mill rate based on 2021 Equalized Valuation (TID-OUT) of \$3,437,359,073 with annual growth as follows:
 2022-23: 3.00%
 2034 and thereafter: 0.00%

NOTES: Example financing scenarios could be impacted by other variables, such as significant market or statutory changes, which may necessitate adjustments to the financing plans.
 Mill rate may remain unchanged or decline in upcoming years if referendum not approved.
 Scenarios where a greater portion of the overall debt is issued in advance of the expenditures of the proceeds will likely result in higher fees earned by the investment manager of the debt proceeds.

***The District's financial advisor is PMA; PMA has been sharing draft referendum financial plans with the School Board.**
***Additional draft financial plans will be created as the referendum planning process moves forward throughout 2022.**



Preliminary Timeline

Preliminary November 2022 Referendum Schedule															
School Year	2021-22											2022-23			
Calendar Year	2021			2022											
Key Board Decision				Winter			Spring			Summer			Fall		
	O	N	D	J	F	M	A	M	J	J	A	S	O	N	
POTENTIAL NOVEMBER 2022 REFERENDUM															
Confirm Facility Planning Priorities/Goals	Work/action														
Option and Budget Development				Work/action	Work/action									36	
Board Workshop (Flexible)	★	Work/action		Work/action	Work/action	Work/action		Work/action	Work/action	Work/action					
Staff & Community Information Sessions				Work/action	Work/action	Work/action		Work/action					Work/action		
Staff & Community-Wide Survey				Planning	Planning	Work/action	Work/action	Work/action							
Refine and Finalize Project Scope / Budget								Work/action	Work/action	Work/action	Work/action				
Adopt Resolution 70 days prior (<i>Deadline Aug. 30, 2022</i>)											Critical referendum dates				
Referendum Communications & Outreach Effort											Work/action	Work/action	Work/action	Work/action	
Early & Absentee Voting												Critical referendum dates	Critical referendum dates	Critical referendum dates	
Potential Referendum (<i>November 8, 2022</i>)														Critical referendum dates	

Planning
Work/action
Critical referendum dates

Critical Board Milestones

January 2022: Enrollment projections

February 2022: Community survey development

March 2022: Community survey launched

May 2022: Survey results

June 2022: Referendum plan development

July 2022: Final scope

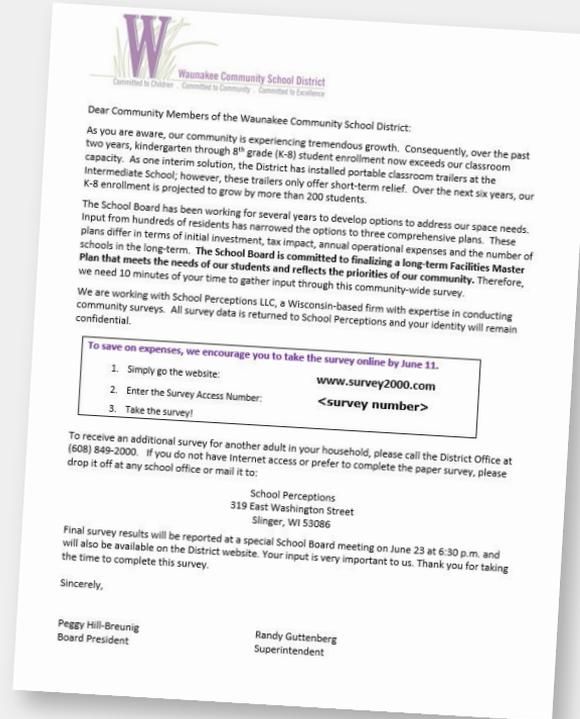
August 2022: Authorization

October 2022: Annual Meeting



Engaging Waunakee Area Stakeholders

- Community Survey
- Staff meetings
- Community meetings
- Targeted stakeholder outreach
- Key communicators
- Traditional / social media



Engaging Stakeholders - Community Survey

The School Board will be seeking community feedback on the following topics through a community survey (March/April timeframe).

- Timing and location of the new middle school construction
- Renovate /expand Heritage Elementary **OR** construct a new Heritage Elementary
- Community support for a capital and operational referendum question with a goal of a consistent tax rate across years



Where can I learn more?

- Website: <https://www.waunakee.k12.wi.us/district/referendum-2022.cfm>
- Email: wcsd_fall2022referendum@waunakee.k12.wi.us



Comments and Questions

- Procedures for Q and A
- Follow the ground rules for Q and A
- Individuals watching online via Zoom Webinar - Q and A Chat or raise your hand to be brought into the Zoom Webinar as a Panelist
- Time limit: 3 minutes

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Next Steps and Thank You!

- Thank you for your input tonight.
- Continued dialog on this topic with Community
 - Options and Costs presented to BOE in February
 - Community Meeting (early March)
 - Community Survey (March/April)
- Next Community Engagement Meeting -- tentatively scheduled for Monday, March 28, 2022

