



Baird School Analytics Sample School Finance Data and Comparables

School District of: Waterford UHS

Your Baird Contacts:

SBS Contact

Banker Contact

Todd Hajewski

Kevin Mullen

thajewski@rwbaird.com

kmullen@rwbaird.com

414-765-1974

414-765-8709

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Comparable School Districts



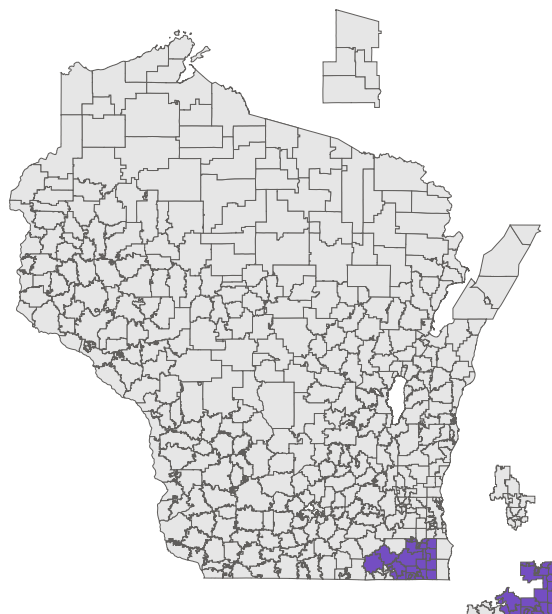
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Baird's Commitment to Your District!

- A collaborative relationship with an in-state team of experts who understand your needs
- A comprehensive fixed income platform providing advisory, investment banking and underwriting services
- Real-time market information from our nationally recognized underwriting desk
- Advanced guidance and solutions to benefit new and seasoned business officials alike
- Conferences and workshops held throughout the state on the topics that impact the bottom line
- A financial services firm founded in Wisconsin and committed to your success

Conference 

Southern Lakes 



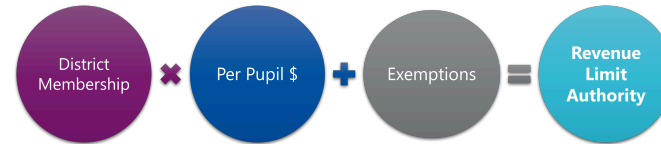
Districts Being Compared:

- Brighton #1
- Bristol #1
- Burlington Area
- Central/Westosha UHS
- Delavan-Darien
- Dover #1
- Elkhorn Area
- Geneva J4
- Genoa City J2
- Lake Geneva J1
- Lake Geneva-Genoa UHS
- Linn J4
- North Cape
- Norway J7
- Paris J1
- Randall J1
- Raymond #14
- Salem

No. 1 FOR WISCONSIN SCHOOLS AS LEAD MANAGING UNDERWRITER AND FINANCIAL ADVISOR BY NUMBER OF ISSUES¹

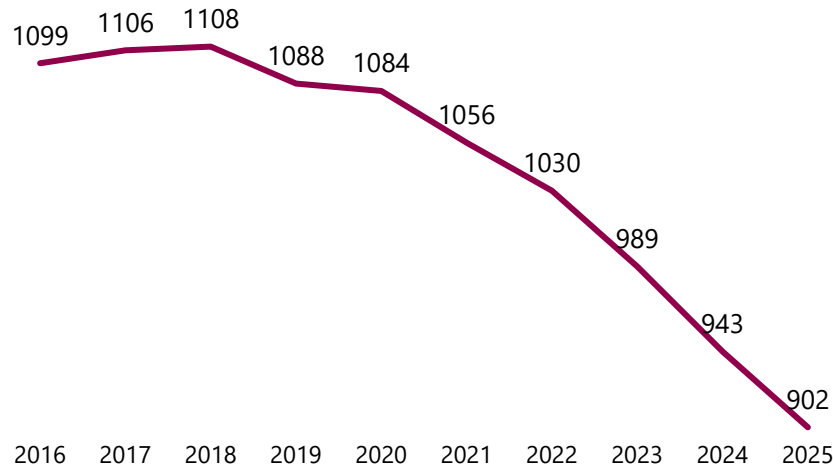
¹Source: S&P Muni Deal Query as of December 31, 2024. Does not include Private Placements or Notes.

Waterford UHS

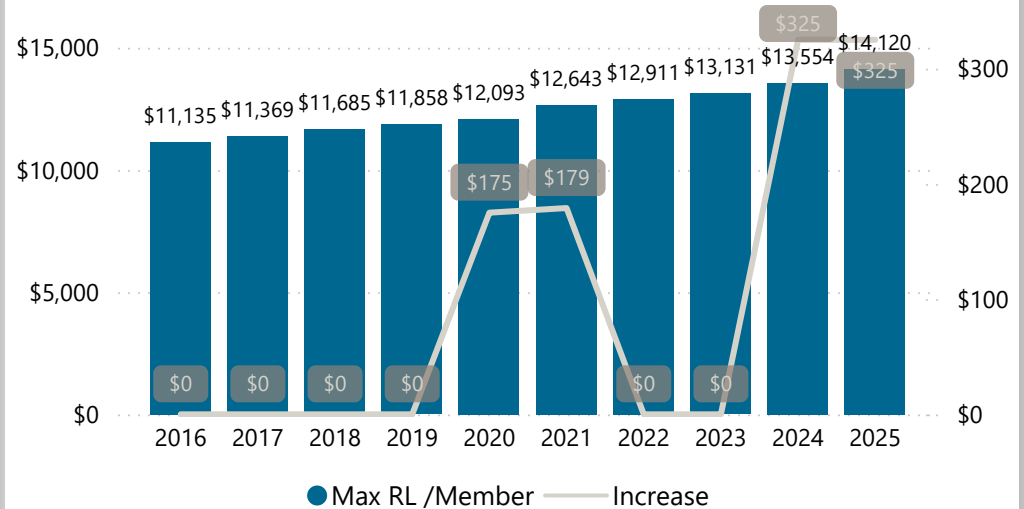


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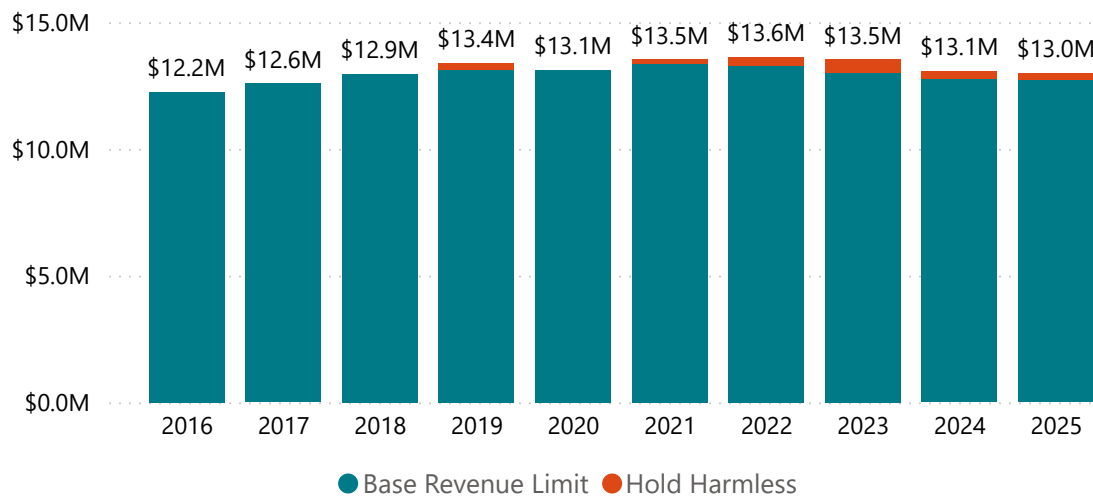
Revenue Limit Average FTE



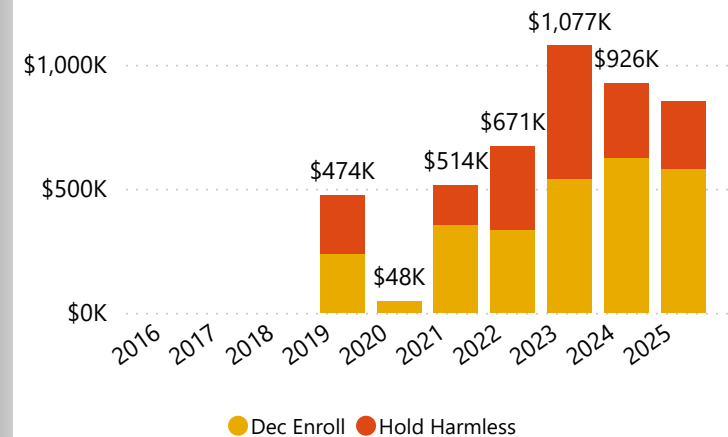
Maximum Revenue Limit / Member



Revenue Limit with No Exemptions



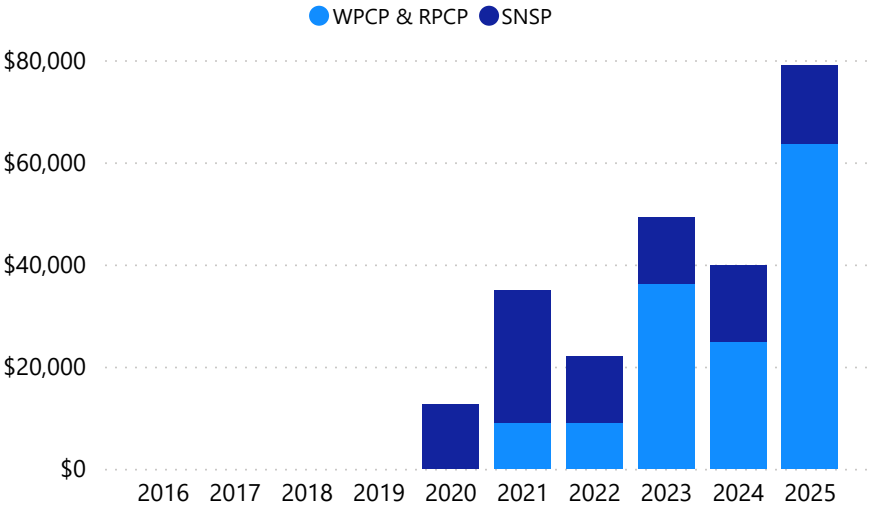
Hold Harmless + Declining Enrollment Exemptions



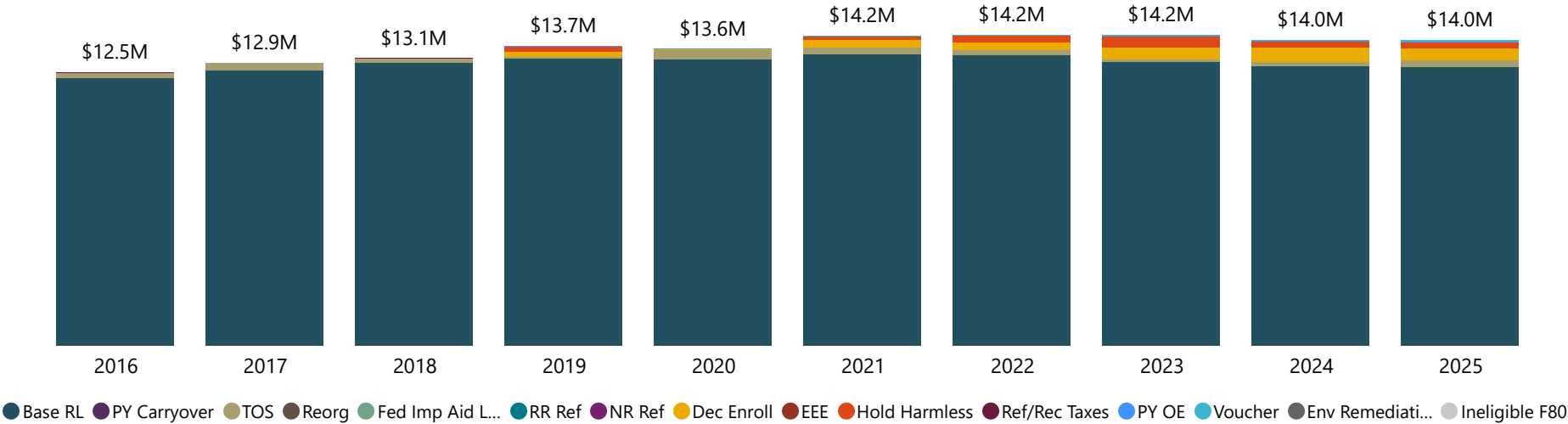
Recurring / Non-Recurring Referendum Authority



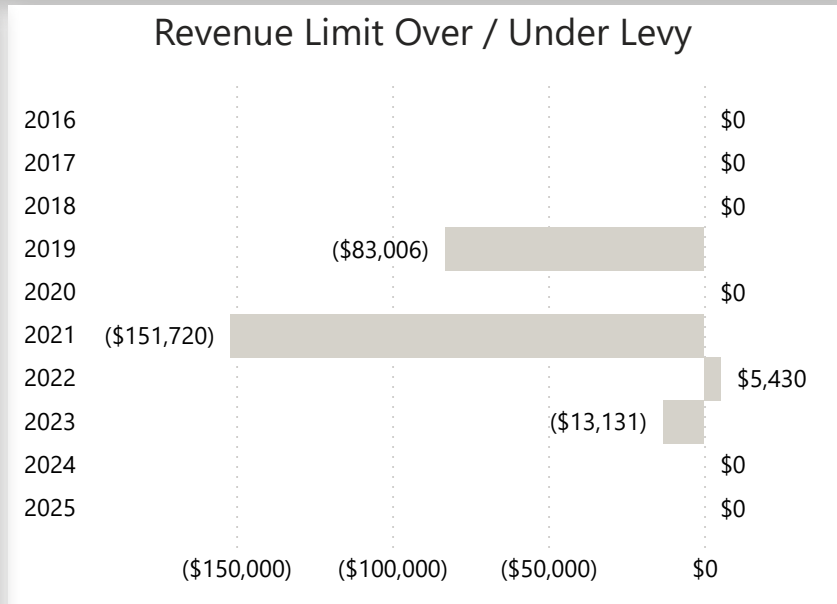
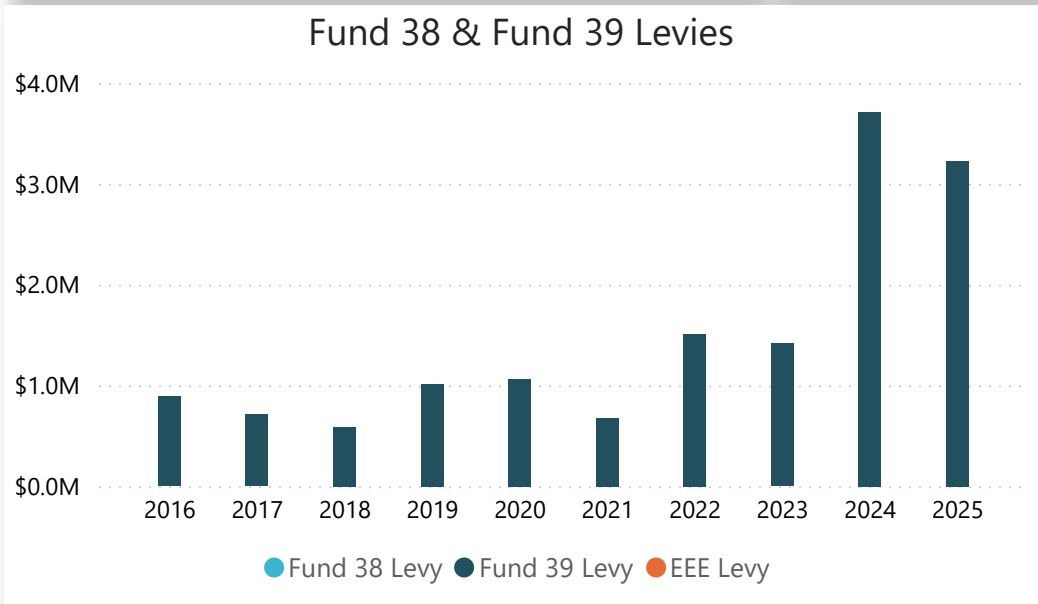
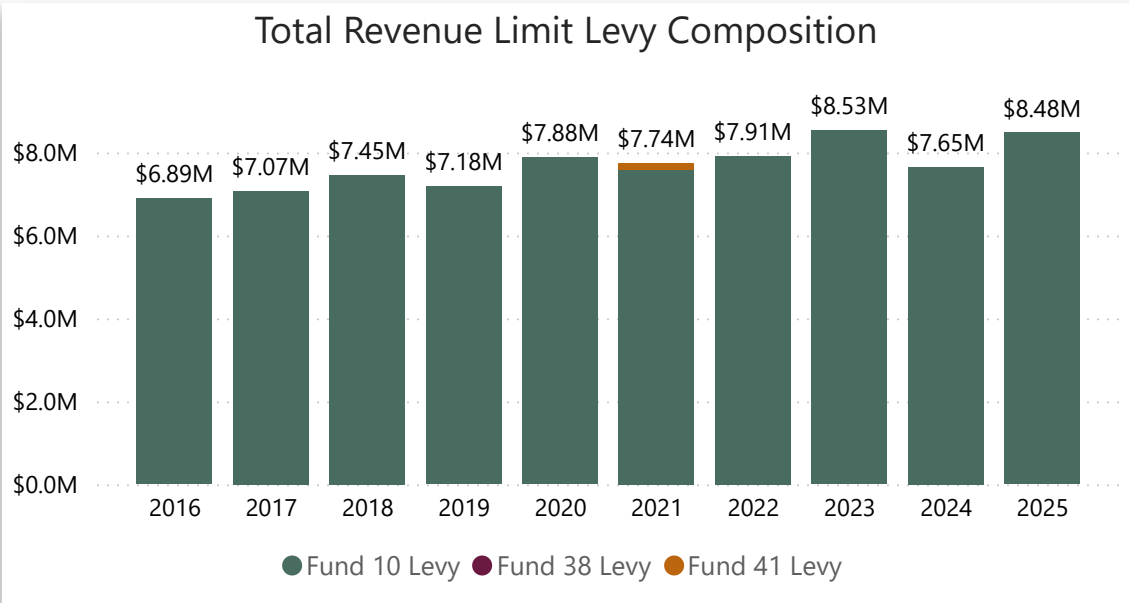
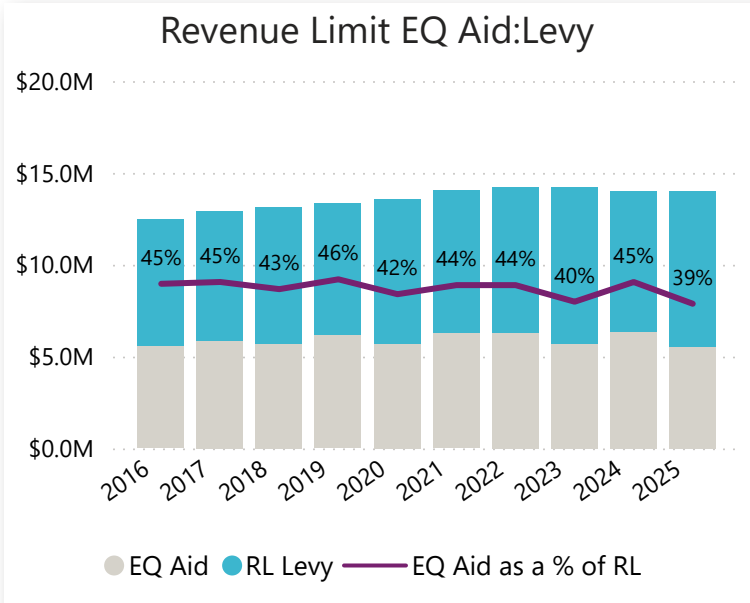
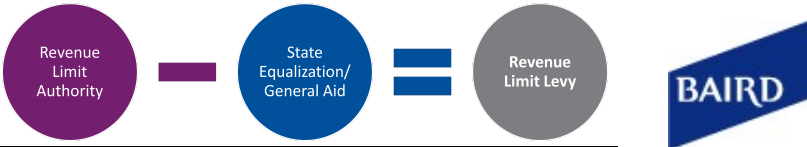
Voucher Exemption



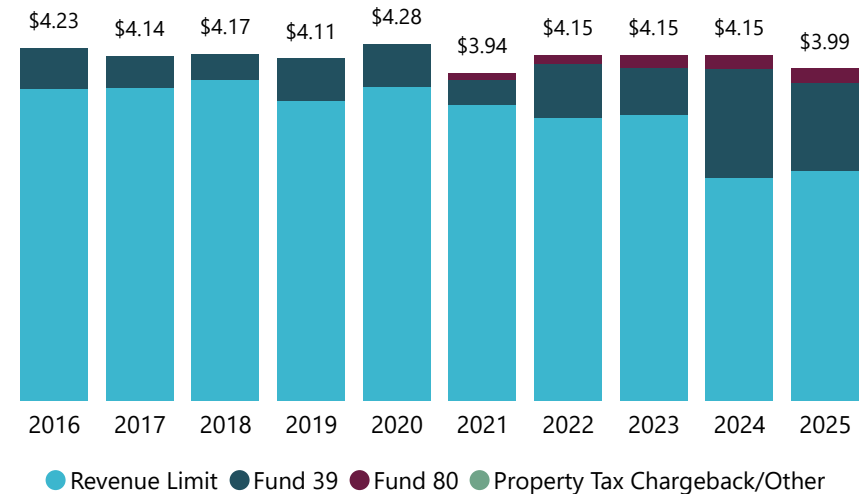
Revenue Limit with All Exemptions



Waterford UHS



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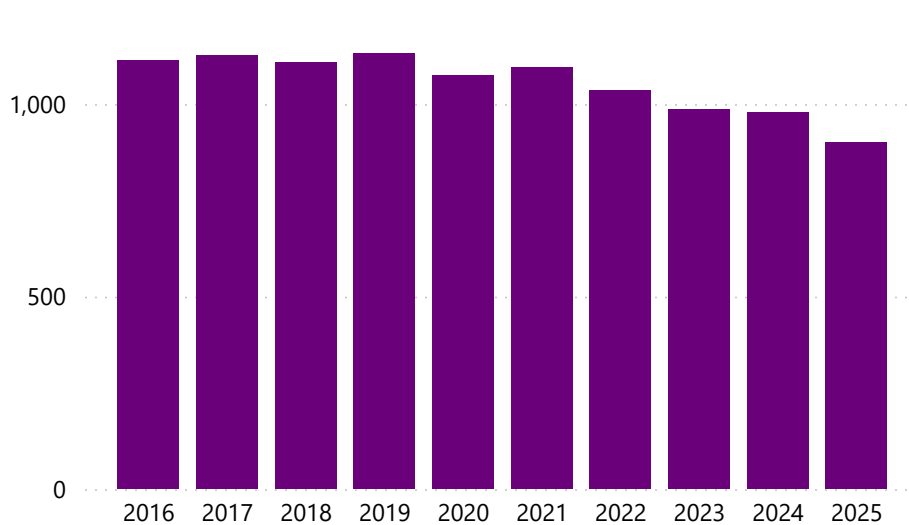


Waterford UHS

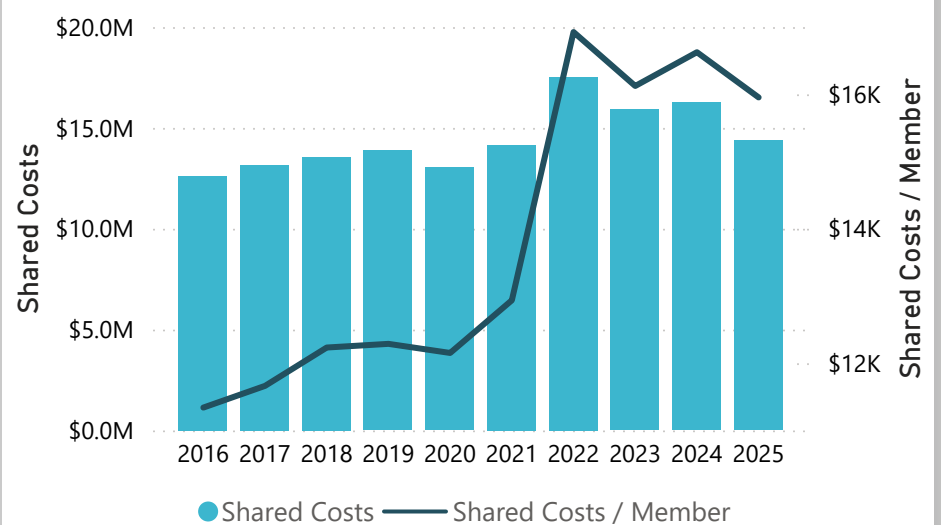
Page 6



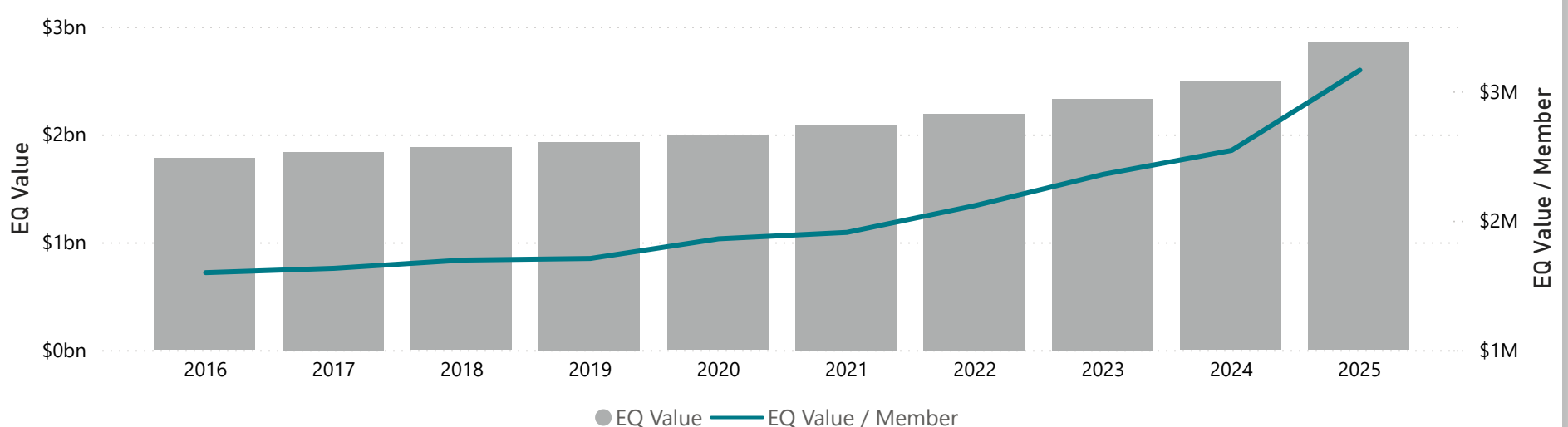
EQ Aid Membership



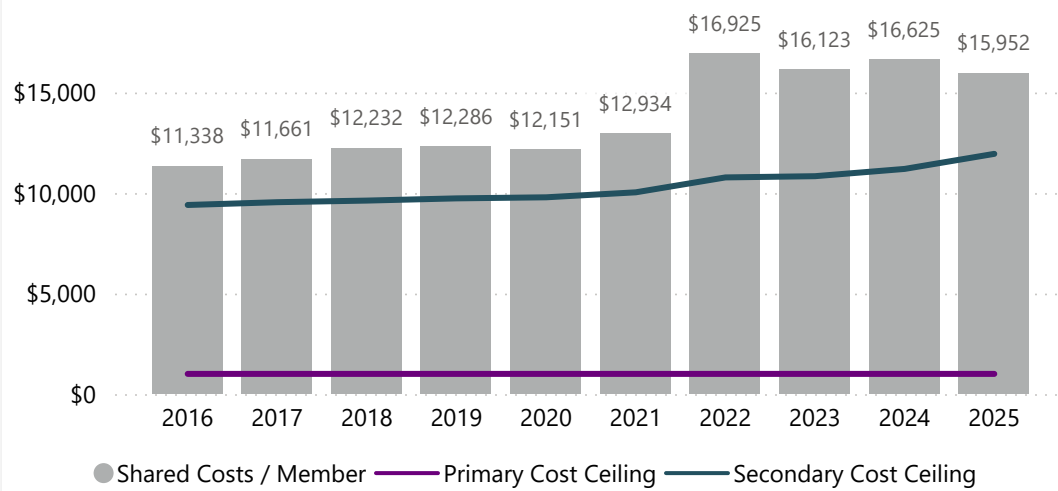
Shared Costs & Shared Costs / Member



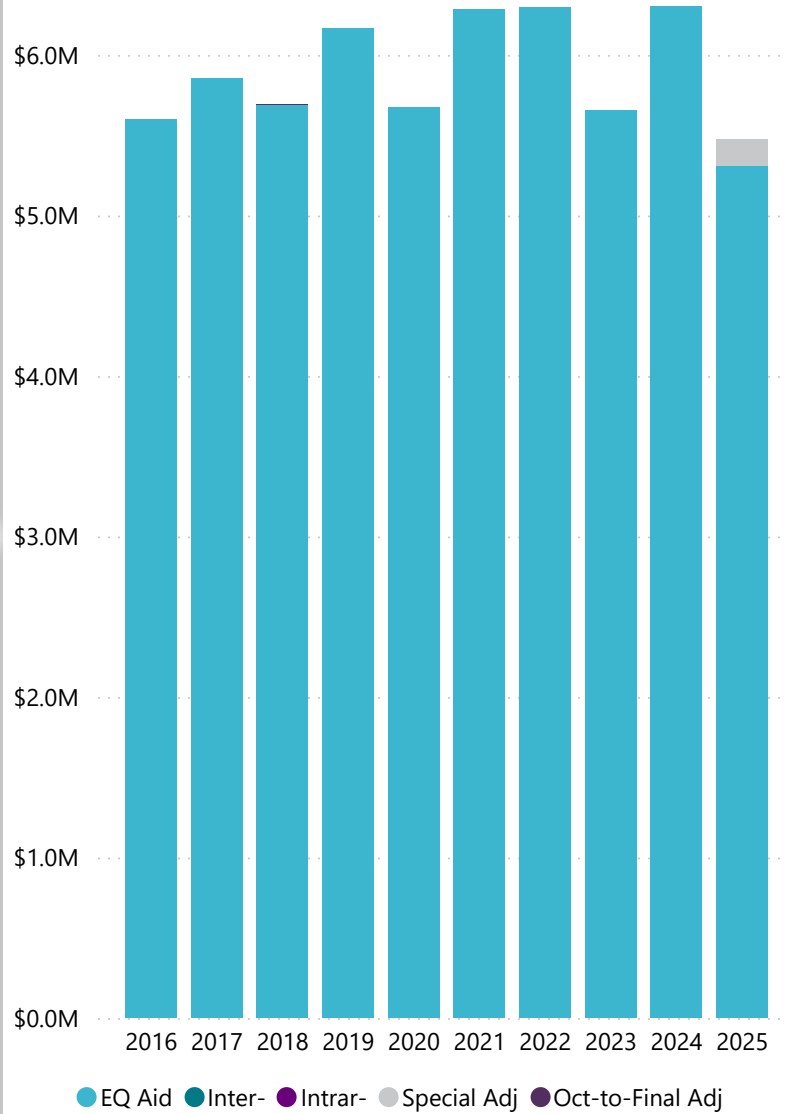
EQ Value (TID Out) & EQ Value / Member



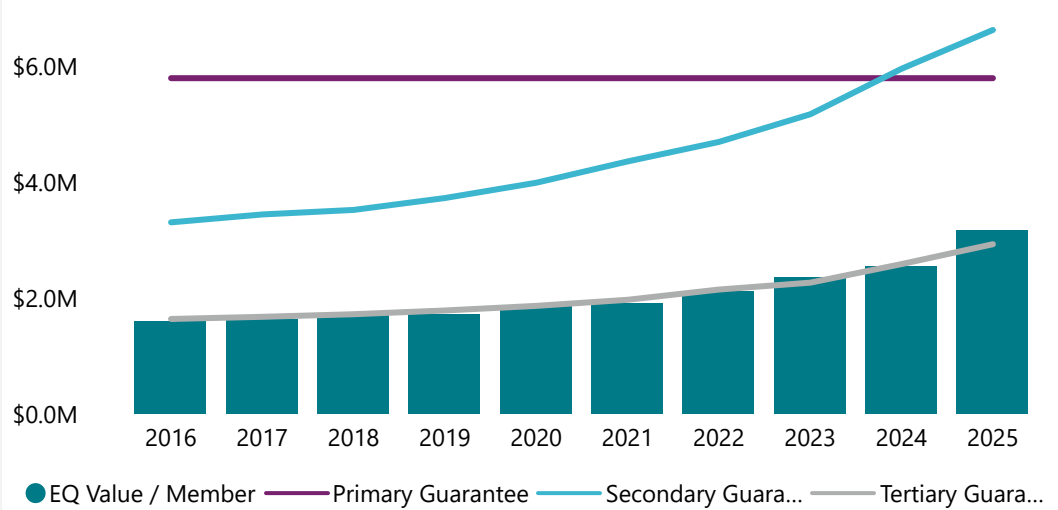
Shared Costs / Member vs. State Cost Ceilings

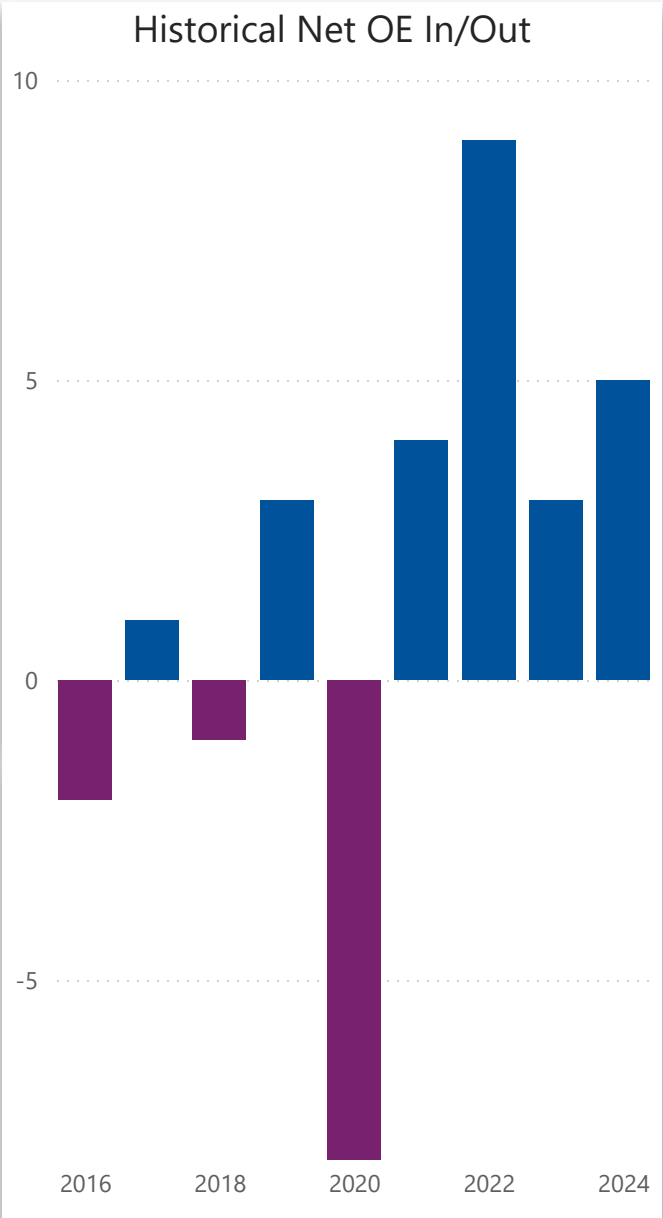
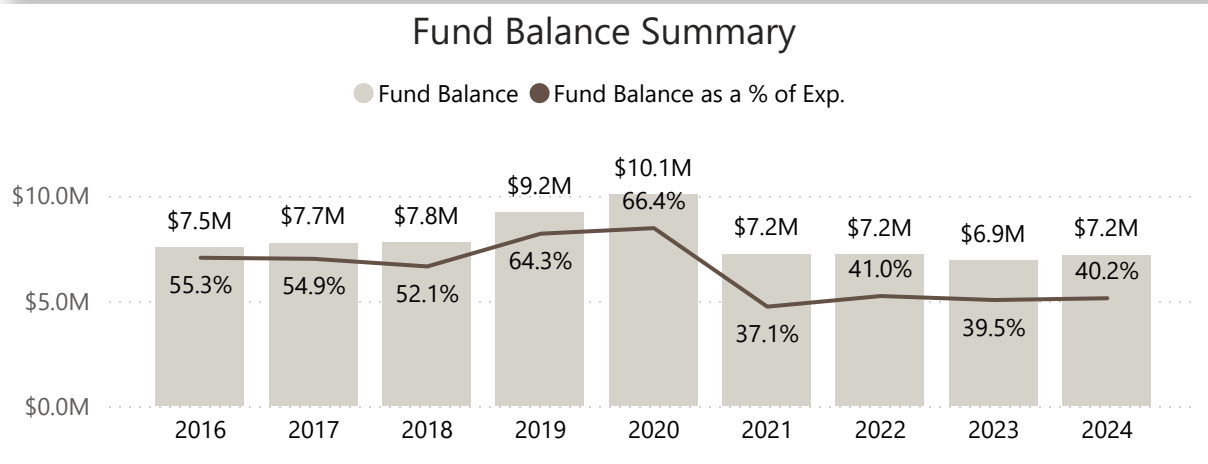
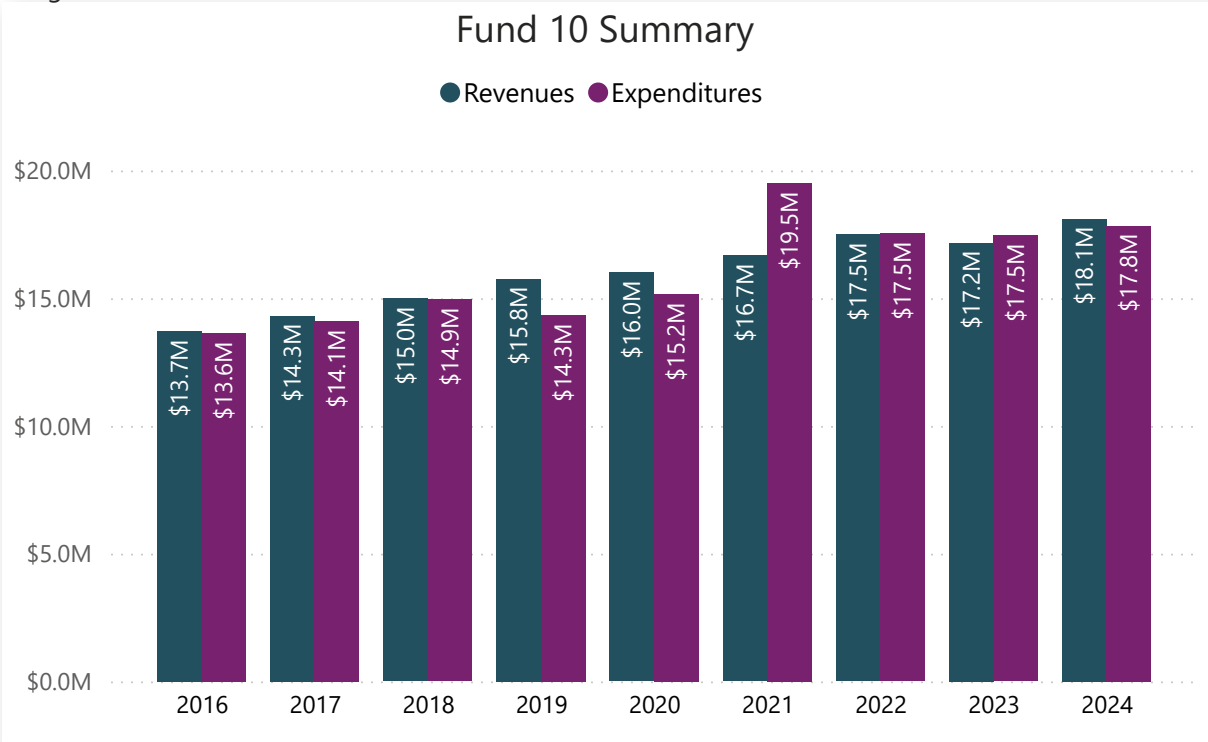


Oct 15 EQ Aid Certification

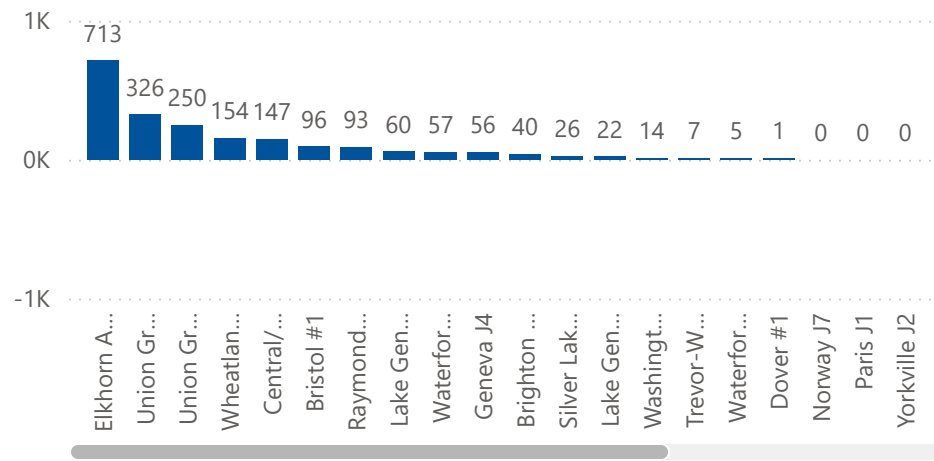


Equalized Value / Member vs. State Guarantees

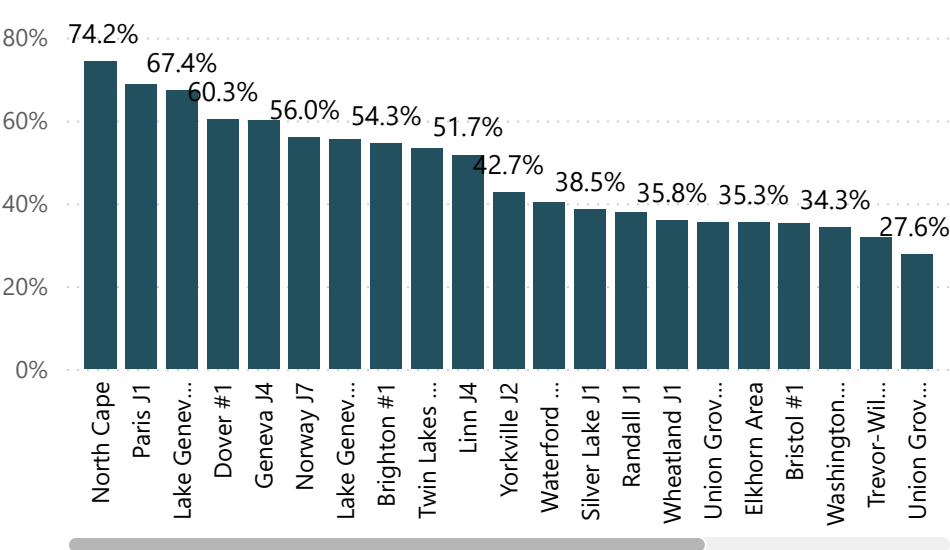




2023-24 Net OE In/Out



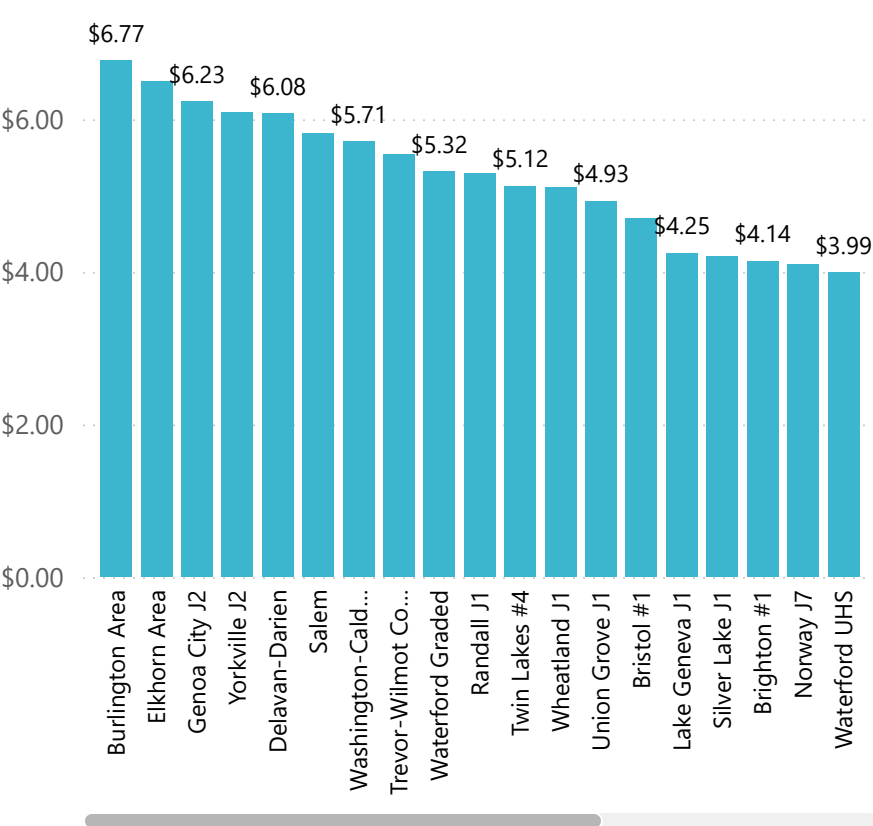
2023-24 Fund Balance as % of Expenditures



2024-25 Mill Rate State Averages:

All Districts: \$7.05 UHS Districts: \$2.35
K-12 Districts: \$7.09 K-8 Districts: \$4.03

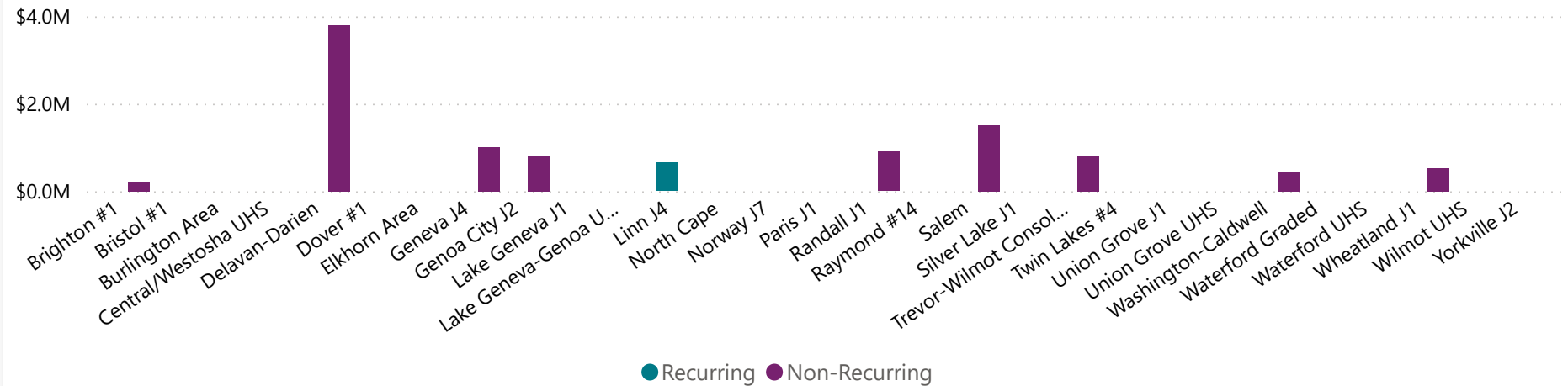
2024-25 Mill Rate Comparison



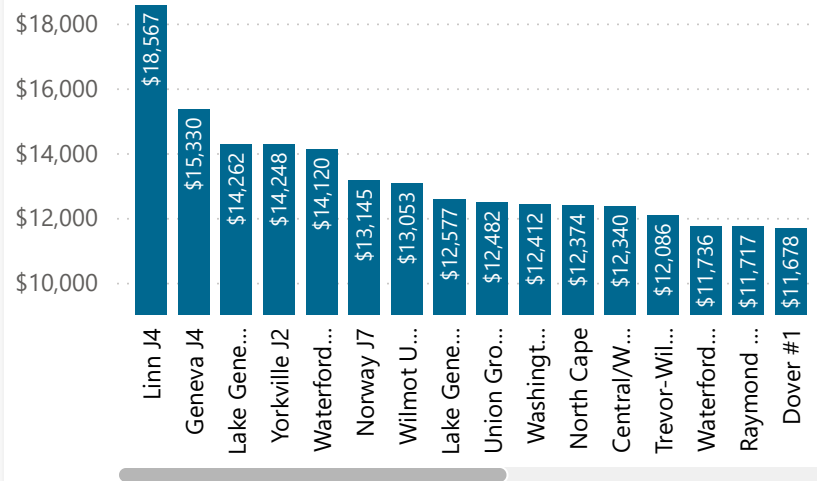
Southern Lakes



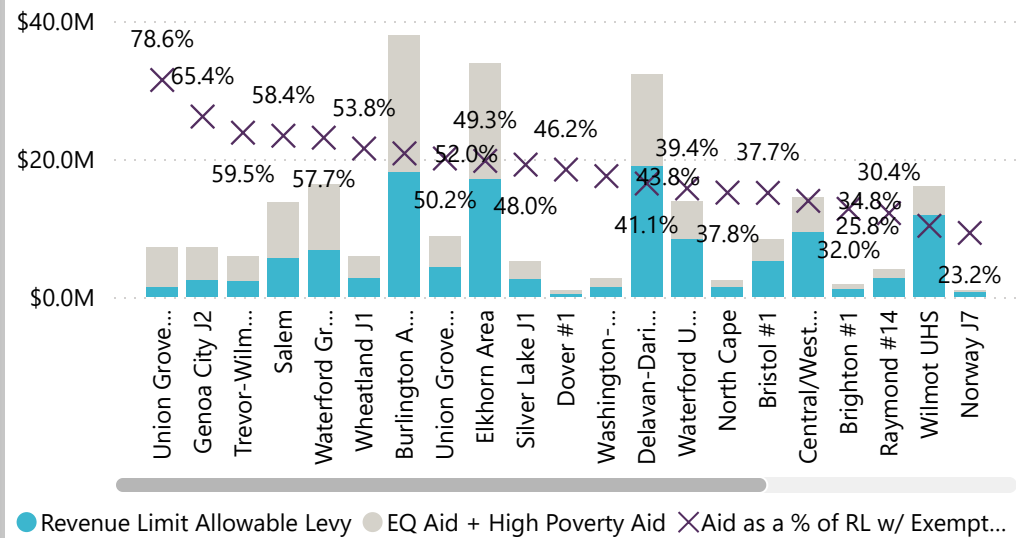
Recent Recurring & Non-Recurring Referenda



2024-25 Maximum Revenue Limit Revenue / Member



2024-25 Revenue Limit EQ Aid: Levy



School Business Solutions

Products & Services Guide

The logo for BAIRD, featuring the word "BAIRD" in a blue, sans-serif font, positioned within a white, parallelogram-shaped graphic that is tilted to the right.

At a time when school districts are asked to do more with less, making smart, forward-looking decisions is best for your students and stakeholders. Our suite of school business tools and solutions can help keep your schools on firm financial footing – and thriving.

TOOLS AND SOLUTIONS

BUDGET MODEL	BAIRD VIDEO LIBRARY	SCHOOL ANALYTICS	TRAINING/CONSULTING
Budgeting tools that let you plan proactively	More than 100 interactive school finance videos in an easy-to-grasp format	Sortable, searchable state and district data – right at your fingertips	Training and consulting from Baird's school business experts
<ul style="list-style-type: none">• Comprehensive school finance forecast that serves as a teaching, learning, and communication tool• "What-if" scenarios for school budget, levy, referendum & more• Grab-and-go charts, graphs, and outputs• Budget upload and import module to streamline the budget building process	<ul style="list-style-type: none">• Increase your team's school business knowledge and efficiency• Toolkits for any board, community, lunch-and-learn or team meeting• Ideal for training, continuing education and talent development	<ul style="list-style-type: none">• Up-to-date school statistics to help you make data-driven decisions• Visuals and high-level summaries for board and community presentations• Tools to identify the factors most closely tied to academic performance in your district	<ul style="list-style-type: none">• Training, mentoring and stand-in services, on-site or remote• Auditing, reporting, bank reconciliations and operational referendum• Board and community presentations

Imagine the difference real-time data can make for your district. Contact Baird's School Business Solutions team today at schoolbusinesssolutions@rwbaird.com or 414-298-2324, or visit us at bairdsbs.com.