



To:	Iowa City Community School District Board of Education
From:	Greater Iowa City, Inc. Staff
Date:	July 24, 2026
Re:	Financial Oversight Committee - Initial Application Process and Recommended Nominees

Purpose

This memorandum summarizes the process used to support the initial review of community members who have applied to serve on the Iowa City Community School District Financial Oversight Committee, and presents the Committee's recommended slate of nominees based on rubric scores for Board consideration along with an addendum of all applicants that were considered. The process was designed to support the modified initial selection process established by the Financial Oversight Committee Charter while promoting transparency, consistency, neutrality, and community trust.

Background

The Financial Oversight Committee was established by the Charter of the Board of Education to provide independent, community-informed oversight of the District's financial condition, reporting, internal controls, and long-term sustainability, while enhancing transparency, accountability, and public confidence in the District's financial practices. The Committee serves in an advisory capacity to the Board, with all final authority remaining with the Board of Education.

The Charter, which was updated and amended in May of 2026, provides for a modified process for the committee. In support of that process, Greater Iowa City, Inc., as a fellow member of the Better Together 2030 coalition, offered to assist District leadership as neutral conveners by supporting outreach, application review, and nominee recommendations for Board consideration. The intent of this support was to help ensure a structured, and community-informed launch of the Committee while maintaining the Board's ultimate appointment authority.

Composition of Review Committee

Consistent with the framework presented to and approved by the Board of Education, a temporary Committee was convened to assist in reviewing and vetting applications and developing recommendations by applying the Board-approved rubric. The committee consisted of:

- ICCSD Board designee – Charlie Eastham, Board of Education
- ICCSD Chief Financial Officer – Pat Moore, Iowa City Community School District
- Greater Iowa City, Inc., Board designee – Todd Means, SVP, Nicolet Bank
- ICCSD Foundation Board designee – Mitch Lauer, IT Audit Leader, Transamerica
- Community Foundation of Johnson County Board designee – Tara Sterba, SouthSlope

All participants understood their role to be limited to reviewing applications, applying the Board-approved rubric, and forwarding recommendations to the Board of Education for its consideration. The Committee's work concluded upon submission of its recommendations.

Application and Review Process

The application period was publicly promoted through District and community channels and remained open through July 13, 2026. Consistent with the Charter and supporting materials, applicants were asked to provide contact information, responses to short-answer questions, and an attestation certifying the accuracy of the information submitted.

The application process generated significant community interest. A total of 164 submissions were received through the District's application platform. Of those submissions:

- 113 submissions included applicant contact information.
- 57 applications were determined to be complete and advanced for scoring and review. 2 of those applications were duplicate submissions and were moved to the incomplete folder for safekeeping. **55** applications were scored. Applications are available to review by the Board.
- 56 submissions were identified as incomplete because they did not include the necessary applicant certification and responses to the short answer questions. All incomplete submissions were retained and are available for review by the Board of Education.

Prior to the review period, Committee members participated in a one-on-one orientation with Greater Iowa City, Inc. staff regarding the application process, committee expectations, conflict-of-interest considerations, and the ensuring full understanding of the scoring rubric criteria. Committee members were given the opportunity to ask questions throughout.

Evaluation Methodology

Applications were reviewed using the Board-approved Financial Oversight Committee Scoring Rubric. The rubric evaluated applicants across eight categories intended to reflect the responsibilities and goals of the Financial Oversight Committee:

Rubric Category and Criteria	Weight
Financial or Technical Expertise	x5
Analytical Thinking and Oversight Mindset	x3
Governance and Role Understanding	x3
Independence and Integrity	x3
Communication and Collaboration	x2
Community Perspective and Representation	x2
Commitment and Availability	x1
Committee Composition Value	x1

The rubric placed the greatest emphasis on financial and technical expertise while also recognizing the importance of governance experience, independence of thought, analytical capability, community perspective, and the ability to work constructively in a collaborative advisory role. Weighted scoring was used to provide consistency in evaluation while allowing

the committee to consider overall committee balance and composition when developing its recommendations.

In reviewing applications and applying the rubric as approved by the Board, the Committee was tasked with identifying a group of recommended nominees that collectively reflected the intent of the Charter, including expertise in areas such as accounting, auditing, finance, banking, business leadership, risk management, and governance, while also bringing diverse perspectives, experiences, and community connections to the work of the Committee. The Committee independently reviewed applications before convening for a structured scoring and discussion meeting on July 20, 2026. The committee shared their scores and verbal feedback at that meeting, and all scores and notes were entered into a spreadsheet. Greater IC staff ensured the spreadsheet formulas applied the correct approved rubric weight and then calculated the average score for each applicant for each criteria reviewed. Scores were calculated using the approved weighted rubric and then grouped into recommendation categories based on the scoring framework adopted for this review. 13 applicants scored in this “Highly Recommended” Category. 7 scored above a 90 composite on the Board-approved rubric.

It should be noted that the Committee faced a very challenging task, not because there was a shortage of qualified candidates, but because there were so many qualified individuals who volunteered to support ICCSD. The applicant pool shows that our community is fortunate to have an absolutely extraordinary number of individuals willing to volunteer their time, expertise, and energy to support the district. Their willingness to step forward reflects a deep commitment to strong stewardship, accountability, and the continued work of rebuilding the district's financial capacity and long-term stability.

Recommended Nominees

Highly Recommended Applicants	Score out of 100
Jeffrey Albright	98.3
Charlie Funk	96
Nicole Davies	94.3
Genevieve Anglin	93.3
Bradley Franzwa	92.8
Simon Andrew	90.3
Dustin Gwee	90
Charles Orr	89.8
Todd Stewert	89.5
William Braverman	89.5
Steven Tripplett	87.8
Paul Heath	86.3
Colin Richen	85

Summary of Recommended Nominees from Applicants

Listed above are the highly recommended applicants. Those shaded in green represent the top scoring applicants (7 total). The Board is allowed by Charter to appoint five to seven committee members, in addition to two Board of Education Directors as members. All seven applicants highlighted below scored at 90 points or above and are the recommended slate of nominees, with all of the highly recommended applicants scoring well and being reviewed as more than qualified by the committee. The recommended slate reflects applicants who demonstrated strong alignment with the criteria established in the Board-approved rubric and, collectively, provide a balanced combination of financial, technical, governance, business, auditing, risk management, and community experience. The committee believes this slate is well positioned to support the Committee's purpose of strengthening financial oversight, transparency, accountability, and public confidence in District financial practices.

Applicant

Application Highlights



Jeffrey Albright combines more than 30 years of executive leadership, financial oversight, and governance experience with a deep personal commitment to the Iowa City community. A lifelong area resident, Albright and his family are all graduates of the Iowa City Community School District, and he has spent years supporting local schools and student activities through leadership roles with Club West and the ICCSD Booster Club. Professionally, he serves as Chairman of Yanmar America and Executive Director of its Global Turf Division, bringing extensive expertise in financial controls, budgeting, organizational accountability, and board governance. His combination of executive experience, community involvement, and commitment to public education makes him well positioned to help strengthen financial transparency and public trust in the district. **(Score 98.3)**



Charles Nelson Funk has exceptional financial leadership experience and longstanding record of service to the Iowa City community. A retired President and CEO of MidWestOne Financial Group, Funk spent 47 years in banking, including 22 years leading a publicly traded financial institution and 25 years serving on its board. Beyond his professional career, he has devoted decades to civic and educational leadership, including service as Chair of the ICCSD Foundation, co-chair of the successful "Yes for Kids" bond campaign, Chair of the Iowa City Area Chamber of Commerce (now Greater Iowa City, Inc.) and numerous other nonprofit and community leadership roles. His deep understanding of financial governance, accountability, and community stewardship would make him a valuable asset to the committee's work. **(Score 96)**



Nicole Knudtson Davies brings extensive professional expertise in public finance and a longstanding commitment to the Iowa City community. As Finance Director for the City of Iowa City and a Certified Public Accountant, she has more than 25 years of experience in public-sector and nonprofit finance, including budgeting, auditing, debt management, grant administration, financial reporting, internal controls, and long-term financial planning. Her career has been dedicated to ensuring public resources are managed responsibly, transparently, and in a manner that earns and maintains public trust. Nicole and her Iowa City Finance Department have won distinguished budget awards from the Government Finance Officers Association for over 14 years in a row. **(Score 94.3)**



Genevieve Anglin brings more than 20 years of experience in financial administration, budgeting, grant management, compliance, auditing, and organizational oversight across local government, higher education, and the nonprofit sector, including at United Action for Youth. Now, as the Grants Manager for Johnson County, she works closely with elected officials, finance staff, auditors, county departments, and community organizations to oversee public funds, strengthen internal controls, monitor compliance, and improve financial processes. Her professional background reflects a deep understanding of public accountability, stewardship, and transparent financial management. **(Score 93.3)**



Bradley Franzwa brings a unique combination of public-sector financial management, grant administration, accounting expertise, and community service. A resident of North Liberty and ICCSD parent, Franzwa holds an accounting degree from Mount Mercy University and currently serves as a Contracts and Grants Manager for Perspective Therapeutics, Inc.. He previously spent more than 25 years at the University of Iowa managing the finances of cancer and vaccine research programs and has extensive experience overseeing federal and state grants and public funding. **(Score 92.8)**



Simon Andrew brings extensive experience in public finance, budgeting, compliance, and strategic planning, along with a strong commitment to students and the broader Iowa City community. As Executive Director of The Housing Fellowship, he oversees complex financial operations involving multiple legal entities, audits, and compliance requirements while managing significant federal, state, and local funding. He also previously led the City of Iowa City's budget process and has specialized training in public budgeting, finance, and organizational management. Beyond his professional qualifications, Andrew is the parent of a City High student, mentors a Liberty High student through Big Brothers Big Sisters, and has long been involved in local housing, community development, and civic initiatives. His work has included partnerships with ICCSD through Student Build housing projects, and his academic research focused on socioeconomic achievement gaps in K–12 education. **(Score 90.3)**



Dustin Gwee has more than seven years of experience in financial planning and analysis, budgeting, forecasting, financial reporting, risk management, and long-range planning at Collins Aerospace. He holds both accounting and MBA degrees from the University of Iowa and has experience overseeing large budgets and supporting data-driven financial decision-making. Beyond his professional qualifications, Gwee is a product of the Iowa City community. He attended ICCSD schools, chose to remain in Iowa City after graduating from the University of Iowa, and is now raising his family in the Longfellow neighborhood, with plans for his children to attend ICCSD schools as well. He currently serves as Treasurer for the Asian Pacific American Public Affairs Association and the Creative Corridor Center for Equity, while also volunteering with the Community Inclusion Club and the Iowa City Odd Fellows. **(Score 90)**

*Photos courtesy of LinkedIn and Employer Bios. Highlights pulled from Applications submitted through ICCSD Qualtrics

Conclusion

The Committee appreciates the willingness of community members to apply and serve during a period of significant public interest in the District's financial stewardship. The committee believes the process was conducted in a manner consistent with the Charter, the Board-approved framework, and the principles of transparency, neutrality, consistency, and community engagement that guided this effort. The final decision regarding appointments remains with the Board of Education, and the Committee respectfully submits these recommendations for its consideration.

Respectfully submitted,

Cady Sinnwell Gerlach

**Better Together 2030 Executive Director &
Greater Iowa City, Inc. Vice President of Programs**

Addendum: All applications submitted through the process have been retained and remain available for review by the Board of Education. This includes applications deemed complete that were reviewed by the Committee, duplicate submissions, and submissions that were incomplete and lacked the required certification and answers to short answer questions. To protect the personally identifiable information contained within the application materials, only applicant names are included in this memorandum attachment. Applicants may request their own composite scores and any noted feedback by emailing cady@greateriowacity.com.

As reflected in the applicant pool, our community is fortunate to have an extraordinary number of individuals willing to volunteer their time, expertise, and energy in service to the district. The breadth and quality of applicants demonstrate a strong commitment to public education, sound stewardship of public resources, accountability, transparency, and the continued work of strengthening the district's financial capacity and long-term sustainability.

ICCSA Financial Oversight Committee - Total Applicants Scored: 55

Andrew Leman	Ji Wu	Robert George
Andrew Mills	John Britt	Robert Strickland
Ann Harvey	Joe Moreland	Ryan Baue
Bradley Franzwa	Joseph Gardam	Sara Hoff
Charlie Funk	Katrina Leyendecker	Sarah Madsen
Charles Orr	Kent Christen	Simon Andrew
Colin Richen	Kimberly Fichter	Solomon Smith
David Mabon	Lucy Liu	Steven Tripplett
Dustin Gwee	Manhing Tsoi (Yoko)	Thomas Balmer
Eric Creach	Mark Breheny	Tim Borchardt
Eric Monahan	Marshall Smith	Toby Hoffman
Ezekial Stone	Marten Roorda	Todd Stewert
Genevieve Anglin	Melissa Schooley	Tuan Nguyen
Isaac Medina	Michael Gentry	Wendy Dixon
Isaac Stauffer	Michael Parrott	William Waldie Jr.
Jacob Thomas	Mitch Meis	William Braverman
Jay Cooper	Mitch Moeller	Zachary Bohannon
Jeffrey Albright	Nicole Davies	
Jenn Gravert	Paul Heath	