

Application for Preliminary Qualification of Bonds

School Bond Qualification and Loan Program for

Berkley School District

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*Include building floor plans and cost estimates for each project.

For additional information about the School Bond Qualification and Loan Program, visit:

Michigan Department of Treasury
Bureau of State and Authority Finance
School Bond Qualification and Loan Program
430 West Allegan Street
Lansing, Michigan 48922
517-335-0994
517-241-1233 (f)
<http://www.michigan.gov/sblf>

Application for Preliminary Qualification of Bonds

Issued under authority of Public Act 92 of 2005, as amended

Election Date August 8, 2023	Application No. 63-050-4-k12-12-01
District Name and Address Berkley School District 14501 Talbot Street Oak Park, MI 48237	School District Code and Phone No. 63 - 050 248-837-8000
Superintendent Name and Email Scott Francis scott.francis@berkleyschools.org	Superintendent Phone No. 248-837-8004 Superintendent FAX No. 248-837-8063

Mailing Instructions

Return ONE originally signed copy to your bond counsel by OVERNIGHT MAIL.
Retain ONE originally signed copy for your files.

Your bond counsel will transmit an electronic copy to the Department of Treasury,
financial consultant, architectural firm, and construction management firm.

Certificate	
<p>I, the undersigned, Secretary of the Board of Education, do certify hereby that the Board of Education of this School District, at a (regular/special) meeting of the Board, which was conducted and for which public notice of said meeting was given pursuant to and in full compliance with Act 276 of the Public Acts of 1976 (Open Meetings Act), on this</p> <p style="text-align: center;">13 day of March 2023 took the following action:</p>	
<p>(1) Resolved to apply for preliminary qualification of bonds by the State Treasurer for the purpose of financing the school construction description in this application.</p> <p>(2) That said application is presented to the State Treasurer for action prior to the official action of the Board of Education calling the election on said bond issue.</p> <p>(3) Resolved that this Board of Education will present a final qualification application to the State Treasurer for qualification of their bonds after this bond issue has been approved by the electors of said district.</p> <p>(4) Read this application and approved all statements and representations contained herein as true to the best knowledge and belief of the Board.</p> <p>(5) Authorized the Secretary of the Board of Education to sign this Preliminary Application and submit same to the State Treasurer for review and approval.</p>	
<p>IN WITNESS whereof, I have hereunto set my hand this <u>13 day of March 2023</u></p>	
<p style="text-align: center;">Sarah Mountain <small>Secretary, Board of Education</small></p>	<p style="text-align: center;"><small>Signature of Secretary</small></p>
<p style="text-align: center;">Keith Logsdon <small>Treasurer, Board of Education</small></p>	<p style="text-align: center;">Scott Francis <small>Superintendent of Schools</small></p>
<p style="text-align: center;">Thrun Law <small>Bond Counsel</small></p>	<p style="text-align: center;">P.O. Box 2575 East Lansing, MI 48826 <small>Mailing Address</small></p>
<p style="text-align: center;">PFM Financial Advisors LLC <small>Financial Consultant</small></p>	<p style="text-align: center;">555 Briarwood Cicle, Suite 333, Ann Arbor, MI 48108 <small>Mailing Address</small></p>
<p style="text-align: center;">Stantec Architecture, Inc. <small>Architectural Firm</small></p>	<p style="text-align: center;">2338 Coolidge Hwy Suite 100, Berkley, MI 48072 <small>Mailing Address</small></p>
<p style="text-align: center;">McCarthy & Smith, Inc. <small>Construction Management Firm</small></p>	<p style="text-align: center;">24317 Indoplex Cir, Farmington Hills, MI 48335 <small>Mailing Address</small></p>

ATTACH PROPOSED BALLOT LANGUAGE.

Financial Summary - Berkeley Community Schools

Financial information provided as of: 2/9/2023

A. Existing Bond Debt: List each outstanding debt issue separately in chronological order by issue date.

Original Bond Issue		Current Outstanding Principal Balance			Outstanding Principal Balance as of Election Date			Millage		
Issue Date	Purpose	Issue Amount	Current Qualified	Current Non-Voted	Current Total	Qualified	Non-Qualified	Election Date Total	Levied This Tax Year (2022)	Estimate Next Tax Year (2023)
6/24/2015	Building	55,965,000	47,345,000		47,345,000	45,575,000		45,575,000	3.20	3.20
					0					
					0					
					0					
					0					
					0					
					0					
Total			\$47,345,000	\$0	\$47,345,000	\$45,575,000	\$0	\$45,575,000	3.20	3.20

Have proceeds of all existing bonds been spent? Yes

B. Proposed Bond Issue: List each ballot proposal separately.

Proposal	Amount	Bond Term	Avg Int Rate	Bond Interest	SLRF Interest	Total Interest	Avg Millage	Millage Year 1
Proposal 1	\$88,000,000	25 Years	4.75%	\$79,661,063	\$0	\$79,661,063	3.61	3.05
Proposal 2								
Proposal 3								
Proposal 4								
Combined Issue	\$88,000,000			\$79,661,063	\$0	\$79,661,063	3.61	3.05

(Totals may not foot due to differences in the financial structure of individual proposals and a combined bond issue.)

C. School Bond Loan Participation

School Bond Loan Fund							Millage			Est Amt to be Borrowed			
Mandatory Final SBLF Loan Repayment Date	Current SBLF Balance	Estimated SBLF Balance as of Election Date	SBLF Beginning Date	Projected SBLF End Date	Estimated SBLF Interest Rate	Maximum SBLF Balance	Maximum SBLF Balance Year	Initial Computed Millage	Estimated Duration of Computed Millage	Existing Bonds Principal	Existing Bonds Interest	Proposed Bonds Principal	Proposed Bonds Interest
N/A	\$0	\$0	N/A	N/A	N/A	\$0	N/A	N/A	N/A	N/A	N/A	N/A	N/A

D. Property Tax Assumptions

Current		Growth Rate			Property Taxes Levied		Pending Material Tax Appeals in the District
Tax Year	Taxable Value	Prior 5 Year Average	Prior 20 Year Average	Projected Rate Years 1 - 5	Projected Rate Years 6+	Winter	Summer
2022	\$1,267,323,629	5.08%	2.50%	5.00% - 3.25%	2.00%	0.00%	100.00%

(If district is aware of any event or circumstance that could significantly affect its future, disclosure must be included.)

E. Millage

Total Estimated Proposed Millage for 2024 Tax Year	Estimated Duration of Millage Levy	Maximum Millage without SBLF Participation	1st Year Millage Increase
5.45	25	5.45	2.25

F. Key Financial Measures

Total Debt to Taxable Value	Weighted Average Maturity of Bonds	120% of Average Useful Life of Assets	Total Current Bond Debt plus School Bond Loan Debt
0.11	19.06	38.81	\$47,345,000

G. Bond Issuance

Series/Proposal	Amount	Dated Date	Construction Fund Beg. Date	Construction Fund End Date
1	\$10,000,000	11/1/2023	11/1/2023	5/1/2025
2	78,000,000	5/1/2024	5/1/2024	11/1/2025
3				
4				
5				

H. Certification

The financial impact presented herein is based on certain assumptions regarding interest rates and taxable value growth rates. Actual millage rates may be subject to adjustment based on differences in these assumptions, actual interest rates, and future taxable value growth.

Prepared By Kari Blanchett
Firm PFM Financial Advisors LLC



Prequal

\$88,000,000
BERKLEY SCHOOL DISTRICT
COUNTY OF OAKLAND, STATE OF MICHIGAN
2023, 2024 SCHOOL BUILDING AND SITE BONDS
(GENERAL OBLIGATION - UNLIMITED TAX)

ESTIMATED MILLAGE NEEDED TO RETIRE BONDED DEBT

Series 2023	Series 2024
Amount: \$10,000,000	Amount: \$78,000,000
TIC: 4.75%	TIC: 4.75%
Dated Date: Nov 1, 23	May 1, 24
First Payment: May 1, 24 < 6 Months	Nov 1, 24
Capitalized Int: \$237,500	Jul 1, 24
Debt/TV ⁽¹⁾ : 4.18%	\$0
Bond Term: 24 yrs., 6 mo.	10.04%
1:5 Ratio: TRUE	25 yrs., 0 mo.
Average Life: 17.41	TRUE
120% ProjUsefulLife: 33.42	19.27
	39.51

Ballot Information	
Election Date	August 8, 2023
First Yr. Millage	3.05
Avg. Millage	3.61

Levy Cycle July Only	
Projected Millage Impact	5.45
Current	3.20
Net Increase	2.25

Interest Factor
0.91

Fiscal Year	Tax Year	Existing UT Debt	Series 2023			Series 2024			Total Proposed Debt	Capitalized Interest	Reimbursement Amount ⁽²⁾	Delinquency Allowance 8.75%	Use of Funds on Hand	Proposed and Existing UT Debt	Projected Tax Base ⁽²⁾	Growth Rate	Mills Needed										
			Interest Due Nov 1	Interest Due May 1	Total Debt Service	Principal Due May 1	Total Debt Service	New Bond									All Qualified Debt										
2022	2023	\$3,822,056	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$354,851	(\$109,431)	\$4,055,436	\$1,267,323,629	5.44%	3.20	3.20										
2023	2024	3,823,556	0	237,500	0	237,500	0	0	(237,500)	(12,040)	0	446,691	4,258,207	1,330,689,810	5.00%	3.05	5.45										
2024	2025	3,820,556	237,500	237,500	80,000	555,000	0	3,705,000	0	(12,040)	300,346	(880,904)	7,487,958	1,373,937,229	3.25%	3.06	5.45										
2025	2026	3,823,056	235,600	235,600	90,000	561,200	190,000	3,895,000	0	(15,050)	0	(532,890)	7,731,317	1,418,590,189	3.25%	3.06	5.45										
2026	2027	3,823,994	233,463	233,463	100,000	566,925	190,000	3,885,975	0	(15,050)	0	(279,260)	7,982,584	1,464,694,370	3.25%	3.06	5.45										
2027	2028	3,822,900	231,088	231,088	110,000	572,175	190,000	3,876,950	0	(15,050)	0	(14,395)	8,242,581	1,512,296,937	3.25%	3.06	5.45										
2028	2029	3,823,900	228,475	228,475	130,000	586,950	340,000	4,017,925	0	(15,050)	0	0	8,413,725	1,542,542,876	2.00%	3.06	5.45										
2029	2030	3,824,400	225,388	225,388	165,000	615,775	495,000	4,156,775	0	(15,050)	0	0	8,581,900	1,573,393,734	2.00%	3.06	5.45										
2030	2031	3,824,150	221,469	221,469	210,000	652,938	645,000	4,283,263	0	(15,050)	0	0	8,745,300	1,604,861,608	2.00%	3.12	5.45										
2031	2032	3,822,900	216,481	216,481	240,000	672,963	840,000	4,447,625	0	(15,050)	0	0	8,928,438	1,636,958,841	2.00%	3.12	5.45										
2032	2033	3,823,525	210,781	210,781	260,000	681,563	1,045,000	4,612,725	0	(15,050)	0	0	9,102,763	1,669,698,017	2.00%	3.17	5.45										
2033	2034	3,820,400	204,606	204,606	275,000	684,213	1,230,000	4,748,088	0	(15,050)	0	0	9,237,650	1,703,091,978	2.00%	3.19	5.42										
2034	2035	3,817,900	198,075	198,075	300,000	696,150	1,410,000	4,869,663	0	(15,050)	0	0	9,368,663	1,737,153,817	2.00%	3.20	5.39										
2035	2036	3,813,400	190,950	190,950	325,000	706,900	1,600,000	4,992,688	0	(15,050)	0	0	9,497,938	1,771,896,894	2.00%	3.21	5.36										
2036	2037	3,813,000	183,231	183,231	350,000	716,463	1,800,000	5,116,688	0	(15,050)	0	0	9,631,100	1,807,334,831	2.00%	3.22	5.33										
2037	2038	3,812,600	174,919	174,919	375,000	724,838	2,010,000	5,241,188	0	(15,050)	0	0	9,763,575	1,843,481,528	2.00%	3.23	5.30										
2038	2039	3,807,000	166,013	166,013	400,000	732,025	2,210,000	5,345,713	0	(15,050)	0	0	9,869,688	1,880,351,159	2.00%	3.23	5.25										
2039	2040	3,801,200	156,513	156,513	425,000	738,025	2,380,000	5,410,738	0	(15,050)	0	0	9,934,913	1,917,958,182	2.00%	3.20	5.18										
2040	2041	0	146,419	146,419	615,000	907,838	5,820,000	8,737,688	0	(15,050)	0	0	9,630,475	1,956,317,345	2.00%	4.92	4.92										
2041	2042	0	131,813	131,813	660,000	923,625	6,035,000	8,676,238	0	(15,050)	0	0	9,541,800	1,995,443,692	2.00%	4.80	4.80										
2042	2043	0	116,138	116,138	705,000	937,275	6,265,000	8,619,575	0	(15,050)	0	0	9,500,725	2,035,352,566	2.00%	4.69	4.69										
2043	2044	0	99,394	99,394	750,000	948,788	6,510,000	8,566,988	0	(15,050)	0	0	9,460,875	2,076,059,618	2.00%	4.58	4.58										
2044	2045	0	81,581	81,581	795,000	958,163	6,770,000	8,517,763	0	(15,050)	0	0	9,421,538	2,117,580,810	2.00%	4.47	4.47										
2045	2046	0	62,700	62,700	840,000	965,400	7,045,000	8,471,188	0	(15,050)	0	0	9,382,000	2,159,932,426	2.00%	4.36	4.36										
2046	2047	0	42,750	42,750	885,000	970,500	7,335,000	8,426,550	0	(15,050)	0	0	9,346,550	2,203,131,075	2.00%	4.26	4.26										
2047	2048	0	21,731	21,731	915,000	968,463	7,660,000	8,403,138	0	(15,050)	0	0	8,349,238	2,247,193,696	2.00%	4.16	4.16										
2048	2049	0	0	0	0	0	7,985,000	8,364,288	0	(15,050)	0	0	0	2,292,137,570	2.00%	3.64	3.64										
2049	2050	0	0	0	0	0	0	0	0	0	0	0	0	2,337,980,321	2.00%	0.00	0.00										
												\$68,740,494	\$4,017,075	\$4,254,575	\$10,000,000	\$18,271,650	\$78,000,000	\$149,389,413	\$167,661,063	(\$237,500)	(\$397,313)	\$655,196	(\$1,370,189)	\$235,051,750			

[1] Includes \$45,575,000 of Existing UT Debt and \$0 of Existing LTNQ Debt
 [2] Includes \$0 of equivalent IFT valuations & less DDA/TIFA debt captures of \$0 for 2023.
 [3] Based on \$3,762,436 of Exempt Personal Property for 2022

NT/IKB



PQ MILLAGE 2023

\$10,000,000
BERKLEY SCHOOL DISTRICT
2023 SCHOOL BUILDING AND SITE BONDS

BOND SIZING SCHEDULE			
ESTIMATED BOND ISSUANCE COSTS			
Bond Discount	0.500%	\$50,000	
Bond Insurance		0	
Bond Attorney Fee		27,563	
Financial Consultant Fee		31,000	
Credit Rating		25,000	
Qualification of Bonds		6,000	
Official Statement Printing & Mailing		2,500	
Notice of Sale Publication		1,800	
Treasury Filing Fee(s)		1,000	
Auditor's Consent Fee		500	
Paying Agent Upfront Fee		500	
Municipal Advisory Council Fee		400	
TOTAL BOND ISSUANCE COSTS		\$146,263	
ESTIMATED OTHER COSTS			
Reimbursable Election Costs			\$30,000
Capitalized Interest			237,500
Other			0
TOTAL OTHER COSTS			\$267,500
BOND SIZING			
Total Bond Issuance and Other Costs			\$413,763
Total Project Expenditures			9,694,397
Total Project, Issuance & Other Costs			10,108,159
Less Original Issue Premium			0
Less Estimated Construction Fund Earnings			(108,159)
Less Other Adjustments			0
AMOUNT OF BOND ISSUE			\$10,000,000

PROJECT FUND DRAWS AND EARNINGS SECTION

Date	Estimated Expenditures			Average Life = 0.73 years		Project Fund Balance	Estimated Interest Rate	Projected Interest Earned
	Project Expenditures	Issuance & Other Costs	Totals	Month	Payout %			
Nov 23						\$10,000,000		
Nov 23	\$510,231	\$413,763	\$923,994	1	9.14%	9,076,006	1.50%	\$11,345
Dec 23	510,231		510,231	2	14.19%	8,577,120	1.50%	10,721
Jan 24	510,231		510,231	3	19.24%	8,077,610	1.50%	10,097
Feb 24	510,231		510,231	4	24.28%	7,577,476	1.50%	9,472
Mar 24	510,231		510,231	5	29.33%	7,076,716	1.50%	8,846
Apr 24	510,231		510,231	6	34.38%	6,575,331	1.50%	8,219
May 24	510,231		510,231	7	39.43%	6,073,318	1.50%	7,592
Jun 24	510,231		510,231	8	44.48%	5,570,679	1.50%	6,963
Jul 24	510,231		510,231	9	49.52%	5,067,410	1.50%	6,334
Aug 24	510,231		510,231	10	54.57%	4,563,513	1.50%	5,704
Sep 24	510,231		510,231	11	59.62%	4,058,986	1.50%	5,074
Oct 24	510,231		510,231	12	64.67%	3,553,829	1.50%	4,442
Nov 24	510,231		510,231	13	69.71%	3,048,039	1.50%	3,810
Dec 24	510,231		510,231	14	74.76%	2,541,618	1.50%	3,177
Jan 25	510,231		510,231	15	79.81%	2,034,564	1.50%	2,543
Feb 25	510,231		510,231	16	84.86%	1,526,875	1.50%	1,909
Mar 25	510,231		510,231	17	89.90%	1,018,553	1.50%	1,273
Apr 25	510,231		510,231	18	94.95%	509,594	1.50%	637
May 25	510,231		510,231	19	100.00%	0	1.50%	0
Jun 25	0		0	20	100.00%	0	1.50%	0
	\$9,694,397	\$413,763	\$10,108,159					\$108,159

NT/KB



PQ MILLAGE 2024

\$78,000,000

**BERKLEY SCHOOL DISTRICT
2024 SCHOOL BUILDING AND SITE BONDS**

BOND SIZING SCHEDULE			
ESTIMATED BOND ISSUANCE COSTS			ESTIMATED OTHER COSTS
Bond Discount	0.500%	\$390,000	Reimbursable Election Costs
Bond Insurance		0	Capitalized Interest
Bond Attorney Fee		104,989	Other
Financial Consultant Fee		95,200	
Credit Rating		60,000	TOTAL OTHER COSTS
Qualification of Bonds		19,600	
Official Statement Printing & Mailing		2,500	BOND SIZING
Notice of Sale Publication		1,800	Total Bond Issuance and Other Costs
Treasury Filing Fee(s)		1,000	Total Project Expenditures
Auditor's Consent Fee		500	Total Project, Issuance & Other Costs
Paying Agent Upfront Fee		500	Less Original Issue Premium
Municipal Advisory Council Fee		400	Less Estimated Construction Fund Earnings
TOTAL BOND ISSUANCE COSTS		\$676,489	Less Other Adjustments
			AMOUNT OF BOND ISSUE
			\$78,000,000

PROJECT FUND DRAWS AND EARNINGS SECTION

Date	Estimated Expenditures			Average Life = 0.75 years		Project Fund Balance	Estimated Interest Rate	Projected Interest Earned
	Project Expenditures	Issuance & Other Costs	Totals	Month	Payout %			
May 24						\$78,000,000		
May 24	\$4,115,575	\$676,489	\$4,792,064	1	6.08%	73,207,936	1.50%	\$91,510
Jun 24	4,115,575		4,115,575	2	11.29%	69,183,870	1.50%	86,480
Jul 24	4,115,575		4,115,575	3	16.51%	65,154,775	1.50%	81,443
Aug 24	4,115,575		4,115,575	4	21.73%	61,120,643	1.50%	76,401
Sep 24	4,115,575		4,115,575	5	26.95%	57,081,468	1.50%	71,352
Oct 24	4,115,575		4,115,575	6	32.17%	53,037,245	1.50%	66,297
Nov 24	4,115,575		4,115,575	7	37.38%	48,987,966	1.50%	61,235
Dec 24	4,115,575		4,115,575	8	42.60%	44,933,625	1.50%	56,167
Jan 25	4,115,575		4,115,575	9	47.82%	40,874,217	1.50%	51,093
Feb 25	4,115,575		4,115,575	10	53.04%	36,809,734	1.50%	46,012
Mar 25	4,115,575		4,115,575	11	58.26%	32,740,171	1.50%	40,925
Apr 25	4,115,575		4,115,575	12	63.47%	28,665,521	1.50%	35,832
May 25	4,115,575		4,115,575	13	68.69%	24,585,778	1.50%	30,732
Jun 25	4,115,575		4,115,575	14	73.91%	20,500,934	1.50%	25,626
Jul 25	4,115,575		4,115,575	15	79.13%	16,410,985	1.50%	20,514
Aug 25	4,115,575		4,115,575	16	84.35%	12,315,924	1.50%	15,395
Sep 25	4,115,575		4,115,575	17	89.56%	8,215,743	1.50%	10,270
Oct 25	4,115,575		4,115,575	18	94.78%	4,110,437	1.50%	5,138
Nov 25	4,115,575		4,115,575	19	100.00%	0	1.50%	0
Dec 25	0		0	20	100.00%	0	1.50%	0
	\$78,195,932	\$676,489	\$78,872,421					\$872,421

NT/KB



**BERKLEY SCHOOL DISTRICT
 COUNTY OF OAKLAND, STATE OF MICHIGAN
 EXISTING DEBT BEFORE ADDITIONAL BONDING**

2015 SCHOOL BUILDING AND SITE BONDS - UTQ

*Tax-Type: Unlimited Tax Qualified
 Original Amount: \$55,965,000
 Net Interest Cost: 4.248%
 Call Date: 05/01/2025
 Voter Approved Before 2015: No
 Dated: 06/24/2015*

**BERKLEY SCHOOL DISTRICT
 OUTSTANDING DEBT SUMMARY**

Levy Year	FY End Year	Interest Due Nov 1	Interest Due May 1	Interest Rate	Principal Due May 1	Total Debt Service	Levy Year	Payment Year	TOTAL UTQ	
									Principal	Total Debt Service
2022	2023	\$1,026,028	\$1,026,028	5.000%	\$1,770,000	\$3,822,056	2022	2023	\$1,770,000	\$3,822,056
2023	2024	981,778	981,778	5.000%	1,860,000	3,823,556	2023	2024	1,860,000	3,823,556
2024	2025	935,278	935,278	5.000%	1,950,000	3,820,556	2024	2025	1,950,000	3,820,556
2025	2026	886,528	886,528	3.125%	2,050,000	3,823,056	2025	2026	2,050,000	3,823,056
2026	2027	854,497	854,497	3.125%	2,115,000	3,823,994	2026	2027	2,115,000	3,823,994
2027	2028	821,450	821,450	5.000%	2,180,000	3,822,900	2027	2028	2,180,000	3,822,900
2028	2029	766,950	766,950	5.000%	2,290,000	3,823,900	2028	2029	2,290,000	3,823,900
2029	2030	709,700	709,700	5.000%	2,405,000	3,824,400	2029	2030	2,405,000	3,824,400
2030	2031	649,575	649,575	5.000%	2,525,000	3,824,150	2030	2031	2,525,000	3,824,150
2031	2032	586,450	586,450	3.750%	2,650,000	3,822,900	2031	2032	2,650,000	3,822,900
2032	2033	536,763	536,763	3.750%	2,750,000	3,823,525	2032	2033	2,750,000	3,823,525
2033	2034	485,200	485,200	5.000%	2,850,000	3,820,400	2033	2034	2,850,000	3,820,400
2034	2035	413,950	413,950	5.000%	2,990,000	3,817,900	2034	2035	2,990,000	3,817,900
2035	2036	339,200	339,200	4.000%	3,135,000	3,813,400	2035	2036	3,135,000	3,813,400
2036	2037	276,500	276,500	4.000%	3,260,000	3,813,000	2036	2037	3,260,000	3,813,000
2037	2038	211,300	211,300	4.000%	3,390,000	3,812,600	2037	2038	3,390,000	3,812,600
2038	2039	143,500	143,500	4.000%	3,520,000	3,807,000	2038	2039	3,520,000	3,807,000
2039	2040	73,100	73,100	4.000%	3,655,000	3,801,200	2039	2040	3,655,000	3,801,200
Totals:						\$10,697,747	\$10,697,747	Totals:	\$47,345,000	\$68,740,494

NT 1.10.23



BEFORE ADDITIONAL BONDING

**BERKLEY SCHOOL DISTRICT
COUNTY OF OAKLAND, STATE OF MICHIGAN**

ESTIMATED MILLAGE NEEDED TO RETIRE BONDED DEBT BEFORE ADDITIONAL BONDING

Debt/TV ^[2] : 3.74%	2022 Debt Levy: 3.20
Collection Cycle	
July Levy 100%	Total Levy: 3.20

Existing Unlimited Tax Debt & Mills

Levy Year	Fiscal Year End	Projected Tax Base ^[1]	Growth Rate	Existing UT Payments	Use of Funds on Hand	Delinquency Allowance 8.75%	Exempt Pers. Property Receipts ^[3]	Net UT Payments	Mills Needed All Debt
2022	2023	\$1,267,323,629	5.44%	\$3,822,056	(\$109,431)	\$354,851	(\$12,040)	\$4,055,436	3.20
2023	2024	1,330,689,810	5.00%	3,823,556	446,691	0	(12,040)	4,258,207	3.20
2024	2025	1,373,937,229	3.25%	3,820,556	(511,067)	0	(12,040)	3,297,449	2.40
2025	2026	1,418,590,189	3.25%	3,823,056	(423,596)	0	(9,030)	3,390,431	2.39
2026	2027	1,464,694,370	3.25%	3,823,994	(314,382)	0	(8,992)	3,500,620	2.39
2027	2028	1,512,296,937	3.25%	3,822,900	(199,518)	0	(8,992)	3,614,390	2.39
2028	2029	1,542,542,876	2.00%	3,823,900	(128,230)	0	(8,992)	3,686,677	2.39
2029	2030	1,573,393,734	2.00%	3,824,400	(54,997)	0	(8,992)	3,760,411	2.39
2030	2031	1,604,861,608	2.00%	3,824,150	(75,658)	0	(8,992)	3,739,499	2.33
2031	2032	1,636,958,841	2.00%	3,822,900	0	0	(8,767)	3,814,133	2.33
2032	2033	1,669,698,017	2.00%	3,823,525	0	0	(8,767)	3,814,758	2.28
2033	2034	1,703,091,978	2.00%	3,820,400	0	0	(8,596)	3,811,804	2.24
2034	2035	1,737,153,817	2.00%	3,817,900	0	0	(8,421)	3,809,479	2.19
2035	2036	1,771,896,894	2.00%	3,813,400	0	0	(8,251)	3,805,149	2.15
2036	2037	1,807,334,831	2.00%	3,813,000	0	0	(8,080)	3,804,920	2.11
2037	2038	1,843,481,528	2.00%	3,812,600	0	0	(7,921)	3,804,679	2.06
2038	2039	1,880,351,159	2.00%	3,807,000	0	0	(7,765)	3,799,235	2.02
2039	2040	1,917,958,182	2.00%	3,801,200	0	0	(7,602)	3,793,598	1.98
2040	2041	1,956,317,345	2.00%	0	0	0	0	0	0.00
\$68,740,494 (\$1,370,189) \$354,851 (\$164,279) \$67,560,876									

[1] Includes \$0 of equivalent IFT valuations & less DDA/TIFA debt captures of \$0 for 2022.

[2] Includes principal outstanding: \$47,345,000 of unlimited tax bonds and \$0 of limited tax bonds

[3] Based on \$3,762,436 of Exempt Personal Property for 2022



**BERKLEY SCHOOL DISTRICT
COUNTY OF OAKLAND, STATE OF MICHIGAN
Taxable Value History**

Levy Year	Taxable Value	Exempt Personal Property	Adjusted Total	T.V. Change	Adjusted T.V. Change	5 Year Average	20 Year Average
2022	\$1,267,323,629	\$3,762,436	\$1,271,086,065	5.38%	5.44%	5.08%	2.50%
2021	1,202,635,906	2,881,390	1,205,517,296	4.39%	4.05%	4.88%	2.52%
2020	1,152,080,270	6,471,610	1,158,551,880	4.58%	4.78%	4.66%	
2019	1,101,674,910	4,000,000	1,105,674,910	5.14%	5.07%	4.44%	
2018	1,047,851,240	4,455,385	1,052,306,625	5.98%	6.04%	3.86%	
2017	988,681,210	3,669,525	992,350,735	4.63%	4.43%	2.86%	
2016	944,940,730	5,332,370	950,273,100	2.39%	2.97%	1.58%	
2015	922,900,330	0	922,900,330	3.69%	3.69%	(0.15)%	
2014	890,089,958	0	890,089,958	2.20%	2.20%	(2.39)%	
2013	870,934,100	0	870,934,100	1.01%	1.01%	(3.05)%	
2012	862,250,550	0	862,250,550	(1.94)%	(1.94)%	(3.13)%	
2011	879,328,330	0	879,328,330	(5.70)%	(5.70)%	(1.73)%	
2010	932,444,830	0	932,444,830	(7.50)%	(7.50)%	0.22%	
2009	1,008,061,600	0	1,008,061,600	(1.12)%	(1.12)%	3.05%	
2008	1,019,434,218	0	1,019,434,218	0.58%	0.58%	4.30%	
2007	1,013,509,340	0	1,013,509,340	5.07%	5.07%	5.19%	
2006	964,607,520	0	964,607,520	4.08%	4.08%	5.34%	
2005	926,808,846	0	926,808,846	6.65%	6.65%		
2004	869,025,335	0	869,025,335	5.13%	5.13%		
2003	826,630,586	0	826,630,586	5.00%	5.00%		
2002	787,240,515	0	787,240,515	5.82%	5.82%		
2001	743,921,077	0	743,921,077				

Enrollment Projections

Berkley School District

63 - 050

Complete this form after acquiring an enrollment projection report from an approved enrollment projection provider. Official enrollment projections should be based on the most recent fall membership count.

Prepared By Stantec Architecture, Inc.

Source Stanfred Consultants

Explanation of Method Selected

Recommendation from Stanfred Consultants:
1.5 Projections, expecting the enrollments to fall between the Most Likely and High Projections, closer to the Most Likely Projection: High Projection, plus three times the Most Likely Projection, divided by four.

Subtotals by Grade:

Grade 1	Preceding 5-Year Enrollment 2	2022-2023 Current Enrollment 3	2027-2028 Projected 5-Year Enrollment 4	(Col 4 - Col 3) / Col 3 Projected Enrollment Change (%) 5
K	317	316	325	2.69%
1	287	299	277	-7.36%
2	297	279	277	-0.90%
3	314	284	293	3.08%
4	332	314	300	-4.46%
5	323	260	281	7.98%
6	327	259	304	17.47%
7	297	290	276	-4.74%
8	351	284	281	-1.23%
9	378	308	317	2.92%
10	337	287	254	-11.67%
11	332	294	249	-15.39%
12	318	276	282	2.08%
Total	4,210	3,750	3,714	-0.97%

Non-general ed student count should not be included in the general ed student count listed above unless discussed with and determined by your enrollment service provider.

Project Sheet

Angell Elementary School	Project No. 1
Description of Proposal/Series 1	
Description of Proposal/Series 2	New construction: Multipurpose room/cafeteria and supporting spaces. Remodeling: Gym, including supporting spaces Replacement of classroom furniture and storage equipment
Description of Proposal/Series 3	
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system, new media center technology
Site Work Description	Site, playpad reconfiguration, and utility relocation work associated with addition.

Construction Cost Per Square Foot

New Construction Square Ft	_____	Cost per Sq Ft	_____
New Addition Square Ft.	6,300	Cost per Sq Ft	\$ 566

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

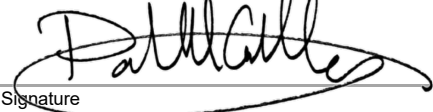
Project will: resolve scheduling and cleaning issues by moving lunch activities out of gym; resolve scheduling and audio problems by moving music program out of undersized classroom. Furniture replacement will improve accommodation for students with varied physical needs.

Estimated Cost of Proposed Construction Project

Column1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction		3,568,390		3,568,390
Remodeling		381,045		381,045
Construction Contingencies		460,779		460,779
Instructional Technology		320,341		320,341
Loose Furnishing/Equipment		1,200,329		1,200,329
Buses		0		0
Site Work		658,350		658,350
Site Acquisition		0		0
Architectural Fees and Costs		368,623		368,623
CM Fees and Costs		506,856		506,856
Estimated Costs	0	7,464,713	0	7,464,713

Certificate by Registered Architect

I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached detail relative to the construction project(s) are true and correct to the best of my knowledge and belief.

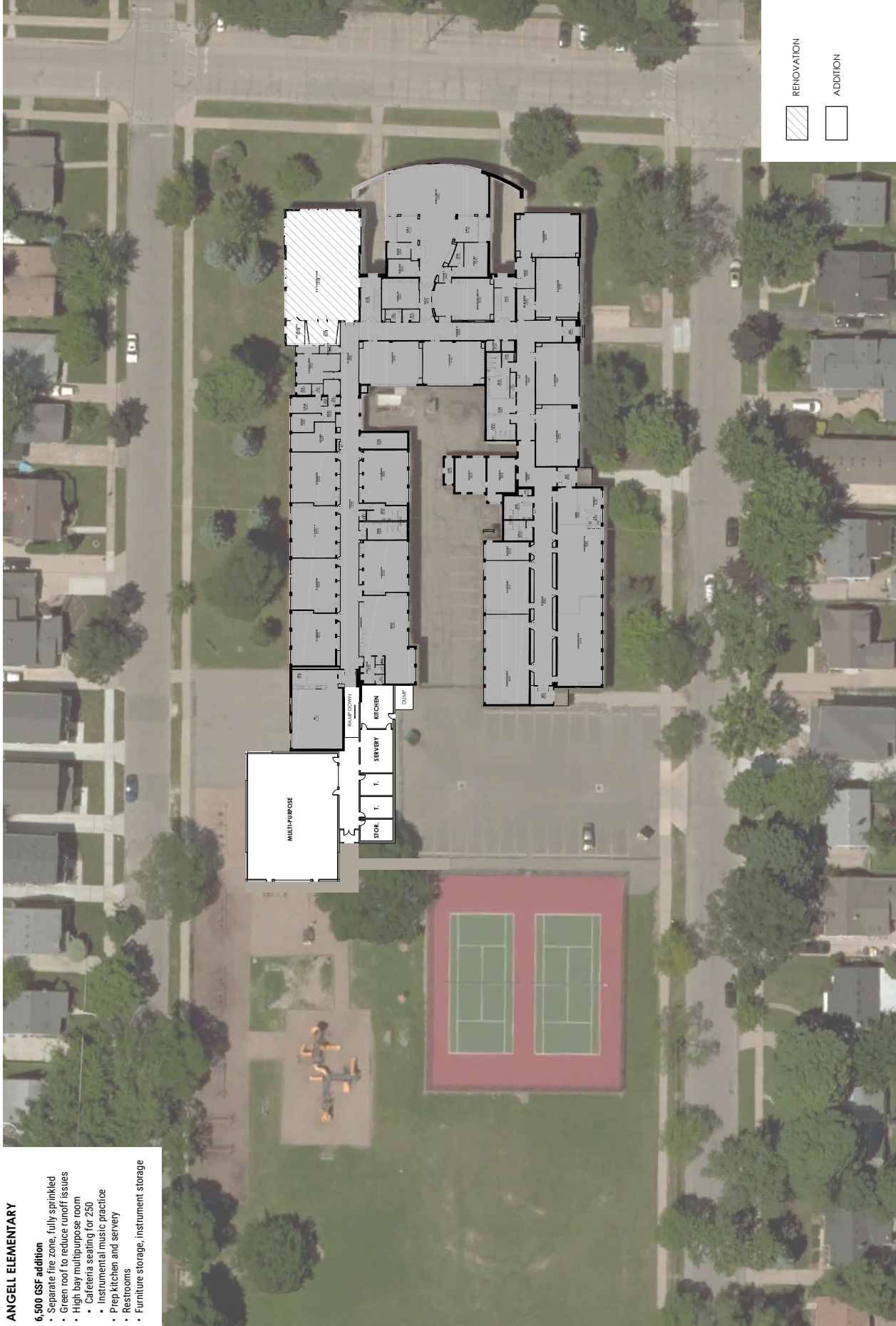
	2/8/2023	Stantec Architecture, Inc. 1301053680
Signature	Date	Firm Name and License Number

Patrick Calhoun	patrick.calhoun@stantec.com	248.336.4860
Printed Name	E-mail Address	Phone Number

ANGELL ELEMENTARY

6,500 GSF addition

- Separate fire zone, fully sprinkled
- Green roof to reduce runoff issues
- High bay multipurpose room
 - Cafeteria seating for 250
 - Instrumental music practice
- Prep kitchen and servery
- Restrooms
- Furniture storage, instrument storage



Building Utilization

School Building Name

Angell Elementary School

Project No. 1

Current Grade Structure K-5
 Proposed Grade Structure K-5

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary	10	20	200
(3-5) Upper Elementary	9	25	225
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	19		425

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	19		425

Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 372

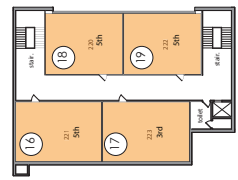
Utilization Percentage 88%

(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.



LEVEL 1





LEVEL 2

 PROPOSED ADDITION
 TEACHING STATION



ANGELL ELEMENTARY

 NORTH

 SCALE = 1" = 20'-0"

Project Sheet

Burton Elementary School	Project No. 2
Description of Proposal/Series 1	New construction: Multipurpose room/cafeteria and supporting spaces. Remodeling: Gym, including supporting spaces, staff spaces to accommodate addition Replacement of classroom furniture and storage equipment
Description of Proposal/Series 2	
Description of Proposal/Series 3	
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system, new media center technology
Site Work Description	Site, playground equipment relocation, parking, and utility relocation work associated with addition.

Construction Cost Per Square Foot

New Construction Square Ft		Cost per Sq Ft	
New Addition Square Ft.	6,400	Cost per Sq Ft	\$ 515

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

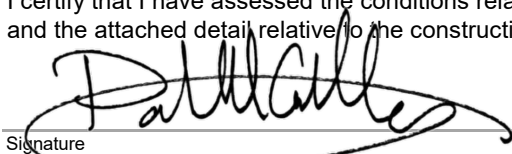
Project will: resolve scheduling and cleaning issues by moving lunch activities out of gym; resolve scheduling and audio problems by moving music program out of undersized classroom. Furniture replacement will improve accommodation for students with varied physical needs.

Estimated Cost of Proposed Construction Project

Column 1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction	3,293,015			3,293,015
Remodeling	454,960			454,960
Construction Contingencies	469,783			469,783
Instructional Technology	291,438			291,438
Loose Furnishing/Equipment	1,092,029			1,092,029
Buses	0			0
Site Work	949,850			949,850
Site Acquisition	0			0
Architectural Fees and Costs	375,826			375,826
CM Fees and Costs	516,761			516,761
Estimated Costs	7,443,661	0	0	7,443,661

Certificate by Registered Architect

I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached detail relative to the construction project(s) are true and correct to the best of my knowledge and belief.

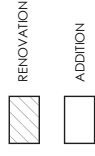
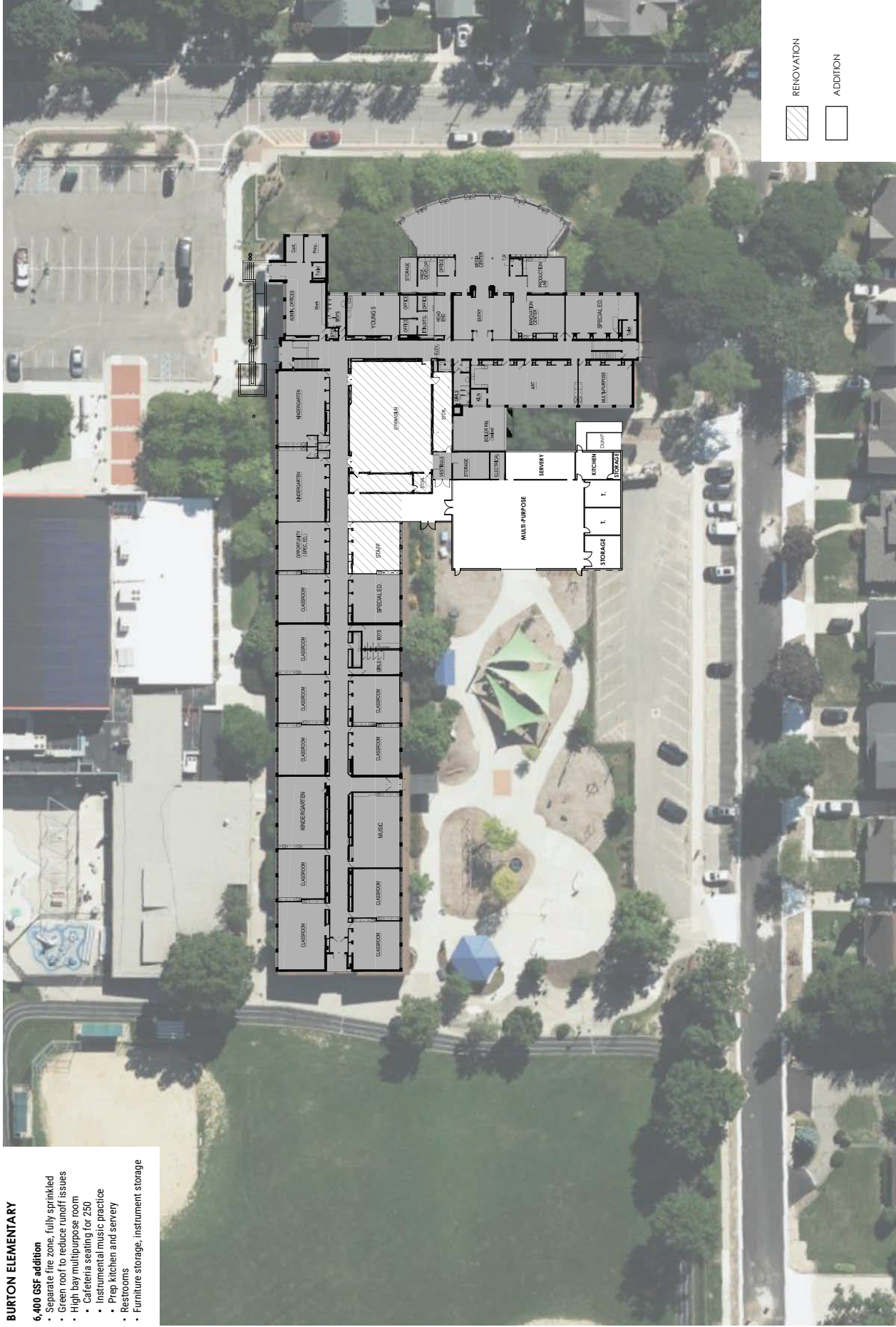

2/8/2023 Stantec Architecture, Inc. 1301053680
 Signature _____ Date _____ Firm Name and License Number _____

Patrick Calhoun 248.336.4860
 Printed Name _____ E-mail Address _____ Phone Number _____

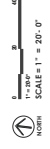
BURTON ELEMENTARY

6,400 GSF addition

- Separate fire zone, fully sprinkled
- Green roof to reduce runoff issues
- High bay multipurpose room
- Cafeteria seating for 250
- Instrumental music practice
- Prep kitchen and servery
- Restrooms
- Furniture storage, instrument storage



BURTON ELEMENTARY



Building Utilization

School Building Name

Burton Elementary School

Project No. 2

Current Grade Structure K-5
Proposed Grade Structure K-5

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary	10	20	200
(3-5) Upper Elementary	11	25	275
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	21		475

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	21		475

Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 420

Utilization Percentage 88%

(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.



PROPOSED ADDITION

TEACHING STATION



BURTON ELEMENTARY



Project Sheet

Pattengill Elementary School		Project No. 3
Description of Proposal/Series 1		
Description of Proposal/Series 2	New construction: Multipurpose room/cafeteria and supporting spaces. Remodeling: Gym, including supporting spaces, staff spaces to accommodate addition Replacement of classroom furniture and storage equipment	
Description of Proposal/Series 3		
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system, new media center technology	
Site Work Description	Site, playpad reconfiguration, and utility relocation work associated with addition.	

Construction Cost Per Square Foot

New Construction Square Ft	_____	Cost per Sq Ft	_____
New Addition Square Ft.	6,400	Cost per Sq Ft	\$ 533

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

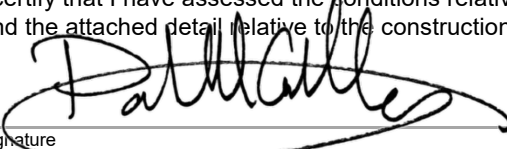
Project will: resolve scheduling and cleaning issues by moving lunch activities out of gym; resolve scheduling and audio problems by moving music program out of undersized classroom. Furniture replacement will improve accommodation for students with varied physical needs.

Estimated Cost of Proposed Construction Project

Column 1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction		3,414,015		3,414,015
Remodeling		433,180		433,180
Construction Contingencies		426,223		426,223
Instructional Technology		291,438		291,438
Loose Furnishing/Equipment		1,092,029		1,092,029
Buses		0		0
Site Work		415,030		415,030
Site Acquisition		0		0
Architectural Fees and Costs		340,978		340,978
CM Fees and Costs		468,845		468,845
Estimated Costs	0	6,881,737	0	6,881,737

Certificate by Registered Architect

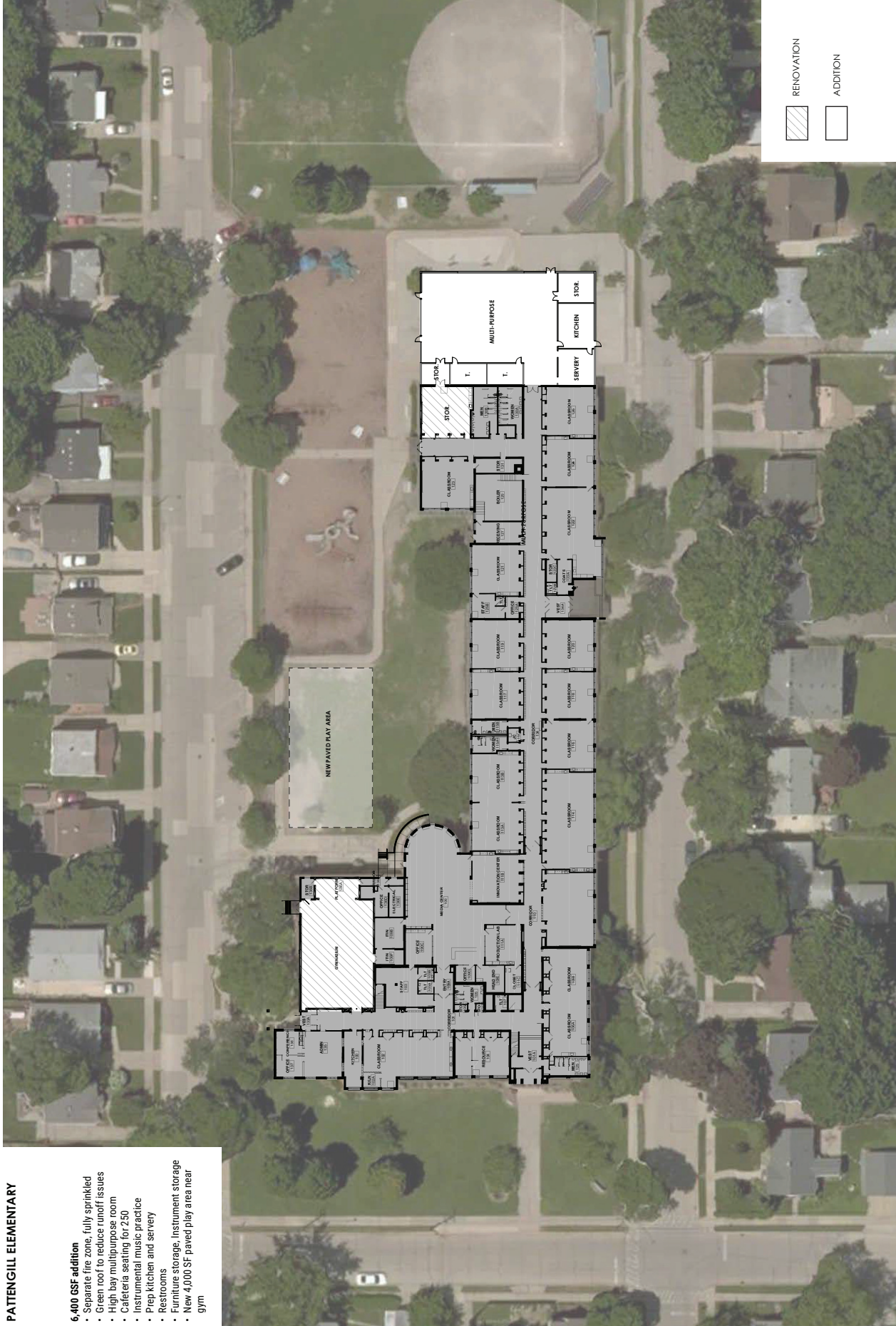
I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached detail relative to the construction project(s) are true and correct to the best of my knowledge and belief.


2/8/2023 Stantec Architecture, Inc. 1301053680
 Signature _____ Date _____ Firm Name and License Number _____

Patrick Calhoun 248.336.4860
 Printed Name E-mail Address Phone Number

PATTENGILL ELEMENTARY

- **6,400 GSF addition**
- Separate fire zone, fully sprinkled
- Green roof to reduce runoff issues
- High bay multipurpose room
- Cafeteria seating for 250
- Instrumental music practice
- Prep kitchen and servery
- Restrooms
- Furniture storage, instrument storage
- New 4,000 SF paved play area near gym



Building Utilization

School Building Name

Pattengill Elementary School

Project No. 3

Current Grade Structure K-5
Proposed Grade Structure K-5

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary	7	20	140
(3-5) Upper Elementary	6	25	150
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	13		290

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	13		290

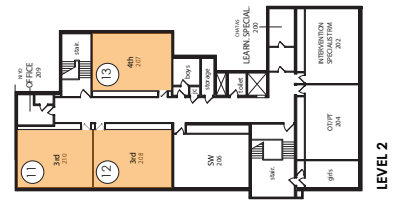
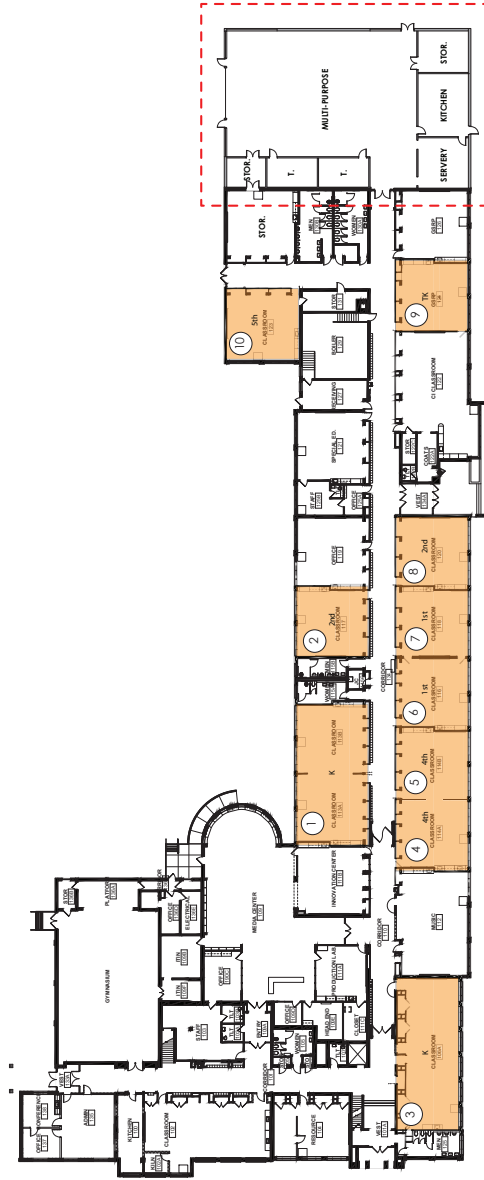
Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 279

Utilization Percentage 96%

(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.

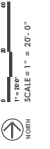


PROPOSED ADDITION

TEACHING STATION



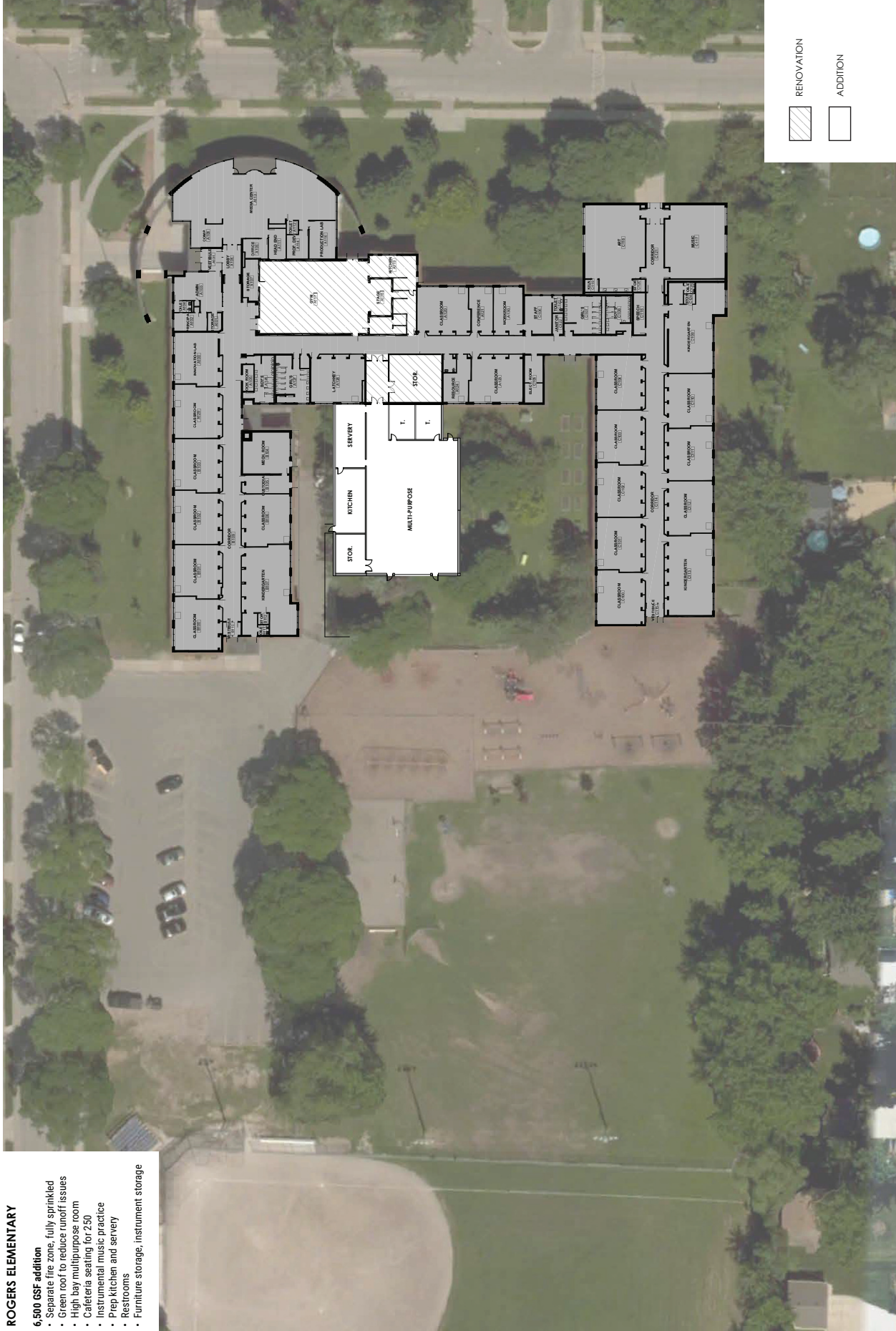
PATTENGILL ELEMENTARY



ROGERS ELEMENTARY

6,500 GSF addition

- Separate fire zone, fully sprinkled
- Green roof to reduce runoff issues
- High bay multipurpose room
- Cafeteria seating for 250
- Instrumental music practice
- Prep kitchen and servery
- Restrooms
- Furniture storage, instrument storage



Preliminary Bond Application Detailed Work Scope
Berkeley School District
Proposed August 2023 Bond
February 20, 2023
Project Rogers Elementary

Project #: 4 Existing Building SF: 45,537

Description	QTY	Unit	Unit Cost	Cost	Sub Total	Series	
						Year	Esc Factor
Loose Furnishings/Equipment							
Tech Allow for New Café	1	Allow	\$ 30,000	\$ 30,000			
FF & E For New Café	1	Allow	\$ 50,000	\$ 50,000			
Phone System, Network Switches	1	Allow	\$ 207,117	\$ 207,117			
Student and teacher desk chair - Media center furniture	1	Allow	\$ 650,386	\$ 650,386			
			Subtotal		\$ 937,503		\$ 1,246,879
Busses				\$ -	\$ -		
Site Acquisition				\$ -	\$ -		
Contingency				10%	\$ 358,250		\$ 476,473
CM Fees and Costs							
CM Fee and Reimbursables				8%			
General Conditions/Permits				3%			
				11%	\$ 394,075		\$ 524,120
A/E Fees and Costs							
A/E Fees				7%			
Reimbursables(Survey/Geo Tech)				1%			
				8%	\$ 286,600		\$ 381,178
Grand Total					\$ 5,799,786	\$ -	\$ 7,713,715

Construction Costs for Calculation	
Site Work	\$ 385,000
New Construction	\$ 2,780,000
Remodeling	\$ 417,500
Subtotal	\$ 3,582,500

Building Utilization

School Building Name

Rogers Elementary School

Project No. 4

Current Grade Structure K-5
 Proposed Grade Structure K-5

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary	9	20	180
(3-5) Upper Elementary	8	25	200
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	17		380

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	17		380

Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 346

Utilization Percentage 91%

(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.

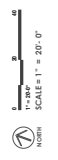


PROPOSED ADDITION

TEACHING STATION



ROGERS ELEMENTARY



Project Sheet

Norup International School		Project No. 5
Description of Proposal/Series 1		
Description of Proposal/Series 2	Remodeling: Gym, including supporting spaces. Replacement of classroom furniture and storage equipment.	
Description of Proposal/Series 3		
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system, new media center technology	
Site Work Description	N/A	

Construction Cost Per Square Foot

New Construction Square Ft _____ Cost per Sq Ft _____
 New Addition Square Ft _____ Cost per Sq Ft _____

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

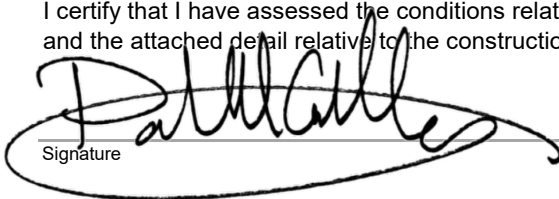
Furniture replacement will improve accommodation for students with varied physical needs.

Estimated Cost of Proposed Construction Project

Column 1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction				0
Remodeling	978,285			978,285
Construction Contingencies	97,829			97,829
Instructional Technology	291,438			291,438
Loose Furnishing/Equipment	697,309	463,690		1,160,999
Buses				0
Site Work				0
Site Acquisition				0
Architectural Fees and Costs	78,263			78,263
CM Fees and Costs	107,611			107,611
Estimated Costs	2,250,734	463,690	0	2,714,424

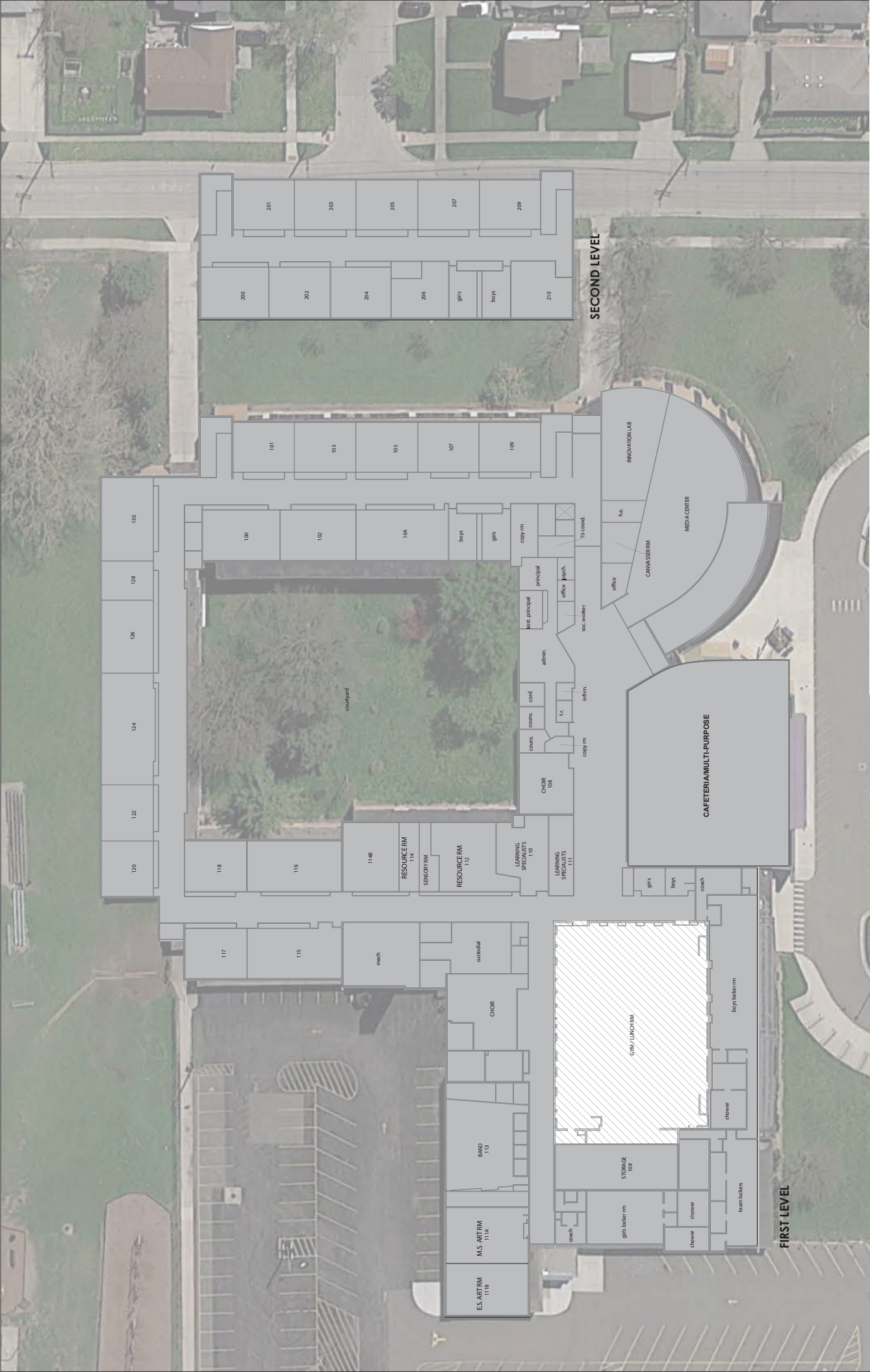
Certificate by Registered Architect

I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached detail relative to the construction project(s) are true and correct to the best of my knowledge and belief.


 Signature

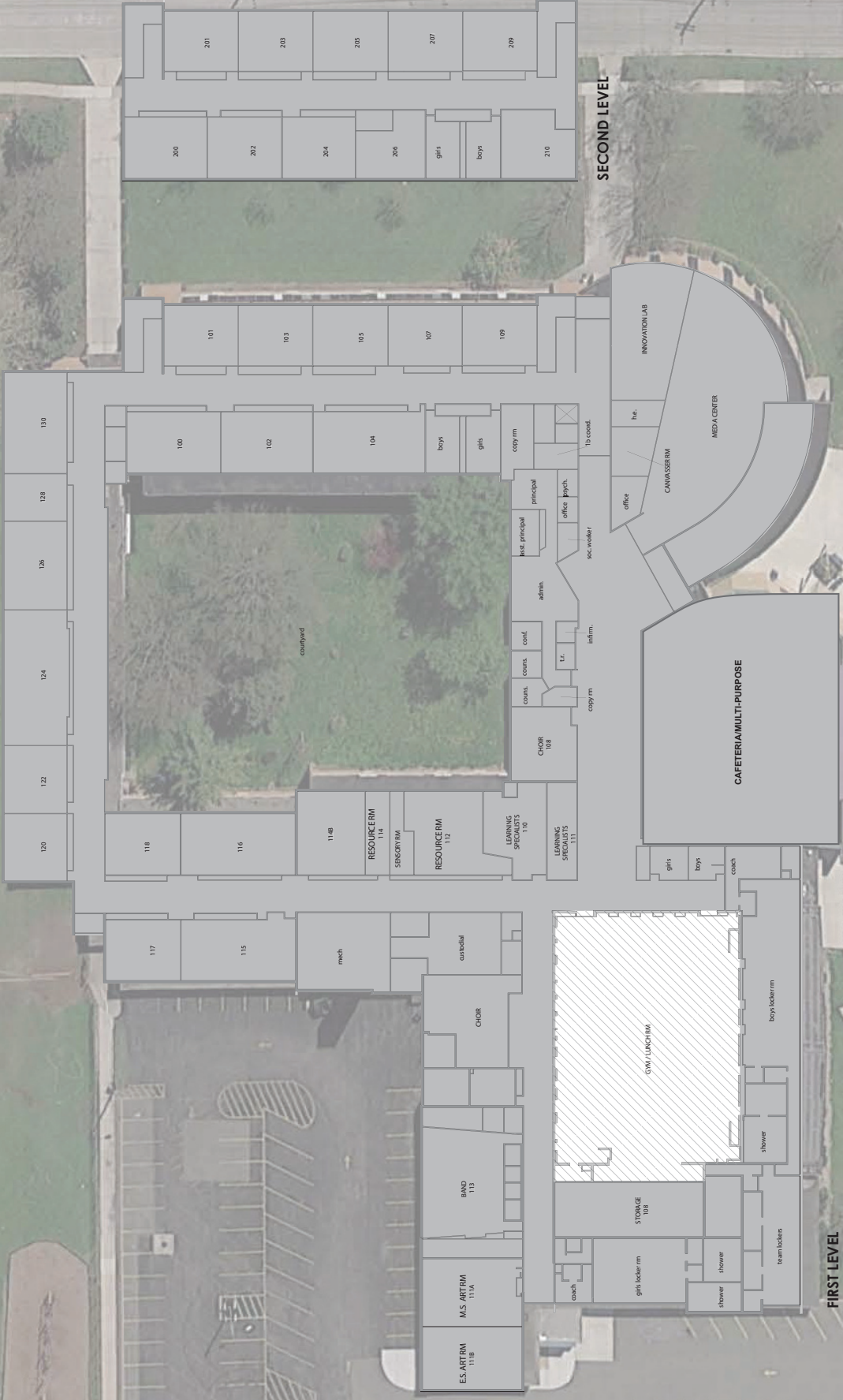
Date 2/8/2023 Firm Name and License Number Stantec Architecture, Inc. 1301053680

Printed Name Patrick Calhoun E-mail Address patrick.calhoun@stantec.com Phone Number 248.336.4860



SECOND LEVEL

FIRST LEVEL



100 102 104 106 108 110 112 114 116 118 120 122 124 126 128 130

200 202 204 206 208 210

101 103 105 107 109

201 203 205 207 209

courtyard

CAFETERIA/MULTI-PURPOSE

INNOVATION LAB

MEDIA CENTER

CANTINE

ES. ART RM 111B

M.S. ART RM 111A

BAND 113

CHOR

mech

outdoor

RESOURCE RM 112

RESOURCE RM 114

114B

116

118

LEARNING SPECIALISTS 111

LEARNING SPECIALISTS 110

CLERK 108

counts

counts

cont.

admin

asst. principal

principal

copy rm

to coord.

boys

girls

copy rm

h.c.

office

office princ.

soc worker

infirm.

copy rm

l.r.

counts

counts

cont.

admin

asst. principal

principal

copy rm

to coord.

girls

boys

coach

shower

boys locker rm

STORAGE 108

GYM/LUNCH RM

shower

shower

team lockers

girls locker rm

Preliminary Bond Application Detailed Work Scope
Berkley School District
Proposed August 2023 Bond
February 20, 2023
 Project Norup International School

Project #: 5

Existing Building SF: 97,789

Description	QTY	Unit	Unit Cost	Cost	Sub Total	Series		
						Year	2024	2025
CM Fees and Costs						Esc Factor	121%	133%
<i>CM Fee and Reimbursables</i>			8%					
<i>General Conditions/Permits</i>			3%					
	808,500		11%	\$ 88,935	\$ 88,935		\$ 107,611	
A/E Fees and Costs								
<i>A/E Fees</i>			7%					
<i>Reimbursables(Survey/Geo Tech)</i>			1%					
	808,500		8%	\$ 64,680	\$ 64,680		\$ 78,263	
Grand Total				\$ 2,243,326	\$ 2,243,326	\$ -	\$ 2,250,735	\$ 463,690

Construction Costs for Calculation	
<i>Site Work</i>	-
<i>New Construction</i>	-
<i>Remodeling</i>	808,500
<i>Subtotal</i>	808,500

Building Utilization

School Building Name

Norup International School

Project No. 5

Current Grade Structure K-8
 Proposed Grade Structure K-8

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary	6	20	120
(3-5) Upper Elementary	7	25	175
(6-8) Junior High	22	22.5	495
(9-12) High School		21.25	0
Subtotal	35		790

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	35		790

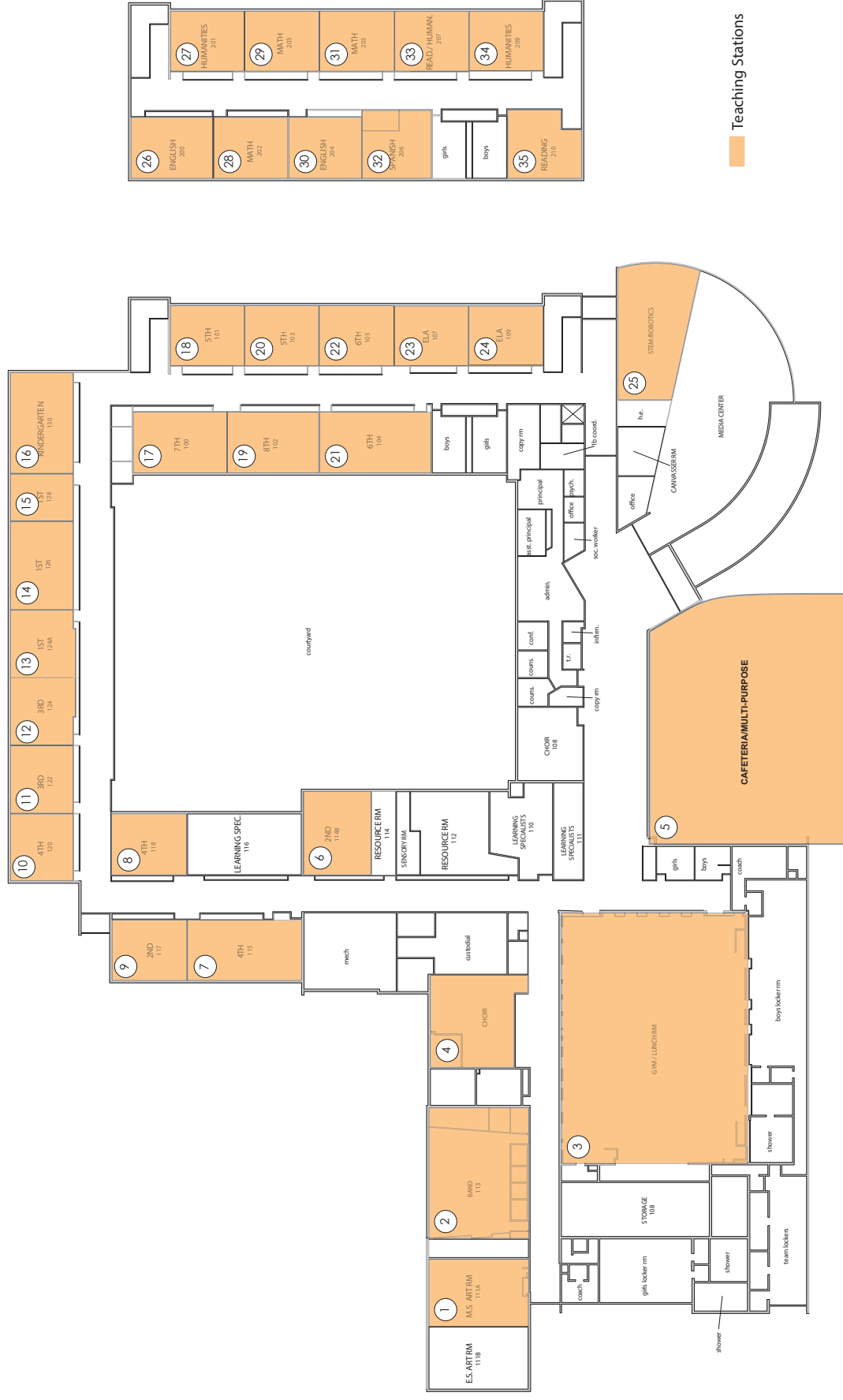
Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 648

Utilization Percentage 82%

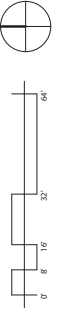
(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.



Teaching Stations

NORUP INTERNATIONAL SCHOOL K-8



Project Sheet

Anderson Middle School		Project No. 6
Description of Proposal/Series 1		
Description of Proposal/Series 2	Remodeling: Gym, including supporting spaces; convert unused locker rooms to home team locker facilities. Replacement of classroom furniture and storage equipment. Remodeling: Renovation of Hurley Stadium building to provide appropriate visiting team facilities.	
Description of Proposal/Series 3		
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system, new media center technology	
Site Work Description	Site work related to Hurley Field improvements, including expansion and reconfiguration of the parking lot; renovation of track and field stations, and stadium lighting.	

Construction Cost Per Square Foot

New Construction Square Ft _____ Cost per Sq Ft _____
 New Addition Square Ft _____ Cost per Sq Ft _____

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

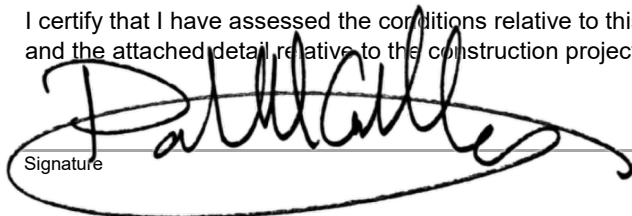
Renovation of the stadium and locker rooms will improve space and security for both teams during competitions. Furniture replacement will improve accommodation for students with varied physical needs. New field lighting will reduce energy use.

Estimated Cost of Proposed Construction Project

Column 1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction				0
Remodeling		1,523,515		1,523,515
Construction Contingencies		383,240		383,240
Instructional Technology		320,341		320,341
Loose Furnishing/Equipment		1,271,617		1,271,617
Buses				0
Site Work		2,308,880		2,308,880
Site Acquisition				0
Architectural Fees and Costs		306,592		306,592
CM Fees and Costs		421,563		421,563
Estimated Costs	0	6,535,748	0	6,535,748

Certificate by Registered Architect

I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached detail relative to the construction project(s) are true and correct to the best of my knowledge and belief.


 Signature

2/8/2023 _____ Date
 Stantec Architecture, Inc. 1301053680 Firm Name and License Number

Patrick Calhoun _____ Printed Name
 patrick.calhoun@stantec.com _____ E-mail Address
 248.336.4860 _____ Phone Number

Building Utilization

School Building Name

Anderson Middle School

Project No. 6

Current Grade Structure 6-8
 Proposed Grade Structure 6-8

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High	30	22.5	675
(9-12) High School		21.25	0
Subtotal	30		675

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Subtotal	0		0
Total	30		675

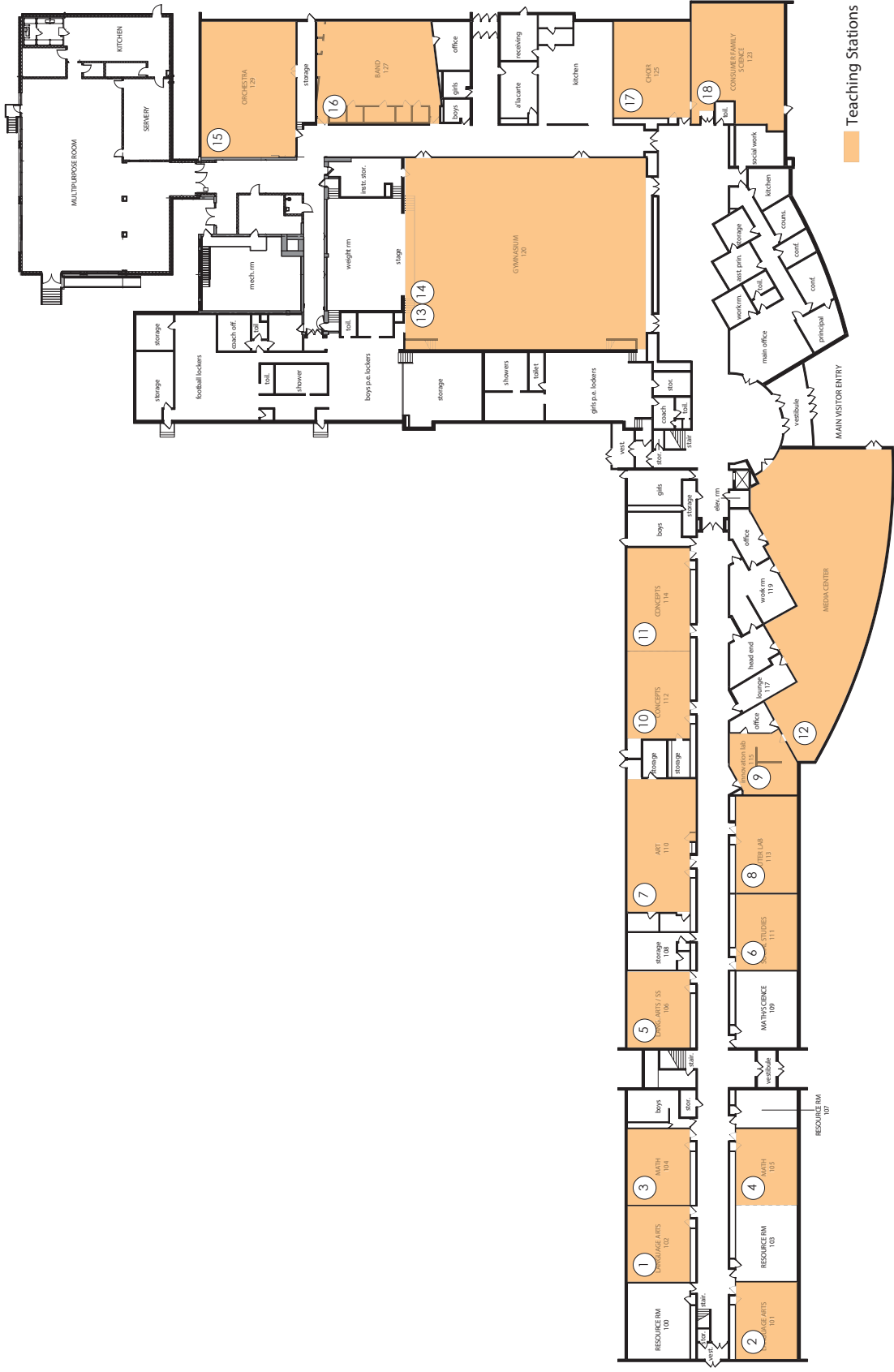
Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 458

Utilization Percentage 68%

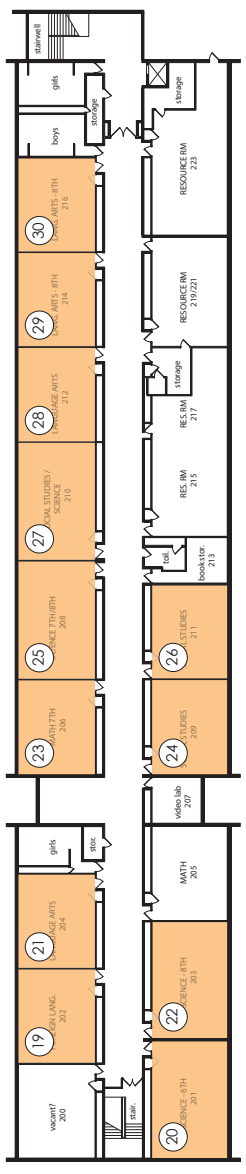
(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.



Teaching Stations

ANDERSON MIDDLE SCHOOL



Project Sheet

Berkley High School	Project No. 7
Description of Proposal/Series 1	
Description of Proposal/Series 2	<p>New construction: Multipurpose blackbox classroom addition for performing and music arts programs, including support/storage spaces. Auditorium lobby addition for event prefunction and other activities. New indoor practice/training facility for athletics programs, music programs, physical education, and robotics teams.</p> <p>Remodeling: Auditorium, music classrooms and associated support spaces. Science classrooms and labs to replace lab casework, upgrade plumbing and exhaust, and meet current code and safety requirements. Natatorium upgrades to pool, equipment and space. Replacement of classroom furniture and storage equipment.</p>
Description of Proposal/Series 3	
Instructional Technology Description	New interactive classroom instructional/ audiovisual equipment, new phone system.
Site Work Description	Site, crosswalk, new turf practice field, parking, lighting, utility work, and demolition of district maintenance building associated with additions and new construction.

Construction Cost Per Square Foot

New Construction Square Ft	66,000	Cost per Sq Ft	\$ 278
New Addition Square Ft.	7,300	Cost per Sq Ft	\$ 545

Statement describing any existing environmental or usability problems the proposed project will address. (ex: asbestos, energy use, or ADA requirements)

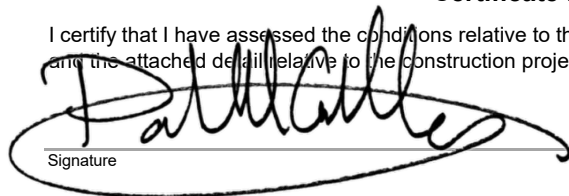
Blackbox and lobby addition will resolve scheduling, storage and access issues related to performing and musical arts programs. New practice facility will resolve issues of insufficient indoor and outdoor practice space for educational, athletic, music and other extracurricular programs. Site work will improve parking availability and student safety by reducing the number of areas where students cross the street. Furniture replacement will improve accommodation for students with varied physical needs.

Estimated Cost of Proposed Construction Project

Column 1	Proposal/Series 1	Proposal/Series 2	Proposal/Series 3	Total
New Construction		22,339,625		22,339,625
Remodeling		7,548,706		7,548,706
Construction Contingencies		3,600,364		3,600,364
Instructional Technology		291,438		291,438
Loose Furnishing/Equipment		2,673,920		2,673,920
Buses				0
Site Work		5,587,175		5,587,175
Site Acquisition				0
Architectural Fees and Costs		2,838,040		2,838,040
CM Fees and Costs		4,257,061		4,257,061
Estimated Costs	0	49,136,329	0	49,136,329

Certificate by Registered Architect

I certify that I have assessed the conditions relative to this facility and the details of the proposed project(s) described above and the attached details relative to the construction project(s) are true and correct to the best of my knowledge and belief.



Signature

Date

2/8/2023 Stantec Architecture, Inc. 1301053680

Firm Name and License Number

Patrick Calhoun

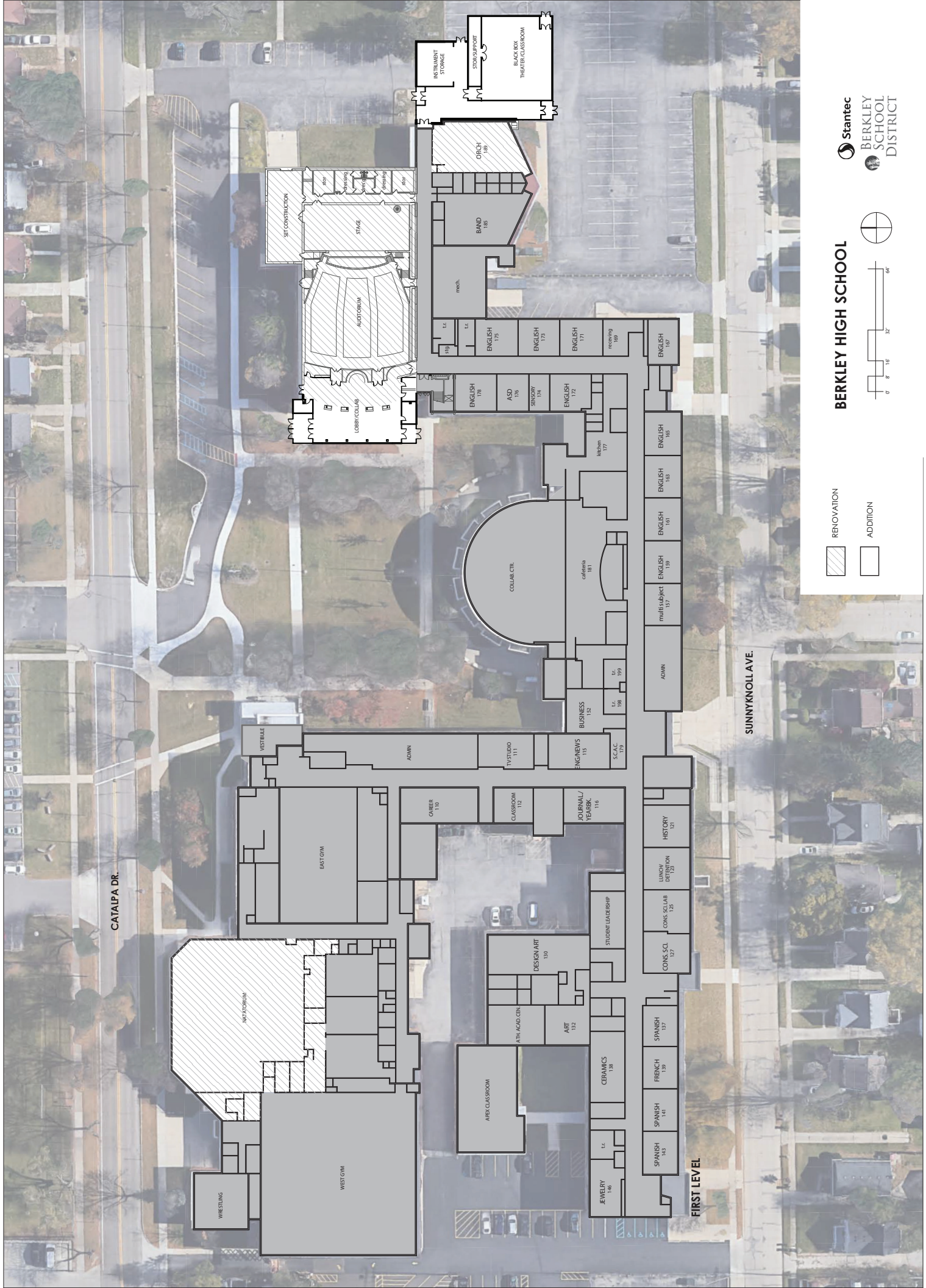
Printed Name

patrick.calhoun@stantec.com

E-mail Address

248.336.4860

Phone Number



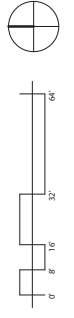
CATALPA DR.

SUNNYKNOLL AVE.

FIRST LEVEL

- RENOVATION
- ADDITION

BERKELEY HIGH SCHOOL



WESTING

WEST GYM

VESTIBULE

ADMIN

EAST GYM

CAREER 110

CLASSROOM 112

JOURNAL/ YEARBK 116

TV STUDIO 111

ENGLISH NEWS 115

S.C.A.C. 119

BUSINESS 122

BUSINESS 122

ADMIN

ADMIN

ADMIN

ADMIN

ADMIN

ADMIN

ADMIN

INTEGRATION

ART CLASSROOM

ATH. ACAD. CEN.

ART 132

DESIGN ART 130

STUDENT LEADERSHIP

CERAMICS 138

JEWELRY 146

SPANISH 143

SPANISH 141

FRENCH 139

SPANISH 137

CONS. SCL. 127

CONS. SCLAB 125

LABORATORY 123

HISTORY 121

LIBRARY/COLLEGE

SET CONSTRUCTION

AUDITORIUM

STAGE

BAND 185

ORCH 189

RESTROOMS STORAGE

STORAGE/POPE

BLACK BOX THEATER/CLASSROOM

ENGLISH 178

ENGLISH 178

ASD 176

SENIOR 174

ENGLISH 172

ENGLISH 172

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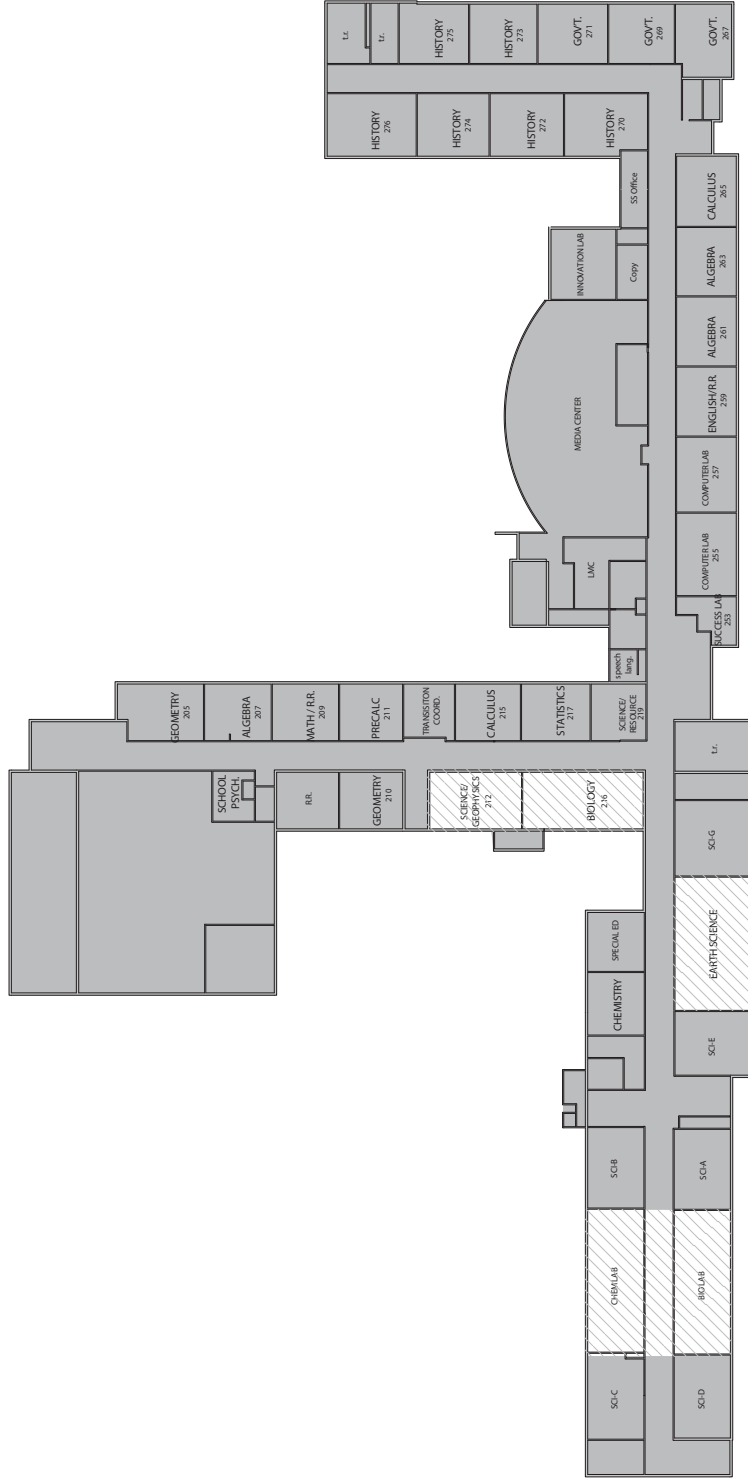
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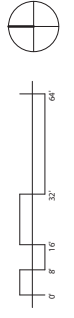
ENGLISH 17



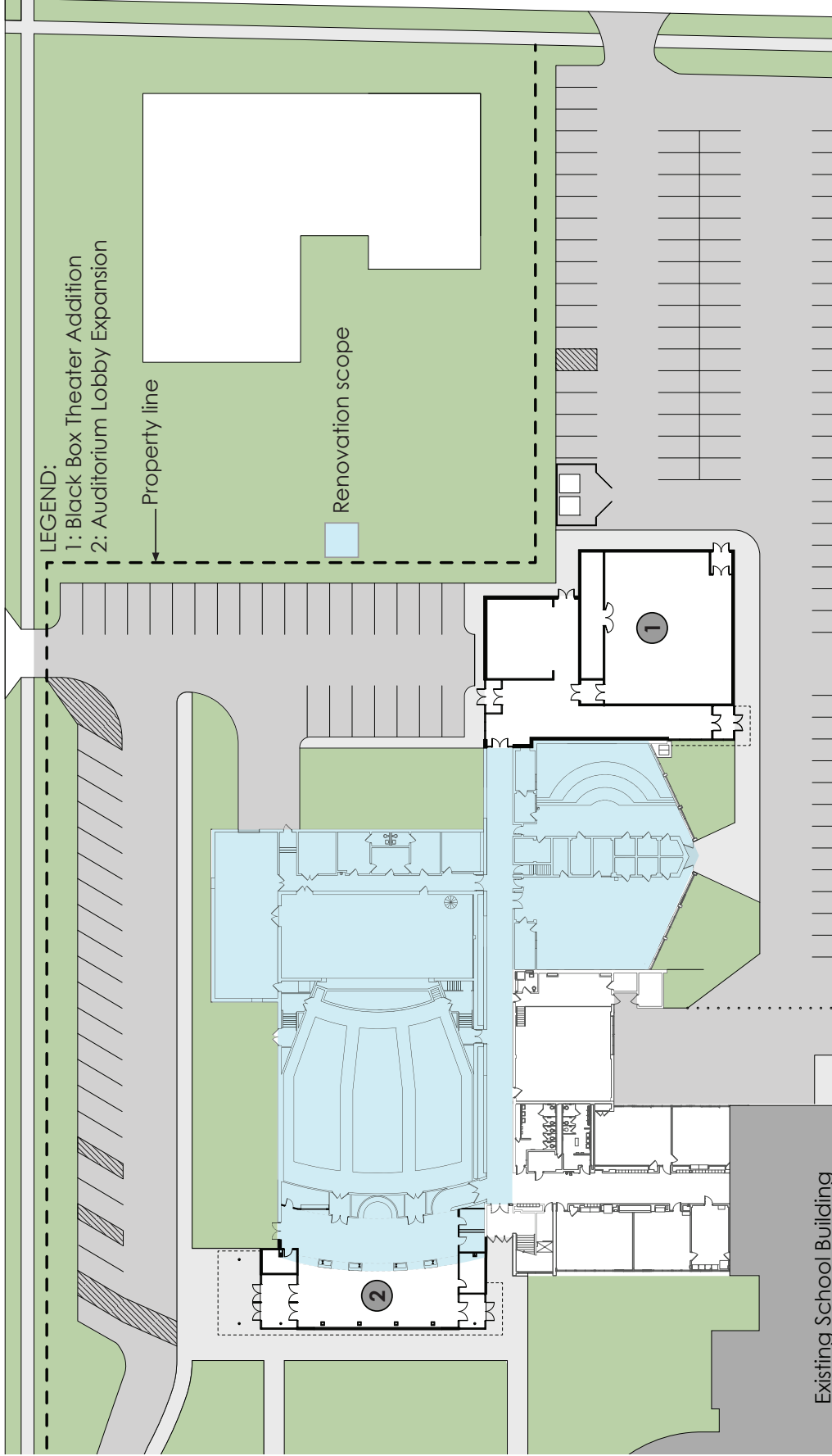
SECOND LEVEL

 RENOVATION
 ADDITION

BERKLEY HIGH SCHOOL



CATALPA DRIVE



HENLEY AVENUE

LEGEND:

- 1: Black Box Theater Addition
- 2: Auditorium Lobby Expansion

Property line

Renovation scope

1

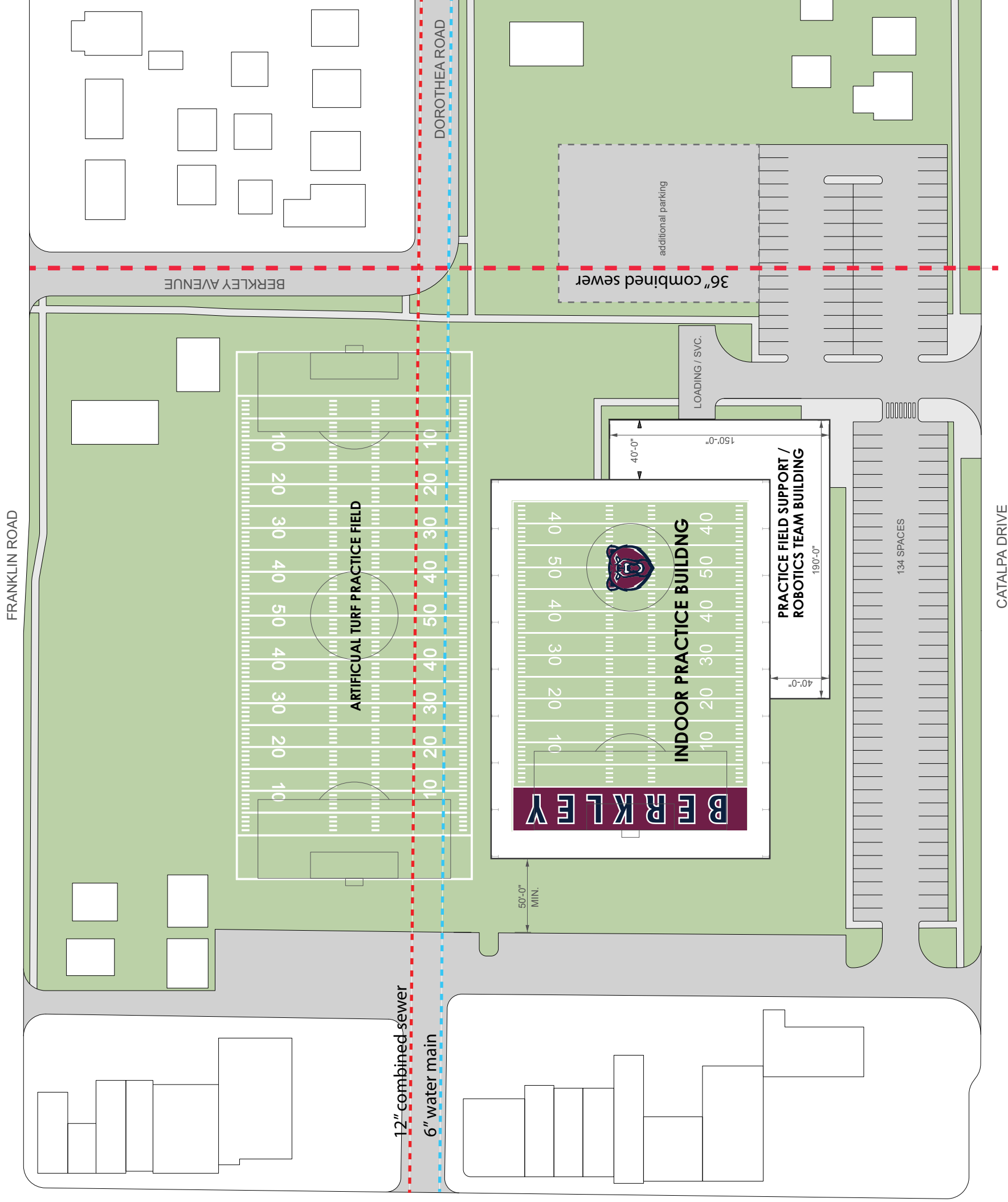
2

Existing School Building



LOBBY EXPANSION & BLACK BOX ADDITION
COMPOSITE PLAN





60 YARD INDOOR FIELD HOUSE WITH
ATTACHED TEAM & ROBOTICS FACILITY



Preliminary Bond Application Detailed Work Scope
Berkeley School District
Proposed August 2023 Bond
February 20, 2023
Project Berkeley High School

Project #: 7 Existing Building SF: 228,147

Description	QTY	Unit	Unit Cost	Cost	Sub Total	Series	
						Year	Esc Factor
A/E Fees			7%			2024	121%
Reimbursables(Survey/Geo Tech)			1%			2025	133%
	29,318,600		8%	\$ 2,345,488	\$ 2,345,488	\$ 2,838,040	
Grand Total				\$ 40,564,889	\$ 40,564,889	\$ 49,136,329	\$ -

Construction Costs for Calculation	
Site Work	\$ 4,617,500
New Construction	\$ 18,462,500
Remodeling	\$ 6,238,600
Subtotal	\$ 29,318,600

Building Utilization

School Building Name

Berkley High School

Project No. 7

Current Grade Structure 9-12
Proposed Grade Structure 9-12

1. List the number of teaching stations in appropriate column.
2. Calculate total capacity using the applicable capacity factor.
3. Enter five (5) year projected enrollment.
4. Calculate building utilization rate.
5. Attach floor plan of the building. Show the rooms and category (existing, proposed new, closed).
6. Number the teaching stations in consecutive order.

Existing	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School	66.00	21.25	1,403
Subtotal	66		1,403

Proposed New	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School	1.00	21.25	21
Subtotal	1		21
Total	67		1423.75

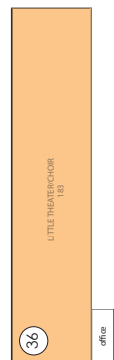
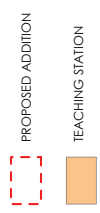
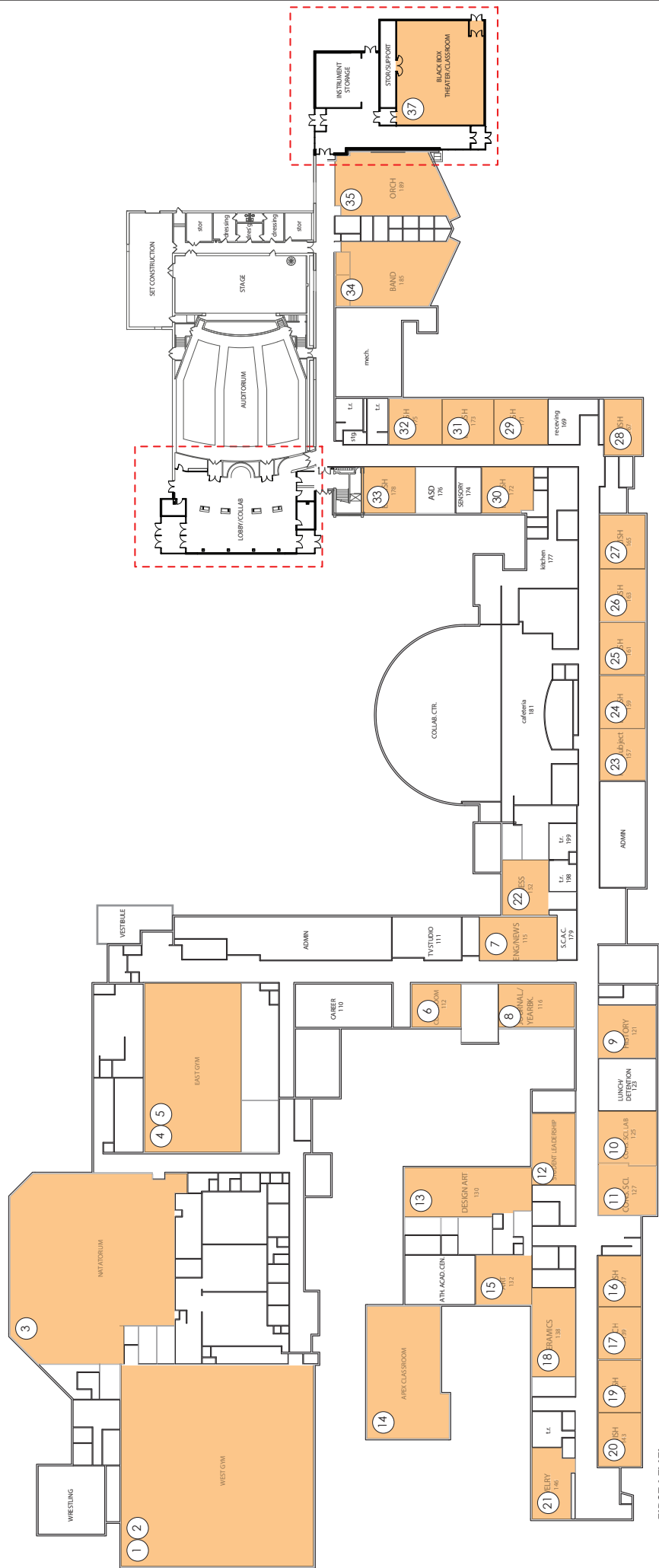
Facility to be Closed	List # of Teaching Stations	Capacity Factor	Capacity
(K-2) Lower Elementary		20	0
(3-5) Upper Elementary		25	0
(6-8) Junior High		22.5	0
(9-12) High School		21.25	0
Total	0		0

Projected 5-Year Enrollment 1190

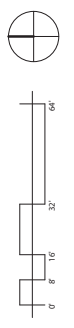
Utilization Percentage 84%

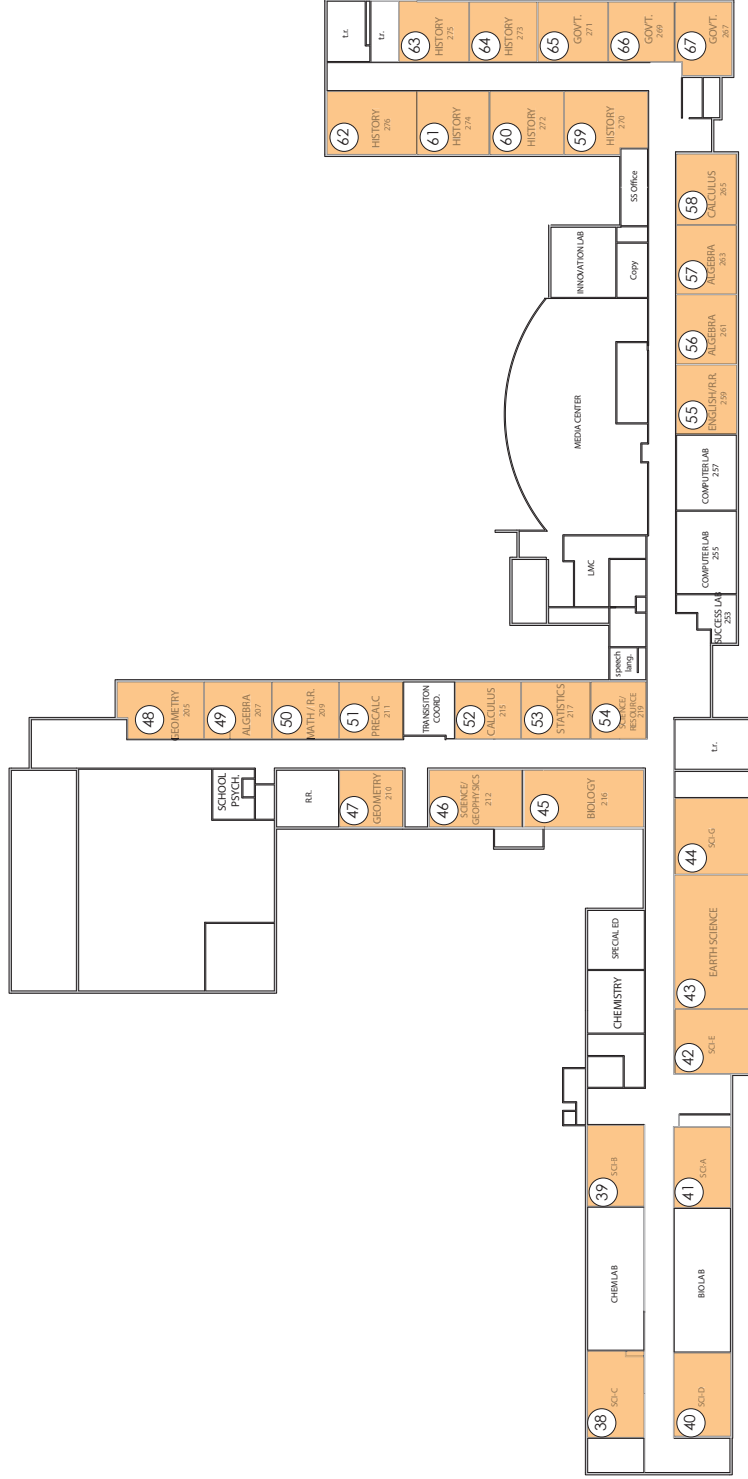
(Projected 5-Year Enrollment / Total Capacity)

Please transfer applicable information to the Utilization Summary on Page 6 of the application.



BERKLEY HIGH SCHOOL

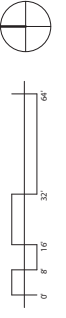




SECOND LEVEL

TEACHING STATION

BERKLEY HIGH SCHOOL



Cost Summary-Series 1

Berkley School District														63 - 060	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Proj. #	Cost per Sq Foot	New Cons Sq Feet	New Construction	Remodeling	Contingency	Instructional Technology	Loose Furn and Equip	Buses	Site Work	Site Acquisition	A/E Fees and Costs	CM Fees and Costs	Project Costs	Election/Issue Costs	Total Cost
1													0		0
2	\$515	6,400	3,293,015	454,960	469,783	291,438	1,092,029	0	949,850	0	375,826	516,761	7,443,661	317,700	7,761,361
3													0		0
4													0		0
5	\$0	0	0	978,285	97,829	291,438	697,309	0	0	0	78,263	107,611	2,250,735	96,063	2,346,798
6													0		0
7													0		0
													0		0
													0		0
													0		0
													0		0
													0		0
Total		6,400	3,293,015	1,433,245	567,611	582,876	1,789,338	0	949,850	0	454,089	624,372	9,694,396	413,763	10,108,159

17. Funding:

Total Estimated Cost of Project: \$10,108,159

LESS:

Estimated Interest Earnings: \$108,159

Other (specify):

AMOUNT OF PROPOSED ISSUE **\$10,000,000**
(Amount to be Qualified)

Cost Summary-Series 2

Berkley School District													63 - 060		
1 Proj. #	2 Cost per Sq Foot	3 New Cons Sq Feet	4 New Construction	5 Remodeling	6 Contingency	7 Instructional Technology	8 Loose Furn and Equip	9 Buses	10 Site Work	11 Site Acquisition	12 A/E Fees and Costs	13 CM Fees and Costs	14 Project Costs	15 Election/Issu e Costs	16 Total Cost
1	\$566	6,300	3,568,390	381,045	460,779	320,341	1,200,329	0	658,350	0	368,623	506,856	7,464,713	64,579	7,529,292
2													0	0	0
3	\$533	6,400	3,414,015	433,180	426,223	291,438	1,092,029	0	415,030	0	340,978	468,845	6,881,737	59,535	6,941,272
4	\$569	6,500	3,697,400	555,275	476,473	320,341	1,246,879	0	512,050	0	381,178	524,120	7,713,715	66,733	7,780,448
5							463,690						463,690	4,011	467,701
6	\$0	0	0	1,523,515	383,240	320,341	1,271,617	0	2,308,880	0	306,592	421,563	6,535,748	56,542	6,592,290
7	\$305	73,300	22,339,625	7,548,706	3,600,364	291,438	2,673,920	0	5,587,175	0	2,838,040	4,257,061	49,136,329	425,088	49,561,418
													0		0
													0		0
													0		0
													0		0
													0		0
Total		92,500	33,019,430	10,441,721	5,347,077	1,543,900	7,948,463	0	9,481,485	0	4,235,411	6,178,445	78,195,932	676,489	78,872,421

17. Funding:

Total Estimated Cost of Project: \$78,872,421

LESS:

Estimated Interest Earnings: \$872,421

Other (specify):

AMOUNT OF PROPOSED ISSUE **\$78,000,000**
(Amount to be Qualified)

Cost Summary-Combined

Berkley School District

63 - 060

1 Proj. #	2 Cost per Sq Foot	3 New Cons Sq Feet	4 New Construction	5 Remodeling	6 Contingency	7 Instructional Technology	8 Loose Furn and Equip	9 Buses	10 Site Work	11 Site Acquisition	12 A/E Fees and Costs	13 CM Fees and Costs	14 Project Costs	15 Election/Issue Costs	16 Total Cost
1	\$566	6,300	\$3,568,390	\$381,045	\$460,779	\$320,341	\$1,200,329	\$0	\$658,350	\$0	\$368,623	\$506,856	7,464,713	64,579	7,529,292
2	\$515	6,400	\$3,293,015	\$454,960	\$469,783	\$291,438	\$1,092,029	\$0	\$949,850	\$0	\$375,826	\$516,761	7,443,661	317,700	7,761,361
3	\$533	6,400	\$3,414,015	\$433,180	\$426,223	\$291,438	\$1,092,029	\$0	\$415,030	\$0	\$340,978	\$468,845	6,881,737	59,535	6,941,272
4	\$569	6,500	\$3,697,400	\$555,275	\$476,473	\$320,341	\$1,246,879	\$0	\$512,050	\$0	\$381,178	\$524,120	7,713,715	66,733	7,780,448
5	\$0	-	\$0	\$978,285	\$97,829	\$291,438	\$1,160,999	\$0	\$0	\$0	\$78,263	\$107,611	2,714,425	100,074	2,814,499
6	\$0	-	\$0	\$1,523,515	\$383,240	\$320,341	\$1,271,617	\$0	\$2,308,880	\$0	\$306,592	\$421,563	6,535,748	56,542	6,592,290
7	\$305	73,300	\$22,339,625	\$7,548,706	\$3,600,364	\$291,438	\$2,673,920	\$0	\$5,587,175	\$0	\$2,838,040	\$4,257,061	49,136,329	425,088	49,561,418
													0		0
													0		0
													0		0
													0		0
													0		0
Total		98,900	36,312,445	11,874,966	5,914,688	2,126,776	9,737,801	0	10,431,335	0	4,689,500	6,802,817	87,890,328	1,090,252	88,980,580

17. Funding:

Total Estimated Cost of Project: \$88,980,580

LESS:

Estimated Interest Earnings: \$980,580

Other (specify): _____

AMOUNT OF PROPOSED ISSUE **\$88,000,000**
(Amount to be Qualified)

3881, Worksheet 1: Useful Life Calculation- Series 1

A school district must demonstrate that the weighted average maturity of the qualified bond issue does not exceed 120% of the average reasonably expected useful life of the facilities, excluding land and site improvements, being financed with the proceeds of the qualified bonds.

The following table lists the recommended average useful life of the categories of assets that should be considered in this calculation. If a specific item is not listed, it should be assigned to the most closely related category.

Asset Category	Useful Life Years
New School Building	40
Building Improvements - interior and exterior remodeling such as plumbing, electrical, HVAC, fire suppression, security systems, elevators, etc.	30
Roofing	20
Flooring	10
Furnishings and Equipment - furniture and fixtures that are not a structural component of a building such as desks, chairs, tables, storage units, office equipment, copiers, fax machines, communications equipment, kitchen equipment and appliances, athletic equipment, etc.	10
Technology Infrastructure - cables, networks, etc.	10
Buses	6
Technology (instructional and non-instructional) - computers, printers, scanners, etc.	5

Use the worksheet below to calculate the weighted average useful life of assets included in projects funded by bond proceeds.

Follow Column Instructions	→	Enter Value	Col. 1 + Col. 2	Enter Value	Enter Value	Col. 4 + Col. 5	Col. 6 ÷ Col. 6 Total	Col. 3 x Col. 7
Asset Type	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8
Asset Type	Average Useful Life of Asset (in Years)	Time between Bonds Issue Date and Purchase	Useful Life of Asset from Bond Issue Date	Expenditure Amount	Allocation of Related Professional Fees	Total Costs (Incl. Related Fees)	% of Total Cost	Average Useful Life of Assets (in years)
School Buildings	40	0	40	3,293,015	625,673	3,918,688	49.01%	19.60
Building Improvements	30	0	30	1,180,113	223,300	1,403,413	17.55%	5.27
Roofing	20	0	20	0	0	0	0.00%	0.00
Flooring	10	0	10	253,132	49,017	302,149	3.78%	0.38
Furnishing/ Equipment	10	0	10	1,321,994		1,321,994	16.53%	1.65
Technology Infrastructure	10	0	10	467,343		467,343	5.84%	0.58
Technology (instr/non-instr)	5	0	5	582,876	0	582,876	7.29%	0.36
Buses	6	0	6	0	0	0	0.00%	0.00
Total for purposes of determining weighted avg useful life				7,098,474	897,989	7,996,463	100.00%	27.85

120% of average useful life of assets

→

33.42

3881, Worksheet 1: Useful Life Calculation-Series 2

A school district must demonstrate that the weighted average maturity of the qualified bond issue does not exceed 120% of the average reasonably expected useful life of the facilities, excluding land and site improvements, being financed with the proceeds of the qualified bonds.

The following table lists the recommended average useful life of the categories of assets that should be considered in this calculation. If a specific item is not listed, it should be assigned to the most closely related category.

Asset Category	Useful Life Years
New School Building	40
Building Improvements - interior and exterior remodeling such as plumbing, electrical, HVAC, fire suppression, security systems, elevators, etc.	30
Roofing	20
Flooring	10
Furnishings and Equipment - furniture and fixtures that are not a structural component of a building such as desks, chairs, tables, storage units, office equipment, copiers, fax machines, communications equipment, kitchen equipment and appliances, athletic equipment, etc.	10
Technology Infrastructure - cables, networks, etc.	10
Buses	6
Technology (instructional and non-instructional) - computers, printers, scanners, etc.	5

Use the worksheet below to calculate the weighted average useful life of assets included in projects funded by bond proceeds.

Follow Column Instructions	→	Enter Value	Col. 1 + Col. 2	Enter Value	Enter Value	Col. 4 + Col. 5	Col. 6 ÷ Col. 6 Total	Col. 3 x Col. 7
Asset Type	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8
	Average Useful Life of Asset (in Years)	Time between Bonds Issue Date and Purchase	Useful Life of Asset from Bond Issue Date	Expenditure Amount	Allocation of Related Professional Fees	Total Costs (Incl. Related Fees)	% of Total Cost	Average Useful Life of Assets (in years)
School Buildings	40	0	40	33,019,430	7,134,761	40,154,191	64.40%	25.76
Building Improvements	30	0	30	9,645,723	2,090,320	11,736,042	18.82%	5.65
Roofing	20	0	20	0	0	0	0.00%	0.00
Flooring	10	0	10	795,999	175,196	971,194	1.56%	0.16
Furnishing/ Equipment	10	0	10	5,027,803	0	5,027,803	8.06%	0.81
Technology Infrastructure	10	0	10	2,456,970	0	2,456,970	3.94%	0.39
Technology (instr/non-instr)	5	0	5	2,007,590	0	2,007,590	3.22%	0.16
Buses	6	0	6	0	0	0	0.00%	0.00
Total for purposes of determining weighted avg useful life				52,953,514	9,400,277	62,353,791	100.00%	32.92

120% of average useful life of assets

→

39.51

3881, Worksheet 1: Useful Life Calculation-Combined Series

A school district must demonstrate that the weighted average maturity of the qualified bond issue does not exceed 120% of the average reasonably expected useful life of the facilities, excluding land and site improvements, being financed with the proceeds of the qualified bonds.

The following table lists the recommended average useful life of the categories of assets that should be considered in this calculation. If a specific item is not listed, it should be assigned to the most closely related category.

Asset Category	Useful Life Years
New School Building	40
Building Improvements - interior and exterior remodeling such as plumbing, electrical, HVAC, fire suppression, security systems, elevators, etc.	30
Roofing	20
Flooring	10
Furnishings and Equipment - furniture and fixtures that are not a structural component of a building such as desks, chairs, tables, storage units, office equipment, copiers, fax machines, communications equipment, kitchen equipment and appliances, athletic equipment, etc.	10
Technology Infrastructure - cables, networks, etc.	10
Buses	6
Technology (instructional and non-instructional) - computers, printers, scanners, etc.	5

Use the worksheet below to calculate the weighted average useful life of assets included in projects funded by bond proceeds.

Follow Column Instructions	→	Enter Value	Col. 1 + Col. 2	Enter Value	Enter Value	Col. 4 + Col. 5	Col. 6 ÷ Col. 6 Total	Col. 3 x Col. 7
Asset Type	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8
Asset Type	Average Useful Life of Asset (in Years)	Time between Bonds Issue Date and Purchase	Useful Life of Asset from Bond Issue Date	Expenditure Amount	Allocation of Related Professional Fees	Total Costs (Incl. Related Fees)	% of Total Cost	Average Useful Life of Assets (in years)
School Buildings	40	0	40	36,312,445	7,760,434	44,072,879	62.65%	25.06
Building Improvements	30	0	30	10,825,836	2,313,620	13,139,455	18.68%	5.60
Roofing	20	0	20	0	0	0	0.00%	0.00
Flooring	10	0	10	1,049,131	224,213	1,273,343	1.81%	0.18
Furnishing/ Equipment	10	0	10	6,349,798	0	6,349,798	9.03%	0.90
Technology Infrastructure	10	0	10	2,924,313	0	2,924,313	4.16%	0.42
Technology (instr/non-instr)	5	0	5	2,590,466	0	2,590,466	3.68%	0.18
Buses	6	0	6	0	0	0	0.00%	0.00
Total for purposes of determining weighted avg useful life				60,051,988	10,298,266	70,350,254	100.00%	32.35

120% of average useful life of assets

→

38.81

Preliminary Bond Application Detailed Work Scope
Berkley School District
Proposed August 2023 Bond
February 20, 2023
 Project Norup International School

Project #: 5

Existing Building SF: 97,789

Description	QTY	Unit	Unit Cost	Cost	Sub Total	Series		
						Year	2024	2025
						Esc Factor	121%	133%
CM Fees and Costs								
CM Fee and Reimbursables			8%					
General Conditions/Permits			3%					
	808,500		11%	\$ 88,935	\$ 88,935		\$ 107,611	
A/E Fees and Costs								
A/E Fees			7%					
Reimbursables(Survey/Geo Tech)			1%					
	808,500		8%	\$ 64,680	\$ 64,680		\$ 78,263	
Grand Total				\$ 2,243,326	\$ 2,243,326	\$ -	\$ 2,250,735	\$ 463,690

Construction Costs for Calculation	
Site Work	-
New Construction	-
Remodeling	808,500
Subtotal	808,500

Cost Summary-Series 1

Berkley School District														63 - 060	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Proj. #	Cost per Sq Foot	New Cons Sq Feet	New Construction	Remodeling	Contingency	Instructional Technology	Loose Furn and Equip	Buses	Site Work	Site Acquisition	A/E Fees and Costs	CM Fees and Costs	Project Costs	Election/Issue Costs	Total Cost
1													0		0
2	\$515	6,400	3,293,015	454,960	469,783	291,438	1,092,029	0	949,850	0	375,826	516,761	7,443,661	317,700	7,761,361
3													0		0
4													0		0
5	\$0	0	0	978,285	97,829	291,438	697,309	0	0	0	78,263	107,611	2,250,735	96,063	2,346,798
6													0		0
7													0		0
													0		0
													0		0
													0		0
													0		0
													0		0
Total		6,400	3,293,015	1,433,245	567,611	582,876	1,789,338	0	949,850	0	454,089	624,372	9,694,396	413,763	10,108,159

17. Funding:

Total Estimated Cost of Project: \$10,108,159

LESS:

Estimated Interest Earnings: \$108,159

Other (specify):

AMOUNT OF PROPOSED ISSUE **\$10,000,000**
(Amount to be Qualified)

Cost Summary-Series 2

Berkley School District

63 - 060

1 Proj. #	2 Cost per Sq Foot	3 New Cons Sq Feet	4 New Construction	5 Remodeling	6 Contingency	7 Instructional Technology	8 Loose Furn and Equip	9 Buses	10 Site Work	11 Site Acquisition	12 A/E Fees and Costs	13 CM Fees and Costs	14 Project Costs	15 Election/Issu e Costs	16 Total Cost
1	\$566	6,300	3,568,390	381,045	460,779	320,341	1,200,329	0	658,350	0	368,623	506,856	7,464,713	64,579	7,529,292
2													0	0	0
3	\$533	6,400	3,414,015	433,180	426,223	291,438	1,092,029	0	415,030	0	340,978	468,845	6,881,737	59,535	6,941,272
4	\$569	6,500	3,697,400	555,275	476,473	320,341	1,246,879	0	512,050	0	381,178	524,120	7,713,715	66,733	7,780,448
5							463,690						463,690	4,011	467,701
6	\$0	0	0	1,523,515	383,240	320,341	1,271,617	0	2,308,880	0	306,592	421,563	6,535,748	56,542	6,592,290
7	\$305	73,300	22,339,625	7,548,706	3,600,364	291,438	2,673,920	0	5,587,175	0	2,838,040	4,257,061	49,136,329	425,088	49,561,418
													0		0
													0		0
													0		0
													0		0
													0		0
Total		92,500	33,019,430	10,441,721	5,347,077	1,543,900	7,948,463	0	9,481,485	0	4,235,411	6,178,445	78,195,932	676,489	78,872,421

17. Funding:

Total Estimated Cost of Project: \$78,872,421

LESS:

Estimated Interest Earnings: \$872,421

Other (specify):

AMOUNT OF PROPOSED ISSUE **\$78,000,000**
(Amount to be Qualified)

Cost Summary-Combined

Berkley School District

63 - 060

1 Proj. #	2 Cost per Sq Foot	3 New Cons Sq Feet	4 New Construction	5 Remodeling	6 Contingency	7 Instructional Technology	8 Loose Furn and Equip	9 Buses	10 Site Work	11 Site Acquisition	12 A/E Fees and Costs	13 CM Fees and Costs	14 Project Costs	15 Election/Issue Costs	16 Total Cost
1	\$566	6,300	\$3,568,390	\$381,045	\$460,779	\$320,341	\$1,200,329	\$0	\$658,350	\$0	\$368,623	\$506,856	7,464,713	64,579	7,529,292
2	\$515	6,400	\$3,293,015	\$454,960	\$469,783	\$291,438	\$1,092,029	\$0	\$949,850	\$0	\$375,826	\$516,761	7,443,661	317,700	7,761,361
3	\$533	6,400	\$3,414,015	\$433,180	\$426,223	\$291,438	\$1,092,029	\$0	\$415,030	\$0	\$340,978	\$468,845	6,881,737	59,535	6,941,272
4	\$569	6,500	\$3,697,400	\$555,275	\$476,473	\$320,341	\$1,246,879	\$0	\$512,050	\$0	\$381,178	\$524,120	7,713,715	66,733	7,780,448
5	\$0	-	\$0	\$978,285	\$97,829	\$291,438	\$1,160,999	\$0	\$0	\$0	\$78,263	\$107,611	2,714,425	100,074	2,814,499
6	\$0	-	\$0	\$1,523,515	\$383,240	\$320,341	\$1,271,617	\$0	\$2,308,880	\$0	\$306,592	\$421,563	6,535,748	56,542	6,592,290
7	\$305	73,300	\$22,339,625	\$7,548,706	\$3,600,364	\$291,438	\$2,673,920	\$0	\$5,587,175	\$0	\$2,838,040	\$4,257,061	49,136,329	425,088	49,561,418
													0		0
													0		0
													0		0
													0		0
													0		0
Total		98,900	36,312,445	11,874,966	5,914,688	2,126,776	9,737,801	0	10,431,335	0	4,689,500	6,802,817	87,890,328	1,090,252	88,980,580

17. Funding:

Total Estimated Cost of Project: \$88,980,580

LESS:

Estimated Interest Earnings: \$980,580

Other (specify): _____

AMOUNT OF PROPOSED ISSUE **\$88,000,000**
(Amount to be Qualified)