

School Board Special Meeting Friday, September 30, 2022; 1:00 PM ECC Room 350

I. Determination of Quorum and Call to Order

II. Action

A. Construction Bids – Countryside Elementary Addition

Description: At the August 30, 2022, Regular Meeting, the Board of Education authorized the rejection of all construction bids for the Concord Elementary and Countryside Elementary building additions. The rejection of bids was due to construction bids being in excess of preliminary estimates by approximately \$2.5 million. At the same meeting, the Board authorized the District administration to advertise bids for only the Countryside Elementary addition. The District opened construction bids on September 27, 2022, for construction projects related to the addition to Countryside Elementary. The District's construction partner, Kraus-Anderson, recommends the enclosed low bidder base bids and alternates for the Countryside Elementary addition project. The project will be financed primarily by building lease levy authority and the related, to be issued, certificates of participation. The recommendation is for approximately 69 percent of the project costs. The remaining construction bids pertaining to the Countryside project will be brought to future Board Meetings for approval.

Presenter(s): Mert Woodard, Director of Business Services

Recommendation: Award construction contracts for the Countryside Elementary addition project to the lowest responsible bidders, in the amount of \$9,902,843, as indicated within the enclosed materials.

B. Preliminary Certification of Property Taxes Payable in 2023

Description: Minnesota law requires school districts to certify their proposed tax levy payable in 2023 to the county auditor on or before September 30, 2022. The District administration has received the most recent property tax levy data from the Minnesota Department of Education (MDE) and has analyzed the details. A written analysis of the proposed levy is enclosed for Board of Education review. A draft of the analysis was reviewed and discussed by the Board's Finance & Facilities Committee members for reasonableness. The MDE is still in the process of adjusting school district levies and will provide districts with updated reports if changes are made. While most components of the levy are materially accurate and complete, the District administration recommends that the Board levy a preliminary amount in all funds. If the Board of Education approves the maximum allowed, the county auditor will automatically include any positive adjustments to the levy. Otherwise, the final levy amount cannot exceed the preliminary levy amount, except for some very limited exceptions. The District administration recommends that the Board of Education adopt this preliminary levy at the "maximum" amount allowed by state statute. The Board will set the final levy certification amounts at its Regular Board Meeting in December 2022.

Presenter(s): Mert Woodard, Director of Business Services

Recommendation: Approve and certify the preliminary property taxes payable in 2023 at the maximum amount allowed by the state.

III. Leadership and Committee Updates

- IV. Superintendent Updates
- V. Adjournment



Board Meeting Date: 9/30/2022

Title: Construction Bids - Countryside Elementary Addition

Type: Action

Presenter(s): Mert Woodard, Director, Business Services

Background: At the August 30, 2022, Regular Meeting, the Board of Education authorized the rejection of all construction bids for the Concord Elementary and Countryside Elementary building additions. The rejection of bids was due to construction bids being in excess of preliminary estimates by approximately \$2.5 million. At the same meeting, the Board authorized the District administration to advertise bids for *only* the Countryside Elementary addition.

The District opened construction bids on September 27, 2022, for construction projects related to the addition to Countryside Elementary. The District's construction partner, Kraus-Anderson, recommends the enclosed low bidder base bids and alternates for the Countryside Elementary addition project. The project will be financed primarily by building lease levy authority and the related, to be issued, certificates of participation. The recommendation is for approximately 69 percent of the project costs. The remaining construction bids pertaining to the Countryside project will be brought to future Board Meetings for approval.

Recommendation: Award construction contracts for the Countryside Elementary addition project to the lowest responsible bidders, in the amount of \$9,902,843, as indicated within the enclosed materials.

Attachment(s):

- 1. Recommendation Letter Kraus-Anderson
- 2. Bid Tabulation



September 29, 2022

Mr. Eric Hamilton Edina Public Schools District, ISD#273 5701 Normandale Road Edina, MN 55424

RE: Countryside 2023 Elementary Schools Additions Contract Recommendation

Dear Mr. Hamilton:

This letter is concerning our recommendations for contract awards for the above referenced project that was bid on September 27, 2022.

Kraus-Anderson has verified bidders and we submit the following lowest responsible bidders and their total bid amount.

The total value of all the apparent low responsible bidders for the project is \$14,345,355.00. This recommendation letter accounts for roughly 69% of that value.

Work Scop	e Co	ontractor, City, State	Bid Amount	
WS 03-A	Concrete & Masonry	Northland Concrete & Masonry, LLC Shakopee, MN	Base Bid	\$3,326,570.00
WS 03-B	Structural Precast	Molin Concrete Products Circle Pines, MN	Base Bid	\$328,148.00
WS 05-A	Structural Steel – Material	Daka Corporation Pine City, MN	Base Bid	\$359,500.00
WS 05-B	Structural Steel – Erection	Red Cedar Erectors, Inc Menomonie, WI	Base Bid	\$176,420.00
WS 06-A	Carpentry	Century Construction Company Ramsey, MN	Base Bid	\$700,000.00
WS 07-A	Waterproofing	Henkemeyer Coatings, Inc. Clearwater, MN	Base Bid	\$99,954.00
WS 14-B	Elevators	Schindler Elevator Eagan, MN	Base Bid	\$162,000.00



WS 23-B	Combined Mechanical	SCR, Inc. St. Cloud, MN	Base Bid	\$2,398,000.00
WS 26-A	Electrical	Erickson Electric, Inc. Forest Lake, MN	Base Bid	\$918,000.00
WS 31-A	Earthwork	New Look Contracting	Base Bid	\$1,434,251.00
		Total Base Bid		\$9,902,843.00

Kraus-Anderson would like to emphasize that the stated contractors represent the best value for the Edina School District and stand by their recommendation that the district proceeds with contract award. Given the level of coverage and understanding of the project verified by each contractor, Kraus-Anderson is certain the stated value is the best price the market can provide.

If you have any questions regarding this information, please do not hesitate to contact me at 763-453-5466.

Very truly yours,

KRAUS-ANDERSON® CONSTRUCTION COMPANY

Scott Clancy Project Manager, K-12/Government Business Units

CC: Shane Butler – Kraus-Anderson Construction Company Dustin Kempf – Kraus-Anderson Construction Company



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 03-A: Concrete & Masonry

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Northland Concrete & Masonry Company, LLC	B&D Associates, LLC	Axel H. Ohman, Inc.	Maertens-Brenny Construction Company		
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond		
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3		
BASE BID	\$3,326,570.00	\$3,600,000.00	\$3,650,000.00	\$4,198,600.00		



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 03-B: Structural Precast

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Molin Concrete	T				
	Products	Taracon Precast, LLC				
BID SECURITY	Bid Bond	Bid Bond				
ADDENDA REC'D.	1,2,3	1,2,3				
BASE BID	\$328,148.00	\$379,910.00				



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 05-A: Structural Steel - Material

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Daka Corporation	Northern Lights Steel Fabrication	Construction Systems, Inc.	Ted Mannstedt & Son, Inc.	Tru-Steel, LLC	Ben's Structural Fabrication, Inc.
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3
BASE BID	\$359,500.00	\$365,800.00	\$371,448.00	\$403,900.00	\$416,000.00	\$469,646.00



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 05-B: Structural Steel - Erection

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Red Cedar Steel					
	Erectors, Inc.	Amerect, Inc.	Sowles Company			
BID SECURITY	Bid Bond	Bid Bond	Bid Bond			
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3			
BASE BID	\$176,420.00	\$211,582.00	\$255,550.00			



BID TABULATIONS

September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

WORK	SCOPE	06-A:	Carpentry
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	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Century Construction Company	Kellington Construction, Inc.	Ebert, Inc. dba Ebert Construction	Meisinger Construction Company, Inc.	Parkos Construction Company	Tekton Construction Company
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3	1,2	1,2,3
BASE BID	\$700,000.00	\$710,500.00	\$767,700.00	\$771,900.00	\$780,400.00	\$784,000.00



BID TABULATIONS

September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

WORK SCOPE 06-A:	Carpentry
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	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Maertens-Brenny Construction Company					
BID SECURITY	Bid Bond					
ADDENDA REC'D.	1,2,3					
BASE BID	\$892,600.00					



BID TABULATIONS

September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Henkemeyer Coatings,					
	Inc.					
BID SECURITY	Bid Bond					
ADDENDA REC'D.	1,2,3					
BASE BID	\$99,954.00					



BID TABULATIONS

September 27, 2022 @ 2:00PM

WORK SCOPE 14-B: Elevators

OWNER: Edina Public Schools District

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Schindler Elevator Corporation	KONE, Inc.	TK Elevator Corporation			
BID SECURITY	Bid Bond	Bid Bond	Bid Bond			
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3			
BASE BID	\$162,000.00	\$195,495.00	\$235,000.00			



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 23-B: Combined Mechanical

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	SCR, Inc.	Sentra-Sota Sheet Metal, Inc.	Davis Mechanical Systems, Inc.	McDowall Company	Northland Mechanical Contractors, Inc.	Klamm Mechanical Contractors, Inc.
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3
BASE BID	\$2,398,000.00	\$2,411,000.00	\$2,436,000.00	\$2,463,900.00	\$2,543,300.00	\$2,557,800.00



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 23-B: Combined Mechanical

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Pioneer Power	Kraft Mechanical, LLC.	Peterson Sheet Metal, Inc.			
BID SECURITY	Bid Bond	Bid Bond	Bid Bond			
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3			
BASE BID	\$2,698,000.00	\$2,756,000.00	\$2,765,000.00			
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September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 26-A: Electrical

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Erickson Electric Company, Inc.	Fobbe Electric, Inc.	Laketown Electric Corporation	NAC Mechanical & Electrical Services	Vinco, Inc.	Gunnar Electric
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3
BASE BID	\$918,000.00	\$936,425.00	\$937,500.00	\$969,000.00	\$973,389.00	\$998,100.00



September 27, 2022 @ 2:00PM

WORK SCOPE 26-A: Electrical

OWNER: Edina Public Schools District

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	Manor Electric, Inc.	A.J. Moore Electric, Inc.	Bloomington Electric Company			
BID SECURITY	Bid Bond	Bid Bond	Bid Bond			
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3			
BASE BID	\$1,037,250.00	\$1,048,000.00	\$1,145,000.00			



September 27, 2022 @ 2:00PM

OWNER: Edina Public Schools District

ARCHITECT: Wold Architects & Engineers

WORK SCOPE 31-A: Site Clearing & Earthwork

	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER	BIDDER
	New Look Contracting	Rachel Contracting, LLC	Veit & Company, Inc.	Peterson Companies, Inc.	Kevitt Excavating, LLC	
BID SECURITY	Bid Bond	Bid Bond	Bid Bond	Bid Bond	Bid Bond	
ADDENDA REC'D.	1,2,3	1,2,3	1,2,3	1,2,3	1,2,3	
BASE BID	\$1,434,251.00	\$1,777,401.00	\$1,827,998.00	\$1,890,000.00	\$1,946,000.00	



Board Meeting Date: 9/30/2022

Title: Preliminary Certification of Property Taxes Payable in 2023

Type: Action

Presenter(s): Mert Woodard, Director, Business Services

Background: Minnesota law requires school districts to certify their proposed tax levy payable in 2023 to the county auditor on or before September 30, 2022. The District administration has received the most recent property tax levy data from the Minnesota Department of Education (MDE) and has analyzed the details. A written analysis of the proposed levy is encolsoed for Board of Education review. A draft of the analysis was reviewed and discussed by the Board's Finance & Facilities Committee members for reasonableness.

The MDE is still in the process of adjusting school district levies and will provide districts with updated reports if changes are made. While most components of the levy are materially accurate and complete, the District administration recommends that the Board levy a preliminary amount in all funds. If the Board of Education approves the maximum allowed, the county auditor will automatically include any positive adjustments to the levy. Otherwise, the final levy amount cannot exceed the preliminary levy amount, except for some very limited exceptions. The District administration recommends that the Board of Education adopt this preliminary levy at the "maximum" amount allowed by state statute.

The Board will set the final levy certification amounts at its Regular Board Meeting in December 2022.

Recommendation: Approve and certify the preliminary property taxes payable in 2023 at the maximum amount allowed by the state.

Attachment(s):

- 1. Preliminary Pay 2023 Levy Memorandum
- 2. Levy Limitation and Certification Report 2022 Payable 2023



Mert Woodard, Director, Business Services 5701 Normandale Road | Edina, MN 55424-2401 952-848-4916 | Fax: 952-848-3903 | www.edinaschools.org

То:	Members of the Board of Education Dr. Stacie Stanley, Superintendent of Schools
From:	Mert Woodard, Director, Business Services
Date:	September 30, 2022
Subject:	Recommendation of the Payable 2023 Preliminary Property Tax Levy Certification to Finance a Portion of the 2023-2024 School Year Operations

The District has received the Payable 2023 Preliminary Levy Limitation and Certification document from the Minnesota Department of Education ("the MDE"). Based on state authorization, enclosed are several exhibits summarizing the District's preliminary property tax levy for your consideration.

The District's payable 2023 levy must be certified by the Board of Education by September 30, 2022. Therefore, it is necessary that the District certifies a preliminary tax levy at the special meeting scheduled for Friday, September 30, 2022. Typically, once the District has submitted its preliminary tax levy certification to the county auditor, it can only be increased with authorization from the MDE. However, individual items may be decreased by the Board of Education prior to final approval, which will occur in December 2022.

The District's property tax levy is allocated to individual parcels of property within the District using formulas based upon market values assessed by Hennepin County. The preliminary estimate of the District's total assessed referendum market value (RMV) is estimated to increase by \$1.56 billion from \$11.13 billion to approximately \$12.70 billion. This represents a 14.0% increase in market value and includes existing and new properties. The net tax capacity (NTC) of properties in the District is estimated to increase by 11.0%. A sample of individual parcel school property tax estimates will be available prior to approval of the final levy scheduled in December.

Legislative actions combined with revenue formulas, student enrollment growth and fluctuations in individual taxpayer's market value add complexity to a school district's local property tax levy. The purpose of this document is to discuss the significant changes that have occurred in the payable 2023 levy and to provide clarity to the Board of Education and to the community.

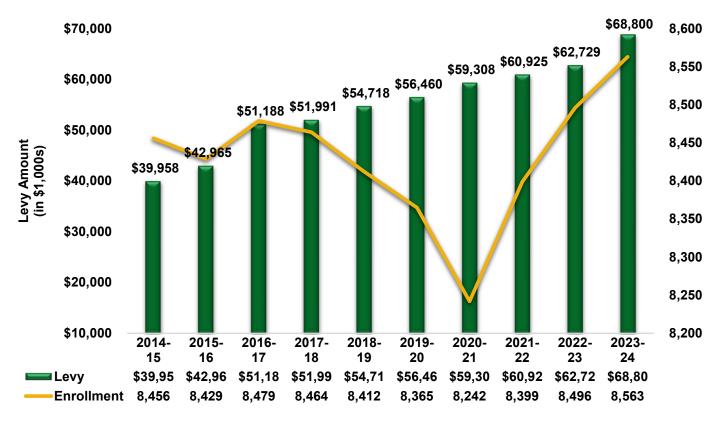
PROPOSED PROPERTY TAX LEVY

The District's total preliminary levy for taxes payable in 2023 is \$68.8 million. This levy amount represents an overall increase of just over \$6.0 million or 9.7% from the previous year.

The following table shows a comparison of the preliminary levy payable in 2023 with the District's certified levy payable in 2022. While the levy detail is presented by fund, it is important to focus on the District's total payable 2023 levy when comparing to the total payable 2022 levy:

Fund	2023 Proposed Levy	2022 Certified Levy	Change (\$)	Change (%)
General	\$53,290,711	\$46,595,052	\$6,695,659	14.37%
Community Service	1,232,060	1,089,859	142,201	13.05%
Debt Service	14,277,476	15,044,488	(767,012)	(5.10%)
Total Levy	\$68,800,247	\$62,729,399	\$6,070,848	9.68%

Year over year changes to the District's property tax levy are due to some of all of the following: legislative actions, enrollment changes, voter approved referenda, population changes, market value changes, debt service payments, and to a lesser agree, decisions made by District administration and the Board of Education. The following chart displays the District's total levy and enrollment history over the last decade:



As displayed on the chart above, the District has experienced relatively stable student enrollment recent years, excluding 2020-21 which was greatly impacted by the COVID-19 pandemic. Over the last five years, the District's total levy has averaged .9%. The District's robust market value growth, 6.1% over the last five years, has minimized the tax impact to the property owners within the District's boundaries. The following pages provide a detailed analysis of the levy by fund.

GENERAL FUND

Exhibit I provides a detailed analysis of the proposed levy recommendation for the General Fund. Overall, the General Fund levy increased by 14.4% or \$6.1 million.

The District's projected student enrollment for the 2023-24 school year, as well as an inflationary increase to the per pupil amount, translates directly into an increase to the District's total operating referendum. The voter-approved per pupil operating referendum amount for taxes payable in 2023 is \$2,065 compared \$1,877 the prior year, which represents the most significant change to the District's overall levy. It is important to note that the District's levy amounts also include adjustments for changes in final 2020-21 enrollment, projected 2021-22 enrollment and projected 2022-23 enrollment.

In 2021 District voters authorized an increase to the annual capital projects levy which funds technology expenditures such as student and staff devices, district-wide technology infrastructure, technology access and support, and other expenditures allowed by state statute. The payable 2023 capital projects levy is \$7.4 million, \$454,165 more than the prior year. The capital projects levy is directly correlated to the net tax capacity of the District and does not take into account student enrollment.

The District levies a portion of its Long-Term Facilities Maintenance (LTFM) revenue on a pay-asyou-go basis to finance deferred maintenance projects on school facilities, improve accessibility, and meet health and safety requirements. To receive revenue, the Board of Education must annually approve a ten-year plan which is subsequently submitted to the MDE for approval. For the payable 2023 levy the District will levy \$10.9 million, an increase of \$1.4 million from the prior year. The additional revenue will finance projects throughout the District and can be carried over from year to year until projects are completed.

The General Fund levy also includes several other levies that are primarily formula driven and have changed either due to revised estimates, enrollment fluctuations or increases in the District's tax capacity. These levy amounts are authorized by statute and the District must levy for each component or risk losing the revenue, or in some cases, lose a corresponding state aid.

Due to the significant change from the prior year levy, the building lease levy warrants additional discussion. The District recently launched a K-5 Spanish immersion program at one of its elementary school sites. The program requires the construction of additional facilities, which is eligible to be financed by lease levy authority. The principal and interest payments for fiscal year 2024 are estimated to be \$1.4 million, which is the primary reason for the significant increase from the payable 2022 levy. This levy component also includes authority granted to Intermediate School District 287, a service cooperative of which the District is a member.

The Other Post-Employment Benefits (OPEB) levy represents the unfunded actuarial accrued liability (UAAL) as calculated by the District's actuary under the Government Accounting Standards Board Statement No. 75 (GASB 75). The District administration also pays close attention to abatements and to other adjustments as large swings can have a large impact on the District's total levy. These amounts are calculated by the MDE.

Overall, each individual component of the General Fund levy has been reviewed for reasonableness and accuracy with the corresponding formula that drives its calculation. The District administration recommends approval of presented amounts.

COMMUNITY SERVICE FUND

Exhibit I provides a detailed analysis of the proposed levy recommendation for the Community Service Fund. These levies are based on statewide tax rates applied to all property in the state as well as the specific populations of taxing jurisdictions. Basic Community Education revenue The school age care levy, which supports children participating in school age care programs that require special needs, is estimated to be \$560,000, an increase of \$107,000 from the prior year. The increase to the school age care levy combined with prior year adjustments result in an increase to the Community Service Fund levy of \$142,201 or 13.0%.

DEBT SERVICE FUND

Exhibit I provides a detailed analysis of the proposed levy recommendation for the Debt Service Fund. The District is required to levy 105.0% of scheduled principal and interest payments. To compensate for this, negative debt excess adjustments are made in subsequent years. The majority of the District's debt service levy relates to voter-approved bonds, primarily the Series 2015A School Building Bonds which were used to finance facility remodels and upgrades throughout the District.

The District finances a portion of its Long-Term Facilities Maintenance program through bonded debt. The principal and interest payments related to those issuances are reflected in the Debt Service Fund and not the General Fund.

Overall, the District's debt service levy for taxes payable in 2023 will decrease by 5.1% or \$767,012 compared to the prior year. This is due to an increase to the debt excess levy as well as a decrease to principal and interest payments, which is related to payment timing and the structure of bonded debt.

TAX IMPACT

Residents of the District often pay close attention to changes to the District's property tax levy as this directly affects the amount they will pay individually in property taxes. In the state of Minnesota, the amount a property owner will pay in property taxes is *mostly* determined by the type of property, the estimated market value of the property, the estimated market value of all other properties, and the aggregate amount levied by taxing jurisdictions in which the property resides. Although the District's property tax levy for taxes payable in 2023 is estimated to rise by 9.7%, the estimated RMV increase of 14.0% and estimated NTC increase of 11.0% means that the majority of property owners will actually see a *decrease* to the amount of property tax they pay that is attributable to the District. It is important to note that this calculation assumes that individual parcel values remain unchanged from the prior year. This calculation also excludes any taxes levied by other jurisdictions, such as the City of Edina. A detailed analysis of the tax impact to property owners can be found on Exhibit II.

SUMMARY AND TRUTH IN TAXATION LAW

The Payable 2023 Preliminary Property Tax Levy represents the total impact, across all funds, of the District's legislated property tax levy authority. As the state continues to refine the 39 pages of formulas that derive levy amounts, it is important to note that changes may still occur. State law allows local school boards to simply approve a "maximum" preliminary levy certification to allow positive changes to be made after September 30th, which will then be reflected in the parcel specific notices mailed out this fall. The District administration recommends that the Board of Education approve the maximum levy amount. The Board of Education retains the option to subsequently reduce the amount of the levy prior to certifying the levy in December 2022.

The public will have the opportunity to speak to the Board of Education about Edina Public Schools' budget and property tax levy at the required Truth and Taxation hearing, which is scheduled to take place at the Regular School Board Meeting at 7:00 p.m. on December 12, 2022, at the Edina Community Center. If you or members of the public have questions regarding the enclosed materials or desire additional information, please contact me at 952-848-4916 or mert.woodard@edinaschools.org.

Property Tax Levy Comparison

Taxes Payable in 2022 vs 2023 (Exhibit I)



DEFINING EXCELLENCE

Fund	Levy Component	Payable 2022 for FY2023		Payable 2023 for FY2024		Change (\$)	Change (%)
General Fund	 * 1st Tier RMV Referendum * 2nd Tier RMV Referendum * Unequalized RMV Referendum 1st Tier Local Optional 2nd Tier Local Optional Equity Levy * Capital Projects Referendum OPEB PAYGO Operating Capital Alt. Teacher Comp (Q Comp) Achievement & Integration Reemployment Career & Technical Education Safe Schools Safe Schools Intermediate 287 	\$	4,253,896 8,838,394 4,266,288 2,769,808 3,920,982 642,824 6,977,669 986,258 1,257,777 789,983 381,976 60,000 112,320 332,914 138,714	\$ 4,305,324 8,945,247 6,457,050 2,803,348 3,968,386 648,840 7,431,835 613,276 1,396,397 802,462 391,167 7,500 112,320 336,938 140,391	\$	51,428 106,853 2,190,762 33,540 47,403 6,017 454,166 (372,981) 138,620 12,479 9,190 (52,500) - 4,025 1,677	1.21% 1.21% 51.35% 1.21% 1.21% 0.94% 6.51% (37.82%) 11.02% 1.58% 2.41% (87.50%) 0.00% 1.21% 1.21%
	Building Lease Levy Long-Term Facilities Maintenance Adjustments - RMV Adjustments - NTC Adjustments - Abatement Total General Fund Levy	\$	788,819 9,580,545 462,056 33,830 - 46,595,052	\$ 2,218,571 10,946,893 1,490,464 (3,775) 278,078 53,290,711	\$	1,429,752 1,366,348 1,028,408 (37,605) 278,078 6,695,659	181.25% 14.26% 222.57% (111.16%)
Community Service Fund	Basic Community Education Early Childhood Family Education Home Visiting Adults with Disabilities School-Age Care Abatement Adjustments Other Adjustments Total Community Service Fund Levy	\$	309,579 309,280 7,438 5,202 453,000 3,302 2,059 1,089,859	\$ 309,579 342,999 8,361 5,202 560,000 5,771 149 1,232,060	\$ \$	- 33,719 923 - 107,000 2,469 (1,910) 142,201	0.00% 10.90% 12.40% 0.00% 23.62% 74.76% (92.78%) 13.05%
Debt Service Fund	* Debt Service - Voter Approved Long-Term Facilities Maintenance Debt Service Debt Excess Abatement Adjustments Total Debt Service Fund Levy	\$	13,494,671 2,483,789 (995,220) <u>61,248</u> 15,044,488	\$ 12,768,998 2,348,654 (929,733) <u>89,557</u> 14,277,476	\$	(725,673) (135,135) 65,487 <u>28,309</u> (767,012)	(5.38%) (5.44%) (6.58%) 46.22% (5.10%)
	Total Property Tax Levy	\$	62,729,399	\$ 68,800,247	\$	6,070,848	9.68%

Notes:

1) Levy components preceded by "*" are voter-approved.

2) Values within the "Payable 2022 for FY2023" column are representative of the certified levy

for taxes payble in 2022 plus county auditor adjustments.

Edina Public School District No. 273

Property Tax Levy and Rate Summary, Taxes Payable in 2022 and 2023 (Exhibit II) September 30, 2022

		Actual Taxes Payable in 2022	Preliminary Estimate of Taxes Payable in 2023	Estimated Change in Annual Taxes	Estimated % Change
Type of Property	Estimated Market Value	Estimate	ed Annual School Distr	rict Property Tax	es
	\$300,000	\$1,525	\$1,496	-\$29	-1.9%
	400,000	2,071	2,031	-40	-1.9%
Residential Homestead	500,000	2,593	2,544	-49	-1.9%
	600,000	3,187	3,125	-62	-1.9%
	700,000	3,781	3,706	-75	-2.0%
	800,000	4,374	4,287	-87	-2.0%
	900,000	4,968	4,868	-100	-2.0%
	1,000,000	5,561	5,449	-112	-2.0%
	2,000,000	11,497	11,259	-238	-2.1%
	\$1,000,000	\$5,806	\$5,685	-\$121	-2.1%
Commercial/	2,000,000	11,754	11,507	-247	-2.1%
Industrial *	3,000,000	17,701	17,328	-373	-2.1%
	4,000,000	23,648	23,150	-498	-2.1%
	5,000,000	29,596	28,971	-625	-2.1%
	\$1,000,000	\$5,936	\$5,810	-\$126	-2.1%
Apartments	2,000,000	11,872	11,621	-251	-2.1%
	4,000,000	23,744	23,242	-502	-2.1%
	2,500,000	14,840	14,526	-314	-2.1%
Key Assumptions:				•	

1. Preliminary Pay 23 RMV is increased 14% and NTC values are increased 11% based on information from Hennepin County.

2. Assumes no change in the value of individual parcels of property from 2022 to 2023 taxes. If the value of a parcel increased, the change in taxes will be larger than shown above.

3. Taxes payable in 2023 are based on latest estimates of the District's proposed levy, as of the date above.

* For commercial-industrial property, the estimates above are for property in the City of Edina. The tax impact for commercial industrial property in other municipalities in the school district may be slightly different due to the varying impact of the Twin Cities Fiscal Disparity program.

Minnesota Department of Education Levy Limitation and Certification Report 2022 Payable 2023

authority.

notices.

District Number-Type: 0273-01 District Name: Edina Public School District Home County: HENNEPIN Date Printed: 9/27/22 Limits Updated: 9/26/22 Proposed Submitted: 9/27/22

LIMIT

The School Board has voted to certify the MAXIMUM levy

After October 1st, the county auditor should consult the Minnesota

Department of Education (MDE) website for the district's current

levy limitation and use this amount for the Truth in Taxation

PROPOSED

SUBTOTALS BY LEVY CATEGORY

GENERAL - RMV VOTER - JOBZ EXEMPT GENERAL - RMV OTHER - JOBZ EXEMPT GENERAL - NTC VOTER - JOBZ EXEMPT GENERAL - NTC OTHER - JOBZ EXEMPT COMMUNITY SERVICE - NTC OTHER - JOBZ EXEMPT GENERAL DEBT - NTC VOTER - JOBZ NONEXEMPT OPEB DEBT - NTC VOTER - JOBZ NONEXEMPT OPEB DEBT - NTC OTHER - JOBZ NONEXEMPT

SUBTOTALS BY FUND

GENERAL FUND

COMMUNITY SERVICES FUND

GENERAL DEBT SERVICE FUND

OPEB/PENSION DEBT SERVICE FUND

SUBTOTALS BY TAX BASE

REFERENDUM MARKET VALUE NET TAX CAPACITY

SUBTOTALS BY TRUTH IN TAXATION CATEGORY

VOTER APPROVED OTHER

TOTAL LEVY

TOTAL LEVY

The school district must submit the completed original of this form to the home county auditor by September 30, 2022. A duplicate form must be submitted to Minnesota Department of Education, School Finance Division, 400 NE Stinson Blvd., Minneapolis, MN 55413, by October 7, 2022.

The certified levy listed above is the levy voted by the school board for taxes payable in 2023.

Signature of School Board Clerk

Date of Certification

September 30, 2022

If there is a change to the district's levy limitation after October 1st, the county will be notified by MDE via email. Before finalizing tax computations for the Truth in Taxation notices, counties should double check the MDE website to be sure no changes have been made to the district's levy limitation that the county is not already aware of through this email process.